



# CRBCunninghams

education solutions



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# Fusion

23.1 — Last update: 27 September 2023

CRBCunninghams

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# Introduction

This user guide is best viewed online, however a .PDF copy can be downloaded using the

 **Download as PDF**

button below the contents section on the left hand side of the page. Individual sections can be printed using the  button to the top right of the page.

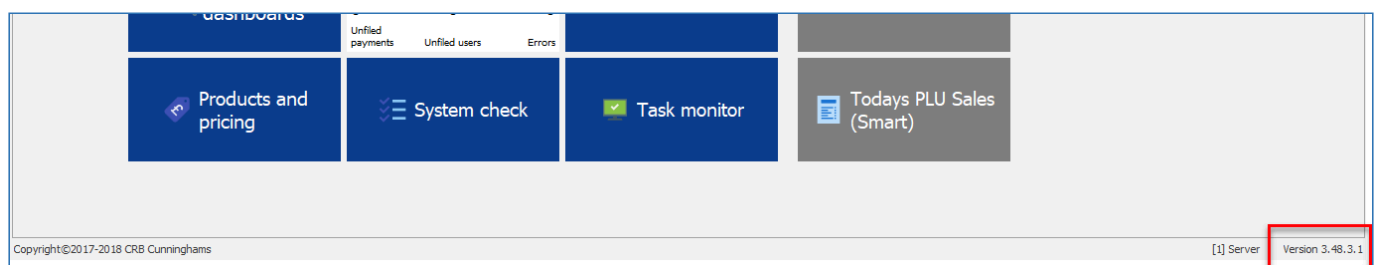
If you are already viewing this user guide in a .PDF, the online version can be found here:

<http://crbcunninghams.co.uk/manuals/fusion/231>.

The online user manual will be updated as each new version is released. You can select your version of the manual from the top of the screen.



Your version of Fusion can be found in the bottom-right corner of the Fusion Back Office.



This manual has been written using a login with the Administrator role. This role has full access to all aspects of the system. Your user account may be limited and there may be some differences in configuration from your system, therefore some aspects of this manual may differ from your experience.



If you are not sure about the operation of any part of the system, or would like something clarified, please do not hesitate to contact our support team and we will be happy to help. Details on how to contact our support team can be found here: <http://crbcunninghams.co.uk/support/>.

## What's new?

*Last modified: 15 June 2023*



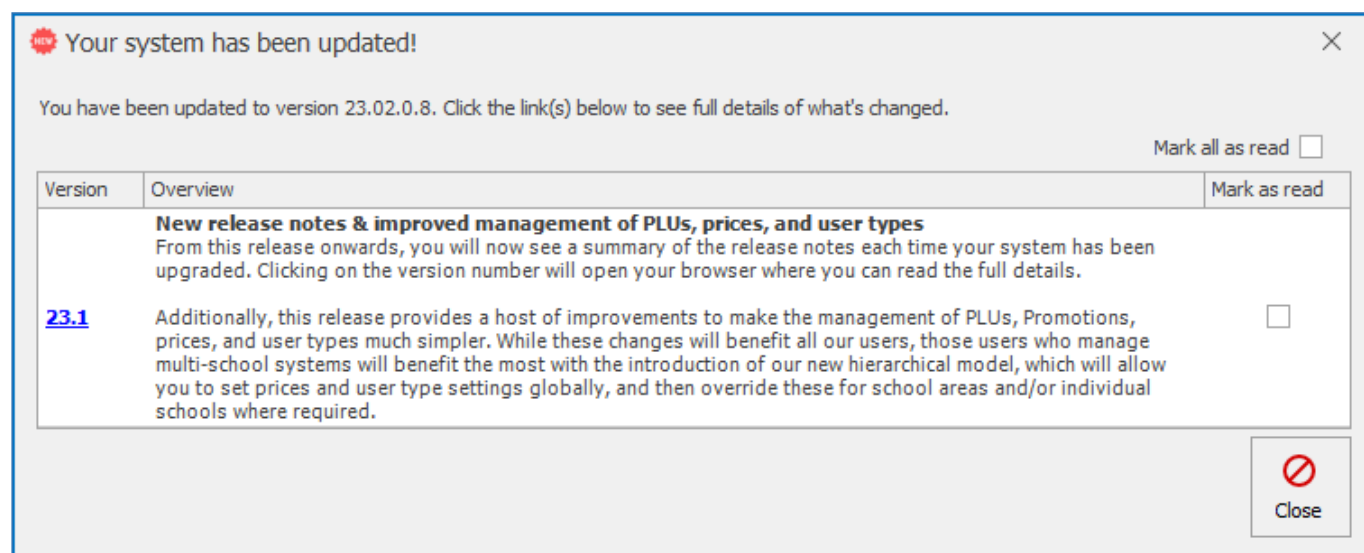
If you have any ideas or suggestions for new features, or wish to vote and provide feedback on potentially upcoming items, please use our product roadmap portal.

In this latest version of Fusion, the following changes have been made:

## Headline features

### New release notes functionality

From this version onwards, users logging into the back office for the first time after their system has been upgraded will be presented with a popup providing a summary as to what has changed since their last log-in. If this is the first time they have logged in for a while or their system has been upgraded by multiple versions, the user will be presented with a summary for each version increment.



Clicking anywhere on the row will open this page of the user manual for that version and simultaneously mark that release as “read”. Additionally, the user can choose to manually mark that item as read (or all as read) and the next time they log in, they will not see these read items again.

[Click here to read more](#)

### Price management improvements

How prices are managed with Fusion has undergone an overhaul. While all users should benefit from these changes, the biggest beneficiaries will be users who manage large multi-school systems. Behind the scenes, these changes are fundamental to how Fusion works and we were very aware that we had to limit any disruption for our existing, single-school systems who understand the current system as it currently is. Therefore, any changes we made had the following requirements:

- Existing single-school systems must be able to intuitively use the new system with no training required.
- Reduce the administration of prices to the minimum absolute minimum required.
- Allow individual schools to have their own prices for a product if required
- Add improved tools to make the management of products and promotions easier
- Improve performance

The new pricing system we have implemented uses a hierarchical model, with a ‘Global’ level at the top of the pyramid, optional ‘School areas’ in the middle, and individual ‘Schools’ at the bottom. It works by setting a global price for an item which will be used across the system unless an override is set further down (in cases where it is a single-school system, all prices are global ones). For example, if you have an item that is the same price at every school within the system, all you now need to do is set the price once at the global level, and all the schools within the system will now use this price. If



a single school needs to charge a different price for that item, an override can simply be enabled just at that school and a new price entered. This provides greater control while reducing the administrative burden.

### No longer need to manually save pricing changes

Previously after making changes to prices, you had to press a save button to commit the changes. Users would all too often make changes but lose them after forgetting to save. Additionally, if you had two users wanting to make changes at the same time, the second person to save would incorrectly overwrite the changes made by the first person. Now, after you have finished changing a price, that change is instantly saved to the database as soon as you navigate away from that cell.

### Improved visibility and management of promotions

Fusion allows for the creation of promotions, commonly referred to as “Meal deals”. Previously, the ability to create and manage promotions was a little hidden and would often be forgotten about when schools would change their prices. Now, there is a new ‘Add promotion’ button directly on the PLU screen, and existing promotions are now shown amongst products in the same table, and are managed and priced in the exact same way.

### Improved ‘Bulk price change’ tool

The ‘Bulk price change’ tool has been completely rewritten. This functionality now provides a “wizard” that guides you through making changes so that you can do this more easily and confidently.

### Improved price list management

Price lists control the price of products between date ranges. They allow you as a user, to prepare for future price changes and have these changes automatically trigger on the specified start date. The process to select price lists has been simplified and the management of them made easier. Additionally, the process of exporting and importing price lists via a .csv file has been improved.

### Performance improvements

Lastly, the performance of this screen and its related functions have been drastically improved by optimising the storage and retrieving of product and pricing data, making those systems with thousands of products to manage much more responsive.

### User-type settings management improvements

Just like with pricing, the management of user type settings has also received an overhaul, allowing for the same level of flexibility whilst reducing administration.

### New look

The User types screen has received a new look. Previously, there was a lot of steps to locate and view/edit the settings that you were interested in. Now, all settings from all the user types are presented in a new grid which closely resembles the PLU screen. This means that you can now locate and change the settings that you wish to change more quickly, while being able to more easily see which settings are in use by all the available user types.

### Multi-school systems, global settings and overrides

Just like prices, user type settings will now follow the same hierarchical structure, where a setting can be set globally, and then overridden at a particular school area, or individual schools as required. For example, perhaps all schools have a daily limit for students of £6, but one school wants to have a

daily limit of £7. Now the global daily limit for students can be set at £6 and an override set just for the one school that wants the different limit.

## User type settings lists

Previously, each user type could have settings starting on different days. Whilst this allows users to make changes that would become active when the start date rolls around, how this was managed was a little confusing and different from how price lists were managed. To simplify this, we have improved how these settings lists are managed, replicating how we do the management of price lists.

## Force offline mode

Fusion has the ability to operate offline while there is no connection to the data server. However, in the case of intermittent network or server issues, some clients wanted to force the Point of Sale into offline mode even if the data server is connected, so that they can get through service without the connection disconnecting and reconnecting frequently. This is now possible.

## General improvements

- Improved school switcher: Changed the school switching process in the back office to make it easier to locate and switch to the school that you want to view
- Products can now have more than one barcode registered against them
- The 'Prices' tab when adding or editing a PLU has been removed so that all prices are managed in the same place to avoid confusion
- The 'Add', 'Edit', and 'Delete' PLU buttons from the layout editor screens have been replaced with a single 'Manage PLUs' button that navigates the user to the PLU screen so that all products and prices are managed in the same place to avoid confusion
- Added some keyboard shortcuts to manage products on the PLU screen as some users prefer to use these
  - CTRL+N: New PLU. CTRL+S: Save PLU, CTRL+SHIFT+S: Save PLU & Close, CTRL+E: Edit PLU
- Added a new 'Breakfast limit' so just like with the Break limit, you can now restrict how much users can spend during breakfast time
- Updated the back office feedback button to link to the new [Product Board portal](#)
- Improved performance of the Daily Summary report(s) by optimising the data source

## Bug fixes

- Fixed an issue where the date range on User activity screen would occasionally default to just showing today's transactions, rather than the previous 28 days.
- Fixed an issue where long menu names caused display issues on the PoS
- Fixed an issue where some settings could still be edited by logins, even though they did not have the 'Edit settings' permission

*Last modified: 15 June 2023*

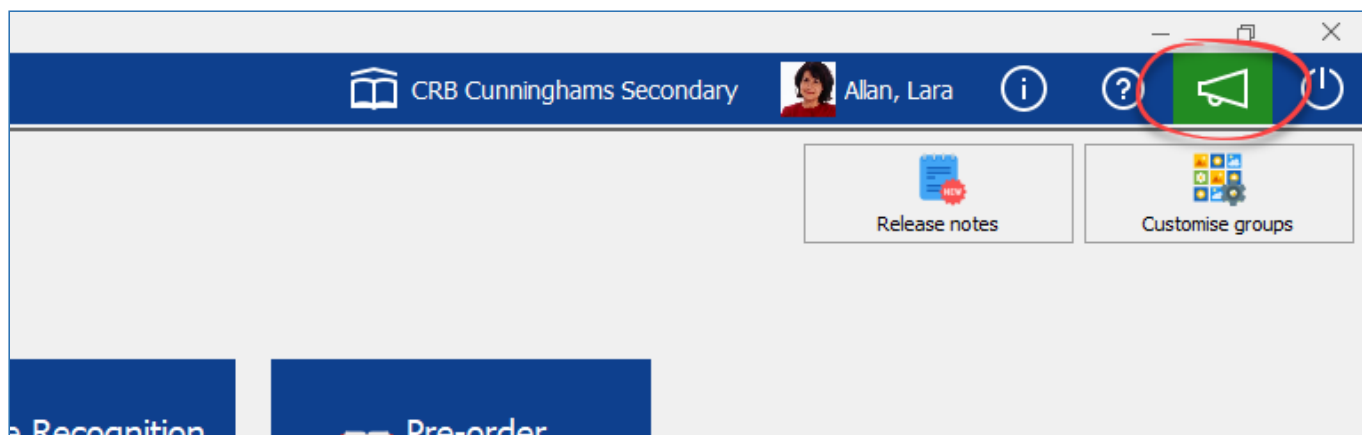
## Providing feedback and suggestions



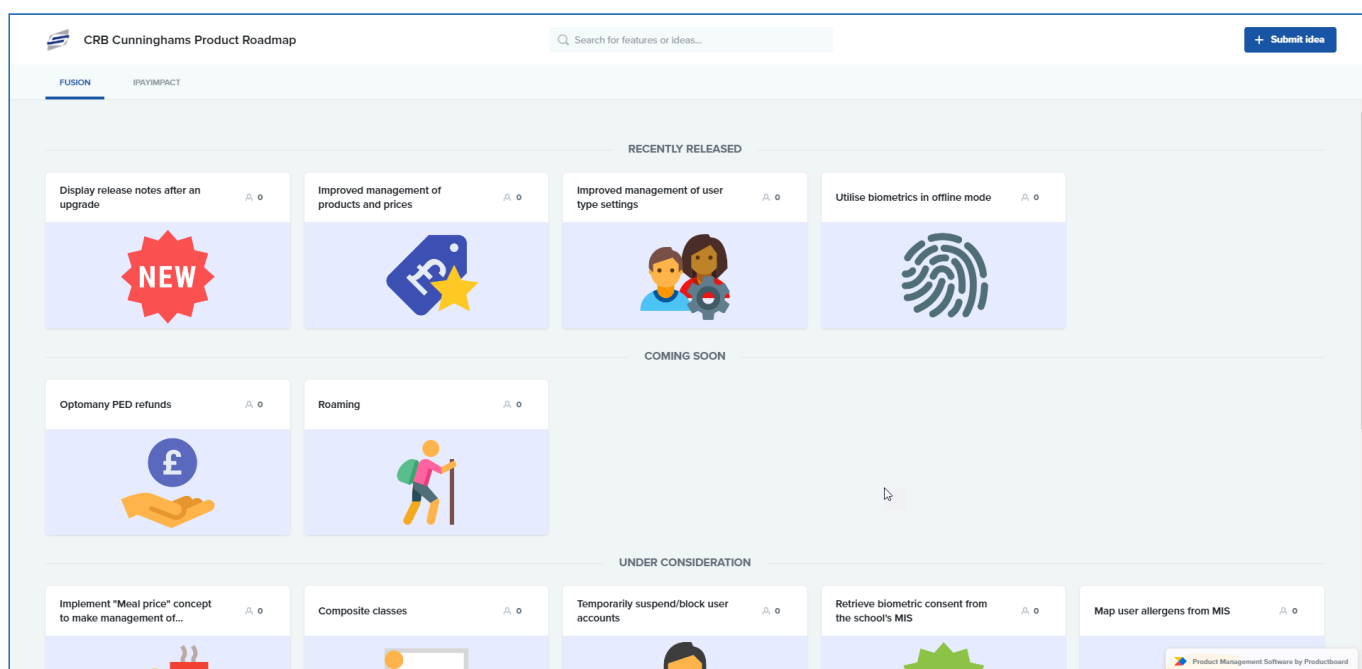
The development team are eager to gather feedback from users of our software. This feedback is very useful to us and will help guide the future direction of the system. To make it easy for you to send feedback, raise suggestions and notify us of any bugs, the Fusion back office has a feedback button in the top-right corner of the screen at all times.

Clicking this button will open your default web browser and take you to our [Product Board portal](#) for

Fusion.



From here, you can see an overview of the items that we have recently released, the items that are in progress and coming soon, and ideas that are under consideration for future development. You can vote on all these items and provide insights/feedback that will assist and guide our development. Additionally, in the top-right corner, you will see a **Submit idea** button that will allow you to submit your own ideas for future consideration.



**Please note:** This is not a support request. If you require support, please visit <http://crbcunninghams.co.uk/support/>

## Installing Fusion Back Office client

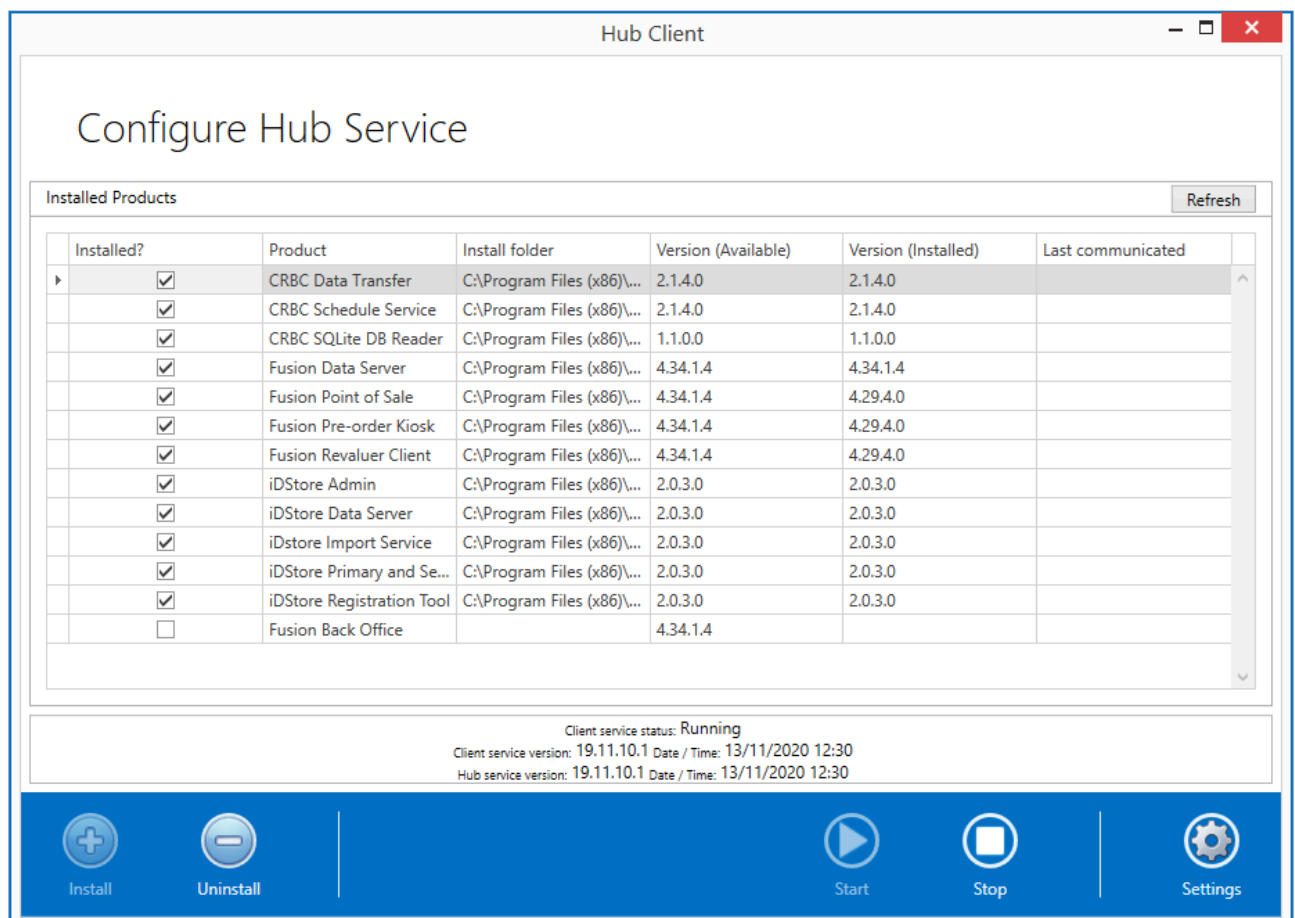
*Last modified: 23 March 2023*

During installation, your engineering team will happily install the Fusion Back Office software on any PC that requires it. In the months/years after your initial installation, you may require the software to be installed on additional PC's, or you may have replaced a PC that previously had the Back Office software on it.

Before installation, you will require the 'CRBC.Hub.Client.Setup...\*.x86.exe' installation file. This can typically be found on the cashless server within a 'CRBCunninghams\InstallFiles\' directory. If you cannot find the installation file, please contact support and they will send you the installation file.

## Installing the CRBC Hub Client

1. Run the 'CRBC.Hub.Client.Setup...\*.x86.exe' installation file.
2. This will run the install process and automatically close.
3. Once complete, navigate to the Windows button and you can find the **Hub Client** program in the CRBCunninghams folder.
4. Open the **Hub Client** program.



## Configuring the CRBC Hub Client

If the Hub Client is running with no error you can skip this section but if you have an error, follow this section carefully.

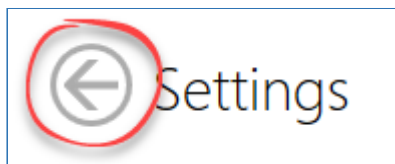
1. Click the **Stop** button located at the bottom of the program, this will stop the service while you can make changes to the configuration.
2. Click on the **Settings** button located on the bottom right of the program.
3. You can enter the IP address of the computer that is running the CRBC Hub Server Service, which is usually the one where the Fusion Database has been installed, in the **Server** section in the **Address** box. Please leave all other settings within this config screen. If you do not know,

please get in touch with the Support Helpdesk and they will assist with that.

- If left blank, the program will try to automatically find the CRBC Hub Server service, if it does not automatically find the server then it is recommended to enter the IP address manually.

Server	
Address	<input type="text"/> (Enter computer name or leave blank for auto-discovery of service)
Port	<input type="text" value="19002"/>

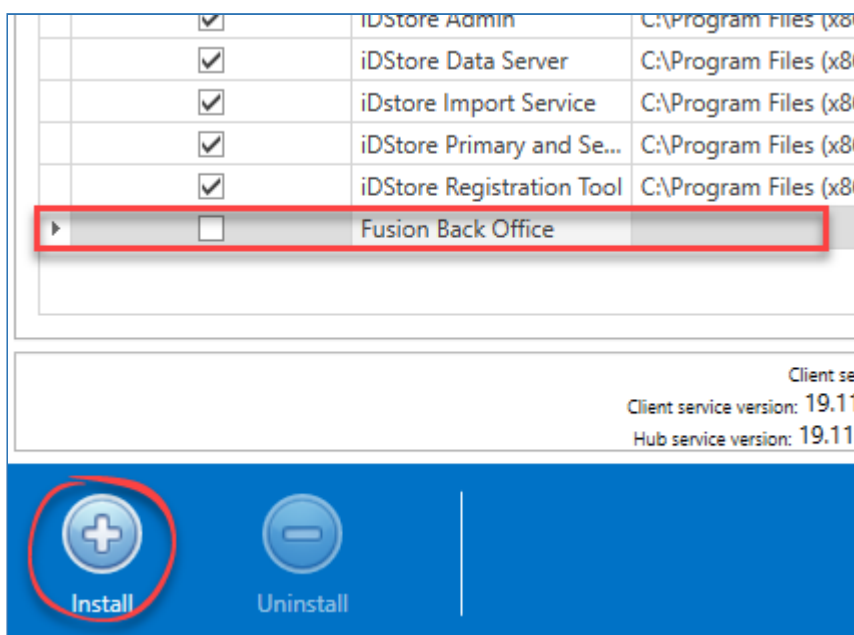
- Click the **Back Arrow** button located at the top left of the program to return to the Hub Dashboard.



- Click the **Start** button located at the bottom of the program to start the Hub Client server.

## Installing Fusion Back Office

- Select **Fusion Back Office** from the Hub List.
- Click the **Install** button located at the bottom left of the program.



- This will proceed to the Configure Install Settings screen where you can set a target directory if needs be.
- Click the **Continue** Button to start the Install of the application.

## Configure install settings

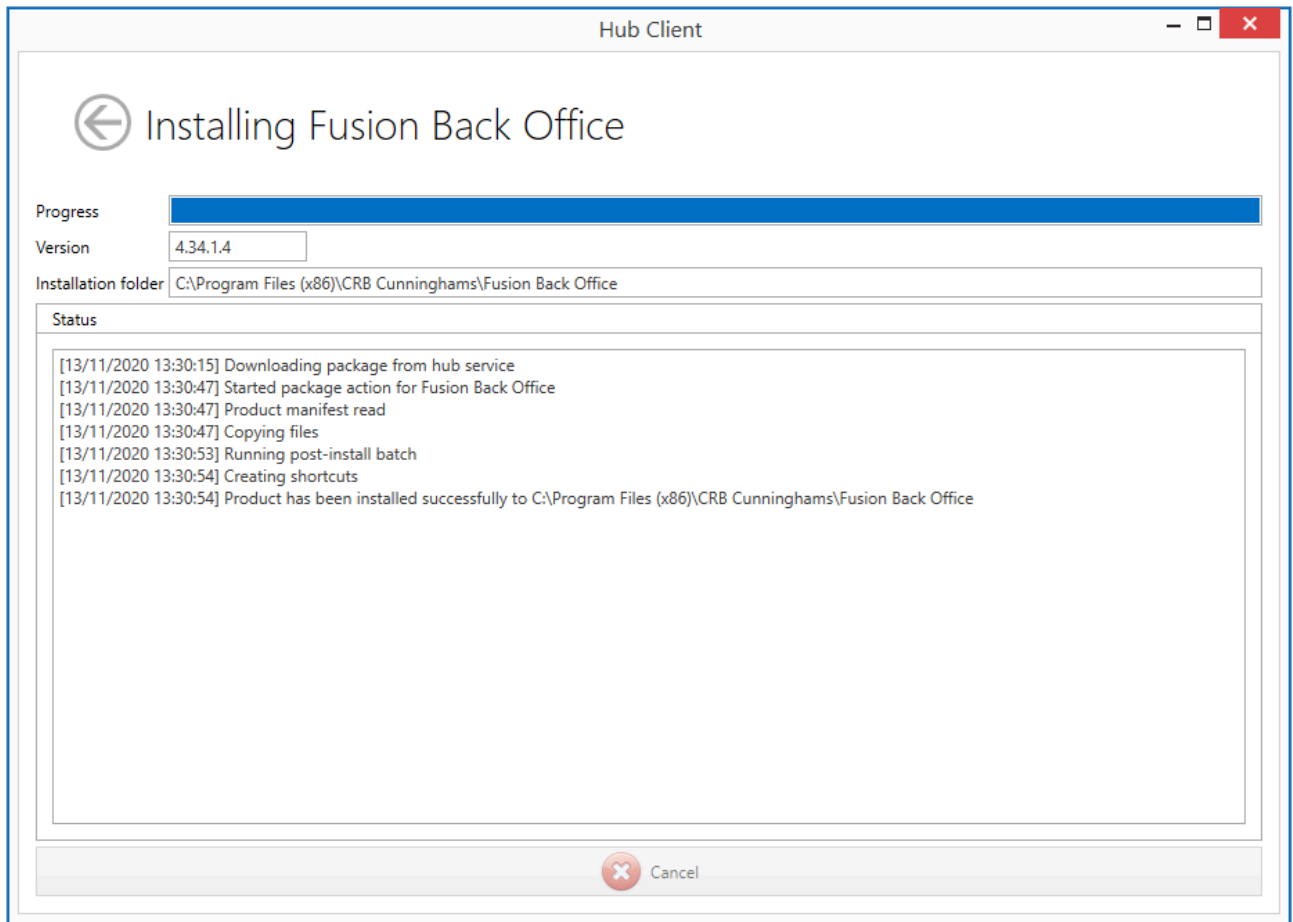
**Install properties**

Install target directory

Select the directory to install Fusion Back Office to.



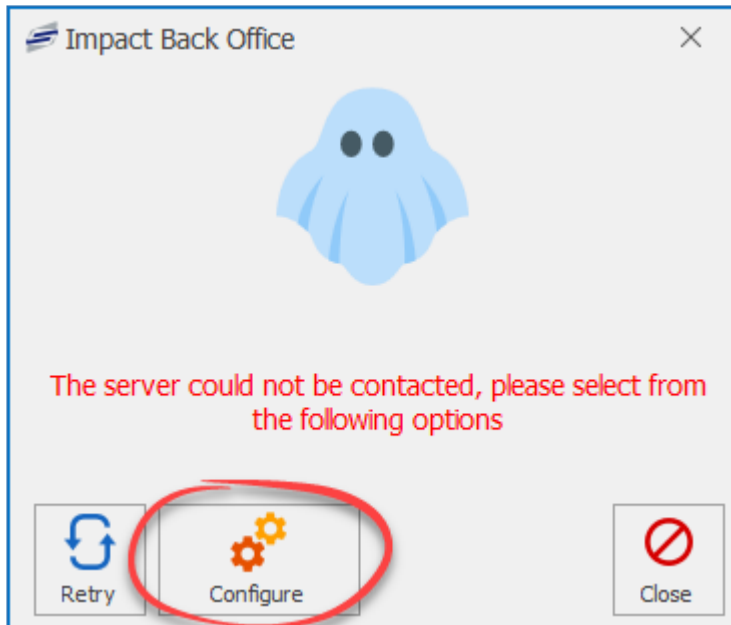
5. This will start installing the application. In the **Status** section you will see that the Product has been installed successfully.



6. Click the **Back Arrow** Button located at the top left of the program to return to the CRBC Hub Client dashboard. You can now close the CRBC Hub Client program.
7. The **Fusion Back Office** shortcut should have been created and added to the desktop of the workstation.

## Opening and Configuring Fusion Back Office

1. Double Click on the **Impact Office** shortcut on the desktop.
2. You will now need to click the **Configure** button to proceed to connect the program to the Fusion database as a new location.



3. Click **Next** at the Connect to server screen.
4. Enter a server address at the Data server connection screen and click the **Test Connection** button. Then click **Next**.
5. Enter a Fusion Admin user credentials at the Enter your credentials screen. If you don't know one, call the Support Helpdesk to assist with this. Then click **Next**.
6. Click the **Create a new location** and then enter a **Location name** and then click **Next**.
7. Click **Next** at the confirmation screen.
8. At the Attached peripherals screen, under the General section, select the types of Authentication being used on that location. When done, click **Next**.
9. Click **Finish** to complete the Install. The Fusion Back Office program will open and you will be presented with the Login screen. You should be able to now log in and use the program.

*Last modified: 19 April 2023*

# Back Office

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The Fusion Back Office application is where all day-to-day administration of the system is performed such as viewing and editing user accounts, setting prices and menus, and generating reports.

## Getting started

The Back Office software must have first been installed on your PC before you can use it. A shortcut will often be found on your desktop.



If not you can look in your Windows start menu;

- Windows 10: **Start > All Apps > CRB Cunninghams > Impact Office**
- Windows 7/8: **Start > All Programs > CRB Cunninghams > Impact > Impact Office**

**i** If you cannot find the application using the above methods, please contact support.

*Last modified: 20 March 2023*

## Logging in

After the software has loaded, you will be presented with the Login screen as below. Before you can use the software, you must first log into the system.



### Username & Password

The first option available is by entering your username and password. Press the green **Login** button to confirm.



### Biometrics (Fingerprint)

If your system is connected to iDStore, you can use your fingerprint to log in. Simply press the Biometric tile from the list and place your finger onto the scanner. If a match is found and your account has access you will be logged in.



### Card

You can also use your card to log into the Fusion Back Office software. Select the card icon from the list and place your card onto the connected card reader. If your account has access you will be logged in.



### PIN

The last method is to use a PIN. Enter your PIN using either the keyboard or mouse and press the green **Login** button to confirm.



The login method(s) that are available for you to use will depend on your system set up. In total, there are four options. The options that are available to you are displayed using the grey tiles at the bottom of the login screen. The option that is currently selected will be highlighted in green. By default this is the Username & Password method on the Impact Office software.

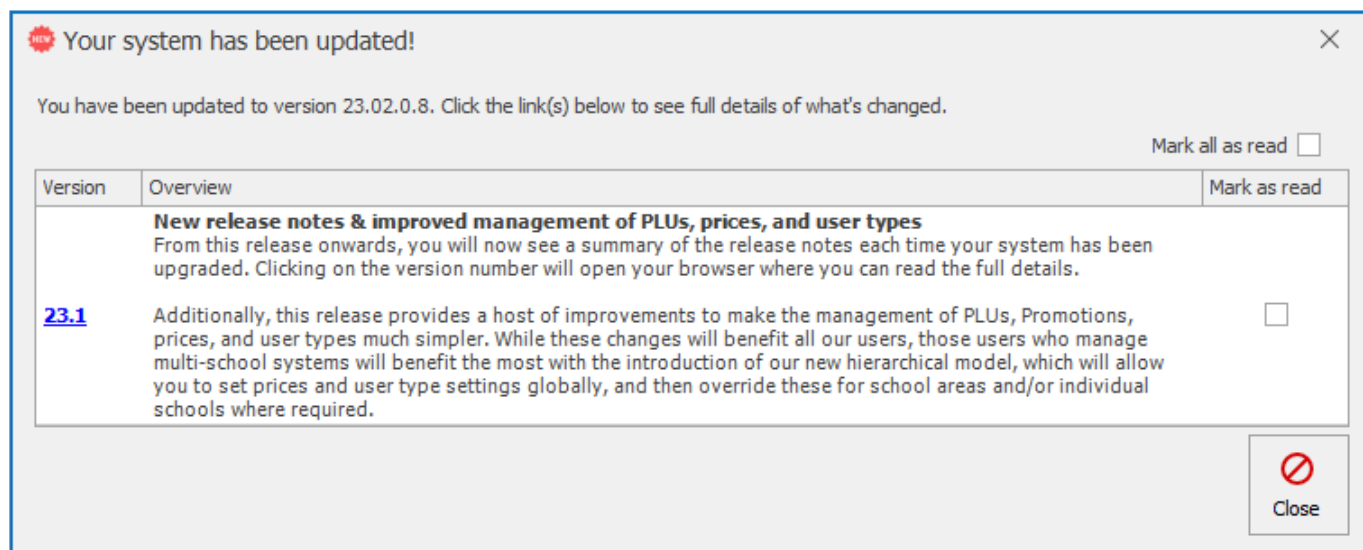


If you do not have login details, speak to your system administrator or contact our support desk.

*Last modified: 20 March 2023*

## Release notes

After logging in successfully to Fusion, you will periodically be presented with a pop-up which alerts you to the fact that your system has been upgraded since your last successful login. This pop-up will provide you with a summary of the changes made for each incremental release.



## How do I see more information?

If you would like to see more information about that release, you can click on the version number (or anywhere on that row) and that will open this user manual at the [What's new?](#) section for that version. For example, clicking on the v23.1 release summary, will open the v23.1 manual version at the What's new? page, so that you can read more detail about that release.

## Will this information appear each time I log in?

The dialog will always be presented each time you log in if you have any unread release notes. When you have clicked the version link to read more detail about that version, that release note will be automatically marked as 'Read'. If you don't wish to view the full details of the release, you can simply check the **Read** checkbox for that release. If you have multiple unread release notes, you can choose to press the **Mark all as read** checkbox. Now that you've set these as read, after you have closed this pop-up, you will no longer be presented with any release notes when you log in, until the next time your system is upgraded and you have unread release notes for that version(s).

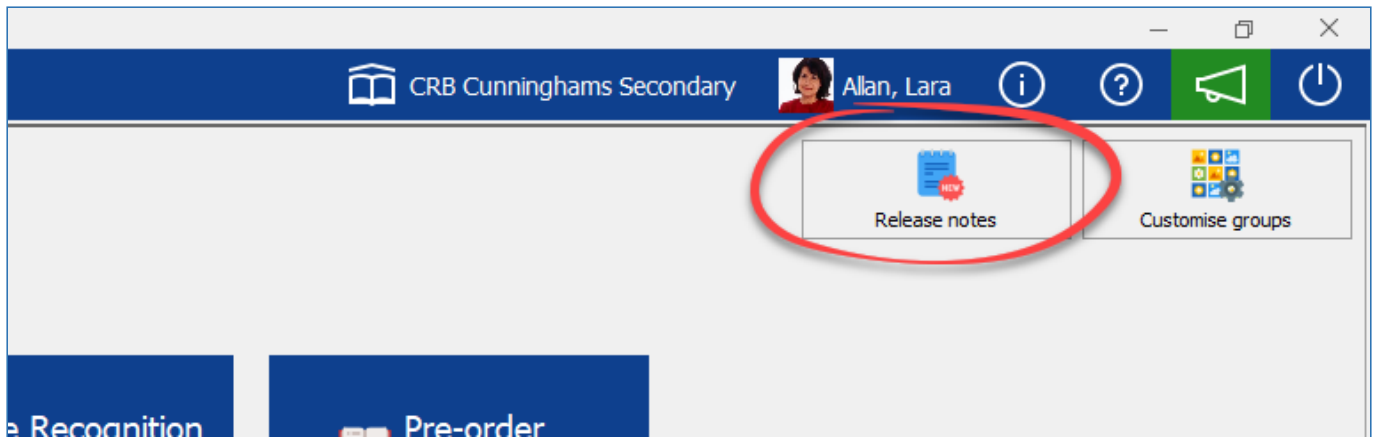
## If I mark the release notes as read, will other users see them?

Yes. The release notes will be presented to every user that can log into the back office. Marking the release notes as read will only mark those release notes as read for your user, when another user logs into the back office, they will still see all the release notes that they have not yet read.

## I previously marked the release notes as read, but now I want to access them again

All past release notes can be accessed by pressing the new **Release notes** button from your home screen dashboard. This will show all release notes, regardless of if they have been marked as read or not. Additionally, it will show you the date that your system was upgraded to that version and the date that you read the release notes.

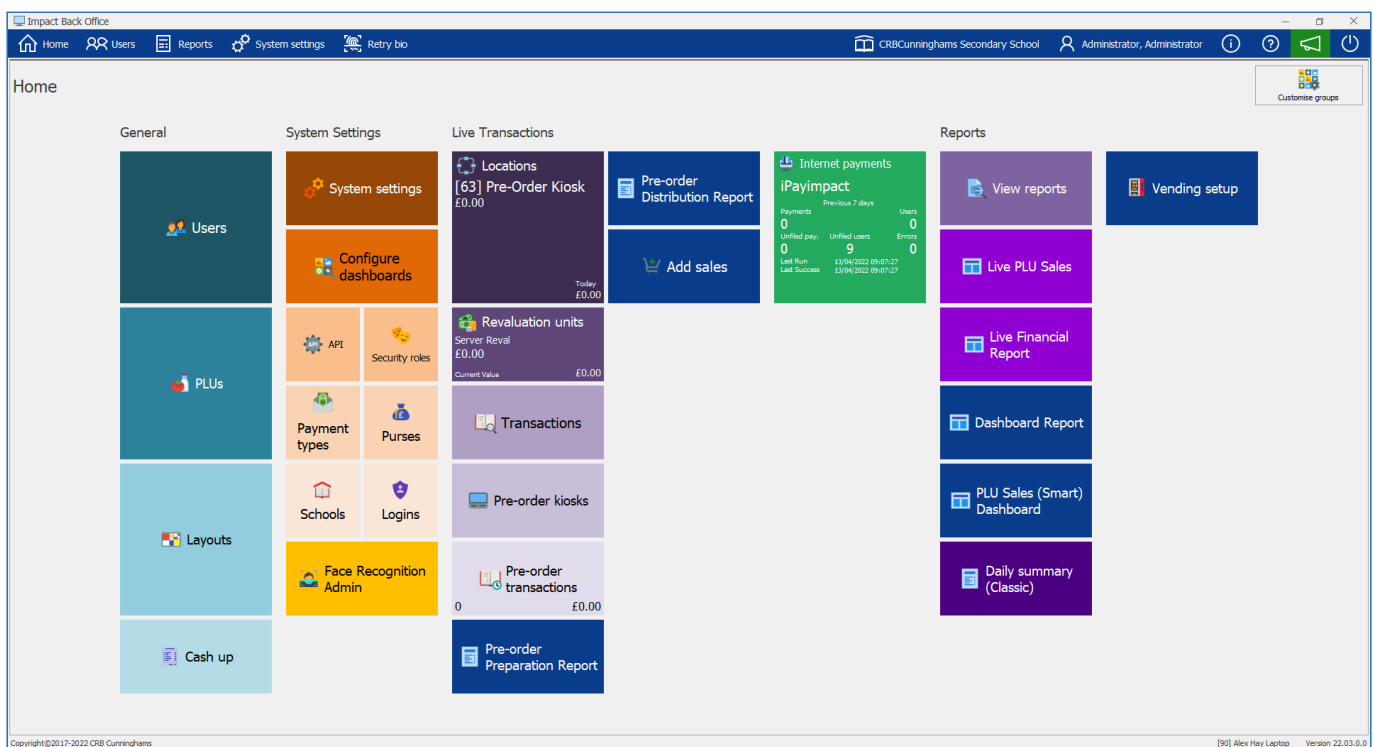




*Last modified: 23 March 2023*

## User interface

After successfully logging in, you will be presented with your home screen.



The home screen is broken down into two components, the menu bar and the dashboard.

## Menu bar



The menu bar is fixed and will always show the same items regardless of who is logged in. These items are often the most commonly used.



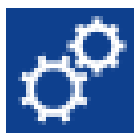
**Home:** Pressing the Home button at any time will return you to the home screen.



**Users:** This shortcut takes you directly to the Users screen. From here, you can view and edit users as well as adding money to their accounts.



**Reports:** This shortcut takes you directly to the Reports screen.



**System settings:** This shortcut takes you directly to the System settings screen. The System settings screen allows for the configuration of your system.



**Retry bio:** This button allows you to quickly test your biometric provider.



**School name:** If your system is configured for multiple schools, the School name section will appear. This lets you know which school you are currently accessing and allows you to quickly change school using the dropdown menu.



**Current user:** Here the name of the currently logged on user will be displayed. This icon will be replaced by the user photo if they have one on their account.



**Info:** Pressing the info button will display additional information about the software such as the version number and location name/ID.

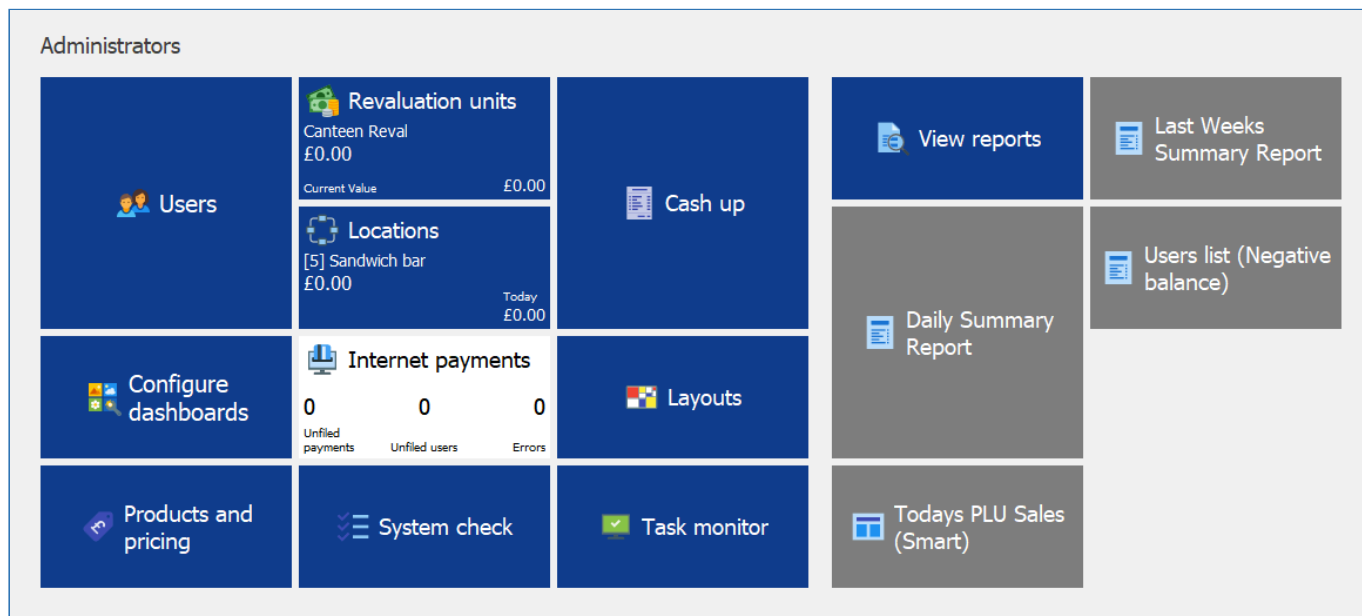


**Help:** Pressing the help button will launch your browser and take you to the relevant page of the user manual for the current screen.



**Feedback:** This button will open up our Fusion feedback form in your default browser. This feedback is sent directly to the development team and guides the future direction of the system.

## Dashboard



The dashboard will be unique to each user. This will have many buttons known as 'Tiles'. The tiles that are displayed will depend on what role you have been assigned. You also have the ability to 'pin' your own tiles to the dashboard and arrange them how you like by dragging them from one location to another.

*Last modified: 20 March 2023*

## Customising your dashboard

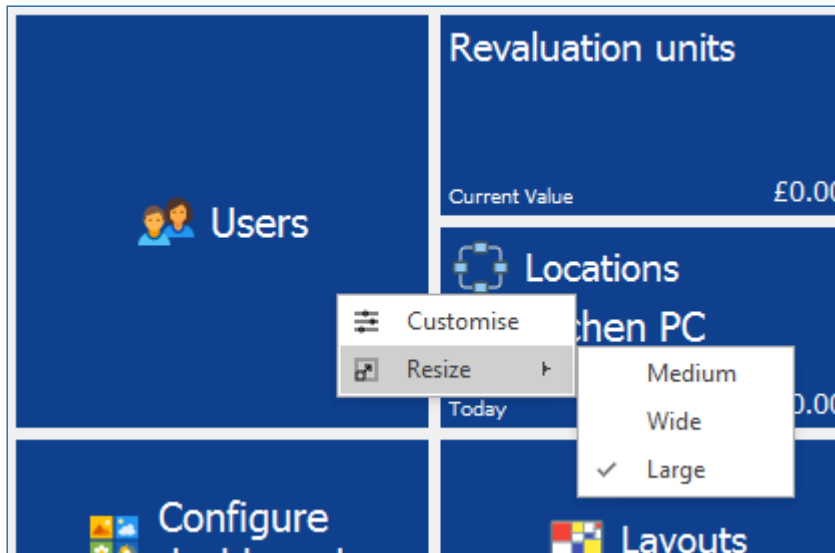
As mentioned in the previous section, the dashboard is unique to each user. This means that you can customise it to how you like. For example, if you want a certain tile to be more prominent, make it bigger and change its colour. Any changes that you make will only affect your dashboard so nobody else is affected.

## Changing tile location

1. Single left-click and hold the required tile.
2. Drag the tile to its new location.
3. Let go of the mouse to confirm.

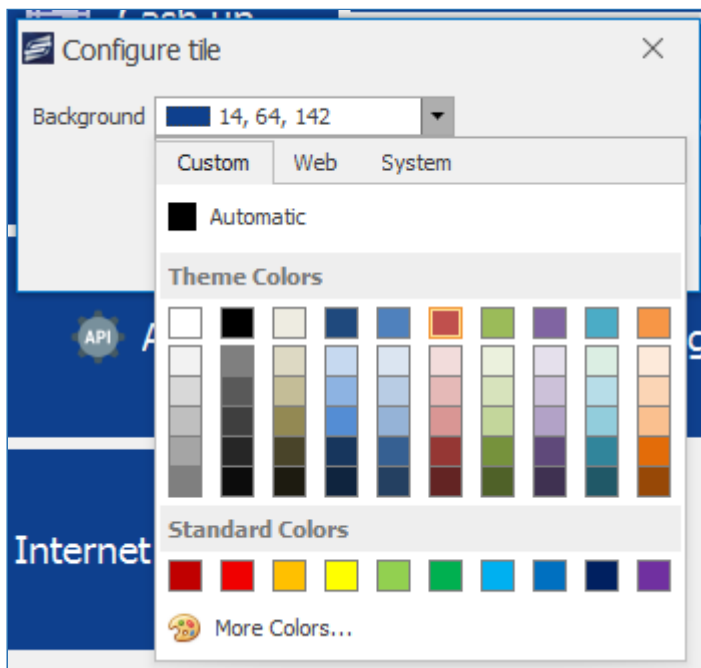
## Resizing a tile

1. Right-click on the desired tile.
2. Hover your cursor over the **Resize** option and then select the required size.



## Changing the colour of a tile

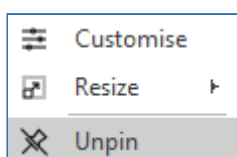
1. Right-click on the desired tile.
2. Select **Customise**.
3. Change the colour of the tiles background by using the colour selector.



4. Press **OK** to confirm.

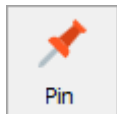
## Removing a tile

1. Right-click on the desired tile.
2. Select **Unpin**.



## Adding new tiles

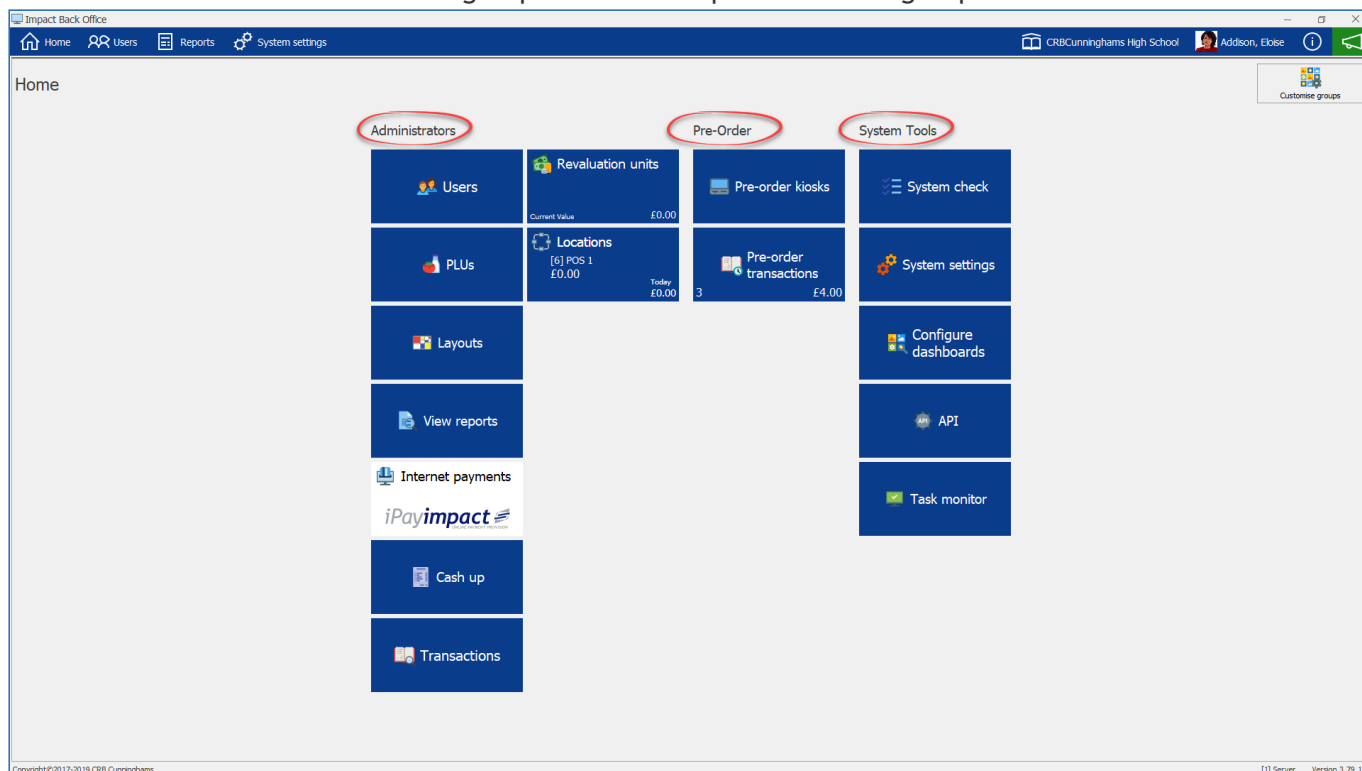
New tiles can be added in two different ways. The first method is by using the **Pin** button that appears when viewing a particular screen. For example, pressing the **Pin** button on the Users Screen will pin a new Users tile to the dashboard.



The second method is by using the [Configure Dashboards](#) feature.

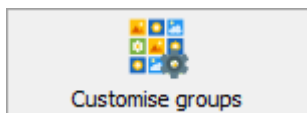
## Customise Groups

You can arrange your tiles on the dashboard into groups by dragging a tile to a new column on the dashboard. This will create a new group. In the example below the groups are circled in red.



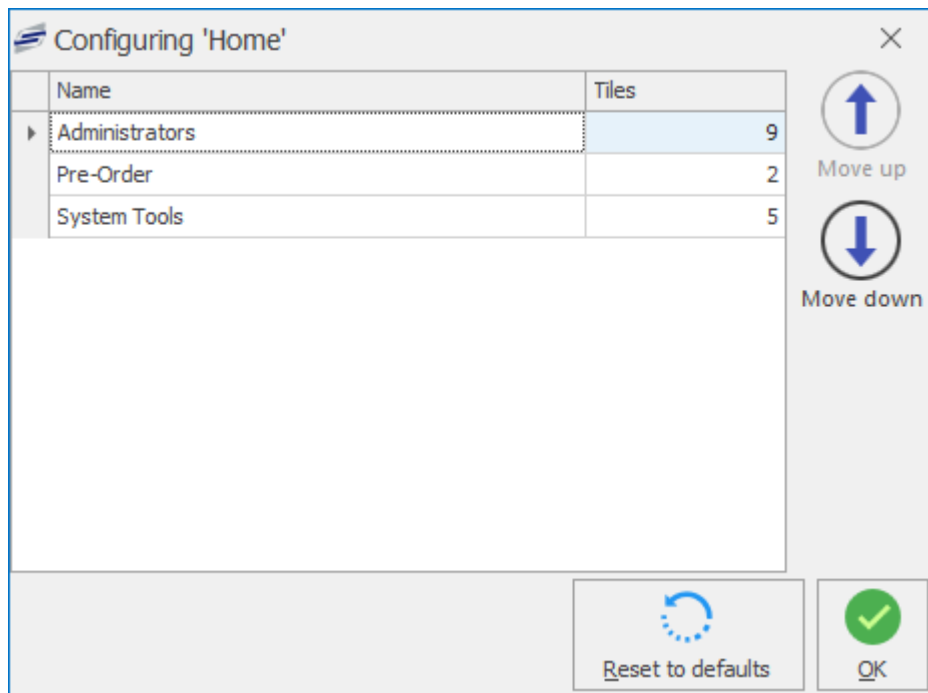
By default, groups will not be named. Whilst editing group names, it is important that you click off the name field to save your changes before pressing the green **OK** button.

To Edit the names of these groups press the “Customise Groups” button located at the top right of the dashboard.



The configure box allows you to name your groups and move them up (left) or down (right) on the dashboard.





## Users

Last modified: 20 March 2023



The Users screen provides functionality for managing your user accounts. It can be accessed by pressing the **Users** button from the menu bar or by pressing the **Users** tile from your dashboard if you have one pinned.

User type	Person ID	Surname	Forename(s)	Known as	DOB	Year / Class	Leaver	Future	FSM	Supervisor	Face	Biometric Permission
Staff	EF6049F2-FDA2...	Alcock	Stuart Robert	Stu	09/09/2002	0, None						Approved
Student	71D0D0F-348F...	Al	Amy	Amy	24/10/2002	11, C4						Denied
Student	5C28011-4656...	Al	Elliot	Elliot	21/03/2004	10, C6						Pending
Student	89F79C06-EC03...	Ali	Emily	Emily	06/06/2005	9, C9						Pending
Student	DF7784A5-D819...	Ali	Johnny	Johnny	09/02/2005	9, C10						Approved
Student	5185A1EC-FA30...	Ali	Terry	Terry	06/07/2006	8, C6						Pending
Student	011846D7-9891...	Allen	Edward	Edward	03/11/2001	12, C6						Pending
Staff	237F894A-A288...	Allen	Jennie	Jennie	04/03/1967	0, None						Approved
Staff	5616C236-87A0...	Allen	Lara	Lara	02/12/1993	0, None						Pending
Student	4AF9D738-6638...	Allen	Lisa	Lisa	19/07/2002	12, C4						Pending
Student	2000012	Allen	Aimee	Aimee		Y7, C1						Pending
Student	SALES-05	Allen	Damon	Damon		0, None						Approved
Student	565C0FC-C54...	Allen	Harrison	Harrison	15/09/2002	11, C4						Pending
Student	960E770A-2B53...	Allen	John	John	28/12/2006	7, C7						Approved
Student	3883384A-144E...	Allen	Katherine	Katherine	30/09/2004	9, C10						Pending
Student	6E7D4461-2CF0...	Allen	Lea	Lea	14/03/2003	11, C10						Pending
Student	802ED288-E495...	Allen	Leah	Leah	14/11/2006	7, C1						Pending
Student	FD313015-F727...	Allen	Susan	Susan	02/05/2003	11, C9						Pending
Student	A925F22-3119...	Allen	William	William	12/09/2001	12, C5						Pending
Student	90619F02-5003...	Anderson	Alexander	Alexander	29/06/2006	8, C3						Pending
Student	8554A144-3417...	Anderson	Daisy	Daisy	04/05/2007	7, C6						Pending
Student	88888A64-7920...	Anderson	Ellis	Ellis	01/03/2005	9, C9						Pending
Student	8E5B7D09-3844...	Anderson	James	James	06/05/2005	9, C12						Pending
Student	4300855A-1AD...	Anderson	Maddison	Maddison	19/04/2002	12, C9						Pending
Staff	AC4C2D7B-E67...	Anderson	Nicole	Nicole	28/08/1993	0, None						Approved
Student	16C5681F-3842...	Anderson	Tilly	Tilly	23/05/2006	8, C3						Pending
Student	D03FE241-608D...	Armstrong	Alex	Alex	24/12/2001	12, C11						Pending
Student	7C771363-C39A...	Armstrong	Cynthia	Cynthia	28/01/2005	9, C4						Pending
Student	86381E9B-4EE6...	Armstrong	Della	Della	25/10/2003	10, C2						Pending
Student	E96EA17E-5478...	Armstrong	Jonathan	Jonathan	26/01/2003	11, C10						Pending
Student	C275749D-0492...	Armstrong	Julie	Julie	19/11/2001	12, C5						Pending

25/04/2022 13:35:50 1251 users found, 1 user selected.

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[90] Alex Hay Laptop Version 22.03.0.0

## User preview

The right side of the users screen displays the details of the currently selected user. Here we can perform actions on this user such as viewing their activity or adding value to their account.

If the FSM Carryover feature has been enabled on a purse, it will be listed in the purse overview

section. This balance will reflect the carryover configuration settings.

Purse	Balance
Catering	£115.12
Supervisor	£0.00
FSM	£0.00
UFSM	£0.00
Breakfast	£0.00
FSM (Carry over)	£0.00
Ad hoc	£0.00

## How much money does a user have?

At the bottom of the user preview section, there is a list of the purses that are available to the user and how much credit is in those purses. Looking at the image above, we can see that Alfredo has £2.50 in his 'FSM' purse and £10 in his 'Catering' purse.



Fusion utilises a “Multi-purse” concept. All configured purses are available to every user, even if they do not use them. For example, a non-free school meal student will still have both the 'FSM' and 'Supervisor' purses, but because they are not entitled to either a Free School Meal or a Supervisory allowance, these purses will never have any credit added to them.

*Last modified: 20 March 2023*

## Finding a user



Before we can perform any action on a user, we must first find and select their account. Above the user grid, you will find the find and filter options.

Name	Status	Current only	Allowance	All
Labels	User type	All		

## Finding an account by name

To find a user by name, simply type either their first or last name into the **Name** field. As you type, the users in the users grid will reduce until you are only left with the users whose first or last name is what you have typed. Now select the user from the grid. Their name will be highlighted and their details will be shown on the right-hand side.

## Changing the filters

By default, the users grid displays all current users regardless of their user type or allowance status. We can alter this by adjusting the filter options using the drop-down menus. The four filters are:

- **Status:**
  - **Current only:** This is the default option. The user grid will only display users who are currently attending the school.
  - **All:** Displays all users regardless of their status.
  - **Left / Future:** This option displays any users who have left school or who are on the system but have not yet started (e.g. new year 7's in June/July).

- **Allowance:**

- **All:** This is the default option. The user grid will display all users regardless of their allowance status.
- **Frees:** This option displays all of the users who are entitled to a free school meal.
- **Supervisor:** This option displays all of the users who are entitled to a supervisor meal.

- **Labels:**

- **Misc:** This option displays all of the users tagged with the chosen label. User labels are created by an administrator and will not be available by default.

- **User type:**

- **All:** Default option. Displays all users regardless of their user type.
- **Student/Staff/Admin etc.:** Only displays users who are a member of that user type.

By choosing the options, Current only, Frees, and Student, the user grid will display all current students who are entitled to a free school meal.

The screenshot shows the 'Find user' interface in the Impact Back Office. The top navigation bar includes 'Home', 'Users', 'Reports', 'System settings', and 'Retry bio'. The main area displays a table of users with columns for User type, Person ID, Surname, Forename(s), Known as, DOB, Year / Class, Leaver, Future, FSM, Supervisor, Face, and Biometric Permission. The table is filtered to show 'Student' users with 'Frees' allowance. A sidebar on the right shows details for a selected user, 'Ali, Emily', including a photo, User ID, Year / Class, DOB, and a list of allowances with their values.

User type	Person ID	Surname	Forename(s)	Known as	DOB	Year / Class	Leaver	Future	FSM	Supervisor	Face	Biometric Permission
Student	89F75C06-ECCD3...	Ali	Emily	Emily	06/06/2005	9, C9						Pending
Student	04C57870-F745...	Barry	James	James	22/05/2002	12, C5						Pending
Student	853A2645-688B...	Bryant	Riley	Riley	05/07/2006	8, C6						Pending
Student	8D0337FA-C47...	Hodgson	Andreas	Andreas	01/02/2004	10, C6						Pending
Student	EAD28433-46A4...	O'Connor	Rhys	Rhys	01/10/2003	10, C6						Pending
Student	6C2FFAAB-2EC7...	Perry	Bethany	Bethany	09/07/2005	9, C8						Pending
Student	E3D0789E-7372...	Rhodes	Jonathan	Jonathan	16/02/2007	7, C7						Pending
Student	4D6346BE-69FA...	Stephenson	Lauren	Lauren	07/04/2006	8, C7						Pending

28/04/2022 12:46:42 8 users found. 1 user selected.

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[90] Alex Hay Laptop Version 22.03.0.0

## Sorting the grid

Another thing that you can do to make finding a user easier is by sorting the grid by a column and order of your choosing. By default the user grid is sorted by the Surname column in ascending order (A > Z). You can change this by simply clicking on the header that you wish to sort by. For example to sort by first name, click on the Forename column header. The users will now be listed in ascending Forename order. Press the column again to switch to descending order (Z > A).



Accounts set with a Free Meal will be highlighted in a darker colour on the user grid for easier findings.

User type	Person ID	Surname	Forenames	Known as	DOB	Year / Class	Start date	Leaving date	Leaver	Future	FSM
Student	468	Adams	Alfredo	Alfredo	06/06/2003	10, A	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	594	Bradford	Alfredo	Alfredo	06/06/2003	10, E	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	206	Campbell	Alfredo	Alfredo	06/06/2005	8, B	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	417	Cooper	Alfredo	Alfredo	06/06/2004	9, D	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	348	Diaz	Alfredo	Alfredo	06/06/2004	9, B	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	863	Douglas	Alfredo	Alfredo	06/06/2001	12, D	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Student	86	Evans	Alfredo	Alfredo	06/06/2006	7, C	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	257	Haye	Alfredo	Alfredo	06/06/2005	8, D	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	322	Keegan	Alfredo	Alfredo	06/06/2004	9, A	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	773	Keegan	Alfredo	Alfredo	06/06/2001	12, A	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	297	Knott	Alfredo	Alfredo	06/06/2005	8, E	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	172	Lemmon	Alfredo	Alfredo	06/06/2005	8, A	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	804	Mccormack	Alfredo	Alfredo	06/06/2001	12, B	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	860	Newman	Alfredo	Alfredo	06/06/2001	12, D	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	449	Podmore	Alfredo	Alfredo	06/06/2004	9, E	29/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Selecting Multiple Users

### Selecting specific accounts

1. Select an account by left-clicking once on one. Then Hold the CTRL button on the keyboard and continue to select more accounts. The selected accounts will be highlighted in blue.

Student	SALES-05	Allen	Damon	Damon	05/07/2006	Y12, C4	29/08/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	56ESECFC-CE6...	Allen	Harrison	Harrison	15/09/2002	Y11, C4	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	960E77DA-2B6...	Allen	John	John	28/12/2006	Y7, C7	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	38B3384A-144...	Allen	Katherine	Katherine	30/09/2004	Y9, C10	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	6E7DA467-2CF...	Allen	Lea	Lea	14/03/2003	Y11, C10	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	802ED288-E49...	Allen	Leah	Leah	14/11/2006	Y7, C1	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	FD313015-F72...	Allen	Susan	Susan	02/05/2003	Y11, C9	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	A9251F22-311...	Allen	William	William	12/09/2001	Y12, C5	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	90619F02-500...	Anderson	Alexander	Alexander	29/06/2006	Y8, C3	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	B554A14A-341...	Anderson	Daisy	Daisy	04/05/2007	Y7, C6	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Selecting a group of accounts

1. Select an account by left-clicking once on one. Then hold the SHIFT button on the keyboard and then select the last record of the group. This will highlight all selected accounts.

Staff	237FB94A-A2B...	Allen	Jennie	Jennie	04/03/1967	0, None	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff	5616C236-87A...	Allen	Lara	Lara	02/12/1993	0, None	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Student	4AF9D73B-663...	Allen	Lisa	Lisa	19/07/2002	Y12, C4	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	SALES-05	Allen	Damon	Damon	05/07/2006	Y12, C4	29/08/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	56ESECFC-CE6...	Allen	Harrison	Harrison	15/09/2002	Y11, C4	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	960E77DA-2B6...	Allen	John	John	28/12/2006	Y7, C7	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	38B3384A-144...	Allen	Katherine	Katherine	30/09/2004	Y9, C10	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	6E7DA467-2CF...	Allen	Lea	Lea	14/03/2003	Y11, C10	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	802ED288-E49...	Allen	Leah	Leah	14/11/2006	Y7, C1	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	FD313015-F72...	Allen	Susan	Susan	02/05/2003	Y11, C9	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	A9251F22-311...	Allen	William	William	12/09/2001	Y12, C5	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	90619F02-500...	Anderson	Alexander	Alexander	29/06/2006	Y8, C3	23/04/2019		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Last modified: 20 March 2023

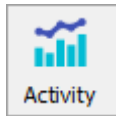
## Viewing user activity



From time to time, you may wish to see what a particular user has been buying on the system. Impact Fusion allows us to easily view any users activity history and even print or export it if required.

To view a users activity;

1. In the Users screen, select the required user from the grid.
2. Press the **Activity** button.



3. The users activity will be displayed. The date range can be changed by choosing different start and end dates. The type of transactions can also be filtered using the 'Type' dropdown list.

Impact Back Office

Home Users Reports System settings

CRBCunninghams High School Addison, Eloise

Activity history for Douglas, Alfredo

Start date: 09/05/2019 End date: 09/05/2019 ID Method: All Type: All Types

Date / Time	Date / Time applied	Transaction	Type	Payment type	Paid	Free	VAT	Location name	Entered by	ID method
09/05/2019 10:52:00	09/05/2019 10:52:00	100000004 PC Revaluer	Cheque		£20.00	£0.00	£0.00	Server	Addison, Eloise	Manual lookup
09/05/2019 10:59:05	09/05/2019 10:59:05	100000005 Sale - Till			-£0.70	£0.00	-£0.08	POS 1	Administrator, Admin...	PoS lookup

2 records found, last updated 09/05/2019 10:59:15

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**Douglas, Alfredo**

Print Print receipt Refund

User ID: 887


Year / Class: 12-D FSM 31/12/2099

DOB: 06/06/2001

Message:

Purse	Balance
Catering	£19.30
Supervisor	£0.00
FSM	£0.00
UFSM	£0.00
Breakfast	£0.00

Total points: 5

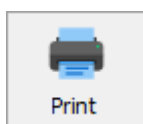
4. The users activity will be grouped by transaction. If a user has purchased multiple items in a single transaction, you can press the  button to expand the transaction.

Date / Time	Date / Time applied	Transaction	Type	Payment type	Paid	Free	VAT	Location name	Entered by	ID method																																	
09/05/2019 10:52:00	09/05/2019 10:52:00	100000004	PC Revaluer	Cheque	£20.00	£0.00	£0.00	Server	Addison, Eloise	Manual look																																	
<div>Revaluer details list</div> <div>Purses</div> <table><tr><th>Reference</th><th>Internet ID</th><th>Account number</th><th>Name</th><th>Sort code</th></tr><tr><td></td><td></td><td>123456</td><td>Miss A Douglas</td><td>01-01-01</td></tr></table>											Reference	Internet ID	Account number	Name	Sort code			123456	Miss A Douglas	01-01-01																							
Reference	Internet ID	Account number	Name	Sort code																																							
		123456	Miss A Douglas	01-01-01																																							
09/05/2019 10:59:05	09/05/2019 10:59:05	100000005	Sale - Till		-£0.70	£0.00	-£0.08	POS 1	Administrator, Admi...	PoS lookup																																	
<div>Details list</div> <div>Purses</div> <table><tr><th>PLU No.</th><th>PLU</th><th>Group</th><th>Quantity</th><th>Price level</th><th>Paid</th><th>Free</th><th>VAT</th><th>Disc.</th><th>Points</th><th>Refunded</th></tr><tr><td>23</td><td>Cookies</td><td>Desserts</td><td>1</td><td>1</td><td>-£0.50</td><td>£0.00</td><td>-£0.08</td><td>£0...</td><td>0</td><td><input type="checkbox"/></td></tr><tr><td>1</td><td>Apple</td><td>Fresh Fruit</td><td>1</td><td>1</td><td>-£0.20</td><td>£0.00</td><td>£0.00</td><td>£0...</td><td>5</td><td><input type="checkbox"/></td></tr></table>											PLU No.	PLU	Group	Quantity	Price level	Paid	Free	VAT	Disc.	Points	Refunded	23	Cookies	Desserts	1	1	-£0.50	£0.00	-£0.08	£0...	0	<input type="checkbox"/>	1	Apple	Fresh Fruit	1	1	-£0.20	£0.00	£0.00	£0...	5	<input type="checkbox"/>
PLU No.	PLU	Group	Quantity	Price level	Paid	Free	VAT	Disc.	Points	Refunded																																	
23	Cookies	Desserts	1	1	-£0.50	£0.00	-£0.08	£0...	0	<input type="checkbox"/>																																	
1	Apple	Fresh Fruit	1	1	-£0.20	£0.00	£0.00	£0...	5	<input type="checkbox"/>																																	

## Printing/exporting the users activity

To print the users activity - or to export it as a file;

1. Press the **Print** button.



2. A printable version of the report will be displayed using the same criteria that was chosen. If the report is multiple pages long, it can be navigated using the First, Previous, Next and Last

buttons.

- If you wish to print the report, press the **Print** button and follow your printer prompts. If you wish to export, press the **Export** button and choose the format of the file that you wish to export. Select a location, enter a filename and press **Save**.

The report can be exported in PDF, Rich Text, Excel or CSV format.

*Last modified: 20 March 2023*

## Adding/editing users

Users can easily be added or edited in Impact Fusion.



### Adding a new user

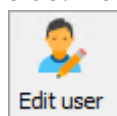
To add a new user, simply press the **Add New User** button located in the top-right corner of the users screen.



If your Impact Fusion is connected to an MIS system (SIMS, CMIS, SEEMIS etc.), do not create a user who has been, or will be, added to your MIS system. Doing so will cause duplicate records. If you are unsure, please consult with your administrator or feel free to contact our Help Desk. Details can be found [here](#).

## Editing an existing user

Find the user from the user grid and select them. Their details will be displayed on the right-hand side. Double-click the user or click the **Edit user** button.



*Last modified: 20 March 2023*

## Account Overview

### User details

After clicking either **Add New User** or **Edit user**, you will be taken to the **User details** screen. If you are adding a new user, all of the fields will be blank whereas if you are editing an existing user, this screen will be populated with the selected user's details. Any fields with a red-ish background are mandatory.

Back

### Ali, Emily details

Surname
Ali
Forename(s)
Emily
Family
Known as
Emily
Gender
Female
DOB
06/06/2005
Ethnicity
Please select
E-mail address

☐ Hide meal choice (internet payments)

Facial recognition
Face recognition permission
Pending
Add face template
Remove face template

Capture
Open
Clear

Field	Required	Description
Surname	Yes	The last name of the user.
Forename(s)	Yes	The user's forename(s).
Family	No	Users can be grouped into families. This feature is not yet fully implemented.
Known as	No	If the user is more commonly known by another name, you can enter this here. This will replace their forename on the tills etc.
Gender	No	The user's gender. Set by using the dropdown menu. If the user's identified gender is not listed as an option, use the magnifying glass icon and add it. More information on managing genders can be read <a href="#">here</a> .
DOB	No	The user's date of birth.
Ethnicity	No	The user's ethnicity.
E-mail address	No	The user's (or their parent's/guardian's) email address.

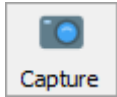
## Setting a user photo

When it comes to the user photo we have two options:

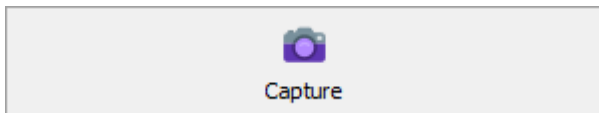
### Capturing a photo using an attached webcam

If you have a web camera attached to your computer, you are able to take a photo of the user directly into Impact. To do this:

1. Press the **Capture** button.




2. The 'Capture photo' screen will be opened. If there is no webcam configured, you will see a "No webcam found" message. If the webcam is connected and working, an image will be shown in the left box.
3. Press **Capture** to take an image.



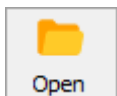
4. The captured image will be displayed on the right. Drag the square to crop the area for the photo.
5. If you are happy with the image press **Save** to complete, or press **Capture** to take another. Pressing **Cancel** will close the window without saving any changes.

### Importing a user photo

If you already have a user photo in the form of an image file, you can import this directly into Impact.


 The file must be in JPEG format.




1. Press the **Open** button.



2. Use the window to navigate and select the image that you wish to use.

Surname	<input type="text" value="Bloggs"/>	Forename(s)	<input type="text" value="Joeseeph"/>
Family	<input type="text" value="Bloggs"/>	Known as	<input type="text" value="Joe"/>
Gender	<input type="text" value="Male"/>	DOB	<input type="text" value="20/09/2005"/>
Ethnicity	<input type="text" value="Information Not Yet Obtained"/>		
E-mail address	<input type="text" value="jbloggs@mail.net"/>		



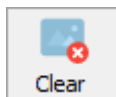
 Capture  
 Open  
 Clear

### Clear a user photo

You can delete a photo from a users account.

1. Press the **Clear** button.





2. Select either **Yes** or **No** to confirm the action.

## Additional user details

As well as the details listed at the top of the user details screen, the bottom of the screen has additional fields where you can store information about that user. These tabs are discussed in the next few sections.

## Hide meal choice

There is an option to hide meal choices that will be sent to the online payment provider's transaction log. From the age of 16, the user has the right to decide whether they can deny their parent's access to the description of the meal choices they have made at a point of sale. To enable this simply click the **Hide meal choice (internet payments)** box and **Save** the changes.

☒ Hide meal choice (internet payments)

*Last modified: 20 March 2023*

## Facial Recognition

Facial recognition within Fusion allows users to quickly and securely open their accounts without the need to physically touch anything. This provides a safe, easy to use alternative to the traditional methods of accessing accounts.

Facial recognition

Face recognition permission
Pending

Add face template

Remove face template

## Configuring a user for facial recognition

A number of steps must be taken to allow for the use of facial recognition for a user, including setting their permissions, and adding a face template.

## User permissions

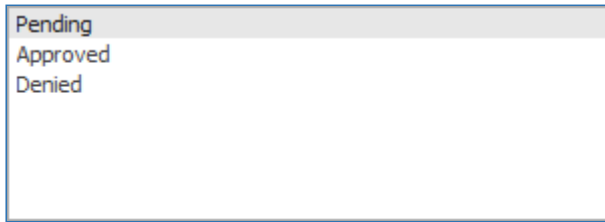
There are three permission statuses that can be set for a user within Fusion.

- **Pending:** No explicit consent has been granted nor denied. System will not allow face capture.
- **Approved:** User has granted explicit consent. System will allow for capture of a faceprint.
- **Denied:** User has denied granting consent. System will not allow face capture.

To add a face template to Fusion, the user must first have their permission set to **Approved** to allow for the use of facial recognition.

## Setting a user's permission status

1. Locate the **Face recognition permission** dropdown from within the Facial recognition section of the user details screen.



2. Click this dropdown and select the appropriate permission.
3. Press **Save** to save this permission choice.

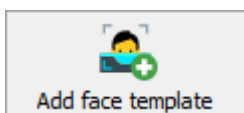
## Setting permissions for multiple users

1. Select multiple users on the Users screen and press **Edit**, or right click and select **Group update**.
2. Click on the **Permissions** tab.
3. Click on the **Update** checkbox, and select the appropriate permission status to be applied to these users from the dropdown menu.
4. Press **Update**, and then **Yes** to confirm and save these changes.

## Adding a face template to a user

Face templates can be added to users using multiple different methods. This can be done through the back office manually as explained below, through the point of sale as explained [here](#), or the system can attempt to automatically register a user with the appropriate permission if they have a photo registered against their account.

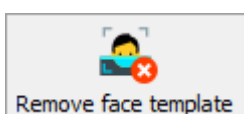
1. Locate and press the **Add face template** button from within the Facial recognition section of the user details screen.



2. The image through the computer's webcam will be displayed. Click on the user's face to capture an image.
3. Press the **Save** button to save the capture.

## Removing a face template

1. Locate and press the **Remove face template** button from within the Facial recognition section of the user details screen.



2. This will remove the face templates associated with that user.

*Last modified: 20 March 2023*

## Update facial recognition templates queue and results

Fusion and the face recognition service have the ability to convert multiple users' stored photos into facial recognition templates. This function can be performed in bulk (for example the entire school) but doing so can be slow and previously the user would not know if it was working or complete. This led to a few issues when the back office was closed.

Version 21.3 now has a screen that allows you to view how many images are in the queue and will display the success and failure rate of these. It will also display any errors with failures.

To access the **Face recognition queue**, click the button located at the top of the **User** screen.

The screenshot shows the 'User' screen for 'Alcock, Stuart'. At the top, there are three buttons: 'Face recognition queue' (highlighted with a red box), 'Add new user', and 'Pin'. Below these are four tabs: 'Face', 'Biometric Permission', 'Edit user', and 'Activity'. The 'Face' tab is selected, showing a list of biometric permissions with columns for 'Face' and 'Biometric Permission'. The permissions listed are 'Approved', 'Denied', 'Pending', and 'Pending'. To the right of the tabs are four more buttons: 'Edit user', 'Activity', 'Add value', and 'Actions'. A user photo is visible at the bottom right of the screen.

The screenshot shows the 'Facial Recognition Server Queue' screen. On the left, there are statistics: 'In Queue: 685', 'Pending: 471', 'In progress: 5', 'Success: 207', and 'Failure: 2'. The main part of the screen is a table with the following columns: 'Attempted', 'User ID', 'Name', 'Year/Class', 'Picture', 'Command', 'Result', and 'Message'. The table contains two rows of data:

Attempted	User ID	Name	Year/Class	Picture	Command	Result	Message
16/07/2021 14:37:42	23056	Lewis Carl	0 - None	No image data	AddTemplate	No user photo	
16/07/2021 14:37:47	931	Little Scott	12 - C5		AddTemplate	ID exception	Image is blank or contains non-recognizable modality.

On the right side of the screen, there are three buttons: 'Export errors', 'Pin', and 'Pop-out'.

*Last modified: 20 March 2023*

## Basic details



The basic details tab stores some more details about the user such as their Account type and Year / Class information.

The screenshot shows the 'Basic details' tab of a user management interface. It contains various input fields for user information, including dropdown menus for 'User type' and 'Year / Class', date pickers for 'Start date' and 'Leaving date', and text boxes for 'Person ID', 'MIS ID', 'Biometric ID', 'Payment ID', 'Tag', 'PIN', 'Card number(s)', 'Permanent message', 'Temporary message', and 'AD Username'. Some fields are pre-filled with example data.

Field	Required	Description
User type	Yes	The user type that the user will belong to. This affects some settings such as their default daily and break spend limits or free meal allowance amount (if applicable). For more information, please see the <a href="#">User types</a> section.
Year / Class	Yes	What Year / Class is this user in? To choose a class, click the  button and choose a Year / Class from the list. Press <b>Select</b> to complete. For more information, see the <a href="#">Years &amp; Classes</a> section.
Start date	Yes	The date that the user can start using the account from. By default, the system uses the date that the user account is created. Use the calendar to adjust if required.
Leaving date		If you know the date that the user is set to leave, enter it here. After this date, the account will be marked as a leaver.
Person ID		The users unique ID, often the schools admission number.
MIS ID		The users MIS ID (if applicable). Non-editable.
Biometric ID		Displays the users Biometric ID if linked to an identity management platform such as iDStore. Non-editable.
Payment ID		Used by some online payment providers to link accounts between the two systems.
Tag		This field is used for schools using more than one internet payment service and helps differentiate users.
PIN		Displays the users PIN (if applicable). If you want to generate a PIN for the user, press the  button. A PIN will be generated. Using the field to the right of the PIN you can enter an expiry date after which the PIN will no longer be valid.
Card number(s)		Displays any card numbers allocated to the user. Cards are assigned using the Edit Card feature. More information can be found <a href="#">here</a> .
Permanent message		This message will appear to the operator whenever the users account is opened on a till.
Temporary message		This message will appear to the operator the first time the users account is opened at the till. After that it will be removed from the users account.
AD Username		This will show the AD username from the school AD database.

Last modified: 20 March 2023

## Allowances & limits



The Allowances & Limits tab allows you to configure a user's individual spending limits and set their Free Meal - or Supervisor for staff - allowance.

Section	Field	Description
Spending Limits	Set daily limit	Select and enter a value to override the users daily spend limit.
Spending Limits	Set break limit	Select and enter a value to override the users breaktime spend limit.
Spending Limits	Set overdraft limit	Select and enter a value to override the users overdraft limit.
Spending Limits	Set vend limit	Select and enter a value to override the users vending spend limit.
Spending Limits	Vending allowance	Select and enter a value to override the users vending allowance.
Free Meal Periods	Start Date	The start date of the users FSM entitlement. (Press the  button to add, the  to edit or  to delete FSM periods.)
Free Meal Periods	End Date	The end date of the users Free School Meal entitlement.
Free Meal Periods	Free Breakfast	Is this user entitled to a Free Breakfast allowance?
Supervisor	Supervisor	Is this user entitled to a supervisor allowance. Selecting this will make the tickboxes underneath available.
Supervisor	Monday	If the Supervisor tickbox is selected, on which days is the user entitled to a

etc. supervisor allowance.



For information on how to edit allowances and limits for a whole group of users please click [here](#).

*Last modified: 20 March 2023*

## Allergens, dietary & restrictions



The Allergens, dietary & restrictions tab is the area where you can view and update a user's allergies, apply restrictions, and set a dietary message.

### Allergens

Fusion has a list of the 14 allergens recognised by the UK Food Standards Agency. Applying an allergen to a user account is currently a manual process (we are currently unable to automatically map allergens from an MIS, but this is an area we are exploring for future development).

To specify if a user has one or more of the 14 allergens, simply tick the allergen to add or untick to remove.

If a user that has been specified as having an allergy attempts to purchase items that have been set as containing one or more of these allergens, the sale will be refused and the operator alerted as to why. The operator will then be able to choose whether to complete the sale.

### Restrictions

Restrictions work very similar to how allergens do, however, restrictions can be added, edited, and removed as necessary by yourself. Restrictions are commonly used to restrict sales of items for reasons other than for allergens, for example, restricting certain users from buying cakes, or a user may have an intolerance to an ingredient that is not officially recognised by the UK Food Standards Agency.

Applying a restriction is as simple as it is with applying allergies, simply tick the checkbox next to the required restriction and untick to remove it. When the changes are saved, the user will no longer be able to purchase products that are also marked with that restriction.

For more information on restrictions, including on how to add new ones, see the [Restrictions](#) section of the menu.

## Dietary message

The dietary message is a simple informational message that is presented to the PoS operator each time the user opens their account at the Point of Sale. This message must be acknowledged before the transaction can begin.

*Last modified: 20 March 2023*

## Labels




User labels allow us to create and apply labels to user records in Fusion. These labels can then be used to more easily manage groups of users. This is particularly useful for adding ad hoc allowances to multiple users, even if the users have different user types. An example of an appropriate use of user labels would be when a school has boarders of both primary and high school age. There may be different user types for the different age brackets, but a 'Boarders' user label would allow for ad hoc allowances to be added to all boarders.

## Adding a label to a user

1. Select the user from the user screen.

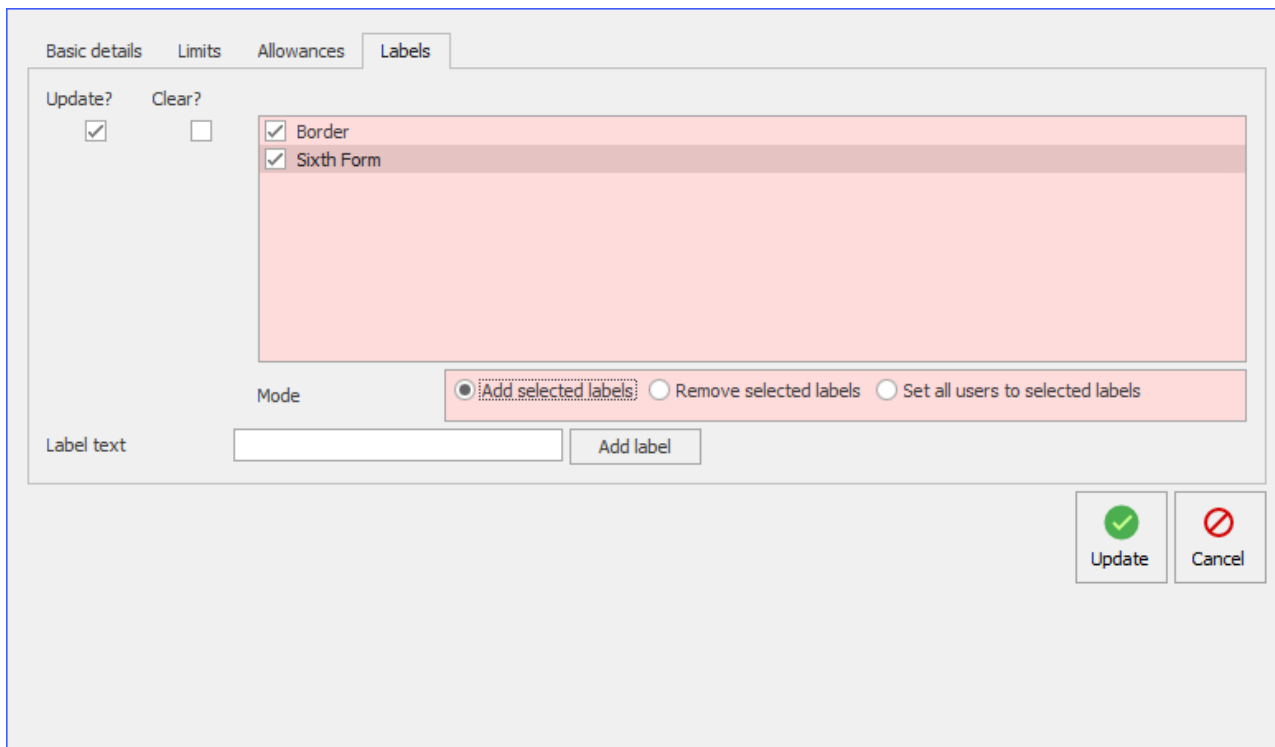
2. Press **Edit user** and navigate to the **Labels** tab.
3. Using the checkboxes, select the label(s) you wish to add to the user.

 New labels can be added by typing a name into the **Label text** field and pressing **Add label**.

4. Press save.

## Adding a label to multiple users

1. Select the users you wish to edit from the user screen.
2. Press **Edit user** and navigate to the **Labels** tab.



3. Press the **Update?** checkbox.
4. Select the label(s) you wish to add to the users.
5. Select the required mode and press **Update** to end the process.

## Removing a label from a user

1. Select the user from the user screen.
2. Press **Edit user** and navigate to the **Labels** tab.
3. Using the checkboxes, select the label(s) you wish to remove from the user.
4. Press save.

## Removing a label from multiple users

1. Select the users you wish to edit from the user screen.
2. Press **Edit user** and navigate to the **Labels** tab.



3. Press the **Update?** checkbox.
4. If you wish to remove all labels press the **Clear?** checkbox. If not select the labels you wish to remove and select the **Remove selected labels** mode.
5. Press **Update** to complete the process.

*Last modified: 20 March 2023*

## Medical & Notes

There are two more tabs which can be used to store additional information about the user.



Currently, Medical and Notes tabs are for informational purposes only and are not used in any other way.

*Last modified: 20 March 2023*

## QR



QR codes are generated for each user in Fusion. If the school is using Fusion Mobile, this QR code will be displayed within the users' app and can be used to open the user's account at the Point of Sale or find their pre-orders in Fusion Collect.

## QR

**Alcock, Stuart details**

Back Pop-out

Surname: Alcock Forename(s): Stuart Robert  
 Family: Known as: Stuart  
 Gender: Male DOB: 09/09/2002  
 Ethnicity: Please select  
 E-mail address:   
☐ Hide meal choice (internet payments)

Basic details Allowances & limits Restrictions Labels Medical Dietary Notes **QR** Internet payments

QR Code

UUID: b8a70dad-b0f6-4618-ac4a-96620975891f

Save Save & close Cancel

This will display the user's QR code that they will use to access their account on the system and will also display the UUID associated to their account.

*Last modified: 20 March 2023*

## Internet payments



The Internet payments section will display provider names and provider ID of the user's online payment provider. You can also go to the record within the Internet payment tile and view all online payment details and transactions from there.

If you select the **Internet payments** tab you can view the provider details. If you click the **Go to record** button, it will navigate to the user's Internet provider details and transactions.

Basic details Allowances & limits Restrictions Labels Medical Dietary Notes QR **Internet payments**

☐ Show inactive configurations


Configuration name	Provider ID
iPayimpact	186838

Go to record

*Last modified: 20 March 2023*

## Saving your changes



After making any changes, you will need to save them. Simply press either **Save** or **Save & close** to save any changes. If a required field does not contain information, you will be unable to save and a red cross  will be displayed next to any fields that require attention.

If you do not wish to save any changes, press the **Cancel** button. You will be notified that the user account has been modified and asking if you want to save changes? Select **No** to return to the Users screen.

*Last modified: 20 March 2023*

## Add value to a user account



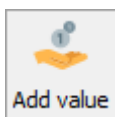
Although the majority of users may top-up their accounts using a Revaluation machine (aka Revaluer, or Reval for short) or online, many users still require that money is added to their accounts manually, for example any users who still bring cheques into school. This money can be added onto the user accounts by using the Add value process.



Money can also be added to user accounts via the Point of Sale.

### Adding money onto a users account;

1. Find and select the required user from the users grid.
2. Press the **Add value** button.



Add value

3. Enter the details about the payment.

Adding value for Adams, Alfredo

User ID

468

Name

Adams, Alfredo


Year / Class

10-10A

Prox Card Number

1720814798

Swipe Card Number



Add payment

History

Amount

£20.00

Purse

Cashless

Payment type

Cash

Reference

Set daily limit (£10.00)

☐ New daily limit

£2.00

Account name

Sort code

Account number

Save

Cancel



Highlighted fields are required for the value to be added. Other fields are for internal reference.



When a user has become a leaver, you may wish to return any money that the user has left on their account. You can use the add value function and enter a negative number to remove any remaining credit.



You can set a new daily limit for the user by selecting the 'Daily limit' check box and entering a new daily limit.

Set daily limit (£10.00) ☒ New daily limit

4. Press **Save** to complete the process.
5. If you are prompted to print a receipt, choose your required option.

Confirm

×

Value added successfully. Do you want a receipt?

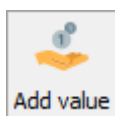
☐ Do you want to save the Settings?



You can have the software remember your preference by selecting 'Do you want to save the settings?' prior to pressing a button so that you will not be asked again.

## Adding an ad hoc allowance to a user account


1. Find and select the required user from the users grid.
2. Press the **Add value** button.



3. Navigate to the **Add allowance** tab.

Adding value for Allen, John

User ID	431	
Person ID	960E77DA-2B63-4985-A5AE-63DC5C0222E1	
Name	Allen, John	
Year / Class	7C7	
Prox card number		Swipe card number



Add payment   Add allowance   History

Mode: ☒ Add amount   ☐ Set to amount

Amount: £10.00

Purse: Ad Hoc Allowances

Reference:

Save   Cancel

4. Select the mode you wish to use to add the allowance.

Mode: ☒ Add amount   ☐ Set to amount



The **Add amount** mode will add the value to the selected purse, while the **Set to amount** mode will set the allowance to the chosen value.

5. Enter the amount you want to add and add a reference if appropriate.  
 6. Press **Save** to complete the process.

*Last modified: 20 March 2023*

## Issuing and editing cards




If your users use cards to identify themselves on the system, you will first need to register cards against your users and update their cards when they inevitably lose or damage them.



If your Impact Fusion system is linked to iDStore, it is recommended that you register and update cards in iDStore Admin. For more information on this process, consult the iDStore Admin user manual. <http://www.crbcunninghams.co.uk/manuals/idstore/topic/registering-cards>

To begin card management, first find and select your required user from the users grid and press the **Actions** button and then select **Edit card** from the list.


 Actions
 
 Edit card

## Issuing a new card

1. After pressing the **Edit card** button, stay on the 'Issue card' tab.
2. If using magnetic stripe cards, enter the number of the card. If using proximity cards, place the card on the reader and press **Read card**.
3. Select an issue reason using the dropdown list.
4. If you wish to charge the user directly, select the 'Charge for card' tickbox and choose which purse to take the money from.

Edit card

User ID

887

Person ID


863

Name

Douglas, Alfredo

Year / Class

12D



Issue card

History

Return card

Old prox card

2977310253

Old swipe card

New card number

2978134685

Read card

Issue reason

Lost

Charge for card


☒

Purse

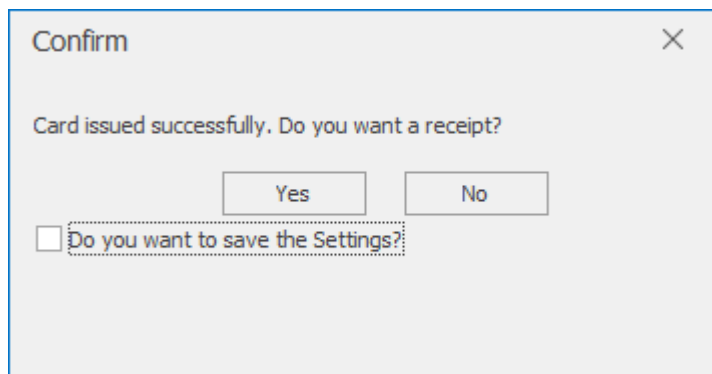
Catering

Save

Cancel

 The amount that is charged for the card is set by the users 'User type'.

5. Press **Save** to complete the process.
6. If you are prompted to print a receipt, choose your required option.



## Viewing card history

A user's card history can be viewed from within the 'History' tab. This will show when and why new cards were issued and what the new card numbers were. Receipts can be printed by selecting a chargeable card transaction from the list and pressing the **Receipt** button.

## Returning a card

When a user no longer requires a card, it can be returned. This then enables this card to be assigned to another user.

1. After pressing **Edit card** navigate to the 'Return card' tab.
2. Select which card to return (if only a single card type is enabled then that is selected by default).
3. Choose a return reason using the dropdown list.
4. Press **Save**.

*Last modified: 20 March 2023*

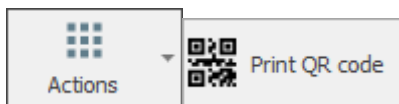
## Print QR code



You can print the user's QR code. This can be used alternatively to account a pre-order for the Fusion Collect app.

## Print QR code

1. Press the **Actions** button and then select **Print QR code** on the selected account.



2. This will print out the QR code for the account selected.

*Last modified: 20 March 2023*

## Printing PIN



If the school are using PIN numbers as a way users can access their account there is an option within Fusion to Print the PIN number.

### Printing PIN Numbers

1. Press the **Actions** button and then select **Print PIN** on the selected account.



2. This will print a PIN letter.

## GDPR Report

*Last modified: 20 March 2023*



The GDPR report can be generated at any time and records all transactions and historical/current data so the user can retrieve this information if requested. Anyone within the Fusion database has the right to request any data collected. This includes any information, transactions and activity regarding their own account.

1. Press the **Actions** button and select **GDPR** from the list.



2. You can either view the **Report** or **Download** the report as a file.

A screenshot of a web form titled 'GDPR report'. The form has three input fields: 'Name' with the value 'Adams, Alfredo', 'Year / Class' with the value '10-A', and 'DOB' with the value '06/06/2003'. Below the input fields, there are three buttons: 'Report' (with a printer icon), 'Download' (with a blue downward arrow icon), and 'Close' (with a red square icon containing a white 'X').

3. To view the Report press the **Report** button.





Impact Back Office

Home Users Reports System settings

CRBCunninghams High School Addison, Eloise

GDPR report

Back First Previous Next Last Print Export Criteria Pin Pop-out

GDPR report

CRBCunninghams High School

**Personal Information**

Surname: Adams  
Forename: Alfredo  
Known As: Alfredo  
Family Group:  
Gender: Male  
DOB: 06/06/2003  
Ethnicity:  
Medical Needs:  
Dietary Preferences:  
Notes: Idstore admin test 4

**School Information**

School: CRBCunninghams High School Year / Class / House: 10 A  
User Type: Student Start Date: 29/04/2019  
Person ID: 468 Leaving Date:  
Source: APG.1  
Messages:

**Points**

Total points: 0

**Current Balances**

Purse Name	Type	Balance
FSM	1	£0.00
UFSM	3	£0.00

Page 1 of 1

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[1] Server Version 3.79.1.0

Impact Back Office

Home Users Reports System settings

CRBCunninghams High School Addison, Eloise

GDPR report

Back First Previous Next Last Print Export Criteria Pin Pop-out

Messages:

**Points**

Total points: 0

**Current Balances**

Purse Name	Type	Balance
FSM	1	£0.00
UFSM	3	£0.00
Supervisor	4	£0.00
Catering	6	£0.00
Breakfast	7	£0.00

**Free Meal Periods**

Start Date	End Date
------------	----------

**Dietary Restrictions**

**Transaction History**

Date & Time	Description	Price	QTY	Paid	Free
-------------	-------------	-------	-----	------	------

**Card Issue History**

Issue Date	Issue Reason	Card Charge
------------	--------------	-------------

Page 1 of 1

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[1] Server Version 3.79.1.0

#### 4. The report displays the following information:

Field	Description
Personal Information	Displays the users personal information such as name and date of birth.
School Information	Displays the users school information, start date and status with in the school.
Points	Displays the amount of point accumulated throughout the users history.
Current Balances	Displays balances from the users FSM, UFSM, Supervisor, Catering and

	Breakfast purses.
Free Meal Periods	Displays periods at which the user was set as a FSM user.
Dietary Restrictions	Displays any Dietary restrictions set against the users account.
Transaction History	Displays all Transactions made on the users account.
Card Issue History	Display any history of cards being issued to the users account.

This report can be printed or exported to a file.

*Last modified: 20 March 2023*

## Clear carry-over allowances

The removal of carry-over allowance can be configured to be removed automatically for all users on a weekly basis on a day of your choosing. However, you may wish to clear the carry-over allowance for a single user, or multiple users on a custom schedule (e.g. Termly). This can be done manually as explained below.



The removal of carry-over allowances is permanent and cannot be undone.

1. From the Users screen, select the user(s) for which you want to remove the carry-over allowance. Don't worry about only having to select those with a balance in their carry-over purse, because if they do not have a balance, they will just be skipped.
  - a. You can use the filters to narrow down the list of users.
2. Go to **Actions** and select **Clear carry over**.

The screenshot shows the Fusion interface for CRBCunninghams Secondary School. The top navigation bar includes the school logo, the name 'CRBCunninghams Secondary School', and the user role 'Administrator, Administrator'. On the right, there are icons for information and a megaphone. Below the navigation bar, there are buttons for 'Add new user' and 'Pin'. The main content area is titled 'Alcock, Stuart'. It features a grid of checkboxes for 'leaver', 'Future', 'FSM', and 'Supervisor'. To the right of the grid, there are buttons for 'Edit user', 'Activity', 'Add value', and 'Actions'. Below these buttons is a user profile card for Stuart Alcock, showing his photo and details: User ID 1108, Year / Class 7 / C4, FSM, and DOB 09/09/2002. To the right of the profile card, there are buttons for 'Edit card', 'Print PIN', 'Print QR code', 'GDPR', and 'Clear carry over' (which is circled in red).

leaver	Future	FSM	Supervisor
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

User ID: 1108  
Year / Class: 7 / C4  
FSM  
DOB: 09/09/2002  
Message:

Buttons: Edit user, Activity, Add value, Actions, Edit card, Print PIN, Print QR code, GDPR, **Clear carry over**

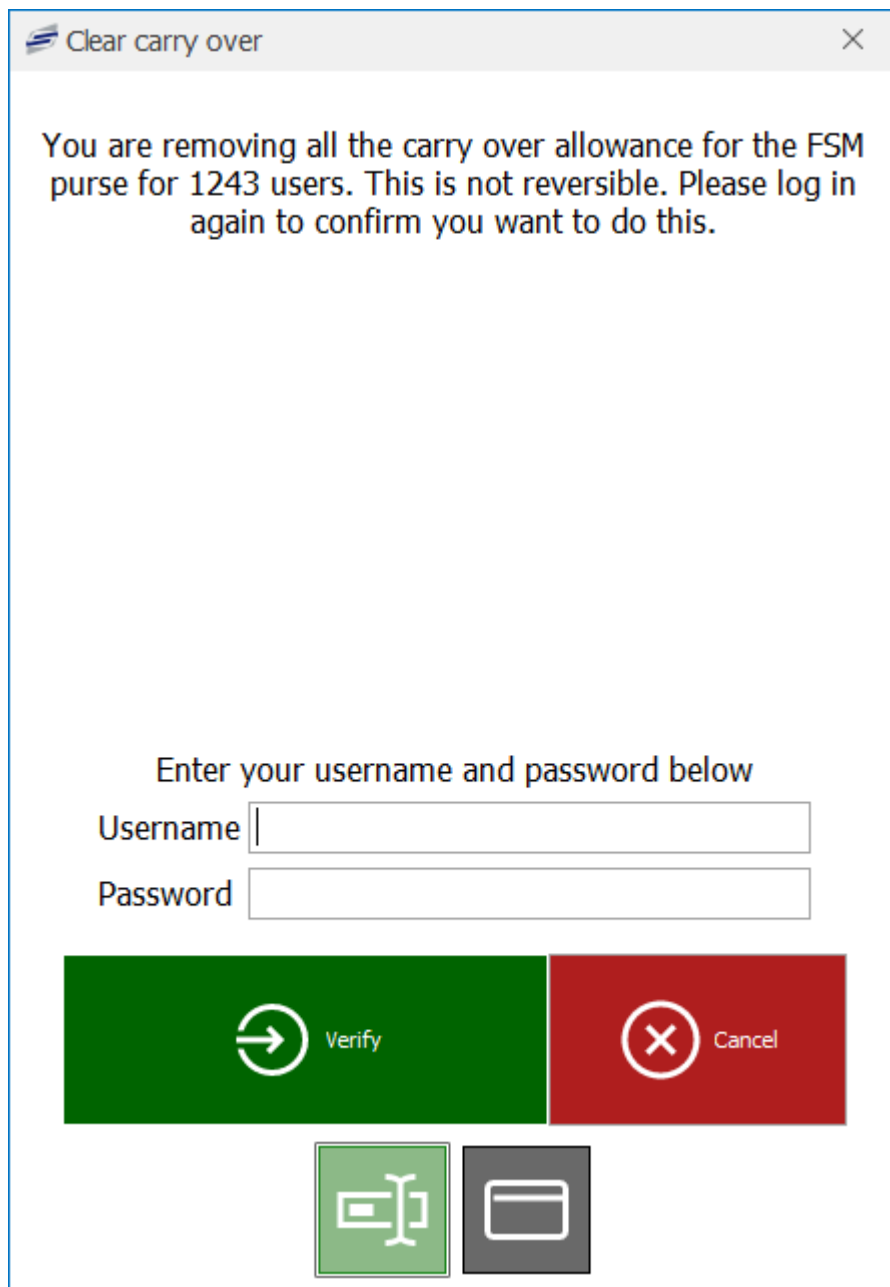
3. Select the purse to remove carry over from and press **Clear**.

The screenshot shows a dialog box titled 'Clear carry over allowance'. It has a dropdown menu labeled 'Purse' with 'FSM' selected. At the bottom, there are two buttons: 'Clear' (with a trash icon) and 'Cancel' (with a red circle and slash icon).

Purse: FSM

Buttons: Clear, Cancel

4. You will be asked to enter your username and password. Enter your details to continue the process and press **Verify**.



Clear carry over



You are removing all the carry over allowance for the FSM purse for 1243 users. This is not reversible. Please log in again to confirm you want to do this.

Enter your username and password below

Username

Password

Verify Cancel

- The carry-over allowance will be removed for the selected user(s).

*Last modified: 20 March 2023*

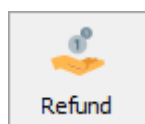
## Issuing refunds



In Fusion, refunds can be issued via the back office application by first finding the user and going into the Activity screen.

### Refunding an entire transaction

- Select the transaction to be refunded from the list.
- Press the **Refund** button.



- Confirm the refund by pressing **Yes**.
- If you are prompted to print a receipt, choose your required option.

Confirm

Value refunded successfully. Do you want a receipt?

Yes

No

☐ Do you want to save the Settings?



You can have the software remember your preference by selecting 'Do you want to save the settings?' prior to pressing a button so that you will not be asked again.

- The selected transaction will now be listed as a refund and a new 'Refund' transaction will be created.

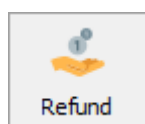
21/02/2018 12:43:01		10 Sale - Till	Cashless	-£4.10	£0.00	£0.00	3 Till 1	Addison, Eloise		
Details list										
PLU No.	PLU	Group	Quantity	Price level	Paid	Free	VAT	Disc.	Points	Refunded
34	Main Meal - Meat option	Hot Meals	1	1	-£2.50	£0.00	£0.00	£0...	0	<input checked="" type="checkbox"/>
38	Hot Dessert	Desserts	1	1	-£1.00	£0.00	£0.00	£0...	0	<input checked="" type="checkbox"/>
1006	Strawberry Milkshake	Drinks	1	1	-£0.60	£0.00	£0.00	£0...	0	<input checked="" type="checkbox"/>

## Refunding a single item

- Expand the transaction by pressing the button.
- Select the item to refund.

Date / Time	Date / Time applied	Transaction #	Type	Purse	Payment type	Paid	Free	VAT	Location #	Location name	Enter
29/08/2018 16:08:20	29/08/2018 16:08:20	80	Sale - Till	Cas...		-£0.20	£0.00	£0.00	2	Till 1	Ac
Details list											
PLU No.	PLU	Group	Quantity	Price level	Paid	Free	VAT	Disc.	Points	Refunded	
1	Apple	Fresh Fruit	1	1	£0.00	£0.00	£0.00	£0...	0	<input type="checkbox"/>	
38	Wrap	Cold Meals	1	1	-£0.20	£0.00	£0.00	£0...	0	<input type="checkbox"/>	
29/08/2018 16:08:42	29/08/2018 16:08:42	81	Sale - Till	Cas...		-£1.20	£0.00	£0.00	2	Till 1	Ac
29/08/2018 16:10:25	29/08/2018 16:10:25	82	Sale - Till			£0.00	£0.00	£0.00	2	Till 1	Ac
29/08/2018 16:11:34	29/08/2018 16:11:34	83	Sale - Till			£0.00	£0.00	£0.00	2	Till 1	Ac

- Press the **Refund** button.



- Confirm the refund by pressing **Yes**.

Last modified: 20 March 2023

## Reports



Fusion contains a full set of reports that make management and analysis of the system easy. The list of reports can be access by either pressing the **Reports** button from the title bar or the **View reports** tile (if available) from your user dashboard.

Impact Back Office

Home Users Reports System settings Retry bio

CRBCunninghams Secondary School Administrator, Administrator

Reports

Filter ☐ Custom only ☐ Favorites ☐ Show receipt reports

Report name	Category	Description	Report type	Created	Modified
★ Revaluation list (by School)	Lists		Standard	02/05/2019	02/05/2019
★ All schools income by month	Income		Standard	18/04/2019	06/07/2021
★ All schools sales by group	Sales		Standard	18/04/2019	06/07/2021
★ Allowance Usage (Detailed)	Allowances		Standard	18/04/2019	06/07/2021
★ Allowance Usage (Summary)	Allowances		Standard	18/04/2019	06/07/2021
★ Balance by range	Lists		Standard	04/01/2021	06/07/2021
★ Balance by range (Template)	Letters		Snap	18/04/2019	06/07/2021
★ Balance by range (Template) 2	Letters		Snap	17/09/2020	17/09/2020
★ Bulk Add Failure	Dashboard		Standard	04/01/2021	06/07/2021
★ Coin Usage	Lists		Standard	18/04/2019	06/07/2021
★ Collect QR Code	Receipts		Standard	02/07/2020	06/07/2021
★ Daily summary (Classic)	Sales	Fusion's answer to the classic daily summary report used within Impact. Pr...	Standard	06/07/2021	06/07/2021
★ Daily summary report	Sales		Standard	18/04/2019	15/04/2021
★ Daily summary report SL	Sales		Standard	25/04/2019	25/04/2019
★ Daily summary report SL (PF)	Sales		Standard	03/05/2019	03/05/2019
★ Dashboard	Dashboard		Smart	18/04/2019	06/07/2021
★ Dashboard Report	Dashboard		Smart	06/08/2019	06/08/2019
★ Daily reports	Sales		Batch	06/07/2021	06/07/2021
★ EPOS Sales by Time-Frame Report	Sales		Standard	21/04/2020	06/07/2021
★ Fusion Online Onboarding Letter	Letters		Snap	02/07/2020	06/07/2021
★ GDPR report	GDPR		Standard	18/04/2019	06/07/2021
★ Income summary	Sales		Smart	18/04/2019	06/07/2021
★ Low balances (Template)	Letters		Snap	18/04/2019	06/07/2021
★ Opening/Closing balance by date range	Lists		Standard	21/04/2020	06/07/2021
★ PLU sales	Sales	Detailed list of all PLU's sold and refunded during the selected date range.	Standard	18/04/2019	06/07/2021
★ PLU Sales (Smart)	Sales		Smart	18/04/2019	06/07/2021
★ PLU Sales (Smart) Dashboard	Sales		Smart	06/08/2019	06/08/2019
★ Pre-order 1-3	Pre-order		Standard	21/04/2020	06/07/2021
★ Pre-order 4-7	Pre-order		Standard	21/04/2020	06/07/2021
★ Pre-order Colours Distribution Report	Pre-order		Standard	18/04/2019	06/07/2021
★ Pre-order Conflicts	Pre-order		Standard	18/04/2019	06/07/2021
★ Pre-order Distribution Report	Pre-order		Standard	18/04/2019	06/07/2021

Revaluation list (by School)

Lists ☐ View ☐ Design ☐ Rename ☐ Clone ☐ Export ☐ Delete

Standard

Allow all roles ☒

- ☐ Administrators
- ☐ Manager
- ☐ Supervisor
- ☐ Operator
- ☐ Read Only
- ☐ Reval Manager
- ☐ PLU Manager
- ☐ Kitchen Manager
- ☐ Business Manager
- ☐ IT Manager

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[90] Alex Hay Laptop Version 21.03.2.0

The reports in Fusion are listed in categories to make finding your reports easier and there are three types of report available:

You can click on the yellow star to the left of a report to mark them as a favourite. Your favourite reports will remain at the top of the reports list and can also be selected easily by clicking the 'Favourites' check box.



Filter  ☐ Custom only ☐ Favorites ☐ Show receipt reports

Report name	Category	Description	Report type	Created	Modified
★ Revaluation list (by School)	Lists		Standard	02/05/2019	02/05/2019
★ All schools income by month	Income		Standard	18/04/2019	06/07/2021
★ All schools sales by group	Sales		Standard	18/04/2019	06/07/2021
★ Allowance Usage (Detailed)	Allowances		Standard	18/04/2019	06/07/2021
★ Allowance Usage (Summary)	Allowances		Standard	18/04/2019	06/07/2021

## Standard report

A standard report is a classic report style simply displaying the information on A4 sheets of paper.

**Example:** Daily Summary Report

Impact Back Office

Home

Users

Reports

System settings

Retry bio

CRBCunninghams Secondary School

Administrator, Administrator

Back

Daily summary report

First

Previous

Next

Last

Print

Export

Criteria

Email

Pin

Pop-out

Daily summary report

15/06/2021 00:00:00 - 15/07/2021 00:00:00

Transaction & Balance Reconciliation

Cashless Balance At Start	7597.76	Less EPOS Cashless Sales	233.70
Allowance Balance At Start	0.00	(Includes preorders of)	2.50
Balances	0.00	Less Vending Sales	0.00
Opening Balance Trans	0.00	Less New Card Sales	0.00
Manual Revaluations	0.00	Less Unused Free Meals	234.80
Add Internet Payments	232.00	Less Unused Supervisor Meals	432.00
Add Invoice Transfers	0.00	Less Unused UFSM	0.00
Add Cash Revaluations	8108.95	Less Unused Breakfast	0.00
Add Card Revaluations	4.15	Less Removed Ad hoc	0.00
Adjustments	0.00	Less Removed Carry over	0.00
Add Free Meal Allowances	246.00	Theoretical Cashless Balance	
Add Supervisor Allowances	446.40	Actual Cashless Balance	15734.76
Add UFSM Allowance	0.00	Allowance Balance At End	20.00
Add Breakfast Allowances	0.00	EPOS Card Sales	4.15
Add Ad hoc Allowances	20.00	EPOS Cash Sales	5.10
Add Carry over Allowances	0.00	EPOS Cashback	0.00
Out of period adjustments		Available for Banking	8114.05

Carry over

Start	
FSM	0.00
UFSM	0.00
Supervisor	0.00
Breakfast	0.00
End	
FSM	0.00
UFSM	0.00
Supervisor	0.00
Breakfast	0.00

Detail Breakdown

User Type	Allowance Sales			Cash Sales					
	Details	Count	Total	Details	Breakfast	M.Break	Lunch	A.Lunch	Total
Cash	FSM		0.00	Trans #		1	2	1	4
	UFSM		0.00	Head Cnt	0	0	0	0	0
	Super.		0.00	Sales	0.00	4.15	3.30	1.80	9.25
			0.00	VAT	0.00	0.00	0.00	0.00	0.00
			0.00						
Student	FSM	6	11.70	Trans #	6	44	28	8	06

Page 1 of 1

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135% —————

F903 Alex Hay Laptop Version 21.03.2.0

## Snap report

A snap report acts like a mail merge allowing Fusion to create reports such as the low balances report where the report is the same but the date is unique to each user displayed on the report.

### Example: Low balances

Impact Back Office

Home Users Reports System settings Retry bio

CRBCunninghams Secondary School Administrator, Administrator

Back Low balances (Template), CRBCunninghams Secondary School

First Previous Next Last Print Export Criteria Email Pin Pop-out

July 15, 2021

To the Parent / Guardian

User ID	Surname	First name	Year group	Balance
484A92CB-3314-	Rhodes	Cornelia	7C2	£0.00
4954-8335-				
423EA1D6C130				

Your Son/Daughter's account for **Catering** is now running low.  
Please arrange for additional funds to be credited to your child's account.

Payments are acceptable by cash or cheque and should be handed in to the school.  
Cash can also be paid in via the Revaluation unit by using your cashless payment card or pin number.

All cheques should be placed in the cheque deposit box with your child's name and year group printed on the back.  
All cheque payments should be made payable to **School name here**.

Please check the above details are correct.

Page 3 of 7

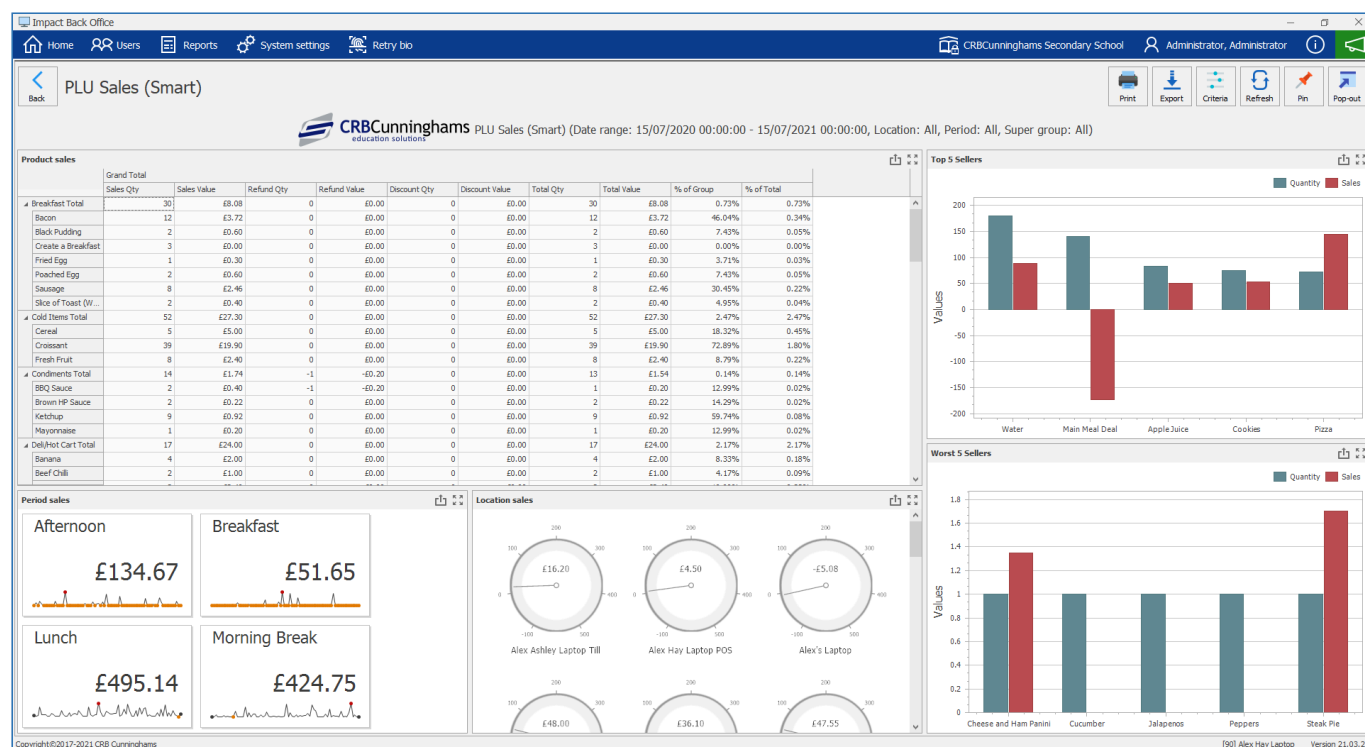
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## Smart report

Finally, smart reports are an interactive report displaying tables and graphs.

## Example: PLU Sales



Last modified: 20 March 2023

## Available reports

The table below details the reports that are currently available in Impact Fusion.

Name	Category	Type	Description
Allowance usage (Detailed)	Allowances	Standard	Provides a detailed list of all allowance allocations, spends, refunds, and deallocations.
Allowance usage (Summary)	Allowances	Standard	Provides a list of users that have spent any of their allowance, including the number of days that the allowance was used and the total allowance spend.
Balance by range	Lists	Standard	Provides a list of users where their balance is between the specified minimum and maximum range and they last used the system between the specified number of calendar days.
Balance by range (Letter)	Letters	Snap	Generates letters to be sent to parents notifying them of their child's low balance. Adjust the text to suit your needs/payment methods available.
Coin usage	Lists	Standard	Provides a breakdown of top ups by coin and note value. Useful to reconcile the physical cash input into the revaluation units.
Collect QR Code	Receipts	Standard	Provides a temporary QR code for collecting pre-orders or authenticating at the Point of Sale when the user does not have access to their Fusion Online app. Fold along the dashed line to make the code easier to use.



Daily summary (Classic)	Sales	Standard	Fusion's answer to the classic daily summary report used within Impact. Provides a summary overview of all trading performed during the selected dates.
Daily summary (Schools overview)	Central	Standard	Provides a summary of all sales for each date within the selected reporting range, grouped by School and User type.
Dashboard	Dashboard	Smart	An interactive dashboard which provides a live look-in (auto-updates every 30 minutes) on today's transactions. Dashboard is single school only.
Discounts usage	Sales	Standard	Provides a list of created discounts and their usage between the selected reporting range.
FSM usage vs eligibility	Lists	Standard	Provides a list of all users and their eligibility for free school meals between the selected date range, along with the number of days that the user used any part of their allowance.
Fusion Online Onboarding Letter	Letters	Snap	Generates a letter with the details required for users to onboard with Fusion Online pre-ordering.
GDPR Report	GDPR	Standard	Provides a full audit of all information held on a user account within the Fusion cashless catering system.
Income by month	Income	Standard	Groups all income by year, month, and payment type.
Income summary	Dashboard	Smart	Provides an interactive look at all income between the selected dates.
Login information	Lists	Standard	Grouped by security role and the user's main school, this report provides a list of all system logins, password change information, and details of their last login.
Login permissions	Lists	Standard	Provides a list of Fusion security roles with the permissions and user logins assigned to them.
Logins by location	Lists	Standard	Provides a list of all successful logins during the selected date range. The school filter is the school where the logged in device resides, not the main school of the login.
Low balances	Letters	Snap	Generates letters to be sent to parents notifying them of their child's low balance. Adjust the text to suit your needs/payment methods available.
Opening/Closing balance by date range	Lists	Standard	Lists all users and their balance at the start and end of the reporting range.

PLU sales	Sales	Standard	Detailed list of all PLU's sold and refunded during the selected date range.
PLU sales (Smart)	Sales	Smart	An interactive version of the PLU sales report, displaying all PLUs sold/refunded during the selected date range.
Pre-order Conflicts	Pre-order	Standard	Displays any users who have pre-ordered an item via the Smart board that conflicts with an allergy or restriction that has been applied to their account.
Pre-order Distribution by collection point	Pre-order	Standard	Provides a list of all pre-orders grouped by collection point and meal period. Cancelled and refunded pre-orders are not displayed.
Pre-order Distribution by year/class	Pre-order	Standard	Provides a list of all pre-orders grouped by year/class and meal period. Cancelled and refunded pre-orders are not displayed.
Pre-order Preparation	Pre-order	Standard	Provides a list of all items that need to be prepared to fulfil pre-orders.
Product allergens	Lists	Standard	Provides a list of all products and their allergen information.
Product sales list	Lists	Standard	A list of users that have purchased the selected product(s) between the two selected dates.
Purse Balances	Allowances	Standard	Provides a list of users and their balance for each purse.
Revaluation list	Lists	Standard	Provides a list of all top ups made onto user accounts.
Revaluation Summary	Income	Standard	Summarises the bankable/non-bankable cash taken via the system between cash-up periods.
Sales by Time-frame	Sales	Standard	Grouped into 30 minute intervals, provides sales figures by time frame. Report uses the time that the transaction was for, so in the case of pre-orders, this report shows the time that the order is available to be collected, not the time the order was made.
Sales summary	Sales	Standard	Provides a simple summary of all sales values by the location that they occurred.
Sales summary by class	Sales	Standard	Provides a summary of all transactions through the system broken down by class.
Sales summary by Product	Sales	Standard	

Group			
Sales summary by Super Group	Sales	Standard	
Sales summary by type	Sales	Standard	Provides a summary of all transactions through the system broken down by transaction type.
Supervisor allowance list	Lists	Standard	A list of users that are set as eligible to receive a supervisor allowance and the days that they will be allocated it.
Till action log	Audit	Standard	Provides details on all actions taken on the Point of Sale.
Transactions by location	Lists	Standard	Provides a list of transactions at the location they occurred. Export report in excel (raw data format) for additional data not on printed report.
Transactions summary by date	Dashboard	Smart	An interactive overview of all system transactions.
Unmatched users	Lists	Standard	Lists all Fusion user accounts that are not matched to a online payment provider account.
User allergens (by allergen)	Lists	Standard	Grouped by allergen, this report provides a list of users that have had allergies applied to their accounts.
User allergens (by user)	Lists	Standard	Provides a list of users that have had allergies applied to their accounts.
User messages	Lists	Standard	Provides a list of all users that have a permanent message, temporary message, dietary preferences, or notes on their user account.
User points	Lists	Standard	Retrieves a list of users and their points accrued during the range, as well as thier current total point value. Sorted by total points descending.
Users list	Lists	Standard	A comprehensive list of all users in the system, their authentication options, and their current balance.
Users list with purse summary	Lists	Smart	A interactive report showing the users in the system and a summary of their purse balance.
Users with no spend	Lists	Standard	Provides a list of users that have not made any transactions between the specified date range. Useful for identifying students that are not

			using allowances that they are entitled to.
Variance Report	Receipts	Standard	If using cash variance functionality, this report provides details as to if and where any variance between the entered and calculated values occurred.
Vending Sales by Product	Vending	Standard	Lists all vending products sold between the selected date range.
Vending Sales by Value	Vending	Standard	Grouped by item value rather than product name, lists all vending products sold between the selected date range. This report is useful when the vending machine is stocked with products not always in the same locations.
Vending Sales Details	Vending	Standard	Grouped by location, provides a list of all vending transactions between the selected date range.

## Daily summary report

See [Daily summary](#)

*Last modified: 20 March 2023*

*Last modified: 20 March 2023*

## Daily summary (Classic)

Fusion's answer to the classic daily summary report used within Impact. Provides a summary overview of all trading performed during the selected dates. This report is split into multiple sections and although it allows reporting over a wide date range, it is typically used at the end of each service day to provide an overview of the day's trading.

### Criteria

- **Date range**
  - **Timeframe:** Choose from a selection of defined date ranges such as 'Last week', 'Previous year', 'Yesterday'. Defaults to 'Today'.
  - **Start:** Adjust the start date for the report (inclusive)
  - **Finish:** Adjust the end date for the report (inclusive).
- **Location**

### Daily summary (Classic)

Fusion's answer to the classic daily summary report used within Impact. Provides a summary overview of all trading performed during the selected dates.

Report generated on 19/11/2021 at 10:40:46 using the below criteria

School(s): CRB Cunninghams Secondary School

Date range: 19/11/2020 00:00:00 - 18/11/2021 00:00:00

Transaction and balance reconciliation +				Sales adjustments ++			
Cashless balance at start	£2,595.82	Less EPOS cashless sales	£403.28	All sales	£408.68		
Allowance balance at start	£95.00	(Includes pre-orders of)	(£42.98)	Future pre-orders	£0.00		
End of year balances	£0.00	Less vending sales	£0.00	Previous pre-orders	£0.00		
Opening balance transactions	£0.00	Less new card sales	£0.00	Cancelled pre-orders	£0.00		
Manual revaluations *	£0.00	Unused FSM allowances	£37,841.00	Received cancellations	£0.00		
Add internet payments	£282.00	Unused UFSM allowances	£0.00	Received offline sales	£0.00		
Add invoice transfers **	£10.00	Unused supervisor allowances	£1,042.80	Received offline refunds	£0.00		
Add cash revaluations **	£660.60	Unused breakfast allowances	£73.70	Previous offline sales	£0.00		
Add card revaluations **	£0.00	Removed ad hoc allowances	£2.20	Previous offline refunds	£0.00		
Adjustments **	£0.00	Removed carry over allowances	£4.40	Received refunds	£0.00		
Add FSM allowances	£37,862.00	Theoretical cashless balance ~	£3,209.34	Previous refunds	£0.00		
Add UFSM allowances	£0.00	Actual cashless balance	£3,196.14	Adjusted sales	£408.68		
Add supervisor allowances	£1,048.80	Allowance balance at end	£551.50				
Add breakfast allowances	£78.00	EPOS debit/credit card sales	£3.90				
Add ad hoc allowances	£5.00	EPOS cash sales	£1.50				
Add carry over allowances	£477.80	EPOS cashback	£0.00				
		Available for banking ^	£662.10				

Carry over balances					
	Start	End		Start	End
FSM	£0.00	£454.50	Supervisor	£0.00	£0.00
UFSM	£0.00	£0.00	Breakfast	£0.00	£0.00

Sales breakdown +++									
User type	Allowance sales			Cash and cashless sales					
	Details	Count	Total	Details	Breakfast	Morning	Lunch	Afternoon	Total
Cash	FSM	0	£0.00	Transactions	0	2	1	0	3
	UFSM	0	£0.00	Users	0	0	0	0	0
	Supervisor	0	£0.00	Sales	£0.00	£3.90	£1.50	£0.00	£5.40
	Breakfast	0	£0.00	VAT	£0.00	£0.00	£0.00	£0.00	£0.00
	Ad hoc	0	£0.00						
Student	FSM	13	£39.90	Transactions	0	10	14	18	42
	UFSM	0	£0.00	Users	0	8	5	11	24
	Supervisor	0	£0.00	Sales	£0.00	£21.60	£17.20	£278.30	£317.10
	Breakfast	5	£4.30	VAT	£0.00	£0.00	£0.00	£0.00	£0.00
	Ad hoc	1	£0.80						
Staff	FSM	0	£0.00	Transactions	0	9	8	8	25
	UFSM	0	£0.00	Users	0	1	4	2	7
	Supervisor	3	£6.00	Sales	£0.00	£12.48	£9.26	£13.44	£35.18
	Breakfast	0	£0.00	VAT	£0.00	£2.09	£2.35	£2.34	£6.78
	Ad hoc	0	£0.00						
Totals	FSM	13	£39.90	Transactions	0	21	23	26	70
	UFSM	0	£0.00	Users	0	9	9	13	31
	Supervisor	3	£6.00	Sales	£0.00	£37.98	£27.96	£291.74	£357.68
	Breakfast	5	£4.30	VAT	£0.00	£2.09	£2.35	£2.34	£6.78
	Ad hoc	1	£0.80						

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19/11/2021 10:40:46

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Powered by Fusion - Version 21.06.0.21

19/11/2021 10:40:46

- **School:** Allows you to select the school to generate the data for (defaults to the currently selected school).
- **Aggregate report:** Used in conjunction with the school filter, when selecting more than one school, when 'Aggregate report' is enabled (default) all the data is aggregated and displayed on a single report. When the checkbox is unchecked, the system will generate a report for each selected school.

## Transaction and balance reconciliation

This section provides information on how balances have changed during the reporting range.

## Sales adjustments

This section provides information on transactions that were partially inside the selected date range. Each transaction has two date and time stamps. The first one is the date and time the transaction occurred, and the second is the date and time that the transaction was for. For Point of Sale transactions, these two timestamps will typically be the same, however, if the PoS was in offline mode, the date/time that the transaction occurred will differ from the date/time that the transaction is uploaded to the database.

Similarly for pre-orders, the order may be made on a Monday, however, the order is for Tuesday. So if viewing this report for Monday, the money would have left the users account when the order was placed, but will not be displayed in the Sales breakdown section of the report as this is showing sales for Monday.

Therefore, this section helps clarify any discrepancies between the 'Less EPOS cashless sales' value in the 'Transaction and balance reconciliation' section with the sales in the 'Sales breakdown' section.

### Carry-over allowance balances (Only displayed if Carry-over enabled)

This section of the report is only visible if any of the allowance purses has carry-over enabled. Carry-over allows all or part of an unspent allowance to be rolled forward to be spent on future days. This section provides details as to how the carry-over allowances has changed during the selected date range.

### Sales breakdown

Split by user type, this section provides a breakdown of sales. It has separate sections for allowance sales (on the left), and cash and cashless sales (on the right).

#### Key:

+ Manual revaluations is the sum of all physical cash that users have paid into the revaluation machines to top up their cashless accounts.

++ These values are top-ups that have been made via the Back office or the Point of Sale.

~ This figure is calculated by starting with the 'Cashless balance at start' figure, then adding all the values on the left (ignoring the 'Allowance balance at start' figure) and then taking away the figures on the right. This figure should then match the 'Actual cashless balance' figure. If not, this could indicate that there is a problem.

^ This figure is all of the physical cash entered by the system. It is calculated as follows: 'Manual revaluations' + 'Add cash revaluations' + 'EPOS cash sales' - 'EPOS cashback'.

*Last modified: 20 March 2023*


### Viewing reports


To generate and view a report;

1. Select the report that you require from the list.
2. Double-click on it or press the **View** button.



3. Select the required criteria for the report and press **OK**.

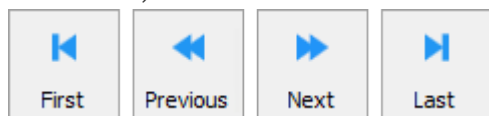
 Each report will have different reporting criteria.

 Depending on the amount of data the system is reporting on, the report may take a while to generate.

4. The report will be displayed.

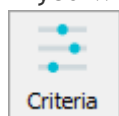
## Navigating the report

Some reports may be multiple pages long. These reports can be easily navigated using the 'First', 'Previous', 'Next' and 'Last' buttons.



## Changing the report criteria

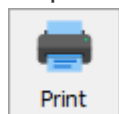
If you wish to regenerate the report using a new set of criteria, press the **Criteria** button.



Update the criteria as required and press **OK** to regenerate the report.

## Printing the report

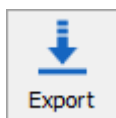
To print the generated report, simply press the **Print** button and follow your printers prompts.



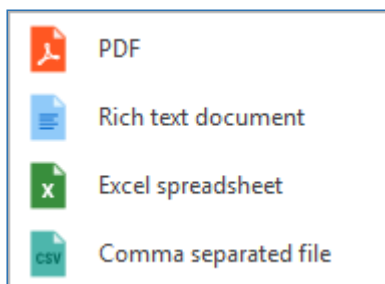
## Exporting the report

Generated reports can be exported into .PDF, .RTF (rich text), .XLSX (excel) or .CSV (comma separated) files. To do this;

1. Press the **Export** button.



2. Choose the file type that you wish to export the report as.

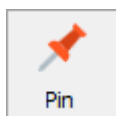


3. Select a location and enter a filename for the exported report.
4. Press **Save**. The report will be saved to the chosen location.
5. Press **Yes** to open the file now or press **No** to return to the report in Fusion.

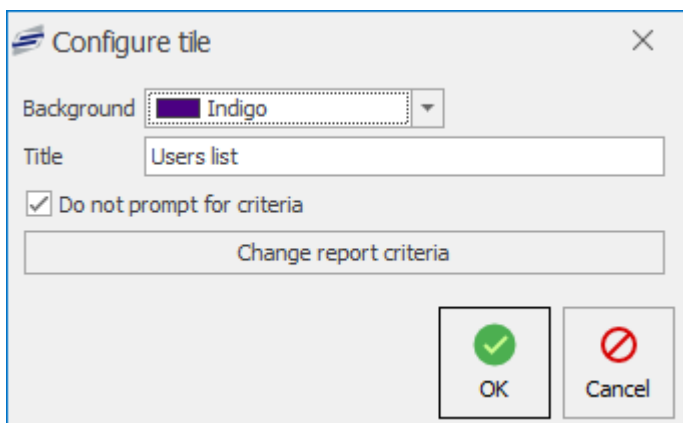
## Pinning a report

If the generated report is a report that you will commonly want, you can save yourself time in the future by 'pinning' this report to your user dashboard. To do this;


1. Press the **Pin** button.



2. Configure the pinned tile as required:



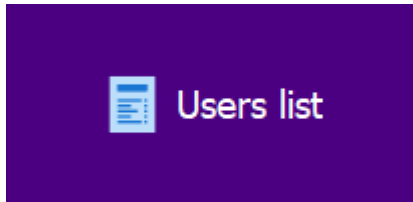
- a. Choose a background colour for the tile.
- b. Set a title that will appear on the tile.
- c. If you wish for the report to automatically generate using the existing criteria, leave the 'Do not prompt for criteria' check box selected. Unselecting this will prompt you to select the criteria when pressing the tile from your user dashboard.

 The report criteria can be adjusted by pressing the **Change report criteria** button.

3. Press **OK** to pin the tile.



4. If you now view your user dashboard, the tile will be listed as configured.



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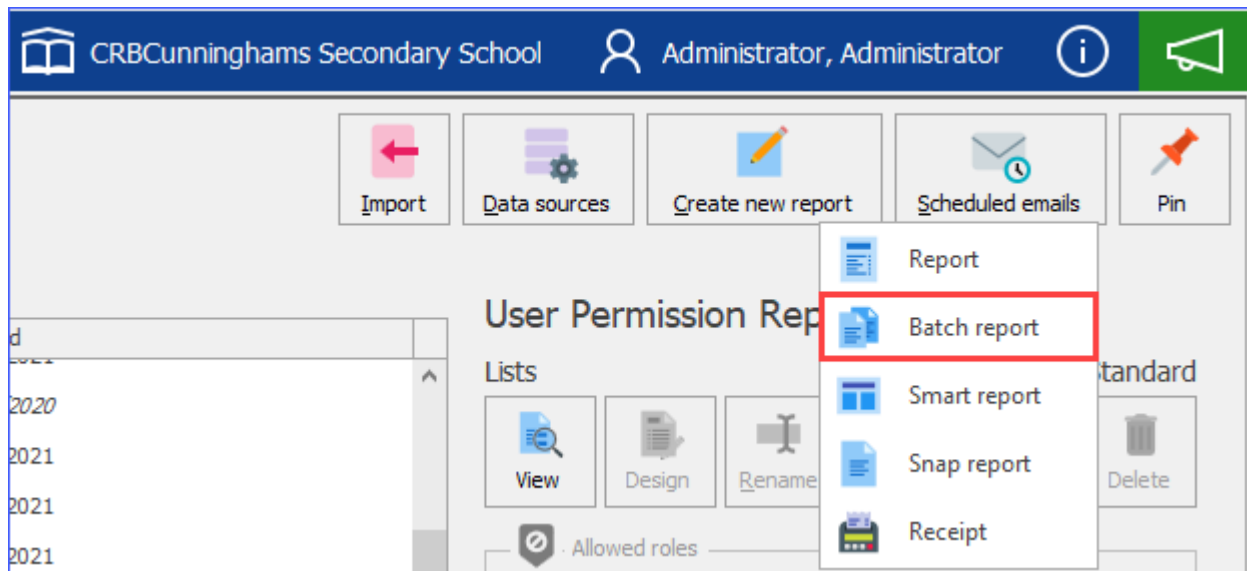
## Batch reports



Batch reports allow users to add multiple reports to a single “Batch” and run them all within a single process. This means that time can be saved when running your regular daily reports, as you can do them all at once rather than one by one.

### How to create a batch report

1. Press the **Create new report** button in the top right hand side of the ‘Reports’ screen and select **Batch report** from the drop down menu.



2. Name the report, give it a description and set the category.

3. Select the reports that you wish to be in the batch from the 'Reports list' and press the **Add** button. Multiple reports can be added simultaneously by using ctrl-left click to select them prior to pressing the **Add** button. Repeat this step until all the desired reports are added.

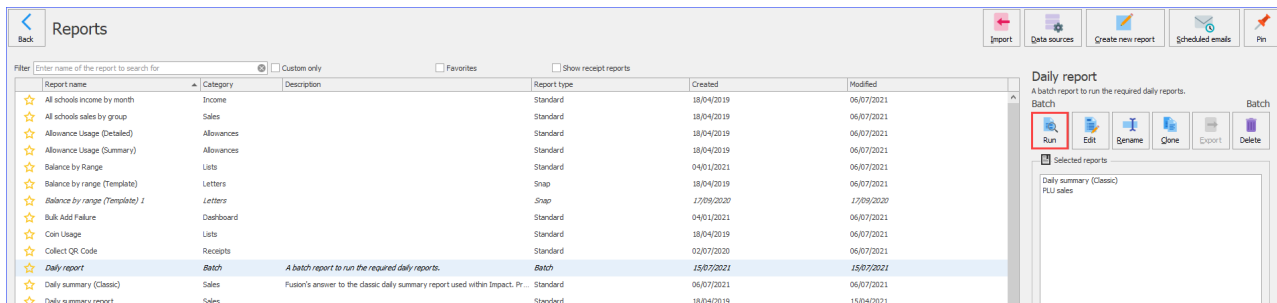
4. Press save.



The order in which the reports are displayed can be changed using the **Up** and **Down** buttons. If you wish to remove a report from the batch this can be done by selecting it from the list on the right and clicking the **Remove** button.

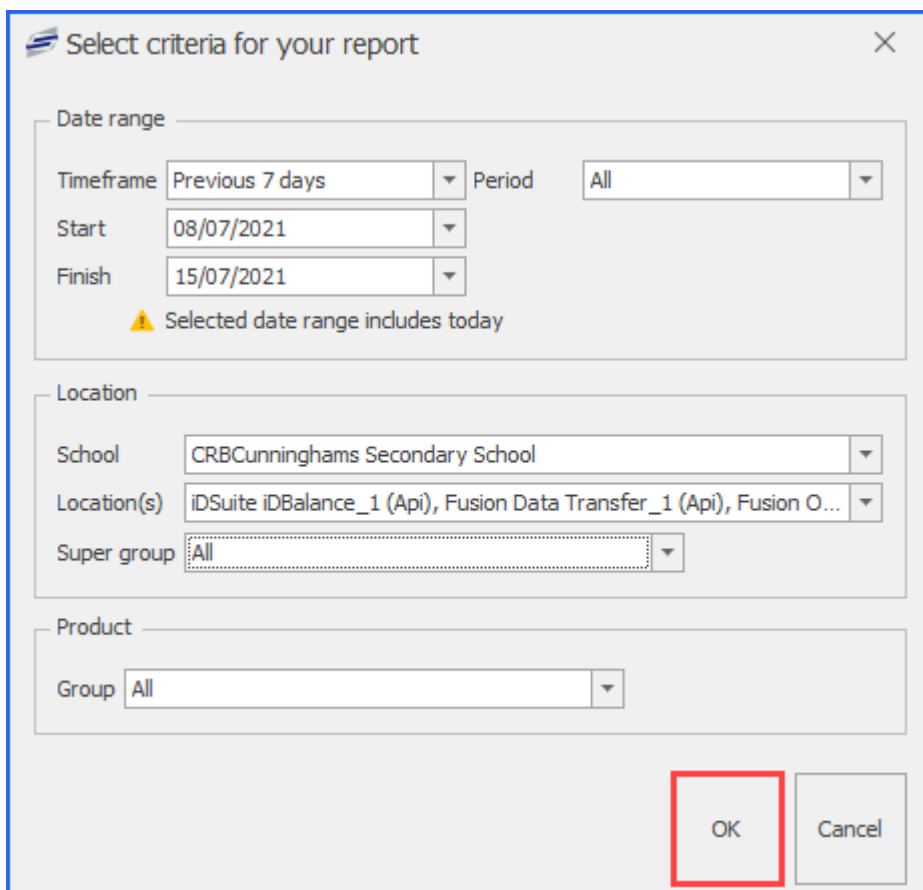
## Generating a batch report

1. Simply select the batch report you wish to run from the list of reports and either double-click it or press the **Run** button on the right hand side of the screen.



Report name	Category	Description	Report type	Created	Modified
All schools income by month	Income		Standard	18/04/2019	06/07/2021
All schools sales by group	Sales		Standard	18/04/2019	06/07/2021
Allowance Usage (Detailed)	Allowances		Standard	18/04/2019	06/07/2021
Allowance Usage (Summary)	Allowances		Standard	18/04/2019	06/07/2021
Balance by Range	Lists		Standard	04/01/2021	06/07/2021
Balance by range (Template) 1	Letters		Snap	18/04/2019	06/07/2021
Bulk Add Failure	Letters		Snap	17/09/2020	17/09/2020
Coin Usage	Dashboard		Standard	04/01/2021	06/07/2021
Collect QR Code	Lists		Standard	18/04/2019	06/07/2021
Daily report	Receipts		Standard	02/07/2020	06/07/2021
Daily summary (Classic)	Batch	A batch report to run the required daily reports.	Batch	15/07/2021	15/07/2021
Daily summary report	Sales	Fusion's answer to the classic daily summary report used within Impact. Pr...	Standard	06/07/2021	06/07/2021
Daily summary report	Sales		Standard	18/04/2019	15/04/2021

- The criteria screen will be displayed. This will show an aggregate of the criteria available for each report. Select the required criteria and press **OK**.



**Select criteria for your report**

**Date range**

Timeframe: Previous 7 days    Period: All

Start: 08/07/2021    Finish: 15/07/2021

⚠ Selected date range includes today

**Location**

School: CRBCunninghams Secondary School

Location(s): iDSuite iDBalance\_1 (Api), Fusion Data Transfer\_1 (Api), Fusion O...

Super group: All

**Product**

Group: All

**OK**    **Cancel**

- Fusion will then generate each of the reports selected and present them all on the same report as different pages so that they can be emailed, exported, or printed.

The screenshot displays the 'Impact Back Office' interface. The top navigation bar includes 'Home', 'Users', 'Reports', 'System settings', and 'Retry bio'. The main area is titled 'Daily report'. On the left, there's a 'Daily summary (Classic)' report showing a table of sales data. On the right, there's a 'PLU sales' report showing a table of sales data. At the bottom, there's a 'Batch report' section showing a list of reports with columns for Report name, Category, Description, Report type, Created, and Modified. The 'Batch report' section shows a list of reports with columns for Report name, Category, Description, Report type, Created, and Modified.

## Pinning a batch report

As batch reports may be used daily, it can be useful to pin a batch report to the dashboard to allow users to access it quickly and generate their daily reports with a single click.

## How to pin a batch report

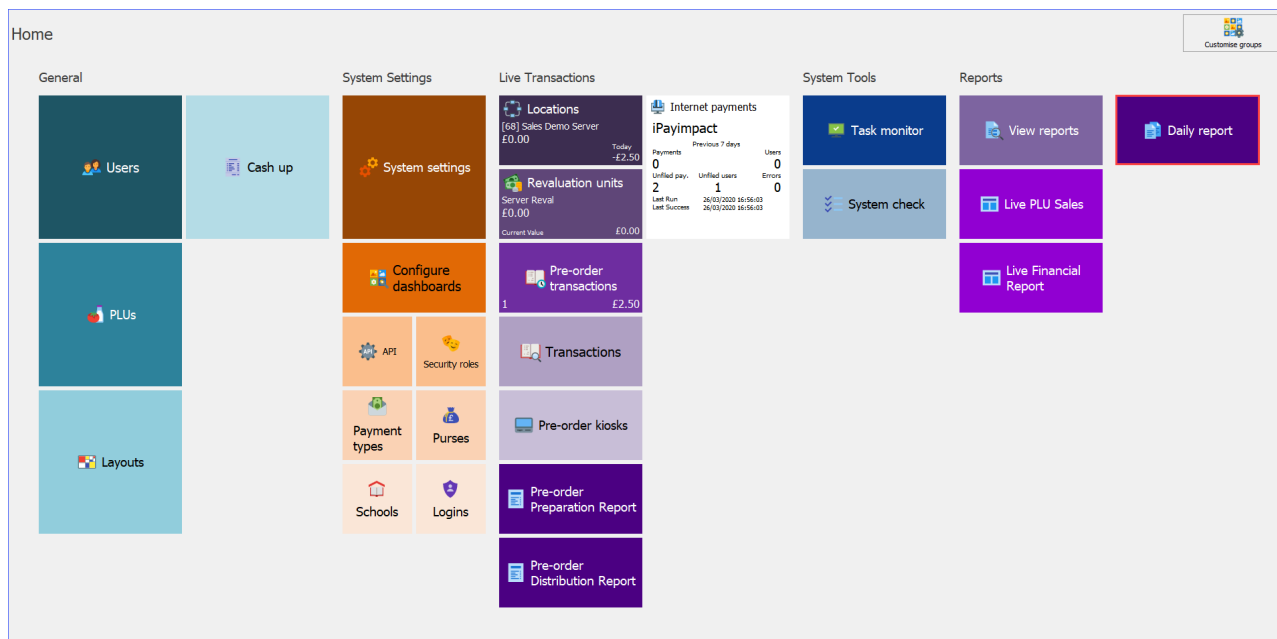
1. Either generate the report or select it from the report list and press the Pin button in the top right hand side of the screen.

The screenshot shows the 'Reports' section of the Impact Back Office. It features a list of reports with columns for Report name, Category, Description, Report type, Created, and Modified. The 'Batch report' section shows a list of reports with columns for Report name, Category, Description, Report type, Created, and Modified. The 'Daily report' section shows a list of reports with columns for Report name, Category, Description, Report type, Created, and Modified.

2. Select your desired background colour, title, and criteria to be used.

The 'Configure tile' dialog box is shown. It has a 'Background' dropdown menu set to 'Indigo'. The 'Title' field contains 'Daily report'. There is a checkbox labeled 'Do not prompt for criteria' which is currently unchecked. Below the checkbox is a button labeled 'Change report criteria'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

3. Press **OK** to finish.
4. The batch report will now appear as a tile on your dashboard.



Last modified: 20 March 2023

## Emailing a report



Fusion allows users to send an email containing individual reports. This provides a quick way to send a report to an interested party.

**Daily summary report**  
15/06/2021 00:00:00 - 15/07/2021 00:00:00

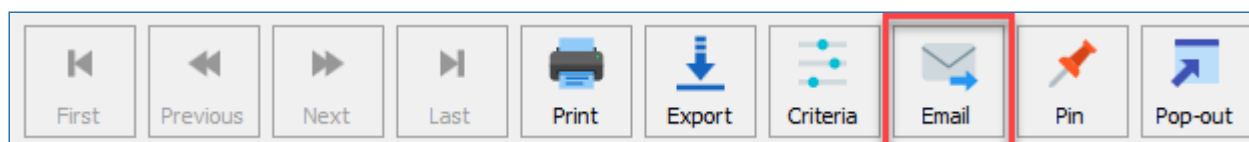
Transaction & Balance Reconciliation									
Cashless Balance At Start	7597.76	Less EPOS Cashless Sales	233.70						
Allowance Balance At Start	0.00	(Includes preorders of)	2.50						
Balances	0.00	Less Vending Sales	0.00						
Opening Balance Trans	0.00	Less New Card Sales	0.00						
Manual Revaluations	0.00	Less Unused Free Meals	234.80						
Add Internet Payments	232.00	Less Unused Supervisor Meals	432.00						
Add Invoice Transfers	0.00	Less Unused UFSM	0.00						
Add Cash Revaluations	8108.95	Less Unused Breakfast	0.00						
Add Card Revaluations	4.15	Less Removed Ad hoc	0.00						
Adjustments	0.00	Less Removed Carry over	0.00						
Add Free Meal Allowances	246.00	Theoretical Cashless Balance							
Add Supervisor Allowances	446.40	Actual Cashless Balance	15734.76						
Add UFSM Allowance	0.00	Allowance Balance At End	20.00						
Add Breakfast Allowances	0.00	EPOS Card Sales	4.15						
Add Ad hoc Allowances	20.00	EPOS Cash Sales	5.10						
Add Carry over Allowances	0.00	EPOS Cashback	0.00						
Out of period adjustments		Available for Banking	8114.05						

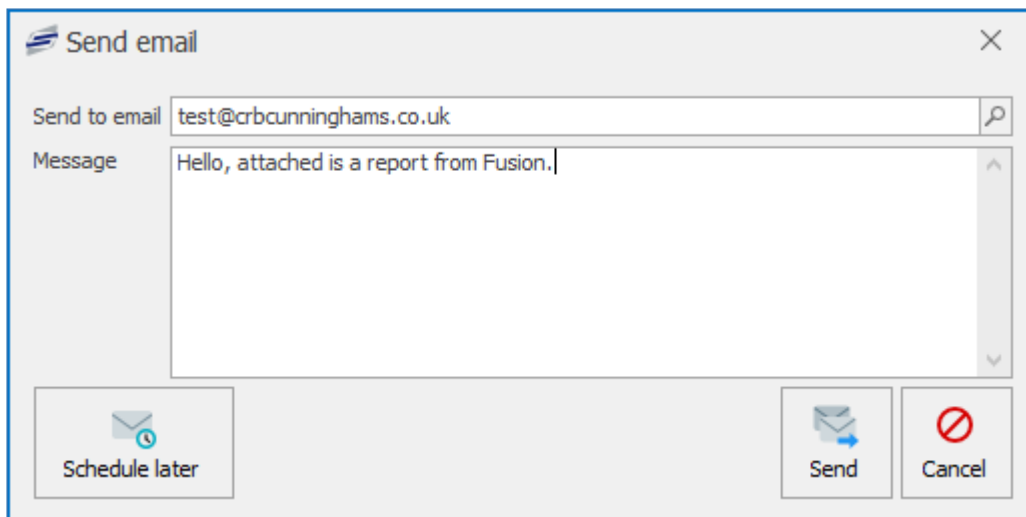
Detail Breakdown										
User Type	Allowance Sales			Cash Sales						
	Details	Count	Total	Details	Breakfast	M.Break	Lunch	A.Lunch	Total	
Cash	FSM		0.00	Trans #	1		2		1	4
	UFSM		0.00	Head Cnt	0		0		0	0
	Super.		0.00	Sales	0.00	4.15	3.30	1.80	9.25	
	B.Fast		0.00	VAT	0.00	0.00	0.00	0.00	0.00	
	Ad hoc		0.00							
Student	FSM	6	11.70	Trans #	6	44	38	8	06	

## How to send a report via email

1. Open and view a report from the list. To see how to view reports click this [link](#).
2. To send the report in an email, click on the **Email** button, located at the top right.



3. In the **Send to email** section, enter the email address you want to send the report and you can also enter a **Message** in the field below.



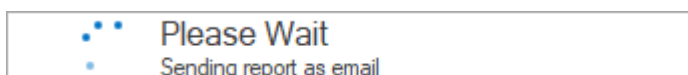
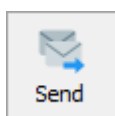
Send email

Send to email: test@crbcunninghams.co.uk

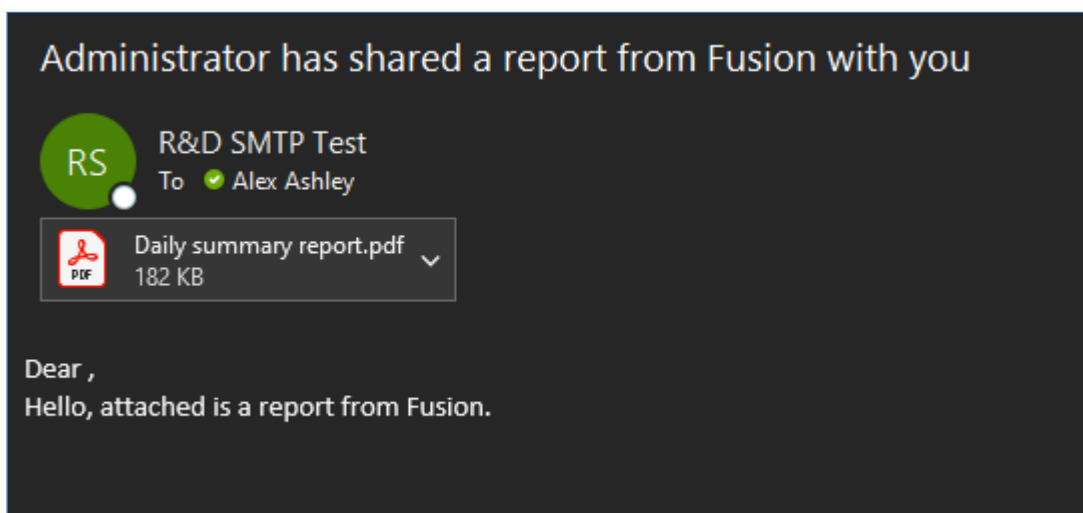
Message: Hello, attached is a report from Fusion.

Schedule later Send Cancel

4. Click the **Send** button to send the report to the email address. You will see a **Please wait** message, wait for this message to disappear and the email will be sent.



5. The recipient will have an email in their inbox with the report attached.



## Schedule later

Refer to section [Scheduled report emails](#) for more information about setting up schedule later via the report screen.

## Scheduled report emails

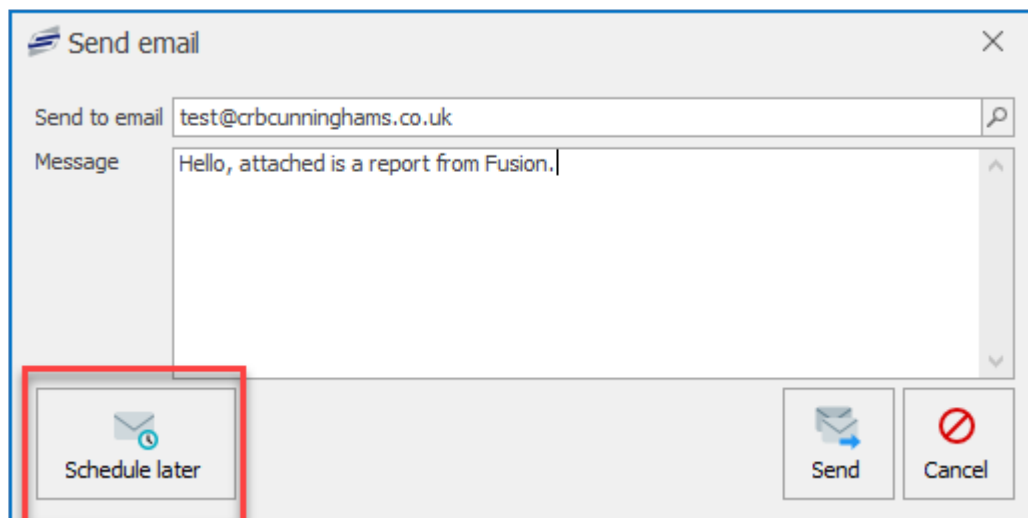
*Last modified: 20 March 2023*



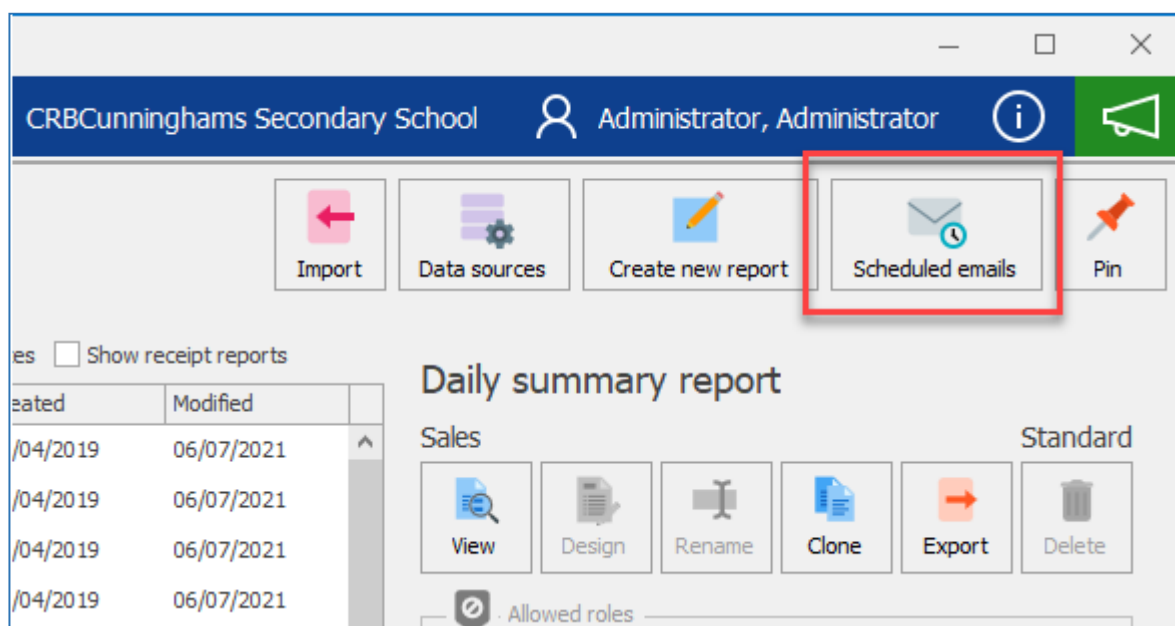
Fusion allows you to set up automated report email sending. For example, a kitchen manager may want the batch report that they've created to be sent to themselves or their area manager daily at a specific time.

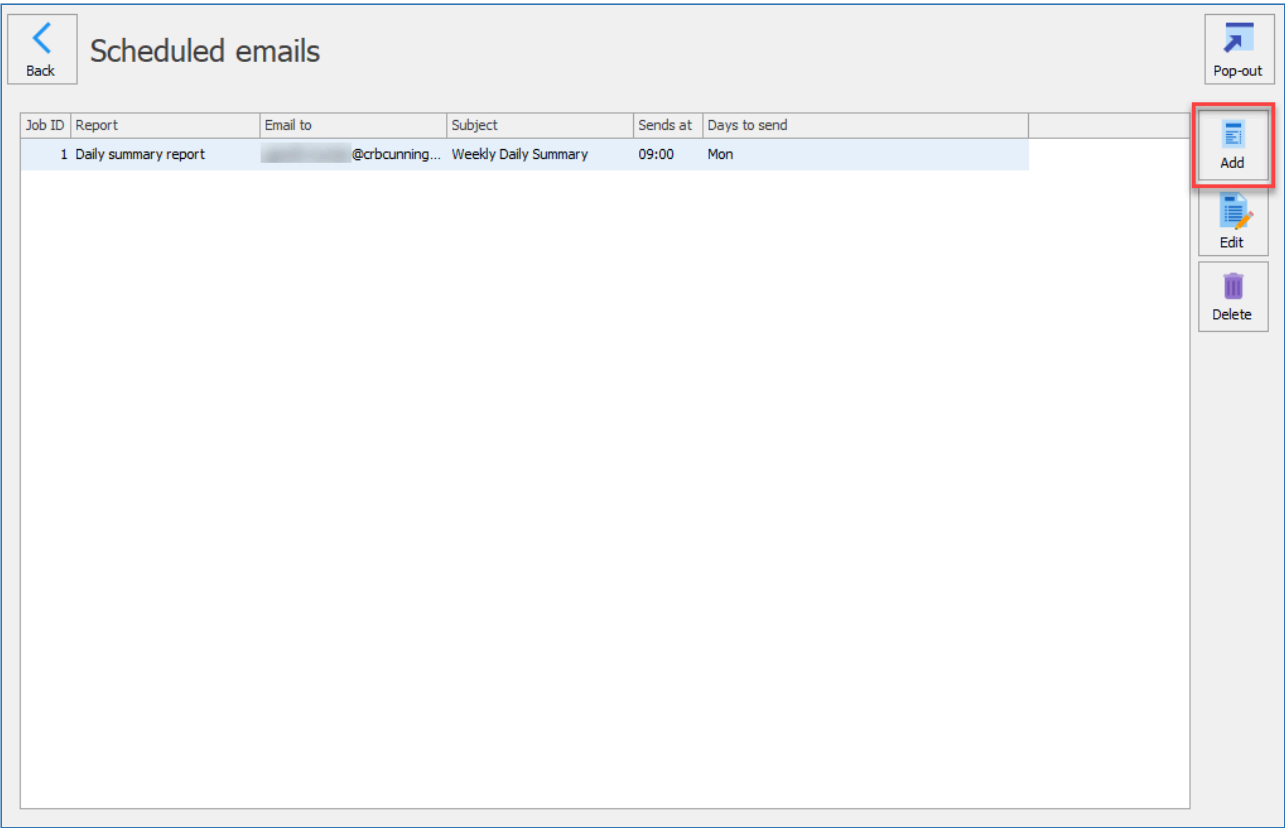
There are 2 methods to start creating a schedule:

- The first is available after a report has been generated and the Email button pressed within the report viewer. Within that form, there is a **Schedule later** button which will take you to the schedule configuration.




- The second is by accessing the Scheduled emails screen by pressing the **Scheduled emails** button in the top right of the reports screen and pressing the **Add** button on the right-hand side.





Regardless of the method taken, you will be presented with the configuration screen. Configure as required:

Field	Description
Send to email	Enter the email address to send the report to. (Use the magnifying glass to select a user from Fusion)
Send to name	The name of the recipient. This can later be used as a parameter in the message body. Can be left blank.
Send from name	Enter the name of the sender. Can also be used as a wild card in the message body. (Can be left blank)
Subject	Enter the subject of the email (Can be left blank)
Message	Enter a message to send along with the email. Can include wildcards as indicated below. (Can be left blank)
Report	Select the report from the dropdown that will be sent. This also allows for sending of batch reports. Once a report has been selected, you will be asked to choose the criteria for the report. This can be adjusted using the criteria button.

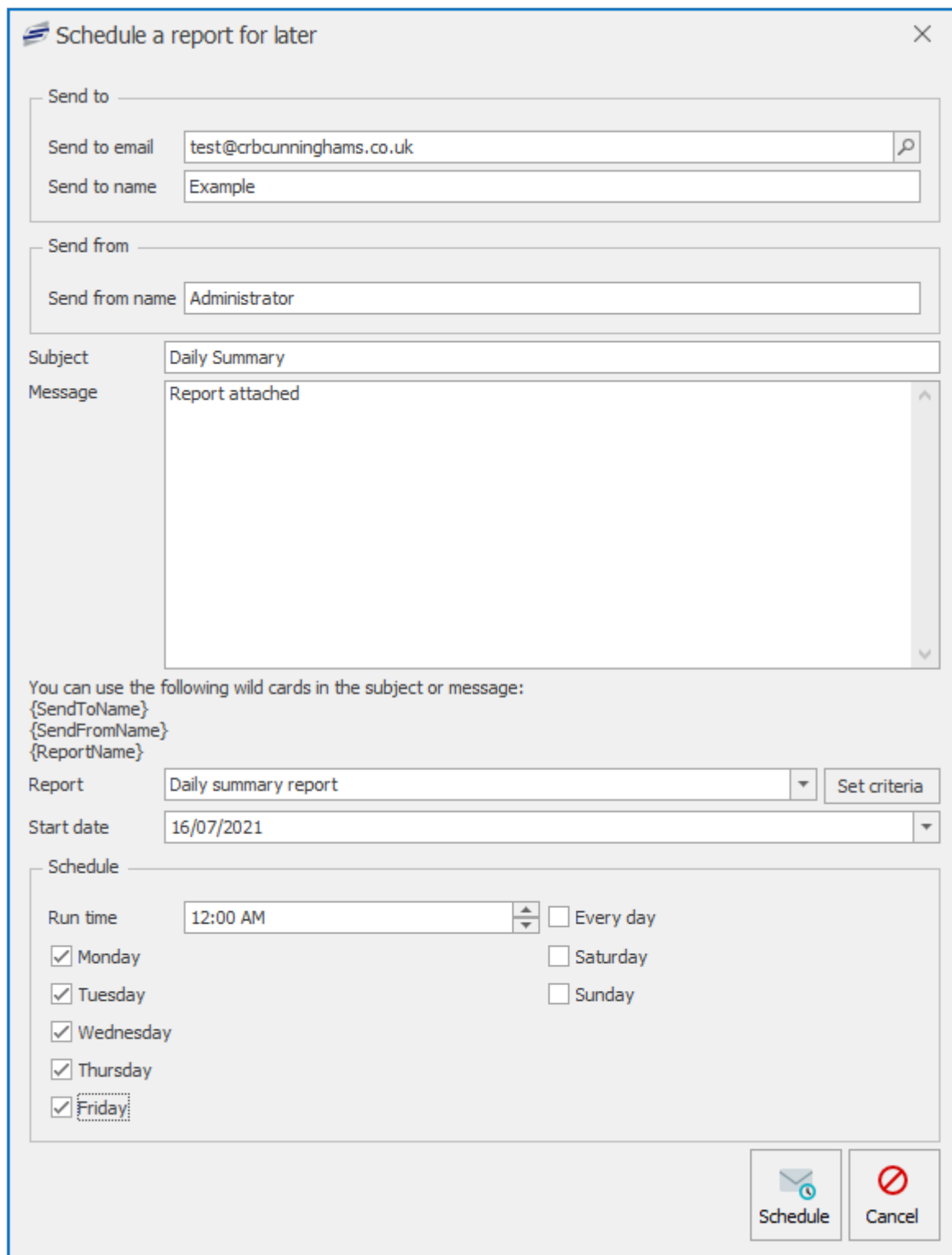


Make sure to specify the correct timeframe for the report criteria. For example, selecting **Today** will always generate the current day’s report when the schedule is met while setting **Last week** will always generate and send the previous week’s report. If you alter the start and finish dates, the timeframe will be set to **Custom** which will always generate the same report every time the



**schedule runs.**

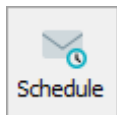
Start date	Specify a start date for this schedule. This defaults to the current date. The schedule will not start sending until this date is reached.
Schedule (Run time & Days)	Specify the time that the report generation will be triggered. Select the days on which the schedule is performed.



The dialog box is titled "Schedule a report for later" and contains the following fields and controls:

- Send to:** Includes "Send to email" (test@crbcunninghams.co.uk) and "Send to name" (Example).
- Send from:** Includes "Send from name" (Administrator).
- Subject:** Daily Summary
- Message:** Report attached
- Wild cards:** A section explaining that wild cards like {SendToName}, {SendFromName}, and {ReportName} can be used in the subject or message.
- Report:** A dropdown menu showing "Daily summary report" with a "Set criteria" button.
- Start date:** A date field showing "16/07/2021".
- Schedule:** A section with "Run time" (12:00 AM) and checkboxes for days of the week: Monday, Tuesday, Wednesday, Thursday, Friday (all checked), Saturday, and Sunday (unchecked).
- Buttons:** "Schedule" (with an envelope icon) and "Cancel" (with a red X icon).

Click the **Schedule** button to save the config.



## Delete a Scheduled email

1. Select a job from the schedule list and click the **Delete** button. Click **Yes** to confirm.

*Last modified: 20 March 2023*

## Importing reports

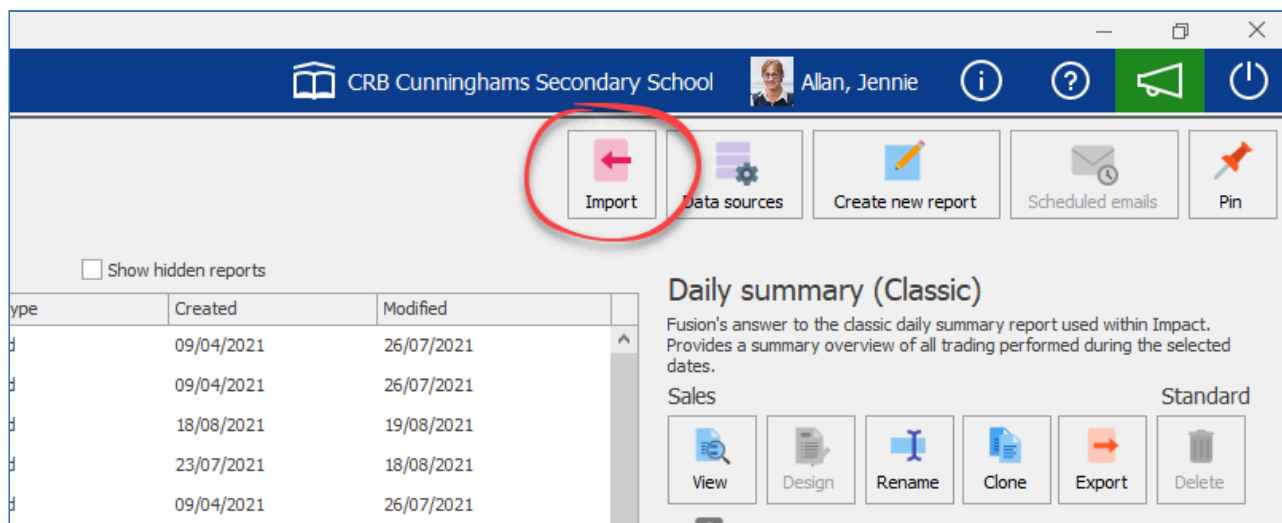
As well as the standard list of available reports, CRB Cunninghams are able to produce custom reports to fulfil your specific requirements. Once created, these reports will be sent to you and need to be imported into your system for you to access them.



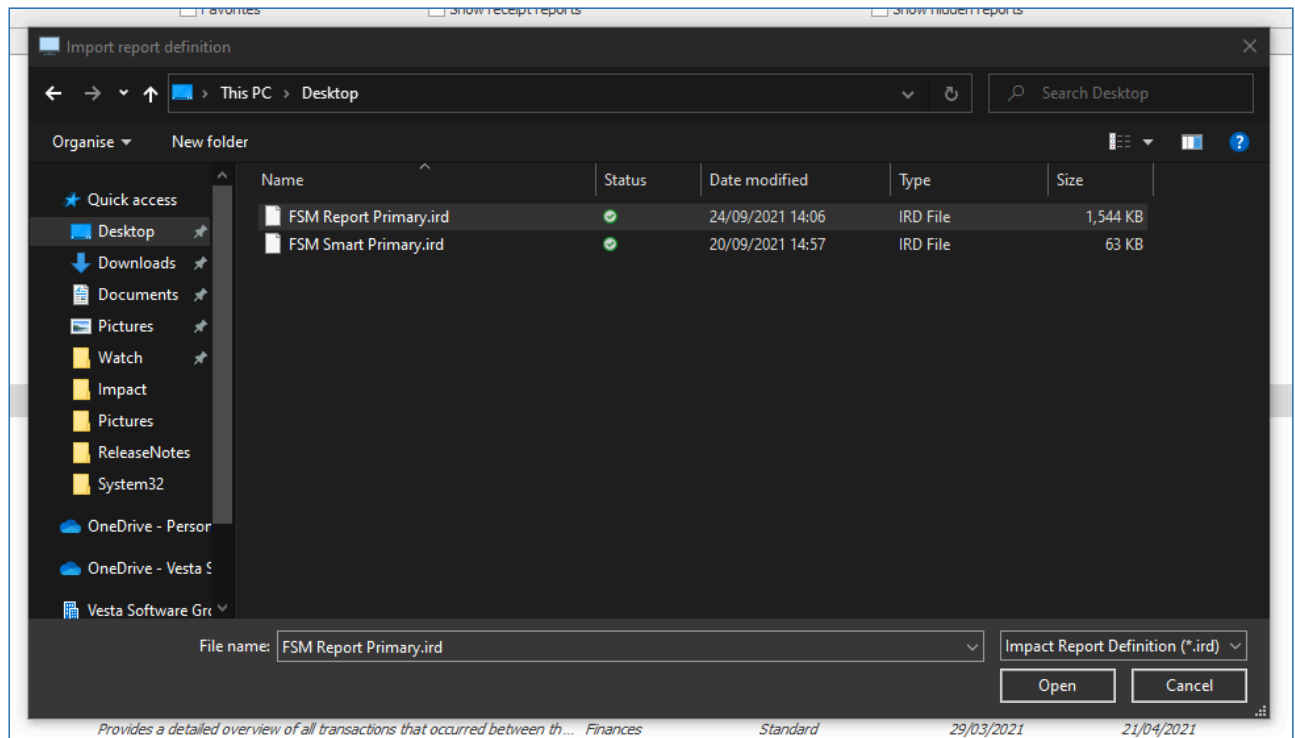
If you require a bespoke report to be created, contact your account manager for your options. Alternatively, use the green feedback button in the top-right of the screen to raise it as a suggestion.

To import a report:

1. Press the **Import** button in the top-right corner of the Reports screen.

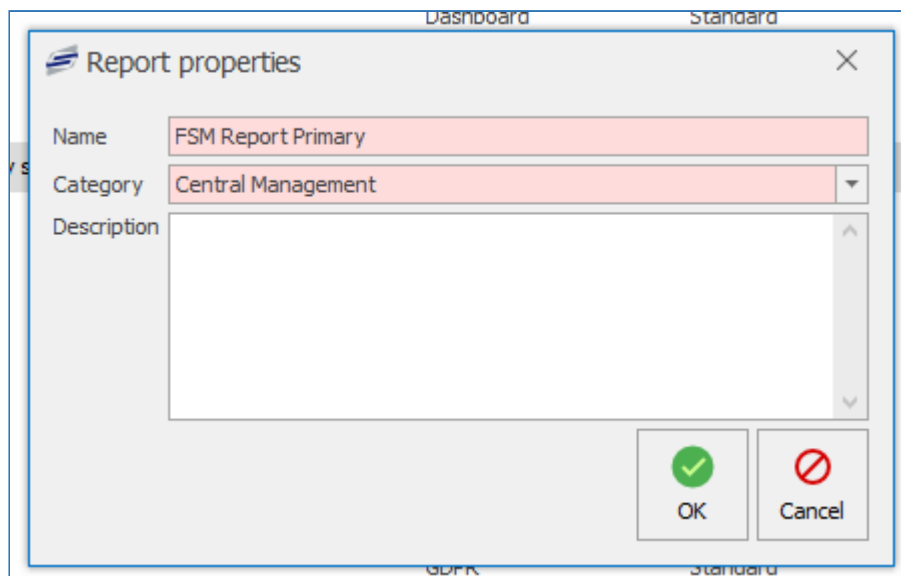


2. Find and select the file that you have been sent. This file is an .ird file and only these files will be displayed by default. Once you have selected the file, press the **Open** button.

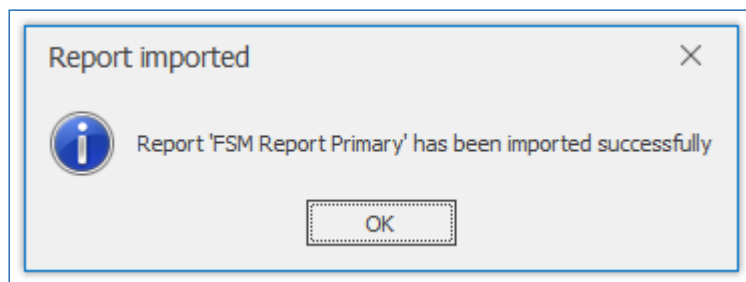


You are only to import one report at a time. If you have multiple reports to import, repeat this process for each file.

- After the file has been selected, you will have the opportunity to give the report a new name, category, and description. If you wish to make any changes, do so, and then press **OK**



- After pressing **OK**, your report will be imported. Press **OK** to complete the process. Your report will now be listed



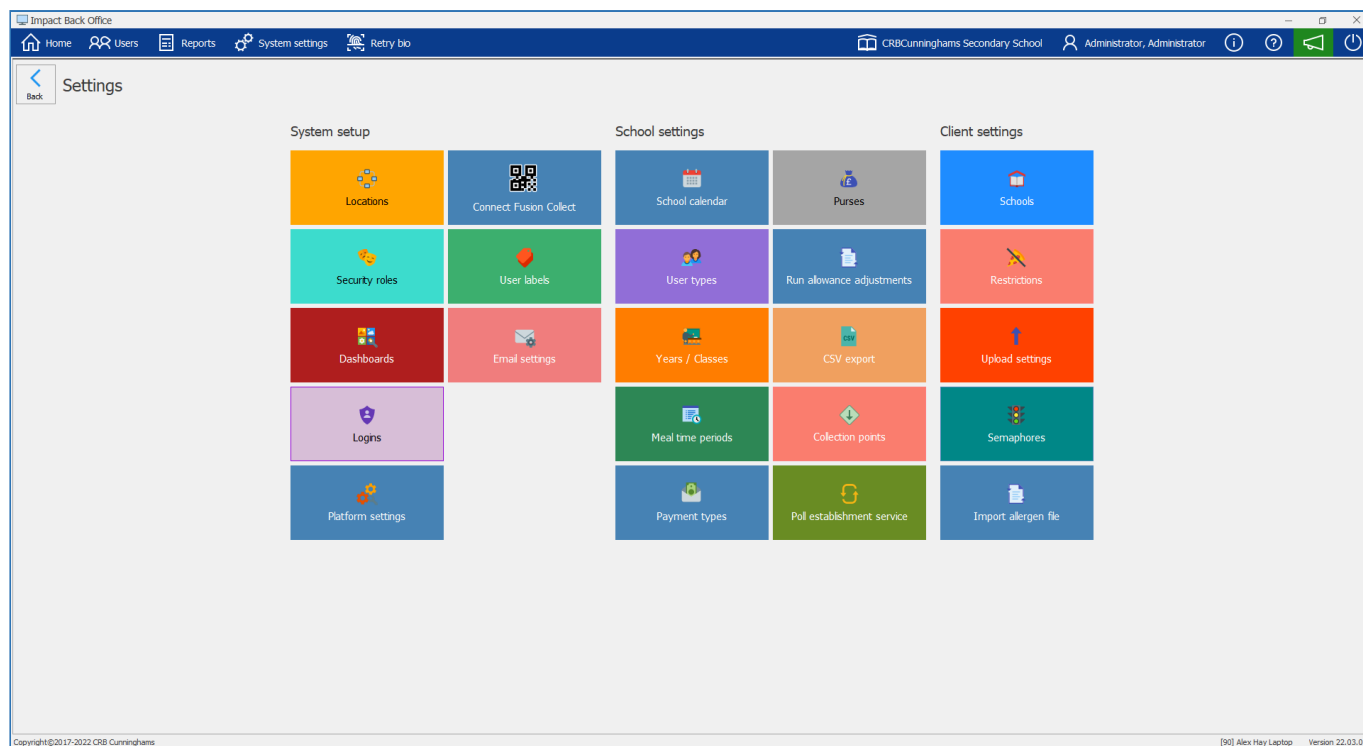
*Last modified: 20 March 2023*

## System settings



The System settings section in Impact Fusion allows for configuration of the system. The majority of options within here will be configured by CRB Cunninghamham and will not require input from the user unless instructed.

There are some options that the user can configure and these are covered in the following sections.



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## Locations



Locations allows you to view existing workstations connected to the Fusion and also allows you to add new locations. The locations that can be added and accessed through this screen include Revals, Point of Sales, Back Office, Pre-order kiosks, and Smart boards.

You can find **Locations** in the system settings tile. If pinned to the dashboard it will show a live tile scrolling location sales activity periodically.




Locations



Locations

[6] POS 1  
£0.00

Today  
£0.00



Only CRBCunninghams staff are advised to **Add new Locations**. This will be for when a new piece of hardware is installed or an existing piece of hardware is returning.

Impact Back Office

HomeUsersReportsSystem settingsRetry bio

CRBCunninghams Secondary SchoolAdministrator, Administrator

Locations

Back

Locations

Super groups

ShowActive records onlyLocation typeAllSuper groupAll

ID	Name	Type	Machine name	Machine IP	Received IP	Super group	De...	Current session
2	Canteen Till 1	Point of sale		192.168.0.9	188.223.45.12	Lower School	<input type="checkbox"/>	<input type="checkbox"/>
63	Pre-Order Kiosk	Pre-order	HIT-10058	172.16.12.157	78.33.23.122		<input type="checkbox"/>	<input type="checkbox"/>
64	Reval 1	Revaluer	HIT-10058	172.16.12.162	127.0.0.1		<input type="checkbox"/>	<input type="checkbox"/>
67	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>
68	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>
69	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>
70	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
71	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
72	Smart board	Smart board					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
75	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>
76	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
77	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>
78	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
81	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>
82	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
83	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>
84	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
85	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>
86	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
87	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
89	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>
90	Back office	Back office					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
91	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
93	Point of sale	Point of sale					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
95	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
96	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
97	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
98	Point of sale	Point of sale					<input type="checkbox"/>	<input type="checkbox"/>
100	Pre-order	Pre-order					<input type="checkbox"/>	<input type="checkbox"/>
101	Back office	Back office					<input type="checkbox"/>	<input type="checkbox"/>

[72] Smart board Demo

Smart board

EditCloneDeleteClear session

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Locations

You can select and view information regarding a location.

The grid will display all locations connected to the Fusion database. You can see **Location ID**, **Location Name**, **Type** of location, **Machine Name** associated with that location, **Machine IP** address associated with that location, **Received IP** address that the location has used, **Super group name** associated to the location, a **Deleted** status and a **Current session** status.

ID	Name	Type	Machine name	Machine IP	Received IP	Super group ...	De...	Current session
2	Canteen Till 1	Point of sale		192.168.0.9	188.223.45.12	Lower School	<input type="checkbox"/>	<input type="checkbox"/>
63	Pre-Order Kiosk	Pre-order	HIT-10058	172.16.12.157	78.33.23.122		<input type="checkbox"/>	<input type="checkbox"/>
64	Reval 1	Revaluer	HIT-10058	172.16.12.162	127.0.0.1		<input type="checkbox"/>	<input type="checkbox"/>

Filtering Locations

You can select whether to show specific locations by using the filter options at the top of the grid.

You can filter to **Show** Active records only or to include any inactive records, **Location type** or **Super group**.

Show

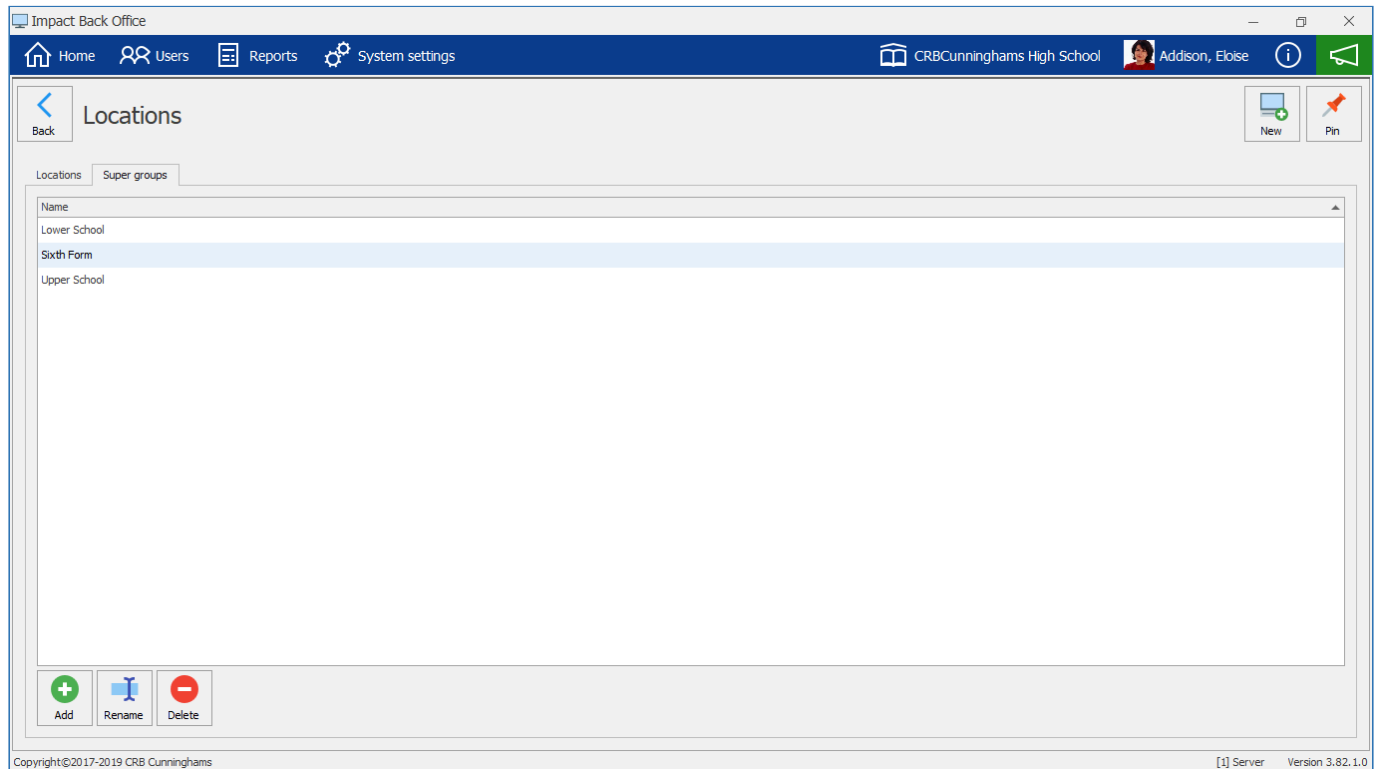
Active records only

Location typeAll

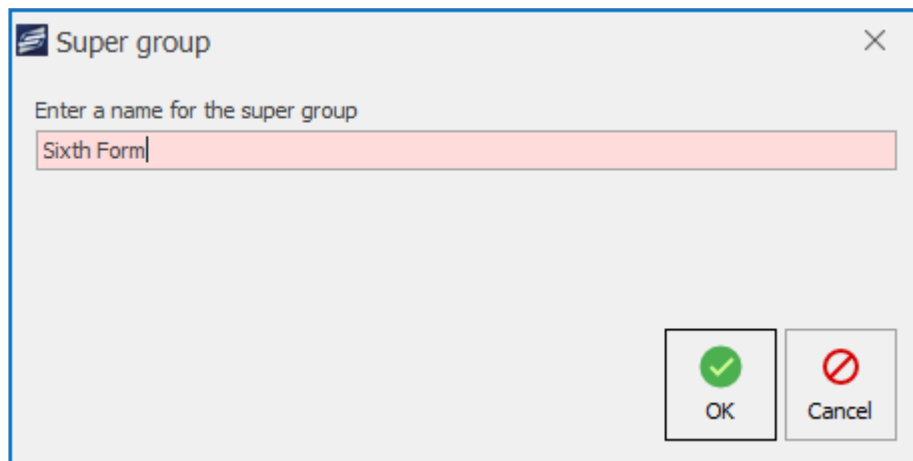
Super groupAll

## Super groups

Super groups are areas for locations to be assigned to. For instance, a School may have an Upper part of the school and a lower part of the school and wish to separate the locations according to this.



To add a new super group press the **Add** button and enter a name for the super group. Press **OK** to confirm.



You can also **Rename** and **Delete** super groups from here.

## How to apply a Super group to a location

A Super group can be applied to a location by selecting a Super group from the drop-down menu when adding or editing a location.

Impact Back Office

Home Users Reports System settings

CRBCunninghams High School Addison, Ebse

Back Edit location - POS 1 Pop-out

Inactive ☐

Assigned computer HT-10308 Location ID 4

Name POS 1 Type Point of sale Super group Upper School

Allowed purse(s)

- ☐ Breakfast
- ☒ Catering
- ☒ FSM
- ☒ Supervisor
- ☒ UFSM

Settings Behavioural Receipts & reports User details Snappy snacks Fast printing

Authentication options

Biometrics ☒ Login? ☒ User authentication?

PIN entry ☒ Login? ☒ User authentication?

Cards ☒ Login? ☒ User authentication?

Startup / Shutdown

☐ Auto login? None

☐ Shutdown requires user verification?

☐ Shutdown to desktop requires password?

Hardware

☒ Keyboard reader None

☒ Show mouse cursor

Printing

Receipt printer Microsoft Print to PDF

☐ Always print cash transactions?

☐ Always print user transactions?

Operational

☐ Day / week can be changed?

Cash history size 1

☐ Prevent overspend on cash?

☒ Allow cash transactions?

☐ Multi column year display

Collection point Not set

Error Log Location C:\ProgramData\CRB Cunningham\Impact\Logging

Save Save & Close Cancel

Copyright ©2017-2020 CRB Cunningham [1] Server Version 4.15.2.0

Last modified: 20 March 2023

## Security roles



The Security roles section enables the school to configure different levels of user login.

This means that the school can limit certain functions of the system only to users who are authorised. For example, the school may wish that members of the 'Operator' role do not have permission to perform refunds at the Point of Sale whereas the 'Supervisor' and

'Manager' roles can.

Impact Back Office

Home Users Reports System settings CRBCunninghams Secondary School Allan, Lara

## Security roles

Security role name	Modified
Administrators	18/04/2019 11:33
<b>Manager</b>	<b>03/10/2022 15:24</b>
Supervisor	16/05/2019 13:11
Operator	04/10/2022 12:10
Read Only	18/04/2019 11:33
Reval Manager	18/04/2019 11:33
PLU Manager	31/05/2019 09:10
Business Manager	07/08/2019 12:55
IT Manager	07/08/2019 12:57
API User	05/05/2022 17:02
Limited Administrator	05/05/2022 17:02

**Manager**

Rename Delete

**Permissions**

- ☐ Access all schools
- ☐ Add partners
- ☐ Add users
- ☒ Add value
- ☒ Allocate supervisor allowance (PoS)
- ☒ Allow export of data in response to GDPR
- ☒ Allow overspend (PoS)
- ☒ Allow user notifications
- ☒ Assign locations
- ☒ Back office
- ☒ Capture facial recognition templates
- ☐ Configure internet payments
- ☐ Configure password policy
- ☒ Configure scheduled emails
- ☒ Edit layouts

**Can allocate these roles**

- ☒ Manager
- ☒ Supervisor
- ☒ Operator
- ☒ Read Only
- ☐ Reval Manager
- ☐ PLU Manager
- ☐ Business Manager
- ☐ IT Manager
- ☐ API User

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By default, there are six roles created. These roles can be edited or added to as required by the school. The below table provides a brief description of the default security roles:

Role name	Description
Administrators	This role is intended for users who will have unlimited access to the system.
Manager	The manager role is intended for kitchen managers that can access the majority of system features but are restricted from system configuration screens such as 'Configure internet payments'.
Supervisor	Half-way between the manager role and the operator role. This would be a more senior / trusted member of staff who could perform refunds and allow overspends at the Point of Sale.
Operator	A typical Point of Sale user with limited access to the system.
Read Only	This user cannot make any changes to the system or it's data but can still view it and run reports.
Reval Manager	Required by the internal Reval Manager login. This login runs the Revaluation (Top up) machines if the school have them.

## Adding a new security role

New security roles can be added by pressing the **New** button.





Enter a name for the new security role and press **OK**. The role will be created.


*Last modified: 20 March 2023*

## Setting role permissions

Once a role has been created, you will need to assign/unassign any permissions that you want it to have. Any logins that are assigned this role, will then be able to perform these actions. For example, if you want to allow PoS operators to be able to perform refunds, you will assign the Operators role the 'Refunds (PoS)' permission and then any logins that are in the Operators role will now be able to perform refunds.

To update permissions for a role;

1. Select the required role from the list
2. On the right side of the screen, under the permissions heading, select or deselect the required permissions.

 The available permissions are detailed in the table below.

 Changes will be automatically saved when you navigate away from this screen.

Permission	Description
Access all schools	(Administrator role only) Has access to all schools if the system is configured for multiple schools which can be accessed via the menu bar at the top of the Back Office software.
Add partners	(Administrator role only) Can add new partners in the API and manage API permissions.
Add users	Can add new users directly into Impact Fusion in the Users tile. (These accounts will not link to iDStore).
Add value	Can add value directly to users' accounts in the Users tile.
Allocate supervisor allowance (PoS)	Can allocate a supervisor allowance during a transaction on the PoS.
Allow export of	Can manage GDPR button on user accounts. Can view, print, download and export.

data in response to GDPR	
Allow overspend (PoS)	Can authorise overspends at the Point of Sale to allow users to enter a deficit and allow a sale.
Allow user notifications	Will be sent system notifications (if applicable).
Assign locations	Can assign locations to new devices.
Back office	Can log into the Impact Back Office application.
Capture facial recognition templates	Can capture facial recognitions from locations that have the function active.
Configure internet payments	(Administrator role only) Can add a new Internet Payment provider and make changes to the configuration of the Internet Payment provider.
Configure password policy	(Administrator role only) Can configure password policies for login accounts.
Configure scheduled emails	Can configure the scheduling of emailed reports.
Edit layouts	Can edit the layout designs that are utilised on the Point of Sale, Pre-Order kiosks & Smart Boards.
Edit locations	Can make changes to the configuration of system locations (i.e. PoS, Reval, Back office, etc).
Edit logins	Can create and edit system logins for Back Office, PoS and Smart board.
Edit products	Can make changes to PLUs and pricing. (Known Issue: Cash Up tile will only appear on the home screen if this permission is selected. Will be fixed in a later version to be released.)
Edit reports	Can clone, edit and create reports. (Requires report editing to be enabled by CRBC)
Edit roles	(Administrator role only) Can create and edit security roles to assign them to Fusion logins.
Edit schools	(Administrator role only) Can make changes to school settings.
Edit settings	Can access the system settings screen in the Impact Back Office application.
Edit user type settings	Can edit the user type settings within the settings.
Edit users	Can make changes to users within Users tile.
Issue card	Can issue cards to users.
Manage internet payments	Can access the Internet Payments tile.
Perform cash	Can perform a cash declaration in the Cash up tile. Will have insufficient permission

declaration	otherwise. Cash Variance needs to be enabled in the school configuration.
Perform cash up	Can perform a cash up in the Cash up tile.
Point of Sale	Can log into the Point of Sale application.
Point of Sale Voice	Can log into the Voice Point of Sale application.
Pre-order kiosk operator	Can log into the Fusion Pre-order Kiosk, view the configuration and manage software exit settings.
Print Activity	Can print out users' Activity report.
Print PIN	Can print out users' PIN numbers.
Print QR	Can print out a users' QR code.
Print Receipt	Can print out a receipt after adding a value to a user's account.
Refunds (PoS)	Can authorise refunds at the Point of Sale.
Reval manager	Can log into the Reval Client application. Only applicable for the Reval setup and will not be used for any other purpose.
Smartboard operator	Can log into the Impact Smartboard application and operate the application.
SQL to FTP	(Administrator role only) Can adjust the SQL to FTP settings in the 'Upload settings' tile in Settings.
View activity	Can view users' activity in the Impact Back Office.
View locations	Can view the configuration of system locations.
View logins	Can view system logins within the system settings.
View reports	Can generate and view reports. Also allows PoS operator to perform a Cash Declaration in the Functions option.
View revaluers	Can view the revaluation units screen.
View roles	Can view the security roles screen within the system settings.
View schools	Can view the school's screen within the system settings.
View settings	Can view the school's settings.
View transactions	Can view user transactions.
View users	Can view the Users screen in Impact Back Office.

*Last modified: 20 March 2023*

## Setting role allocation rules



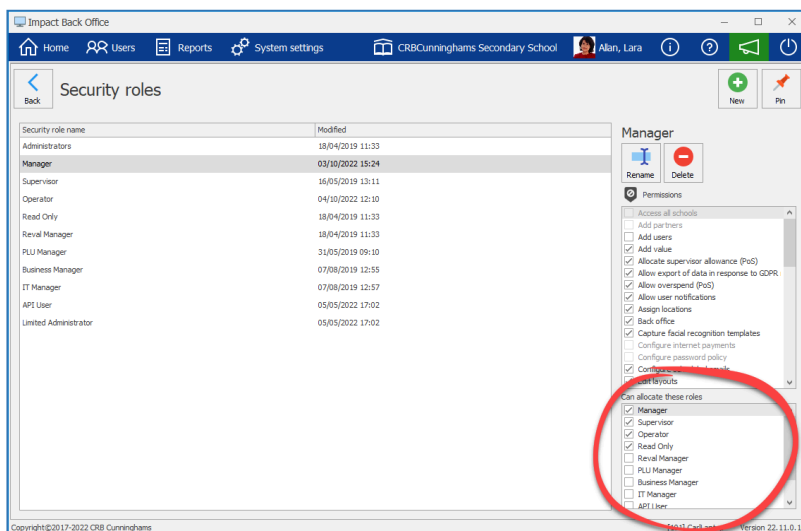
Starting with version 22.11, any role (outside of the Administrators role) that needs to edit logins, will need to be pre-configured by an administrator as to what roles that role can assign. Without this, they would still be able to edit a logins details (such as updating usernames and passwords) and create new ones, but they wouldn't be able to assign/remove any roles from them.

Security roles in Fusion are intentionally flexible to allow schools to create custom roles that suited their specific scenarios. This means, there is no concept of hierarchy, where one role is above or below another. Instead, users are able to perform tasks based on the role(s) they have been assigned. Previously, when a login belonged to a role that had the 'Edit logins' permission, when creating or editing logins they would be able to assign any of the existing roles to that login.

While this works for the vast majority of clients, where the school IT staff and/or the kitchen manager would be assigned as administrators and they would manage the logins, some schools wanted other users, such as supervisors, to be able to manage logins too. However, this caused a potential loophole where a user could be part of a role that had fairly limited permissions, but because it has the 'Edit logins' permission, they could make any logins an administrator, or even create a new login for themselves and make this account an administrator, circumventing the restrictions in place.

The process of allocating which roles can be assigned is the same as assigning which permissions a role has;

1. Select the role from the list of roles
2. On the right hand side of the screen, locate the 'Can allocate these roles' section



3. Select the roles that this role can allocate when editing/creating logins

**i** Changes will be automatically saved when you navigate away from this screen.

## Dashboards

*Last modified: 20 March 2023*

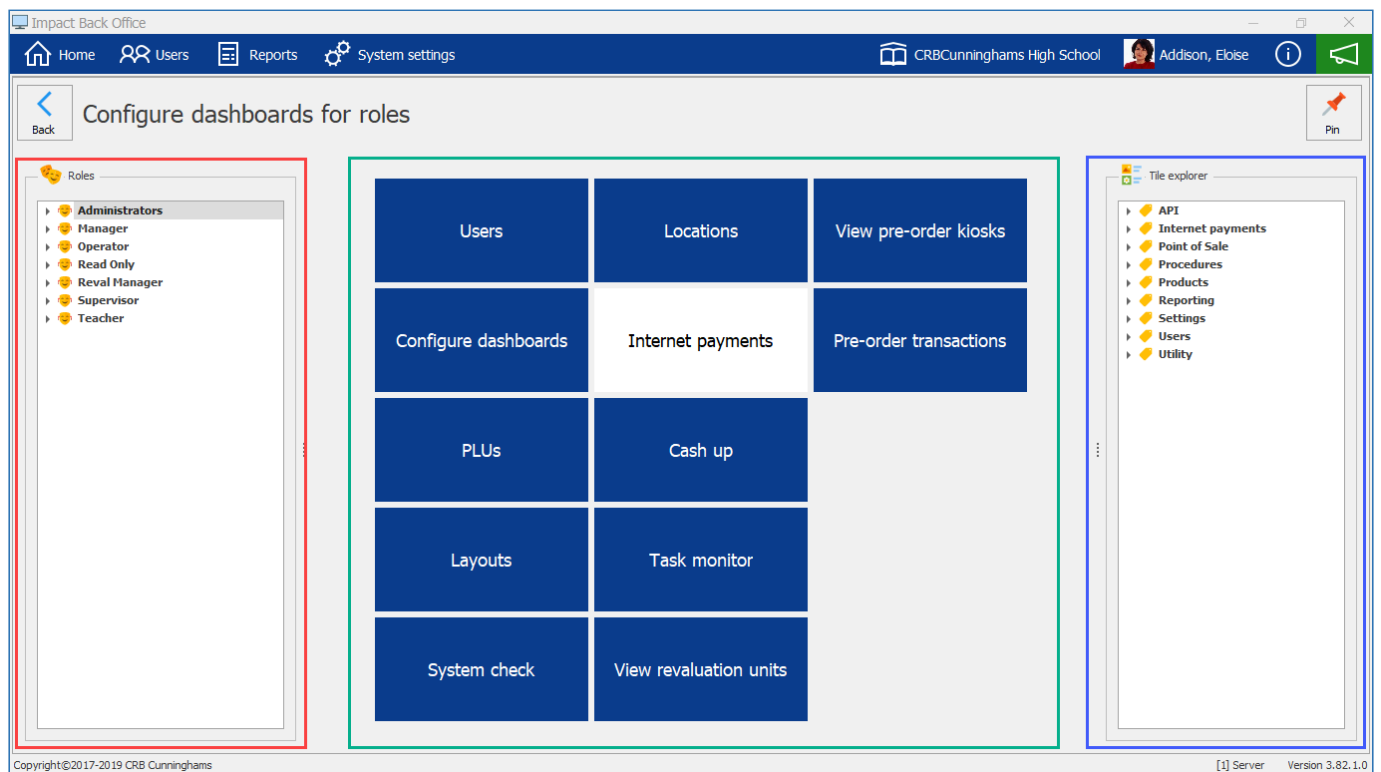


The dashboard is a place where you can easily and quickly access areas of the cashless system. The dashboard can be customised to your liking. Tiles can be pinned and unpinned, moved around the dashboard, you can change the colour and resize the tiles.

The **Configure dashboards** tile can be found by clicking on **System settings** and then pressing the **Dashboards** tile. It can then be pinned to the dashboard to provide quick access to this tile.

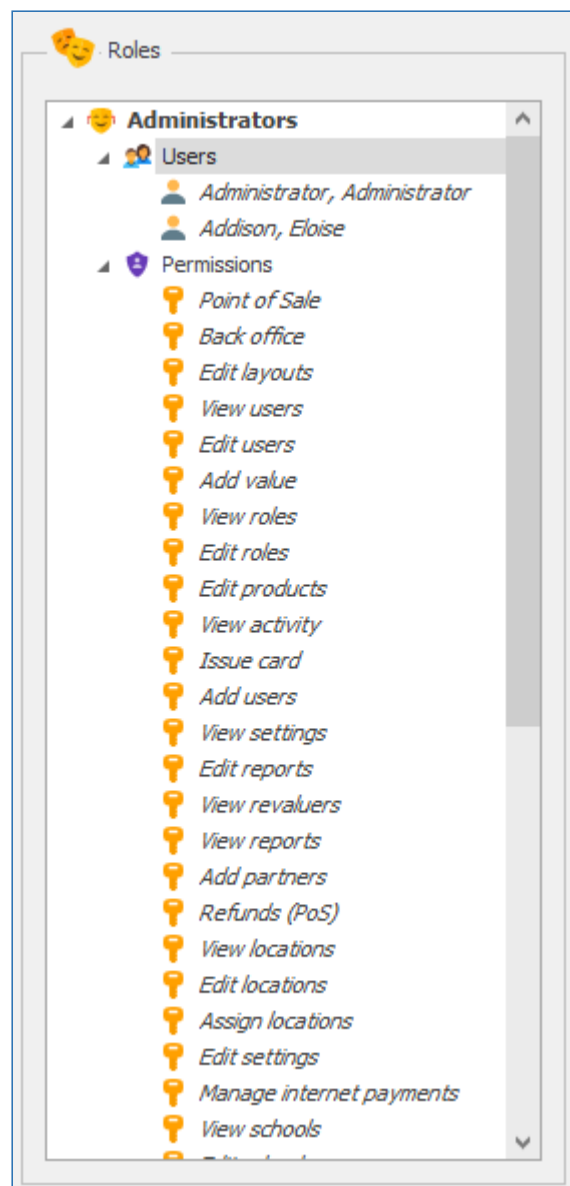


You can customise a dashboard according to which role you are logging in with. For instance, a read only role may only have access to tiles like reports and a manager role will have access to deeper areas of the system.



## Roles

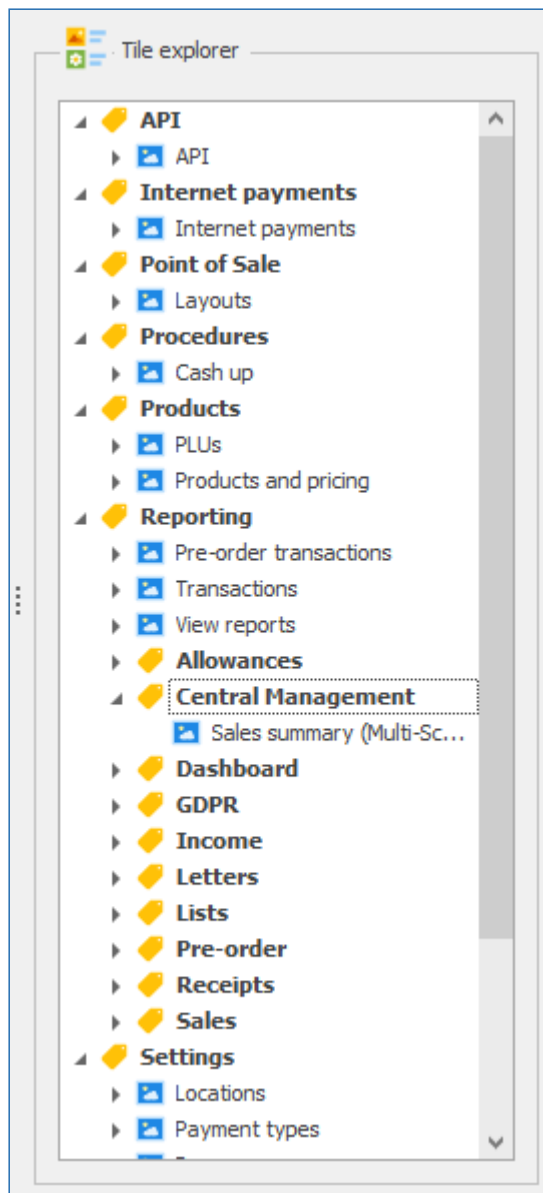
Highlighted in a red border, the **Roles** section allows you to select a role type dashboard to customise. By pressing the drop-down next to the role it will show **Users** that are associated with that role and **Permissions** that role can execute.



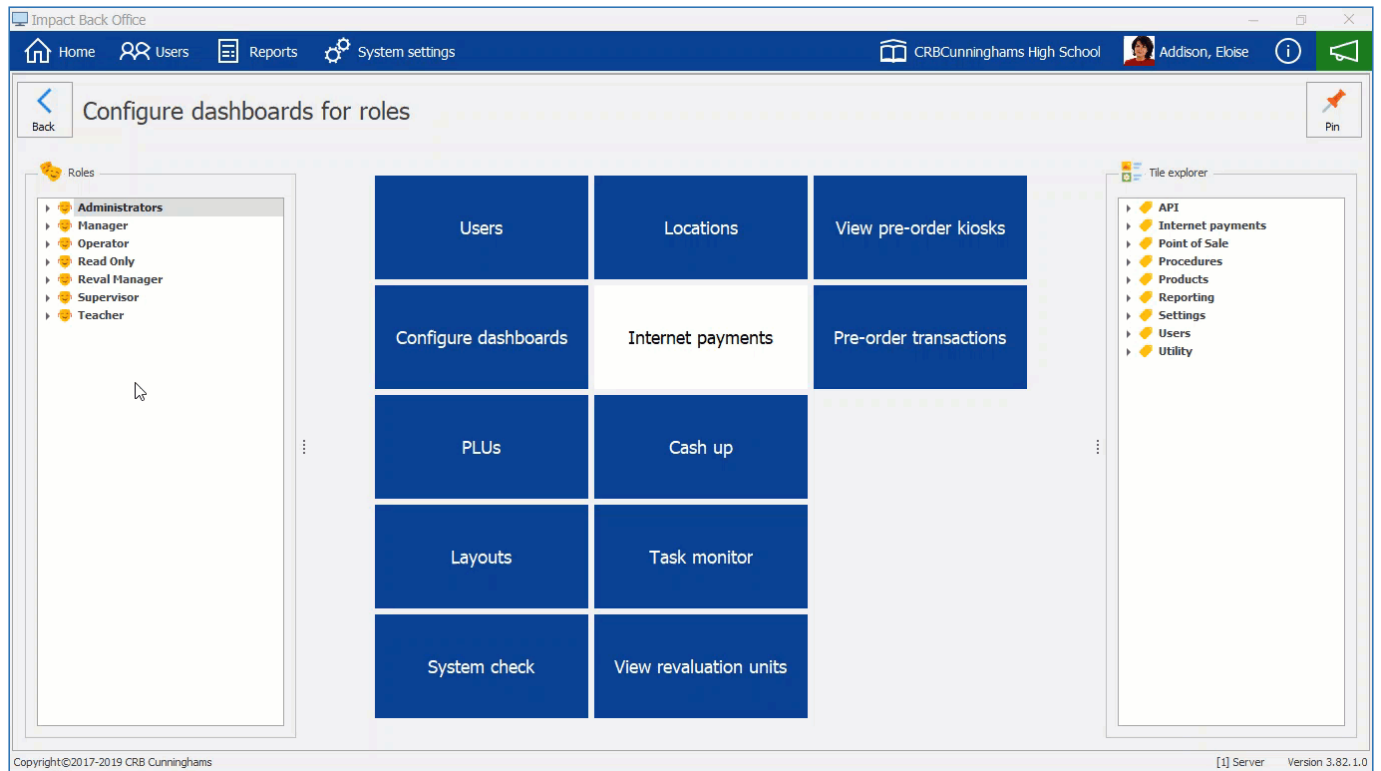
## Tile Explorer

Highlighted in a blue border, the **Tile explorer** section allows you to find a tile to drag on the dashboard.

By pressing the drop-down next to the tile group it will show **Tiles** that you can drag on to the dashboard.

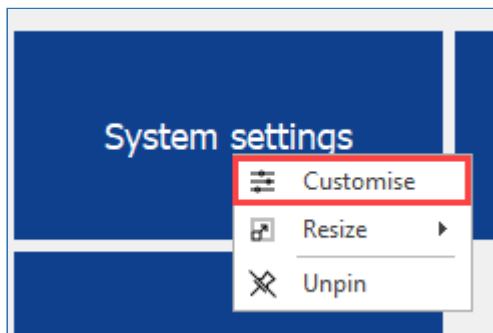


Below is a quick video tutorial on how to add a tile to a dashboard.



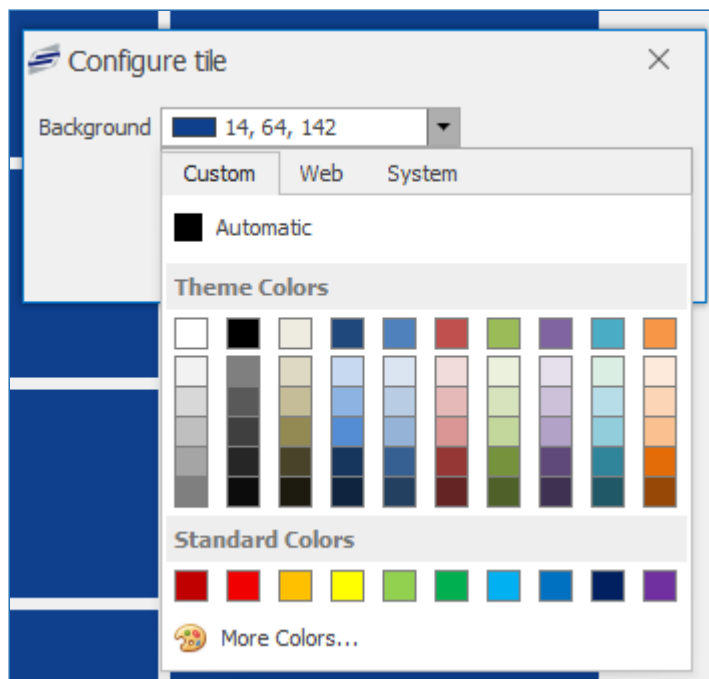
## Changing the Colour of a tile

1. Right click on the tile you wish to change the colour for and press **Customise**.

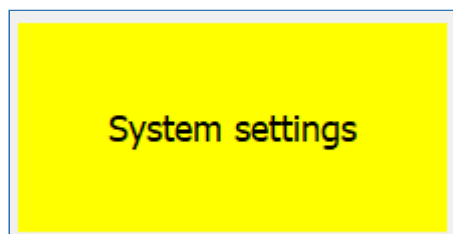


2. Press the drop-down to select a **Background** colour for the tile from the colour pallet.



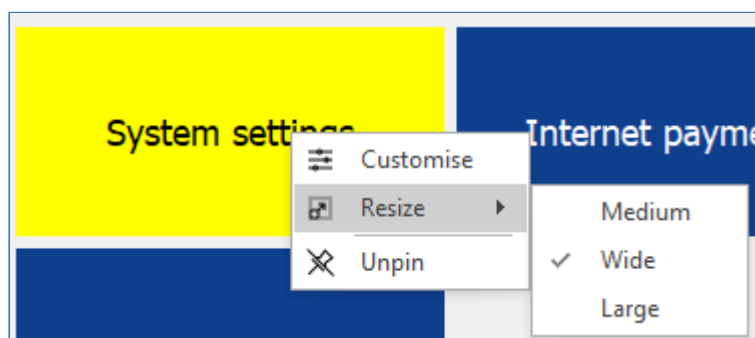


- Once a colour has been selected press **OK**. This will change the background colour of the tile.



### Changing the Size of a tile

- Right click on the tile you wish to change the colour for and press hover over the **Resize** option and select one of the sizes available.



- This will change the size of the tile on the dashboard to the selected size.

## System settings



On some tiles you can customise the **Refresh interval (minutes)** and the **Timeframe** which can scale anywhere between the current day and the previous year.

*Last modified: 20 March 2023*

## Logins



The logins screen allows us to configure which people can log into the system and what credentials they can use. Here we can also assign **security roles** to the users so they only have access to the parts of the system that they are authorised to.

Impact Back Office

Home Users Reports System settings Retry bio

CRBCunninghams Secondary School Administrator, Administrator

### Manage logins

Username	User ID	Name	User type	Biometrics?	Card?	PIN?	PIN expires	Active directory?	Modified	Modified by
Impact	1	Administrator, Administra...	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	04/01/2022 10:31	
Jennie.Allan	1210	Allan, Jennie	Staff	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	04/05/2022 00:01	
alex.ashley	23052	Ashley, Alex	Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	04/05/2022 00:01	
paul.banks	23053	Banks, Paul	Student	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	21/04/2022 10:05	
beal, lauren	1207	Beal, Lauren	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	24/01/2022 16:04	Administrator, Administrator
Graham.Clark	1025	Clark, Graham	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	31/12/2019	<input type="checkbox"/>	24/01/2022 16:05	Administrator, Administrator
Gareth.Hunter	23277	Hunter, Gareth	Student	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	04/05/2022 00:01	
Business.Manager	23055	Leonard, John	Student	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	24/01/2022 16:05	Administrator, Administrator
Sarah.Littlechild	23281	Littlechild, Sarah	Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	26/01/2022	<input type="checkbox"/>	04/05/2022 00:01	
Nick.Phelps	23059	Phelps, Nick	Student	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	21/03/2022 13:15	Administrator, Administrator
RevalManager	2	Reval Manager, Reval	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	04/01/2022 10:31	
Jamie.Roberts	23058	Roberts, Jamie	Student	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	21/03/2022 13:15	Administrator, Administrator
Paul.Tennant	23054	Tennant, Paul	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	21/03/2022 16:00	Administrator, Administrator
Luke.Todd	23278	Todd, Luke	Student	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	21/03/2022 13:15	Administrator, Administrator
Ethan.Webb	1180	Webb, Ethan	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	31/12/2019	<input type="checkbox"/>	24/01/2022 16:06	Administrator, Administrator
Natale.Young	1080	Young, Natalie	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	31/12/2019	<input type="checkbox"/>	24/01/2022 16:06	Administrator, Administrator

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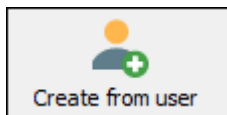
[90] Alex Hay Laptop Version 22.03.0.0

## Creating a new login



Logins can only be created for people who have a user account. If the person does not yet have a user account, one must first be created. If you are using iDStore, be sure to create the user in iDStore Admin, NOT in Impact Fusion.

1. Press the **Create from user** button from the top-right of the screen.



- Find and select the user that you will be creating a login for and press the **Select** button.

**User selection**

Name:  Status:  Allowance:

User type:

Account type	User ID	Surname	Forenames	Known as	Birth date	Year / Class	Start date	Leaving date	Leaver	Future	FSM
Student	468	Adams	Alfredo	Alfredo	06/06/2003	10, 10A	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	165	Adams	Allison	Allison	06/06/2005	8, 8A	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	426	Adams	Becky	Becky	06/06/2004	9, 9E	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	610	Adams	Clara	Clara	06/06/2002	11, 11A	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	291	Adams	Damien	Damien	06/06/2005	8, 8E	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	116	Adams	Dexter	Dexter	06/06/2006	7, 7D	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	1037	Adams	Edward	Edward	06/06/2000	13, 13E	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	453	Adams	Felicia	Felicia	06/06/2003	10, 10A	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	469	Adams	Freddie	Freddie	06/06/2003	10, 10A	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Staff</b>	<b>721</b>	<b>Adams</b>	<b>Gary</b>	<b>Gary</b>	<b>06/06/1982</b>	<b>0, None</b>	<b>01/02/2018</b>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	176	Adams	Gary	Gary	06/06/2005	8, 8A	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	803	Adams	Harold	Harold	06/06/2001	12, 12B	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	187	Adams	Jacqueline	Jacqueline	06/06/2005	8, 8B	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	48	Adams	Joshua	Joshua	06/06/2006	7, 7B	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	220	Adams	Kayla	Kayla	06/06/2005	8, 8C	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	292	Adams	Marvin	Marvin	06/06/2005	8, 8E	01/02/2018		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16 records found, last updated 23/02/2018 11:35:28

- The users details will be displayed. Configure the login as required.

**Impact Back Office**

Home Users Reports System settings CRB Cunninghams High Addison, Eloise

**Edit login**

Surname:  User type:   
 Forename(s):  Known as:   
 E-mail address:

**Authentication**

Username:  User ID:  Biometric ID:   
 New password:  Confirm new password:   
☐ User must change password at next login?

Active directory username:

Proximity card #:  Swipe card #:   
 PIN:  PIN expiry date:

**Security roles** Schools Notes

☒ Administrators  
☒ Manager  
☐ Operator  
☐ Read Only  
☐ Reval Manager  
☐ Supervisor

Modified:  Modified By:

Copyright © 2017-2018 CRB Cunninghams [21] Kitchen PC Version 3.51.3.0


- Authentication: Here the users login credentials are set.
- Security roles: Select the roles that this user will be a member of.

- Press **Save** or **Save & Close** to complete the process.



User passwords must be 6 or more characters long and contain at least one upper-case letter



and a number. You will be unable to save if your user's password is not set, the confirmation password does not match, or the password does not meet the complexity requirements. This will be indicated with a  next to the password fields.

## Editing a login

1. Find and select the login from the list and press the **Edit** button.



2. Make the required changes to the login and press **Save** or **Save & Close** to complete.

## Revoking a login

If a user should no longer be able to login to Impact Fusion, their login can be revoked.

1. Find and select the login from the list and press the **Revoke** button.



2. Press **Yes** to confirm that you wish to revoke login privileges for this user.
3. The users login privileges will be removed and the login deleted.

*Last modified: 20 March 2023*

## Password policies



In order for Fusion to be compliant with your organisation's security policies, you can now configure a custom password policy which user's must comply with.

Fusion's default password policy has rules such as a minimum length of 8 characters, a mixture of uppercase, lowercase, numeric, and symbol characters to create secure passwords. However, some clients have a more strict password policy in play and require their users to create more stringent passwords.

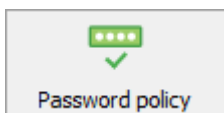
## Setting a password policy

If you wish to enable a password policy for your system, follow the below steps:

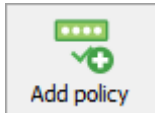


To enable a password policy, your login must have the 'Configure password policy' permission. This is typically only available to logins with the Administrator role applied.

1. Once logged into Fusion Back Office, navigate to **System settings > Logins**.
2. Click the **Password policy** button from the top-right of the screen.



3. Click the **Add policy** button from the bottom-left corner of the Password policies window.



#### 4. Configure as required:

Amending rule.

Password policy

- Start date: 28/01/2021
- Minimum password length: 12
- Minimum lowercase characters: 1
- Minimum uppercase characters: 1
- Minimum numeric characters: 2
- Minimum symbol characters: 2
- Login name check: 0
- Minimum password age (days): 1
- Maximum password age (days): 30
- Maximum number of previous passwords: 5

Test password

Test account name:

Test password:

Users with passwords that do not satisfy this policy will be asked to enter a new password when they log in after the start date.

- **Start date:** The date from which the created policy will be enforced. (Required)
- **Minimum password length:** Created passwords must be equal to or greater than this value. (Minimum 6)
- **Minimum lowercase characters:** Created passwords must contains at least this many lowercase (a-z) characters. (Minimum 1)
- **Minimum uppercase characters:** Created passwords must contains at least this many uppercase (A-Z) characters. (Minimum 1)
- **Minimum numeric characters:** Created passwords must contains at least this many numeric (0-9) characters. (Set to 0 to turn off)
- **Minimum symbol characters:** Created passwords must contains at least this many symbol (e.g. £\$&\*!%@) characters. (Set to 0 to turn off)
- **Login name check:** The password must not contain this many sequential characters from the username. For example, if this is set to 5 and the username is 'admin', a password of 'Admin@123' would not be allowed but 'Adm@123in' would be ok. (Set to 0 to turn off)
- **Minimum password age (days):** This setting stops the user from changing their password if the password is not at least this many days old. This is typically used when a policy does not allow a user to re-use any of the most recent (e.g. 5) passwords. Setting this value to 1 would stop a user changing their password more than once on the same day in an attempt to get back a password they were using previously. Admins can still set a password for the user manually during this period if required. (Set to 0 to turn off)
- **Maximum password age (days):** After this many days have passed since the user set their password, they will be forced to change when next log in. This does not affect a user logging into the PoS using a PIN, card or fingerprint. (Maximum allowed is 365 days. Set to 0 to turn off)
- **Maximum number of previous passwords:** When set, a user cannot use one of their last 'x' passwords. For example, setting this to 5 would mean that a user cannot use one of

their 5 most recent passwords. (Maximum value is 12. Set to 0 to turn off)

5. You can test your created password policy on the right-hand side of the window. Once you are happy with the created policy press the **Save** button.
6. Press **Done** to complete the process.



**Things to note:** Unless a password policy has been created, the existing password policy will continue to be used. After a policy has been created, any new passwords created on or after the start date must meet the rules specified. Any users logging in, on or after the start date of a policy, will be forced to change their password if it does not meet the new policy requirements.

## Managing password policies

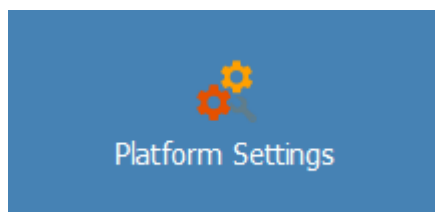
After a password policy has been configured, you may wish to create a new one, edit an existing one, or even remove one and return to the default password policy. These options are available within the Password policy screen which is accessed via the login screen discussed above.

*Last modified: 20 March 2023*

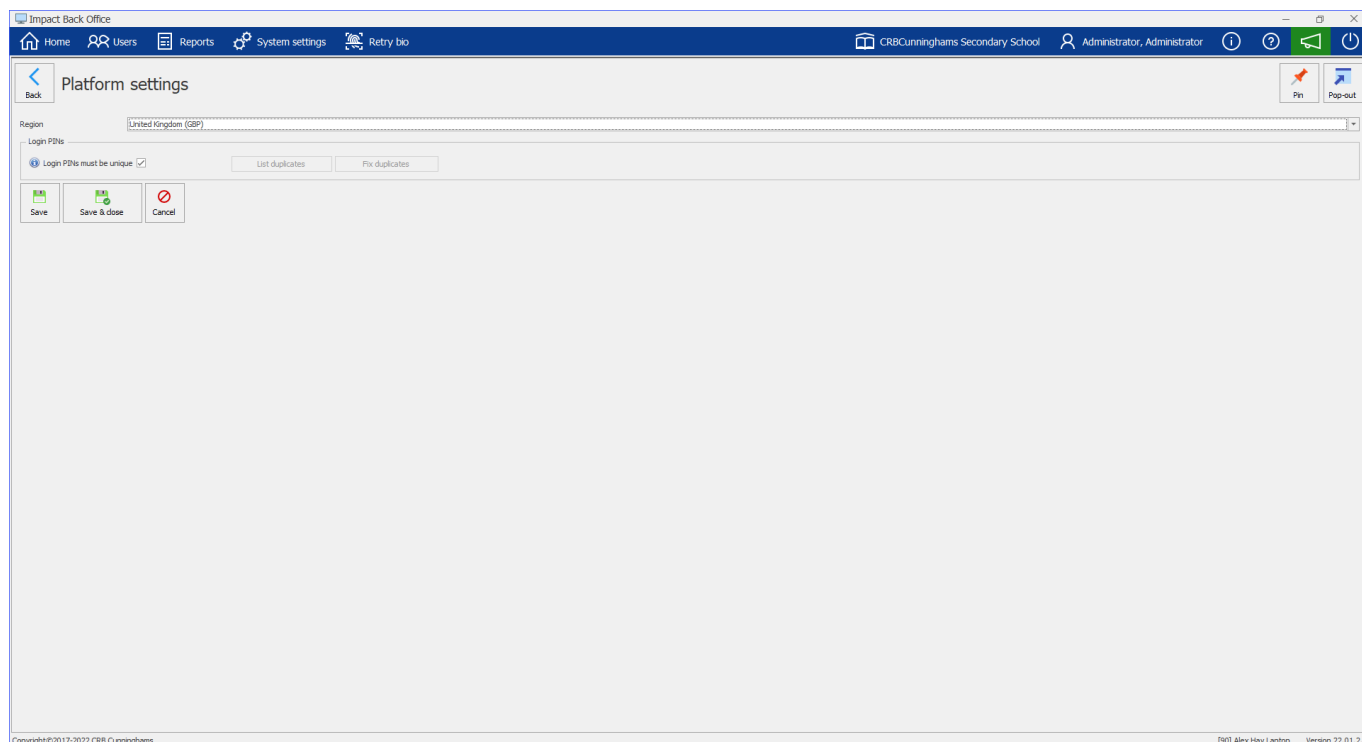
## Platform Settings



The platform settings section of the back office is used to set the currency settings for the cashless system and the Login PIN settings. The 3 available currency options are **United Kingdom (GBP)**, **Republic of Ireland (EUR)** and **United States (USD)**. Login PINs can be required to be unique, allowing PINs to be used across multiple schools. Login PINs are set to unique by default.

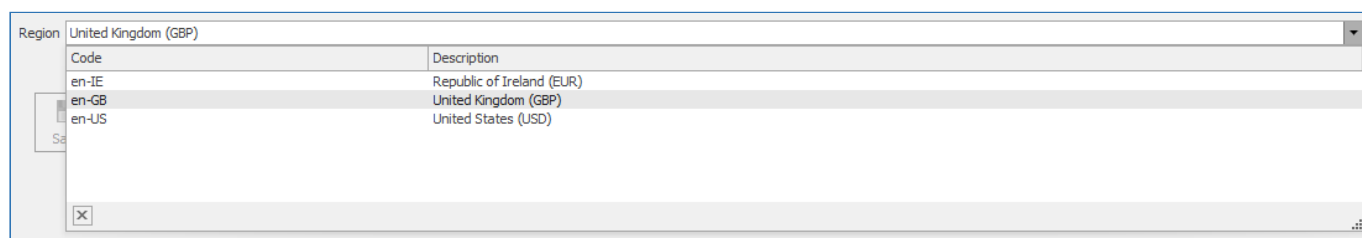


**Platform settings** is accessed in the system settings tile.

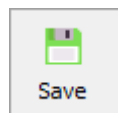


## Changing currency settings

To change the current currency press the drop-down and select the currency to wish to use.

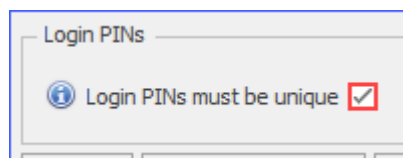


Press **Save** or **Save & close** to confirm changes.

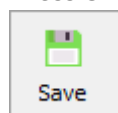


## Setting Login PIN requirements

To disable the enforcement of unique Login PINs simply uncheck the box next to **Login PINs must be unique**.



Press **Save** or **Save & close** to confirm changes.





If duplicate PINs are detected when this setting is checked the **List duplicates** and **Fix duplicates** buttons will be available. **List duplicates** can be used to download a list of users with duplicate PINs. Pressing **Fix duplicates** will automatically fix the duplicate PIN issues.

## Connect Fusion Collect

*Last modified: 20 March 2023*



The Connect Fusion Collect tab allows you to connect the Fusion collect app to the Fusion database.

You can enter the Connect Fusion Collect by entering the system settings and pressing the **Connect Fusion Collect** button.



The box will display the unique QR code ready to be scanned by a device using the Fusion Collect app.





When you scan the QR code on the app it will enter the connection string on the app. You can start using the device.

By clicking the **Print** button, it will print out the QR code.

*Last modified: 20 March 2023*

## User labels

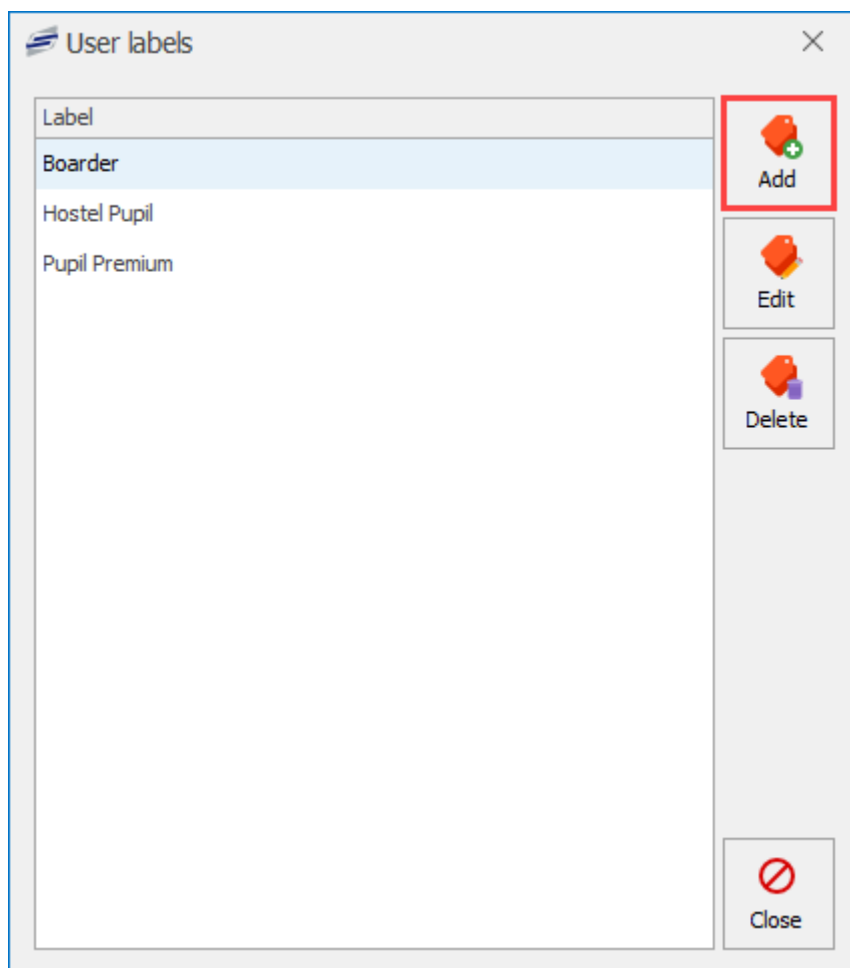


User labels allow us to create and apply labels to user records in Fusion. These labels can then be used to more easily manage groups of users. This is particularly useful for adding ad hoc allowances to multiple users, even if the users have different user types. An example of an appropriate use of user labels would be when a school has borders of both primary and high school age. There may be different user types for the different age brackets, but a 'Boarders' user label would allow for ad hoc allowances to be added to all boarders.

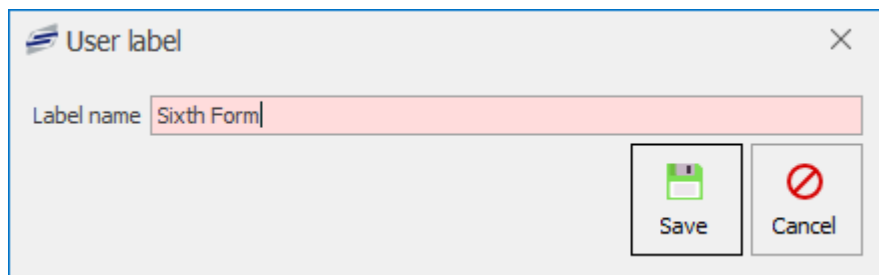
 User labels can be found under its own tile within system settings in Fusion.

### Adding a User label

1. Press the **User labels** tile to open the User labels screen.



2. Press the **Add** button on the right hand side of the screen.
3. Type the name of the label you wish to add in the box.

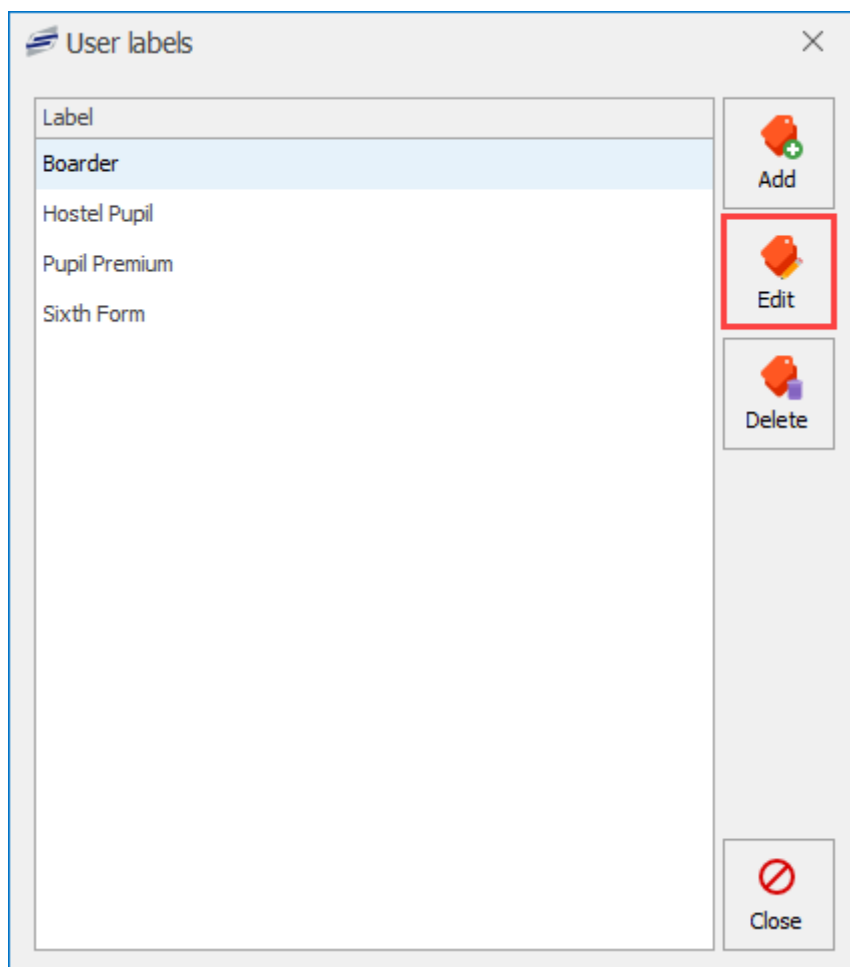


A dialog box titled "User label" with a close button (X) in the top right corner. It contains a text field labeled "Label name" with the text "Sixth Form" entered. Below the text field are two buttons: "Save" (with a green floppy disk icon) and "Cancel" (with a red circle and slash icon).

4. Press save.

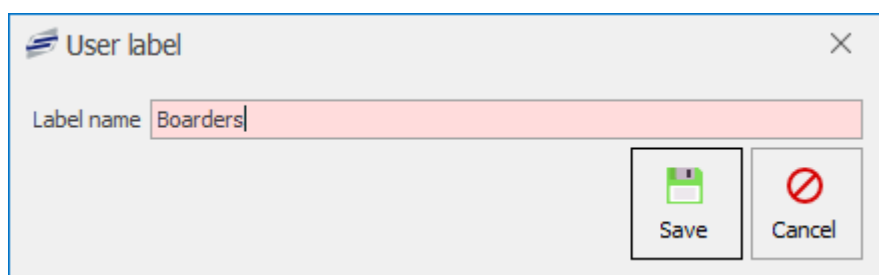
## Editing a User label

1. Press the **User labels** tile to open the User labels screen.



A screen titled "User labels" with a close button (X) in the top right corner. It features a list of labels on the left: "Label", "Boarder", "Hostel Pupil", "Pupil Premium", and "Sixth Form". The "Boarder" label is selected and highlighted in blue. On the right side, there are three buttons: "Add" (with a red plus icon), "Edit" (with a red pencil icon, highlighted with a red rectangle), and "Delete" (with a red trash can icon). At the bottom right, there is a "Close" button (with a red circle and slash icon).

2. Select the label you wish to edit.
3. Press the **Edit** button on the right hand side of the screen.
4. Change the name of the label as required.

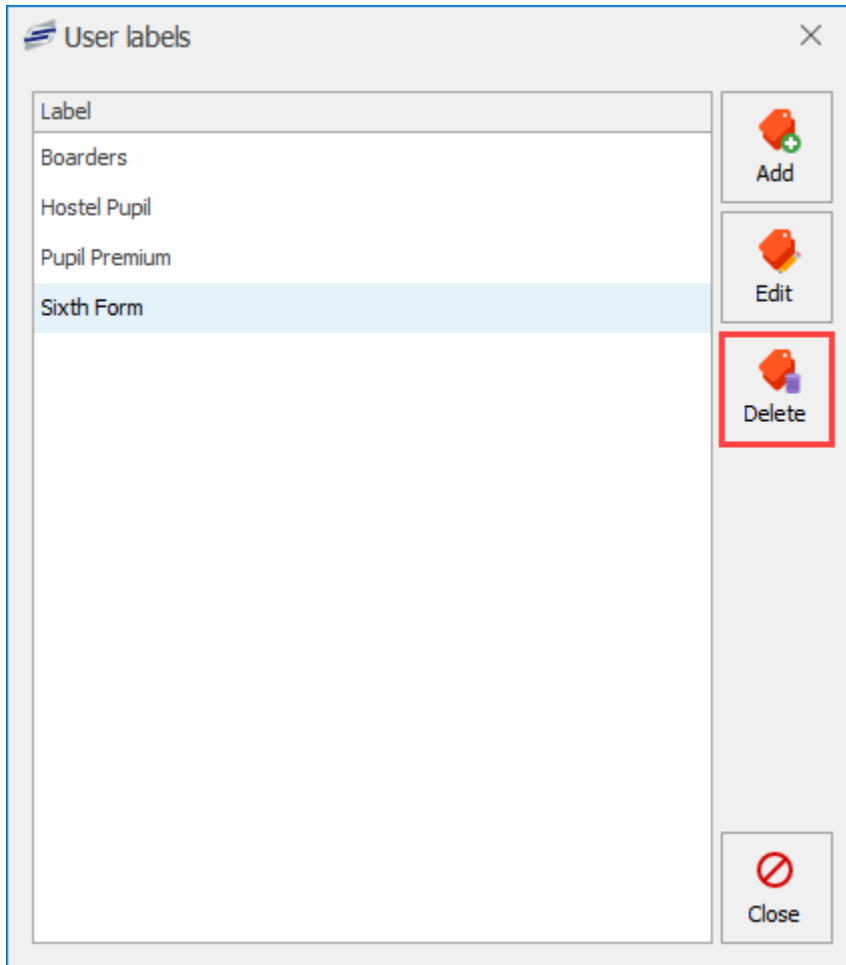


A dialog box titled "User label" with a close button (X) in the top right corner. It contains a text field labeled "Label name" with the text "Boards" entered. Below the text field are two buttons: "Save" (with a green floppy disk icon) and "Cancel" (with a red circle and slash icon).

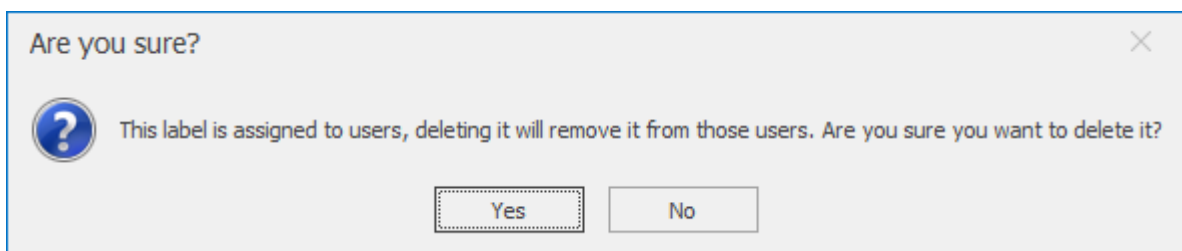
5. Press **Save**.

## Deleting a User label

1. Press the **User labels** tile to open the User labels screen.



2. Select the label you wish to delete.
3. Press the **Delete** button on the right hand side of the screen.



4. You will be prompted to confirm the deletion. Press **Yes** to delete the label.



Information on applying labels to users can be found under the Labels topic in the Users section.

## Adding a label to a user

1. Select the user from the user screen.
2. Press **Edit user** and navigate to the **Labels** tab.
3. Using the checkboxes, select the label(s) you wish to add to the user.

**i** New labels can be added by typing a name into the **Label text** field and pressing **Add label**.

4. Press **Save**.

## Adding a label to multiple users

1. Select the users you wish to edit from the user screen.
2. Press **Edit user** and navigate to the **Labels** tab.

3. Press the **Update?** checkbox.
4. Select the label(s) you wish to add to the users.

5. Select the required mode and press **Update** to end the process.

*Last modified: 20 March 2023*

## Email settings



The email settings will allow the ability to set up a host email address for the system to use to send emails like reports to selected email addresses. We use Simple Mail Transfer Protocol (SMTP), an internet standard communication protocol, for electronic mail transmission. Mail servers and other message transfer agents use SMTP to send and receive mail messages.

Impact Back Office

Home Users Reports System settings CRBCunninghams Secondary School Administrator, Administrator

### Email settings

Back Pop-out

☒ Email enabled

SMTP settings

Host address smtp.office365.com

Port 587

Send from  ☐ Allow override

Username

Password

☒ Use SSL

Send test

Save Save & close Cancel

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To enable email settings, click the check box.

Impact Back Office

Home Users Reports System settings CRBCunninghams Secondary School Administrator, Administrator

### Email settings

Back Pop-out

☒ Email enabled

SMTP settings

Host address smtp.office365.com

Port 587

Send from randdsmtptest@crbcunninghams.co.uk ☐ Allow override

Username randdsmtptest@crbcunninghams.co.uk

Password

☒ Use SSL

Send test

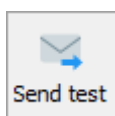
Save Save & close Cancel

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## SMTP Settings

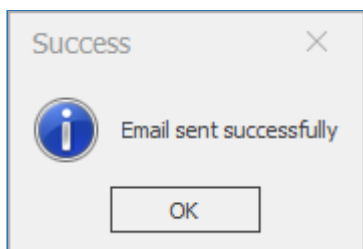
Field Name	Description
Host Address	This is the SMTP server of the mail client or application that you are using, and is generally formatted as smtp.serveraddress.com for example.
Port	This is the SMTP server port and is usually set to 587 as a default port.
Send from	This will be the email address that will send the emails.
Allow override	Office 365 requires the Send from & Username to be the same and If the username is different from the Send from address, you will need to select the Allow override option.
Username	This is the username of the email service account you wish to use.
Password	This is the password of the email service account you wish to use.
Use SSL	SSL Stands for secure sockets layer. Protocol for web browsers and servers that allows for the authentication, encryption, and decryption of data sent over the Internet. Tick this box if you need to use SSL.

1. You can send a test email by clicking on the **Send test** box.

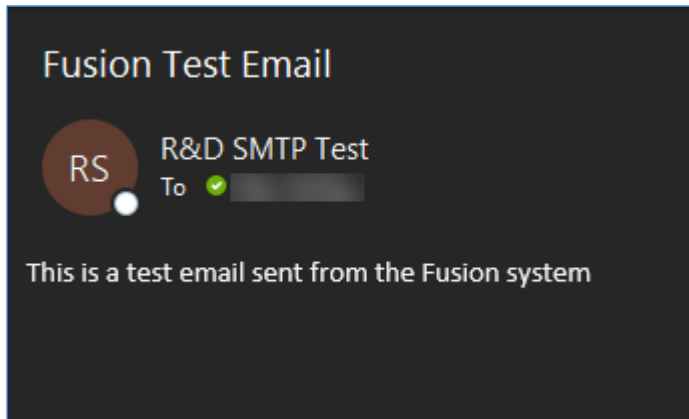


2. Enter a destination email address and click **OK**.

3. If the email was sent successfully, you'll receive a success confirmation. Click **OK**.



4. You should have the test email in the inbox of the destination email address entered.

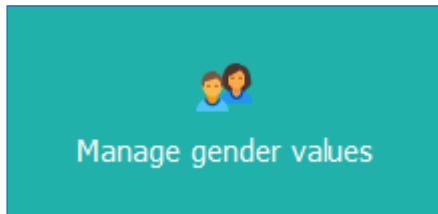


*Last modified: 20 March 2023*

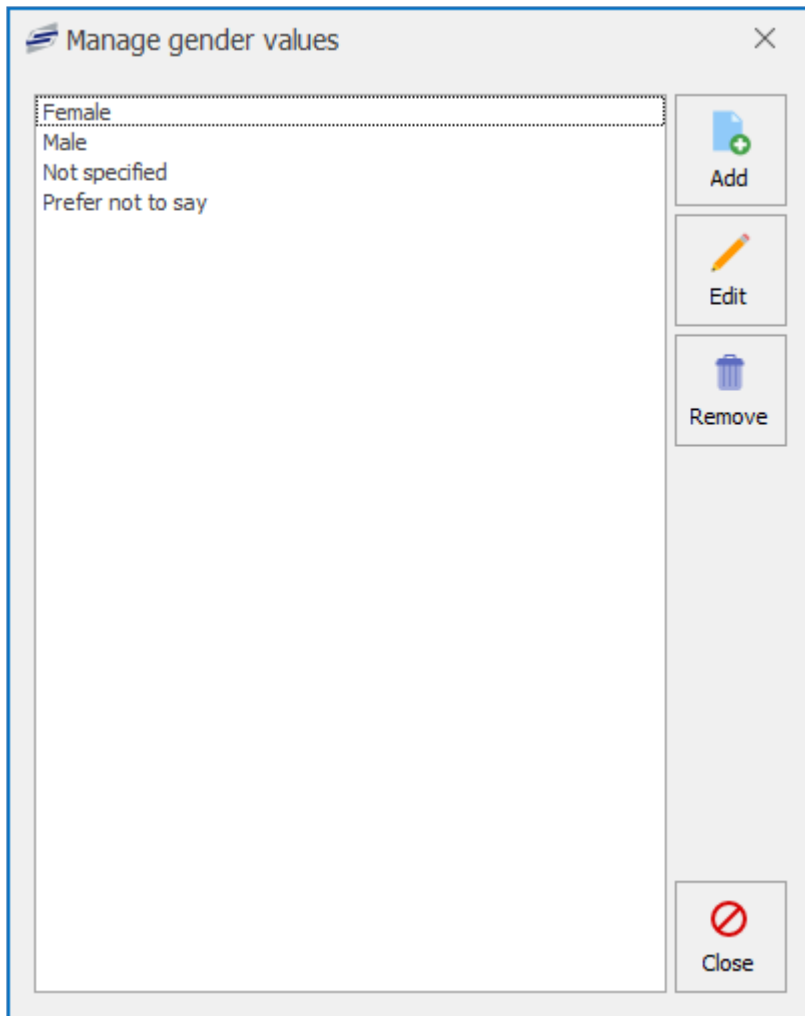
## Manage gender values


Fusion allows for the setting of gender against a user's account. While setting gender on a user account is no longer mandatory, this may be useful for reporting purposes. Fusion has a selection of possible gender values out of the box, however, we are aware that these may not be fully inclusive and some users may identify with a gender not currently present. In these scenarios, additional genders can be added as required. Once a gender value has been created, it can now be applied to a user's account.

The gender values can be managed by accessing the **Manage gender values** tile within the **System setup** section of **System settings**.



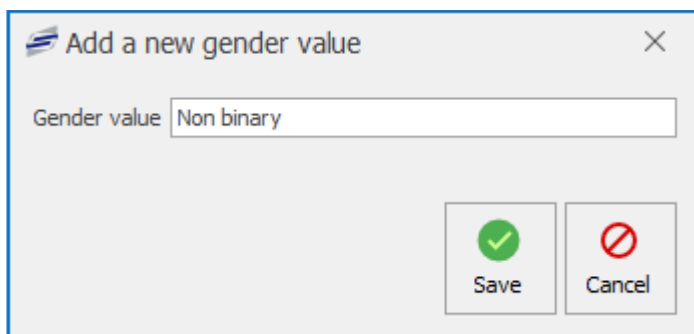
Pressing this tile will display the list of currently available gender values.



The list of genders can also be accessed by pressing the magnifying glass icon  listed next to the gender field when editing a user's details.

## Add a new gender

1. Press the **Add** button.
2. Enter the text for the required gender value.



3. Press **Save** when done.

## Editing a gender

1. Select the gender value from the list.
2. Press the **Edit** button.
3. Adjust the text as required.



- Press **Save**. You will be warned that editing this value will update all the user records that have this value. Press **Yes** to continue or **No** to cancel.

## Deleting a gender



It is not possible to delete a gender value when it is currently being used by one or more users.

- Select the gender value from the list.
- Press the **Delete** button.
- Press **Yes** to confirm.

## School calendar

*Last modified: 20 March 2023*



The school calendar allows for the configuration of term dates. This allows the system to complete the required automated tasks such as adding and removing user allowances. Additionally, the school calendar is critical while using pre-order, particularly Fusion Online, as the system needs to know which are valid service days otherwise users would be able to place pre-orders for days where the school is not open (and vice versa).



A school calendar must be configured for the Fusion system to function correctly, especially when using Fusion Online otherwise users could place pre-orders on days when the school is not open.

Impact Back Office

Home Users Reports System settings CRB Cunninghams High Addison, Eloise

### School calendar

Back Pop-out

June 2018 July 2018 August 2018 September 2018

October 2018 November 2018 December 2018 January 2019

Add term Edit term Delete Days

Term	Start date	End date
Summer 2018	01/05/2018	20/07/2018
Autumn 2018	01/09/2018	21/12/2018
Winter 2019	02/01/2019	30/04/2019

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## Term dates key

Once configured, the school calendar will be filled with different colours.

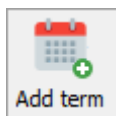
- Unknown:** A term date has not been configured for this day.

**2 Open:** The school is open as normal on this day.

**3 Closed:** The school is completely closed on this day.

## Adding a new term

1. Press the **Add term** button.



2. Enter a term name and set the start and end dates for the term.  
p(banner tip list1). The end date cannot exceed 12 months from the current date. This is to encourage a more accurate configuration of the school calendar.

**Adding school term**

Term name: Summer 2018

Start date: 16/04/2018 End date: 24/07/2018

Mondays: Open

Tuesdays: Open

Wednesdays: Open

Thursdays: Open

Fridays: Open

Saturdays: Closed

Sundays: Closed

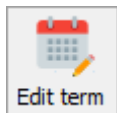
Save Cancel

3. Press **Save** to complete.

**i** If your dates overlap an existing term, you will be warned and returned to the 'Adding school term' window.

## Editing an existing term

If you wish to make changes to an existing term, for example changing the end date, simply select that term from the list and press **Edit**. Make the required changes and press **Save**.



## Setting school holidays

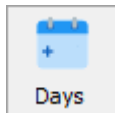
When the school is going to be closed during a term such as half term or training days, we can set these in the system.

1. Using the calendar, select the date(s).

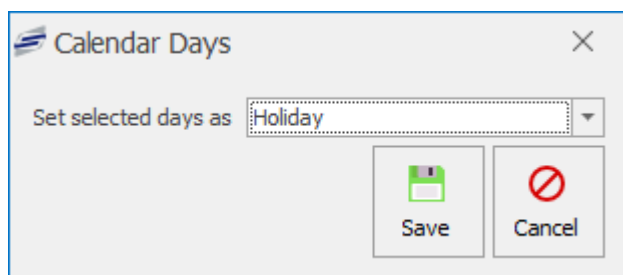


If the dates are consecutive days, simply click and drag on the calendar to select the dates. If the dates are scattered throughout the term, you can hold down the 'Ctrl' button on your keyboard while you select the required dates.

2. Press the **Days** button.



3. Using the dropdown list, select the type of day that you want to set these days as (Open or Closed) and press **Save**.



*Last modified: 20 March 2023*

## User types



The user types section of Impact Fusion is where we can configure settings such as the students default daily spend limit or how much free school meal money is issued to those that are eligible. Typically, most schools will have a 'Student' user type that all of the students user accounts belong to and a 'Staff' one for staff. Some schools may decide to have 'Lower school' and 'Upper school' and/or 'Sixth form' user types. Doing this the school can set different limits for 'Lower school' than 'Upper school' or perhaps different FSM allocation times. This configuration also means that the lower school can be reported on separately to the upper school.

**Edit user types**

Description	Represents
Student	STUDENT
Staff	STAFF
Catering	STAFF
Hospitality	STAFF
Admin	ADMIN

**User Type Settings**

Start date	Overdraft allowed	Overdraft limit	Card charge	Card charge free	Daily limit	Break limit	Vend limit
02/06/2017	<input type="checkbox"/>	£10.00	£1.00	£0.80	£5.00		
03/09/2018	<input type="checkbox"/>	£0.00	£1.00	£0.80	£5.00		

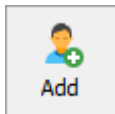
Buttons at the bottom: Add user type settings, Edit user type settings, Copy user type settings, Delete user type settings.

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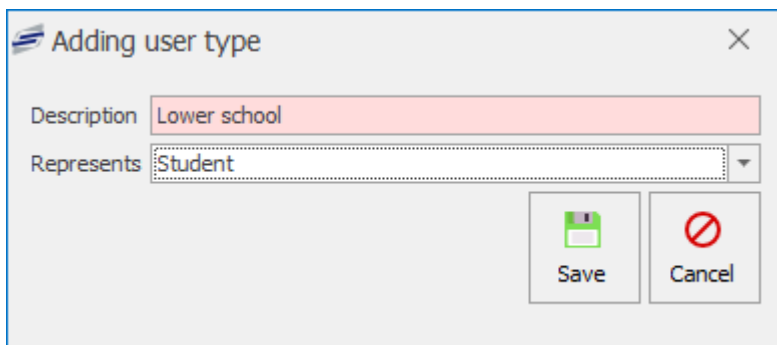
This screen is split into two sections, on the left, user types can be created, edited and deleted, and on the right, the settings used on the user types can be configured.

## Adding a new user type

1. From the left hand side of the screen, press the **Add** button.



2. Enter a description for the user type and choose what type of user that this user type represents.

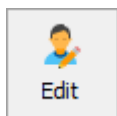


For example, if creating a user type for lower school, the represents will still be 'Student'. This means that they system can still report on all students if required.

3. Press **Save** to complete.

## Editing a user type

To edit an existing user type, select it from the list on the left hand side of the screen and press the **Edit** button. Edit the user type as required.



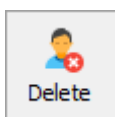
## Deleting a user type

When a user type is no longer required, it can be easily deleted.



You cannot delete a user type that is still being used by user accounts. You must first assign these users to a new account type.

1. Select the required user type from the list on the left hand side of the screen.
2. Press **Delete** and press **Yes** to confirm.



*Last modified: 20 March 2023*

## User type settings

Each user type has settings that any users associated to this type use. For example, if the 'Student' user type has the daily limit set at £5, every user linked to the student group will use that limit unless they have one set against their account.

Editing user type settings for Student

Start date: 03/09/2018

Overdraft

Overdraft allowed: ☒

Overdraft limit: £10.00

FSM allowed overdraft: ☐

Cards

Card charge: £1.00

Card charge free: £0.80

Limits

Daily limit: £5.00

Break limit:

Vend limit:

Allocation rules

Purse type	Allowance	Start time	End time
FSM Daily	£2.50	12:30:00	14:30:00

Buttons: Add, Edit, Delete, Save, Cancel

User type settings are also date activated. This means that they will only be used when the 'Start date' rolls around and no newer settings exist. Using this method allows you to configure user type settings in advance. For example, if your free school meal allowance is changing on the 1st April, you can create a new user type setting that uses the new free school meal allowance and set the start date as the 1st April. The system will not use this new setting until that date.

Before you can make any changes to user type settings, you must first select the required user type from the list on the left hand side of the window.

## Creating new user type settings

New user type settings can be created in two ways, either by pressing the **Add user type settings** button or by selecting a previous user type setting from the list and pressing the **Copy user type settings**.

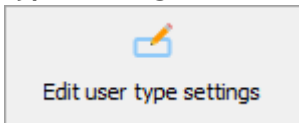
Add user type settings

Copy user type settings

Using the 'Copy user type settings' method is recommended as this uses the selected setting as a starting point whereas using the 'Add user type settings' option requires you to create settings from scratch.

## Editing a user type setting

To edit an existing user type setting, simply select the setting from the list and press the **Edit user type settings** button.



## Configuring user type settings

After accessing the user type settings screen using one of the above methods, you can now configure as required:

### Settings

- **Start date:** Select the date from which these settings will be active.
- **Overdraft settings:**
  - **Overdraft allowed:** Are users in this user type allowed to go overdrawn?
  - **Overdraft limit:** If overdraft is allowed, what is the overdraft limit.
  - **FSM allowed overdraft:** If overdraft is allowed, are users with a Free School Meal also allowed to use the overdraft facility?
- **Cards settings:**
  - **Card charge:** When a non free school meal user is charged for a card, how much will be deducted from their account.
  - **Card charge free:** When a free school meal user is charged for a card, how much will be deducted from their account.
- **Limits settings:**
  - **Daily limit:** What is the maximum that users in this type can spend in an entire day.
  - **Break limit:** What is the maximum that users in this type can spend at break time.
  - **Vend limit:** What is the maximum that users in this type can spend on vending machines per day.

## Allocation rules

The allocation rules are used to issue allowances to eligible users. For example, if a user is eligible for a free school meal, the amount that they will be issued is set by creating an allocation rule.

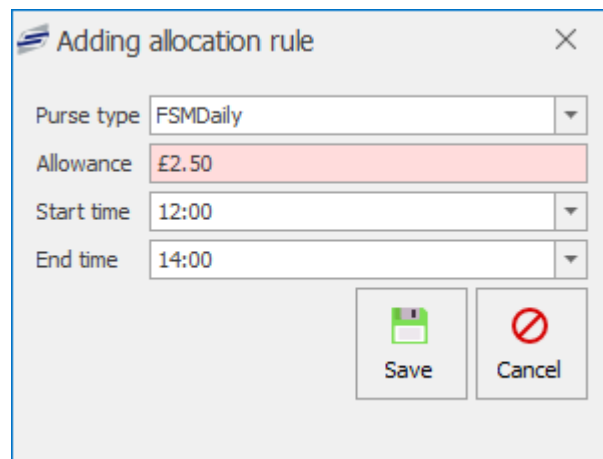
### Adding a new allocation rule

1. Press the **Add** button



2. Configure the allocation rule:

- **Purse type:** Select a purse type to add the allowance to using the dropdown list. While there are currently many purse types in this list, the following should be the only ones used: **Breakfast:** A daily breakfast allowance; **FSMDaily:** A daily free school meal allowance; **SupervisorDaily:** A daily supervisor/duty allowance.
- **Allowance:** Enter the amount that will be added to the purse for eligible users.
- **Start time:** At what time will the allowance be made available to the user.
- **End time:** At what time can the user no longer access the allowance.



Adding allocation rule

Purse type: FSMDaily

Allowance: £2.50

Start time: 12:00

End time: 14:00

Save Cancel

3. Press **Save**.

## Editing an allocation rule

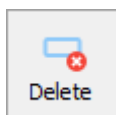
1. Select the required allocation rule from the list and press **Edit**.



2. Edit as required. See the above for more information if required.

## Deleting an allocation rule

1. Select the required allocation rule from the list and press **Delete**.



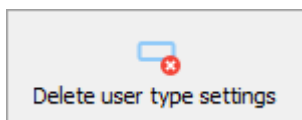
2. Press **Yes** to confirm.

## Deleting a user type setting



You must have at least one user type settings for the system to operate.

1. Select the required user type setting and press **Delete user type settings**.



2. Press **Yes** to confirm.

## Years & classes

*Last modified: 20 March 2023*



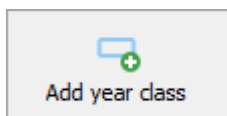
Every user in Impact Fusion must have a year and class. The list of classes can be managed from within the year / classes screen.



If your system is linked to iDStore, your years and classes will be created automatically and there is no management required by you.

## Add a new class

1. Press the Add year class button.



2. Configure the new class as required:

The dialog box 'Adding year class' contains the following fields and controls:

- Year:** Text field with value '12'.
- Year name:** Text field with value '12'.
- Class:** Text field with value 'A'.
- Teacher name:** Text field with value 'Mrs Smith'.
- UFSM year:** Checkbox, currently unchecked.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

- **Year:** The numerical value of the year.
- **Year name:** The name of the year. This can be alphabetical as many primary schools will have names for their years.
- **Class:** The class code or name.
- **Teacher name:** Not required.
- **UFSM year:** If your school is a primary school, will this class be eligible for Universal Free



School Meals? Details on how to set this can be found below.

3. Press **Save** to complete.

## Edit an existing class

1. Find and select the class from the list.
2. Press the **Edit** button.



3. Edit the class as required.

## Deleting a class



Classes cannot be deleted if users are still registered to it.

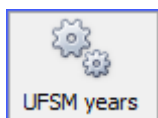
1. Find and select the class from the list.
2. Press the **Delete** button.



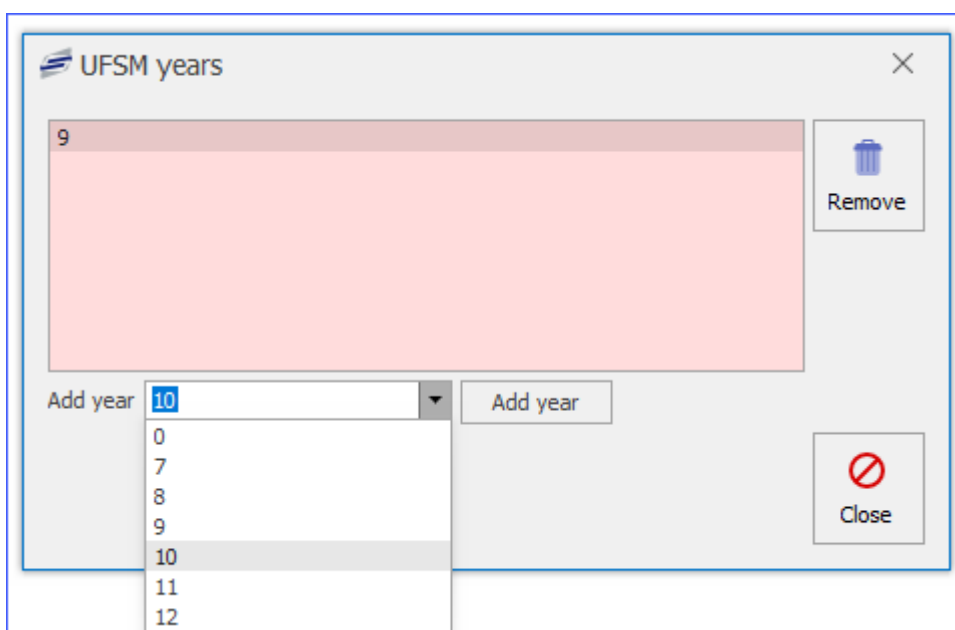
3. Press **Yes** to confirm.

## Set a year as a UFSM year

1. Press the **UFSM years** button in the top right of the screen.



2. Select a year from the dropdown menu and press **add year**. Repeat as necessary.



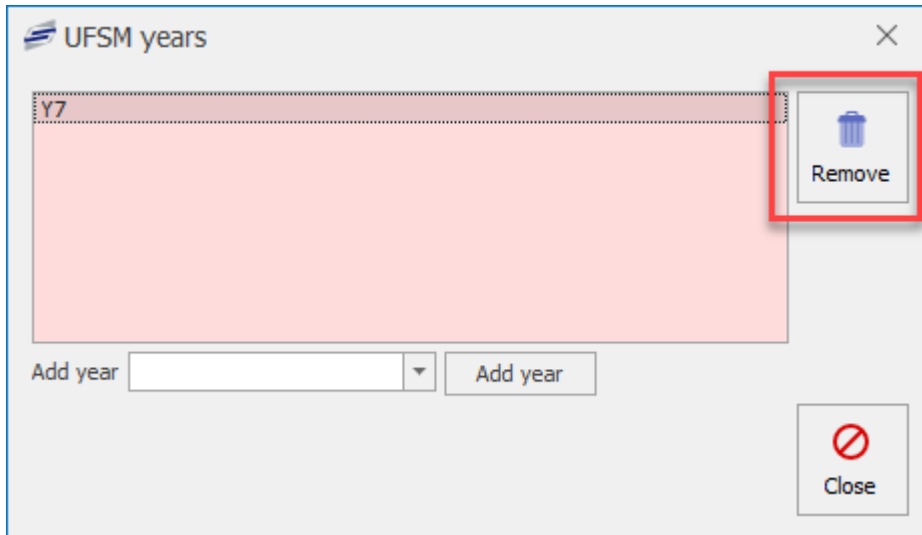
3. Press **Close** to complete the process.

## Remove a UFSM

1. Press the **UFSM years** button in the top right of the screen.



2. Click on a Year from the list.
3. Click the **Remove** button.



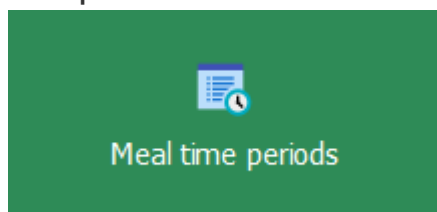
*Last modified: 20 March 2023*

## Meal time periods



Meal time periods are used to set the times in which the system will be available for use. For example, lunch may run from 12:50 til 1:30, and a meal time period can be set to reflect this. Meal time periods are particularly useful for reporting, as they can be used to determine what was sold at certain times throughout the day.

You can enter the Meal time periods setting by entering the system settings and pressing the **Meal time period** button.



The grid will display default meal time periods and what start and end times they are valid.

Impact Back Office

Home Users Reports System settings CRBCunninghams High School Administrator, Administrator

### Edit meal periods

Back Add meal period Pop-out

School: CRBCunninghams High School

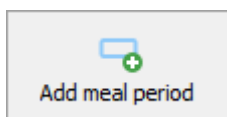
Name	Start time	End time	Represents	Active
Breakfast	06:00	09:15	Breakfast	<input checked="" type="checkbox"/>
Morning Break	09:15	11:30	MorningBreak	<input checked="" type="checkbox"/>
Lunch	11:30	14:30	Lunch	<input checked="" type="checkbox"/>
Afternoon-Evening	14:30	23:59	Afternoon	<input checked="" type="checkbox"/>

Edit Delete

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## Adding a new Meal time period

1. Press the **Add meal period** button.



2. Enter a **Name** for the meal period.
3. Select a **Start time** and **End time** for the meal period.
4. Select an option from the drop-down that **Represents** the meal period (i.e. Breakfast, Morning Break, Lunch, Afternoon or Unknown).
5. Tick or untick whether you want to make the meal period **Active**.

Adding meal period

Name: End of School Club

Start time: 15:00

End time: 17:00

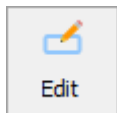
Represents: Afternoon

Active: ☒

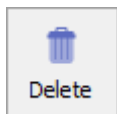
Save Cancel

## Editing or Deleting a Meal period

You can edit an existing meal period by select a meal period from the grid and pressing the **Edit** button. You can amend anything within this section.



You can delete an existing meal period by select a meal period from the grid and pressing the **Delete** button.



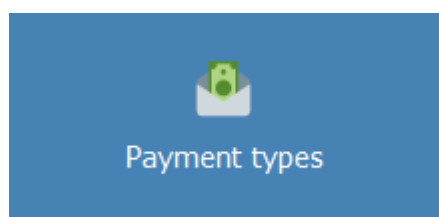
*Last modified: 20 March 2023*

## Payment types



A Payment type is used to represent a transaction and defines the type of payment that was made. This is important as it allows for report figures to reflect the correct methods of payment.

The **Payment types** tile is located within the system settings tile.



In the Payment types tile you can add and amend existing payment types. The Grid columns display Payment Type Name, Represents and Allow manual payments.

**Payment types**

Payment type	Represents	Allow manual payments
Balance transfer	TRANSFER	<input checked="" type="checkbox"/>
Cash	CASH	<input checked="" type="checkbox"/>
Cash Correction	CASH	<input checked="" type="checkbox"/>
Cheque	CHEQUE	<input checked="" type="checkbox"/>
Internet	INTERNET	<input type="checkbox"/>
Internet Correction	INTERNET	<input checked="" type="checkbox"/>
PDQ	DEBITCARD	<input checked="" type="checkbox"/>
Revaluation	CASH	<input type="checkbox"/>

**Payment type details**

Amending payment type

Payment type:

Represents:

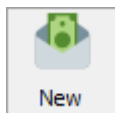
Allow manual payments: ☒

Buttons: Save, Delete, Cancel

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## Adding a new Payment type

1. Press the **New** button.



2. Enter a **Payment type** and select from the drop-down which payment type it represents.
3. Tick the **Allow manual payments** box if you want to allow this to be an option when adding value to a purse.

**Add payment type**

Payment type: Debit Card

Represents: DEBITCARD

Allow manual payments: ☒

Save Cancel

4. Press **Save**.

## Editing a Payment type

1. Select a payment type from the list.

Payment type	Represents	Allow manual payments
Balance transfer	TRANSFER	<input checked="" type="checkbox"/>
Cash	CASH	<input checked="" type="checkbox"/>
Cash Correction	CASH	<input checked="" type="checkbox"/>
Cheque	CHEQUE	<input checked="" type="checkbox"/>
Debit Card	DEBITCARD	<input checked="" type="checkbox"/>
Internet	INTERNET	<input type="checkbox"/>
Internet Correction	INTERNET	<input checked="" type="checkbox"/>
PDQ	DEBITCARD	<input checked="" type="checkbox"/>
Revaluation	CASH	<input type="checkbox"/>

2. Under the **Payment type details** section you can edit the payment type name and select a different representation from the drop-down. You can also tick or untick the option to **Allow manual payments**.

Payment type details

Amending payment type

Payment type

Represents

Allow manual payments ☒

3. Press **Save** to confirm any changes. Press **Delete** to remove the payment type entirely. Press **Cancel** to undo any changes made.

Save Delete Cancel

*Last modified: 20 March 2023*

## Purses



The Fusion cashless system provides each account with a number of purses. As default all account will have a Catering account which can be topped up manually. FSM (Free School Meal), Breakfast, UFSM (Universal Free School Meal) and Supervisor purses will be automatically topped up by the system.

Impact Back Office

Home Users Reports System settings CRBCunninghams High School Addison, Eloise

Back Purses

Name	Type	Can add value?
Breakfast	Breakfast	<input type="checkbox"/>
Catering	Cashless	<input checked="" type="checkbox"/>
FSM	FSM Daily	<input type="checkbox"/>
Supervisor	Supervisor daily	<input type="checkbox"/>
UFSM	UFSM	<input type="checkbox"/>

School-wide settings

Default purses

Point of sale

Office

Revaluer

Pre-order kiosk

Purses will be used in the following order

FSM  
UFSM  
Breakfast  
Supervisor  
Catering

Save Cancel

Breakfast

Edit Delete

Values

£0.00	£0.03	£0.06	£0.09	£0.12	£0.15	£0.18	£0.21	£0.24	£0.27	£0.30	£0.33	£0.36	£0.39	£0.42	£0.45	£0.48

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On the left you can view what current purses are available. The list will show you the **Name** of the purse, the **Type** of purse and if you **Can add value?** to that purse manually.

Name ▲	Type	Can add value?
Breakfast	Breakfast	<input type="checkbox"/>
Catering	Cashless	<input checked="" type="checkbox"/>
FSM	FSM Daily	<input type="checkbox"/>
Supervisor	Supervisor daily	<input type="checkbox"/>
UFSM	UFSM	<input type="checkbox"/>

In the **School-wide settings** section you can see what locations will use as their **Default purse** and also the order in which the sales will proceed. The system will use the top purse, if it contains a value to use, and work down the list.

School-wide settings

Default purses

Point of sale

Breakfast, Catering, FSM, Supervisor, UFSM ▼

Office

Breakfast, Catering, FSM, Supervisor, UFSM ▼

Revaluer

Catering ▼

Pre-order kiosk

Breakfast, Catering, FSM, Supervisor, UFSM ▼

Purses will be used in the following order

FSM

UFSM

Breakfast

Supervisor

Catering

↑



↓

Save

Cancel

Just below the school-wide settings you can view the selected purse's values for the current day.

**Breakfast**

Values

£0.00	£0.03	£0.06	£0.09	£0.12	£0.15	£0.18	£0.21	£0.24	£0.27	£0.30	£0.33	£0.36	£0.39	£0.42	£0.45	£0.48

## Adding a new Purse

1. Press the **New** button.





2. Enter a **Name** for the purse, select a purse **Type** or select whether you **Can add value to purse**.

**Configure purse** [X]

Name

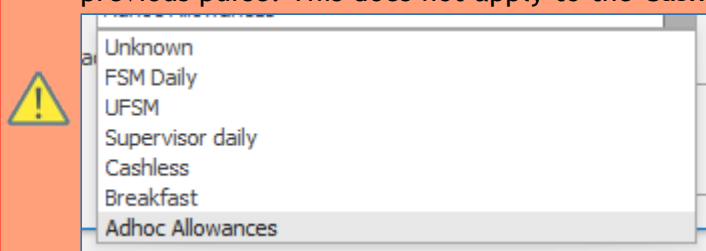
Type

Can add value to purse? ☐

 Save
  Cancel

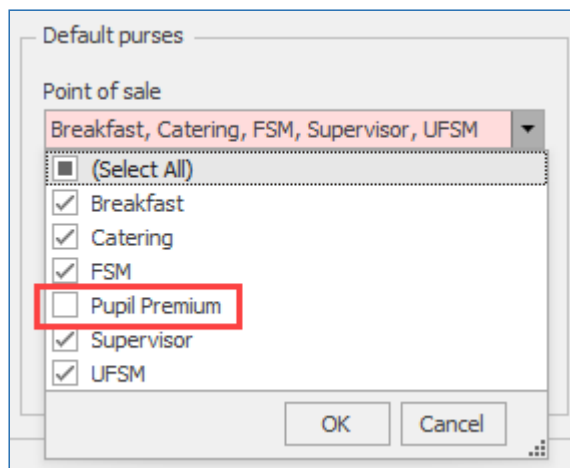
3. Press **Save**.

It is important to note that you cannot select a **Type** that has already been selected for a previous purse. This does not apply to the **Cashless** and **Adhoc Allowances** purse types.

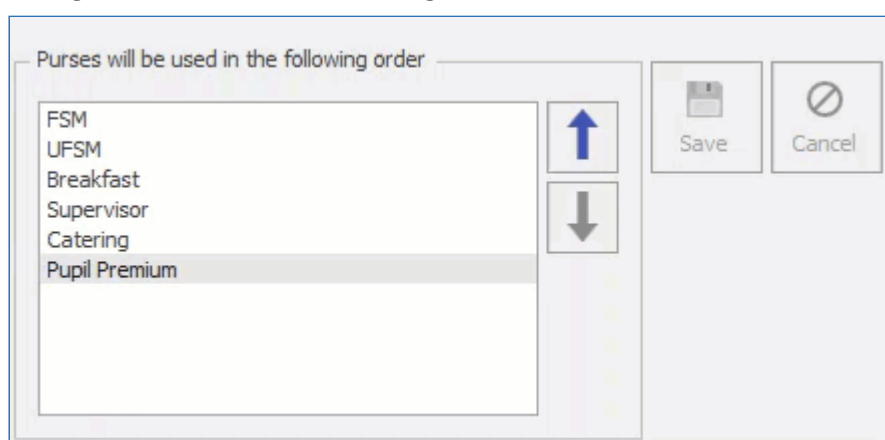


4. Once the purse has been added you can add it to a default purse in the school-wide settings section. Select a location drop-down and tick the box to add the new purse.





5. You can also move the purse **Up** or **Down** on the order of use list. Press **Save** to confirm changes. **Cancel** will undo changes.



## Editing a Purse

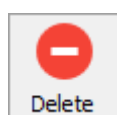
1. Select a purse from the list.
2. Press the **Edit** button.



3. You can change the name, select a different purse type or tick/untick whether the purse can have value added to it.

## Deleting a Purse

1. Select a purse from the list.
2. Press the **Delete** button.



3. Press **Yes** to confirm. This will remove the purse from the list and any school-wide settings.

## Allowance Carry-over

*Last modified: 20 March 2023*

Allowance carry-over can be enabled on FSM, UFSM, and Supervisor purses. When enabled, when the allowance allocation process is performed at midnight, the system will carry-over unused allowance in

accordance with the rules that have been configured. When carry-over is enabled for a purse, this will then show on the user's screen amongst the user's purses. The credit within carry-over purses can only be spent when the main purse is available. For example, if the FSM is configured to be allowed between 12:00 and 14:00, then the FSM carry-over is also only available during these times.

## Configuring Allowance Carry-over

**Configure purse**

Name:  Can add value to purse? ☐

Type:

Enable carry over for this purse ☒

Carry over rules apply to all schools ☒

**Carry over rules**

**Apply to users with labels**

☐ Boarders ☐ Pupil Premium  
☐ Hostel Pupil ☐ Sixth Form

Add label:

**Apply to users in years**

☐ Year 10 ☐ 7 ☐ 9 ☐ 10 ☐ Y12 ☐ 2 ☐ 5 ☐ Y6 ☐ Year 11 ☐ Year 9  
☐ 0 ☐ Y8 ☐ Y9 ☐ Y11 ☐ 12 ☐ 3 ☐ 6 ☐ Y105 ☐ Year 7  
☐ Y7 ☐ 8 ☐ Y10 ☐ 11 ☐ 1 ☐ 4 ☐ 99 ☐ 105 ☐ Year 8

**Apply to user types**

☐ Student  
☐ Staff

**Minimum spend**   
**Maximum value**   
**Maximum carry forward**

Clear carry over ☐ Weekly at end of

If no rules are selected then everyone who receives this allowance will have carry-over enabled.

**i** If you wish to restrict the users that have carry-over enabled you can do this by selecting the relevant checkboxes.



If **Carry-over rules apply to all schools** is unchecked, carry-over rules must be assigned to schools manually. This can be used to assign different rules to different schools if required.

## Carry-over rules

There are a number of rules that can be enabled to restrict the users who have their allowance carried over.

**Apply to users with labels** - Restricts the users receiving allowance carry-over on the selected purse to those tagged with the chosen user label(s).

Apply to users with labels

☒ Border  
☐ Sixth Form

Add label

**Apply to users in years** - Restricts the users receiving allowance carry-over on the selected purse to those in the chosen year group(s).

Apply to users in years

☐ 0 ☐ 9 ☐ 12  
☐ 7 ☐ 10  
☐ 8 ☐ 11

**Apply to user types** - Restricts the users receiving allowance carry-over on the selected purse to the chosen type(s).




Apply to user types

☐ Student ☐ Hospitality  
☒ Staff ☐ Admin  
☐ Catering ☐ test




## Carry-over limits

Limits can be applied to restrict both the amount the value that can be carried over and the instances in which carry-over is activated.




**Minimum spend** - The minimum spend needed to get any allowance carried over. If this value is set to 0 any remaining allowance is carried over.

 Minimum spend	£1.00
 Maximum value	£0.00
 Maximum carry forward	£5.00

**Maximum value** - This sets the maximum value that can be accrued from carry-over. If this value is set to 0 no maximum limit will be imposed.

 Minimum spend	£1.00
 Maximum value	£0.00
 Maximum carry forward	£5.00

**Maximum carry forward** - This sets the maximum value that can be carried over each day. If this value is set to 0 no maximum limit will be imposed.

 Minimum spend	£1.00
 Maximum value	£0.00
 Maximum carry forward	£5.00

## Automatic clearance

You may wish to have the system automatically clear all carry-over allowance each week. This can be automated by ticking **Clear carry-over** and selecting a day to clear the carry-over from the dropdown menu.

Clear carry over	<input checked="" type="checkbox"/>	Weekly at end of	Friday
			Sunday
			Monday
			Tuesday
			Wednesday
			Thursday
			Friday
			Saturday



If you wish to have the carry-over allowance cleared on a different schedule (e.g. monthly, termly, yearly) you will need to clear this manually. Information on how to do this can be found [here](#).

*Last modified: 20 March 2023*

## Ad hoc allowances



Previously known as “Gold cards”, an ad hoc allowance is where the school can allocate and deallocate allowances manually, hence the name ad hoc.

### Adding a new Ad hoc allowance Purse

1. Press the **New** button.



2. Enter the **Name** of the Ad hoc allowance.
3. Select **Ad hoc allowances** from the **Type** dropdown list.
4. Click **Save** to add the new purse.

**Configure purse**

Name:  Can add value to purse? ☒

Type:

Enable carry over for this purse ☐

Carry over rules

Apply to users with labels

☐ Border

☐ Pupil Premium

Add label

Apply to users in years

☐ 0 ☐ Y8 ☐ Y9 ☐ Y11 ☐ 12

☐ Y7 ☐ 8 ☐ Y10 ☐ 11

☐ 7 ☐ 9 ☐ 10 ☐ Y12

Apply to user types

☐ Student

☐ Staff

Minimum spend

Maximum value

Maximum carry forward

5. In the **School-wide settings**, add the new ad hoc allowance to the relevant **Default purses** dropdown lists.
6. In the **Purses will be used in the following order** section, move the new Ad hoc allowance up or down to the correct order to be used on the system.
7. Click **Save**.

**School-wide settings**

Default purses

Point of sale

Office

Revaluer

Pre-order kiosk

Purses will be used in the following order

Breakfast  
FSM  
UFSM  
Supervisor  
Catering  
Ad hoc

## CSV export

*Last modified: 20 March 2023*



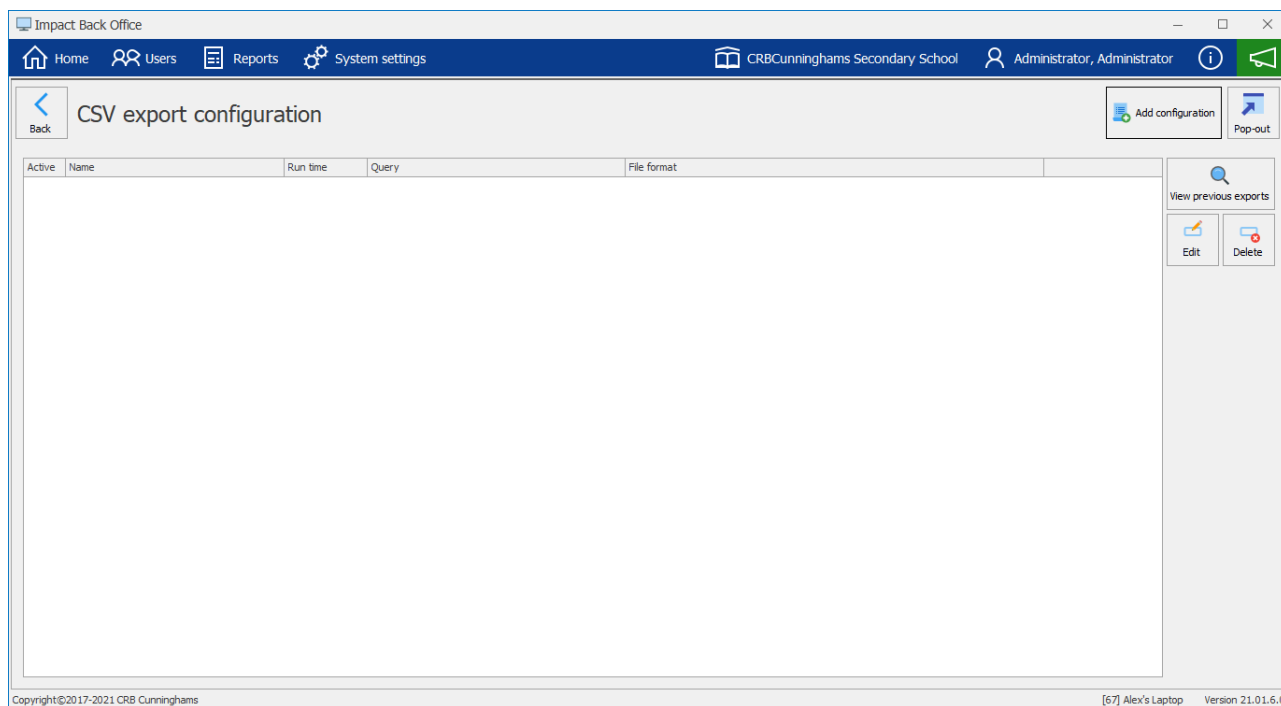
This function allows the creation of a CSV file via an SQL query and to schedule the output to happen automatically. If you want to perform an export of users and their balance to a CSV to be used by a third party, you will be able to.

## How to create an export

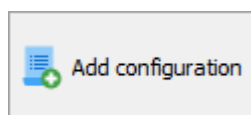
1. Click the **CSV export** button.



2. You will now see the CSV export configuration.



3. Click the **Add configuration** button.



4. Fill out the information for the configuration.

CSV export configuration

Active ☒

Get data from 31/03/2021

Name

Run time 00:00

Query Please select a query to use

Output folder C:\ProgramData\CRB Cunninghams\Impact\ExportOutput

File format

**This file format must include an extension (eg. .csv) but this can also use the wildcards**

**Wild card date formats sample**

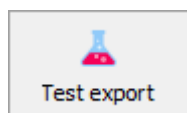
dd-MM-yyyy	31-01-2021
dd-M-yyyy	31-1-2021
MM-dd-yyyy	01-31-2021
yyyy-MM-dd	2021-01-31
ddMMMyyyy	31Jan2021
ddMMMMyyyy	31January2021

Test export

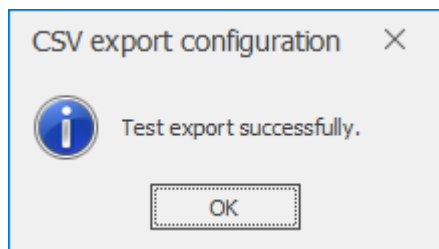
Save Cancel

Field	Description
Active	Set the export to be active or inactive by ticking or unticking the box.
Get data from	This is the date that the system will get transaction data from. This will default to the current date.
Name	Specify a useful name for the export so people understand this in the future.
Run time	The time the output will be performed. Ideally set for after the school canteen has finished serving for the day.
Query	Select a query or create a new query, click the ellipses. See the Query section for more information regarding this <a href="#">Click here</a> .
Output folder	The location where the files will be output. This folder <b>MUST</b> exist on the same machine as the Fusion Data Server.
File format	This is the name of the file. This allows for wild cards. This allows the file name to be dynamically set based on these wild cards. You want each file to have a unique name so that there are no clashes. So with a multi-school system, you may want to do something like 'Saffron-[schoolid]-[date:yyyymmdd].csv' which will output something like 'Saffron-12-20200920.csv'.

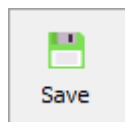
- Click the **Test export** button. This will not output the file to the output folder. You will be asked to select a directory for the file to be output.



- Click **OK** to confirm the test.



7. Click **Save** to add the CSV export.



## Editing a CSV export

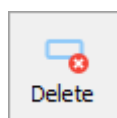
1. Select an export from the grid. This will highlight the record in blue.
2. Click the **Edit** button.



3. Edit the relevant fields.

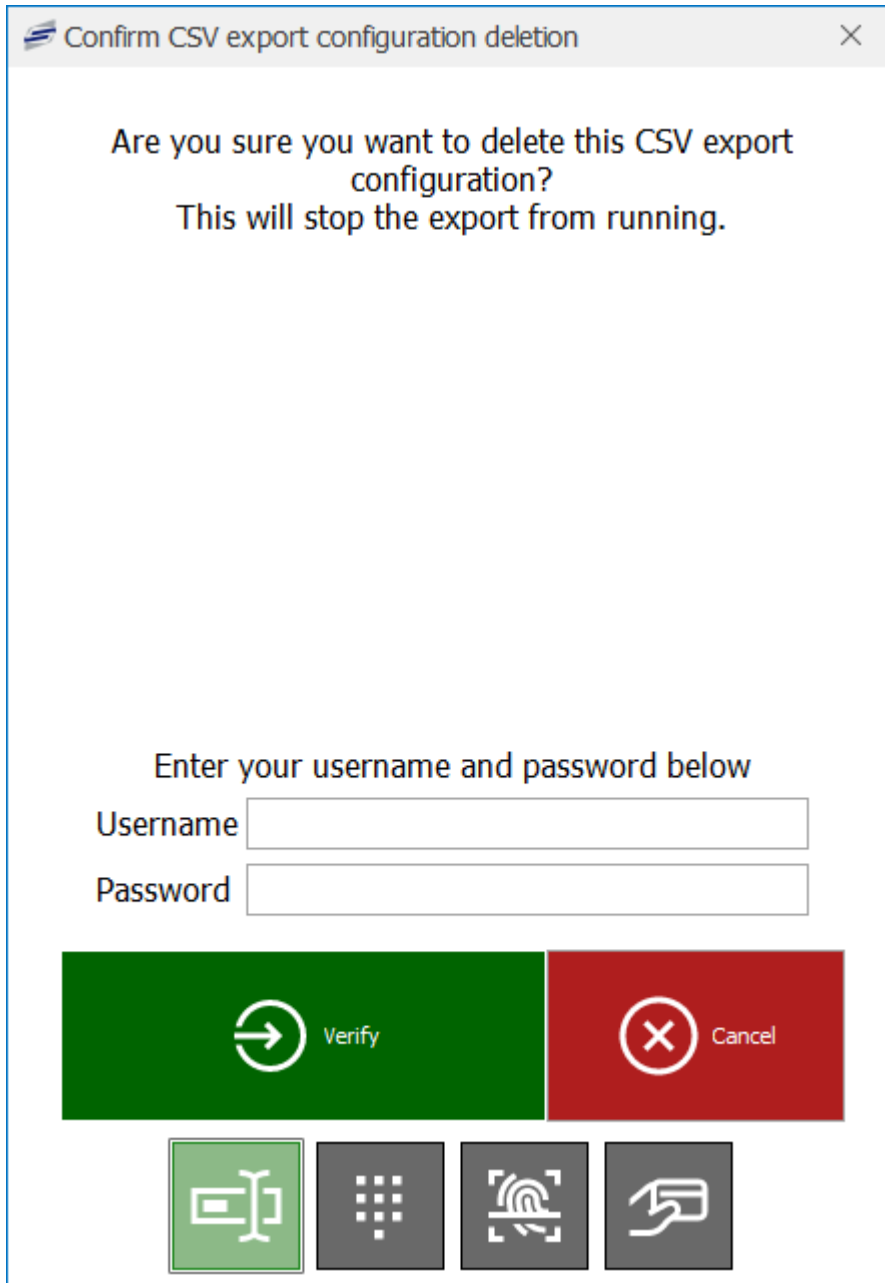
## Deleting a CSV export

1. Select an export from the grid. This will highlight the record in blue.
2. Click the **Delete** button.



3. Enter an admin username and password to verify the deletion of the CSV export record.







Confirm CSV export configuration deletion





Are you sure you want to delete this CSV export configuration?  
This will stop the export from running.

Enter your username and password below

Username

Password

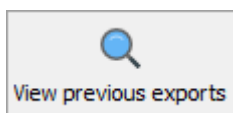
 Verify  Cancel

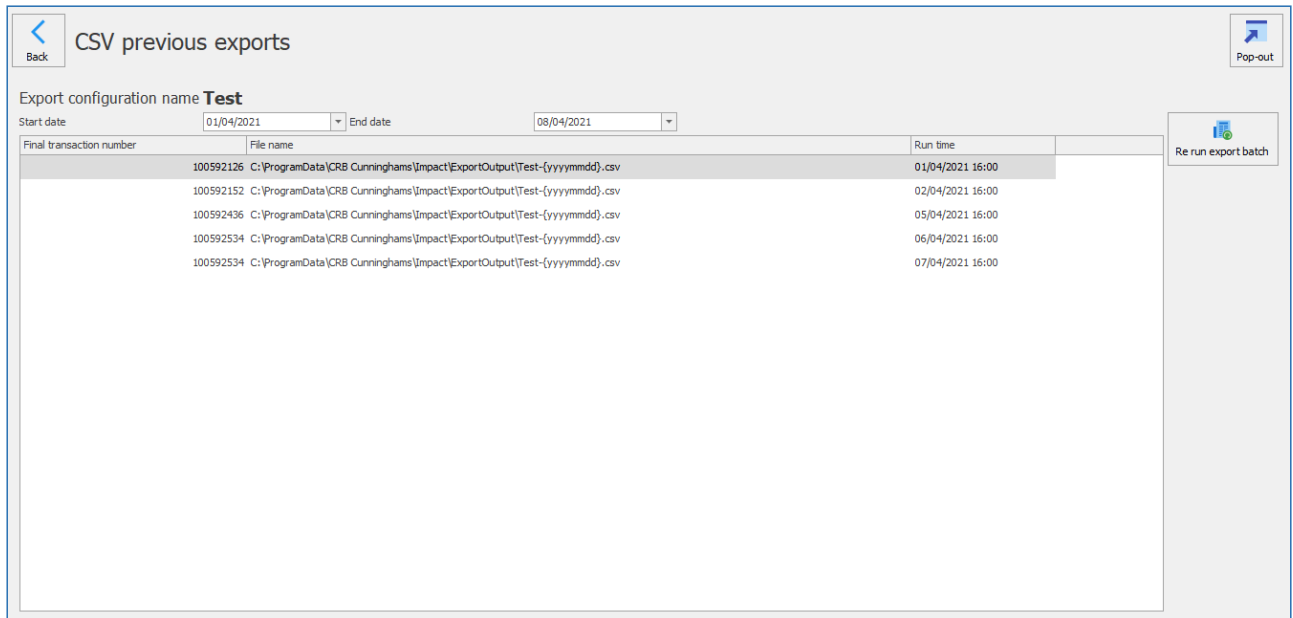
4. This will delete the record from the grid.

### Viewing previous exports

1. Select an export from the grid. This will highlight the record in blue.
2. Click the **View previous exports** button.



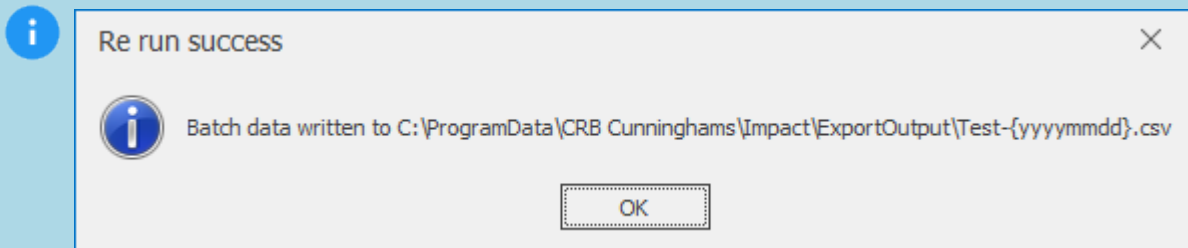
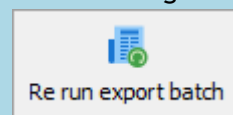
3. This will display a list of the selected records exports created from the first date to the present.  
You can amend the **Start date** and **End date**.



You can re-run an export batch by selecting a file from the grid and clicking the **Re run export**

**batch** button. This will recreate the output file.

Click **OK** to the Re Run success confirmation.



*Last modified: 20 March 2023*

## Creating and editing Queries

### CSV export queries

1. Click on the **ellipses** at the end of the **Query** field.

**CSV export configuration**

Active ☒

Name

Run time

Query

Output folder

File format

**This file format must include an extension (eg. .csv) but this can also use the wildcards**

**Wild card date formats sample**

dd-MM-yyyy	31-01-2021
dd-M-yyyy	31-1-2021
MM-dd-yyyy	01-31-2021
yyyy-MM-dd	2021-01-31
ddMMMyyyy	31Jan2021
ddMMMMyyyy	31January2021

**Test export**

**Save** **Cancel**

- This will display the **Select query** box. It will list any **built in** queries available for selection and will allow you to create new or edit any custom queries.

**Select query**

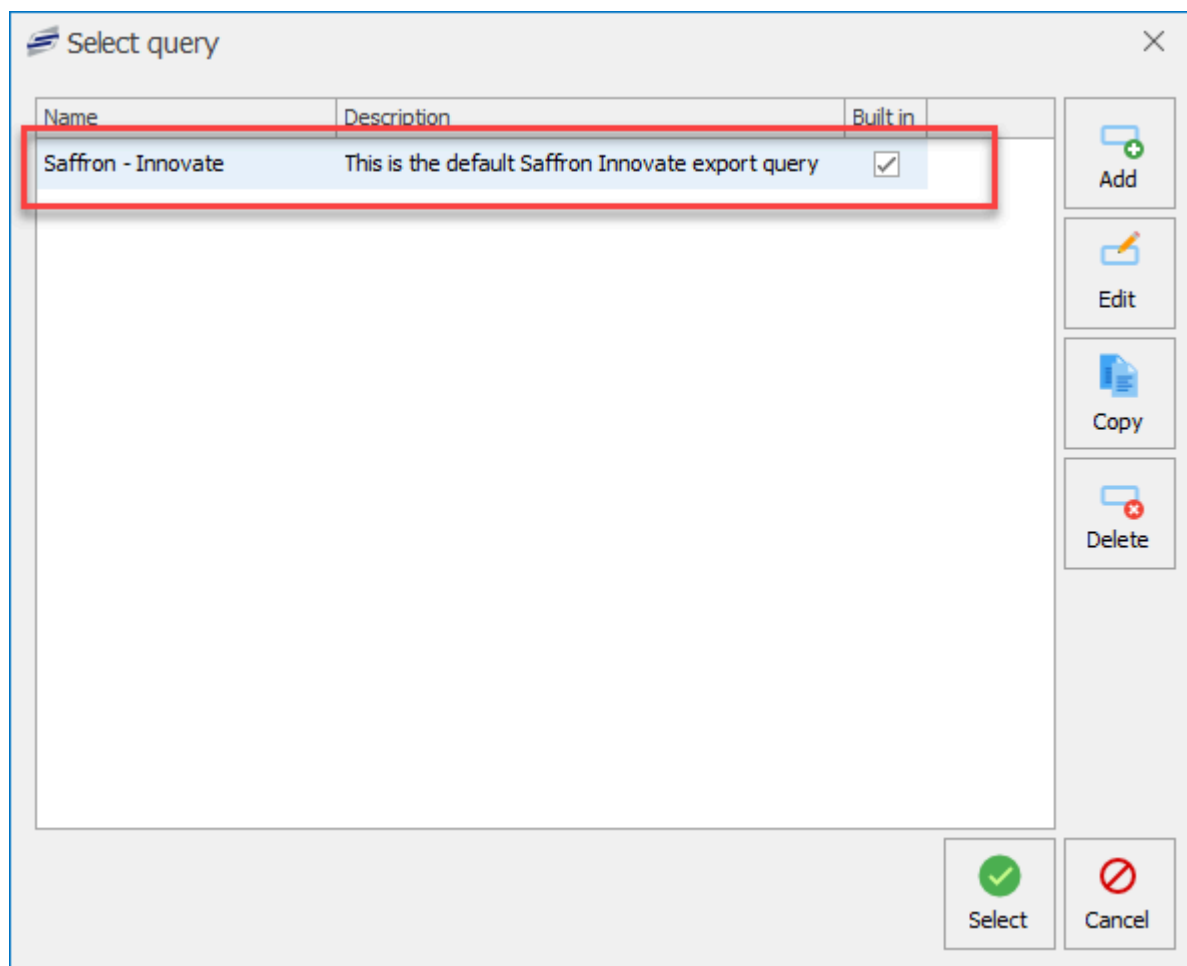
Name	Description	Built in
Saffron - Innovate	This is the default Saffron Innovate export query	<input checked="" type="checkbox"/>

**Add** **Edit** **Copy** **Delete**

**Select** **Cancel**

## Selecting a query

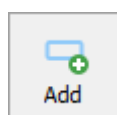
- Select a query from the grid. This will be highlighted in blue when selected.



2. Click the **Select** button. This will set the query as selected for the CSV export.

### Adding a new query

1. Click the **Add** button.



2. This will display the **CSV query**.

**CSV query**

Name




Description

Built in ☐

Query

**Available SQL parameters:**

- @SchoolID The school ID of the export configuration being run
- @StartTrans The starting transaction number for this export batch
- @EndTrans The ending transaction number for this export batch
- @RunTime The run date and time for this batch (used to get the EndTrans)

 Test  Save  Cancel

3. Enter a **Name** and a **Description** for the query.

Name

Description

4. In the **Query** section, enter a query, The query allows for the inputting of some parameters, these are listed at the bottom of the form for reference. You can test the query as you go by using the **Test** button. This will display what the query would output.
5. When you are happy with the query, press **Save** then select the newly created query from the list of queries and press Select to return to the CSV export configuration.

## Editing a query

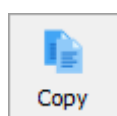
1. Select a query from the list and click the **Edit** button.



2. You can amend the **Name**, **Description**, and the **Query**.

## Copying a query

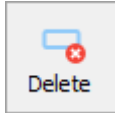
1. Select a query from the list and click the **Copy** button.



2. You can then amend the query as you see fit, click Test, and then Save.

## Deleting a query

1. Select a query from the list and click the **Delete** button.



You cannot delete built in queries.

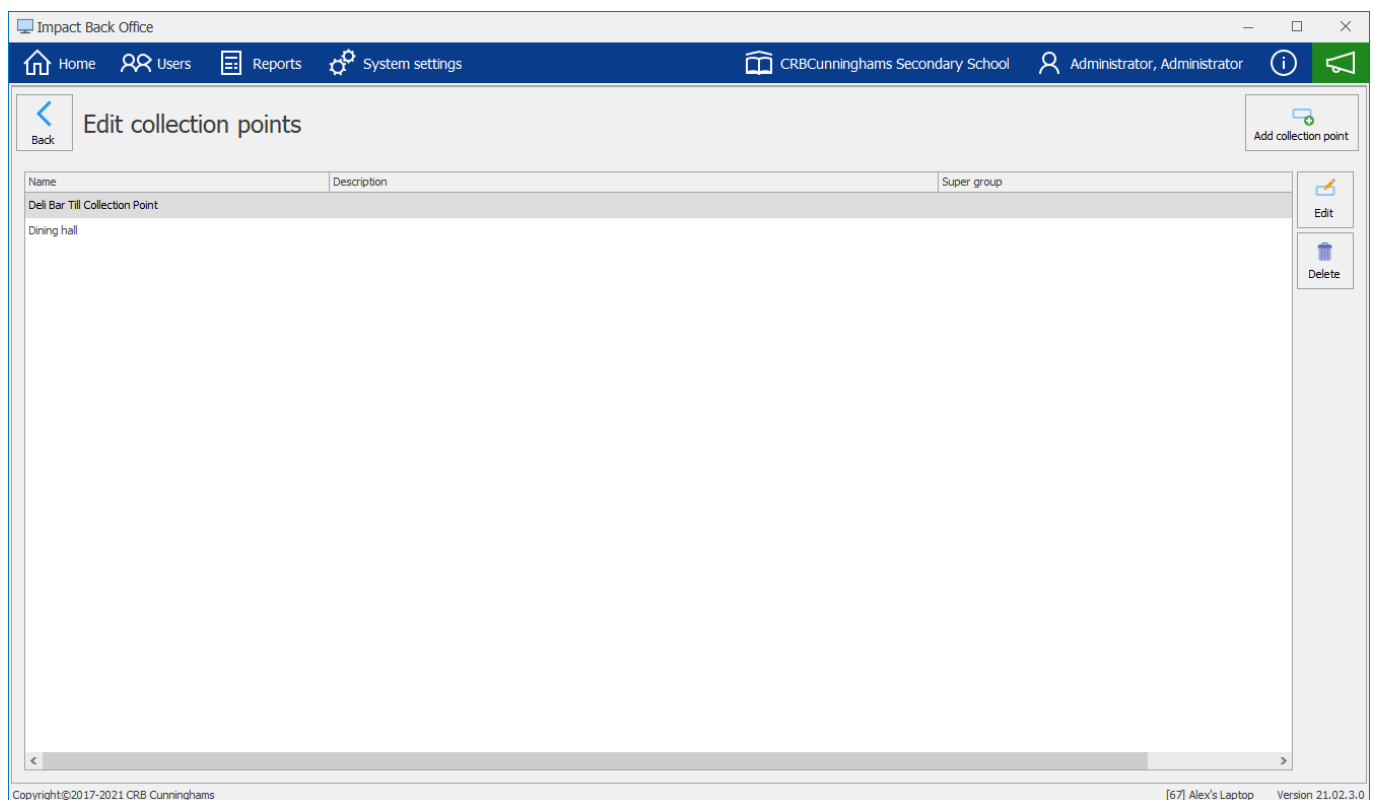
2. This will delete the query from the list.

*Last modified: 20 March 2023*

## Collection points



Collection points can be set up for selection by users making pre-orders. This will be an option during the pre-order transaction that the user will select to provide a location of where they can collect their order. A POS can also be selected as a Collection point. When the user opens their account on the POS location 30 minutes before the order time, it will display their pre-order and the operator can mark it as collected.



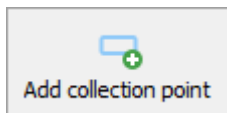
You can open the Collection points tile from the System Settings screen.



Collection points

## Adding a new Collection point

1. Click the **Add collection point** button.

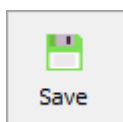


2. Enter a **Name** for the collection point, enter an optional **Description** to describe the collection point, and an optional **Super group**. Click the **Restrict collection points** box and select the groups you want to limit the collection point to if required. Make sure the **Active** box is ticked for it to become live.

A screenshot of the 'Adding collection point' dialog box. It has a title bar with a close button. The form contains:

- Name:** 'Tuck Shop' (highlighted in red)
- Active:** ☒
- Description:** 'Outside Tuck Shop located by Maths block'
- Super group:** 'Upper School' (dropdown menu)
- Restrict collection points:** ☒ (checked)
- Allow users to use this collection point with any of the following items:**
  - Years:** A list with checkboxes for Year 10, Y7, Y8, 9, Y10, Y11 (selected), and Y12.
  - User labels:** A list with checkboxes for Border and Pupil Premium.
  - User types:** A list with checkboxes for Student (selected) and Staff.
- Buttons:** 'Save' (green floppy disk icon) and 'Cancel' (red circle with slash icon) at the bottom right.

3. Click **Save** to add the new Collection point.



## Editing a Collection point

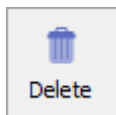
1. Select a Collection point from the grid.
2. Click the **Edit** button.



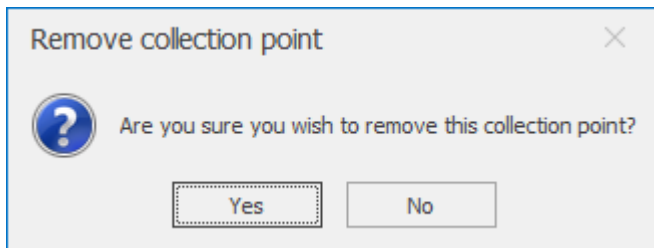
3. Amend configuration and click the **Save** button.

## Deleting a Collection point

1. Select a Collection point from the grid.
2. Click the **Delete** button.



- Click **Yes** to remove the collection point.



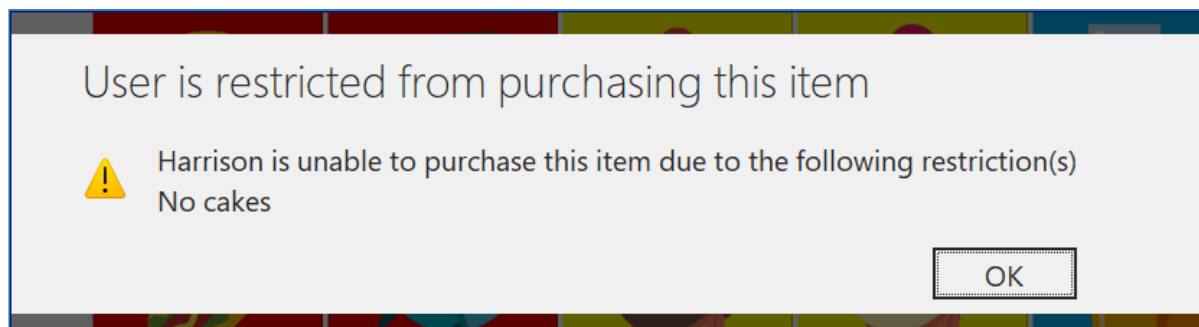
- This will remove the collection point from the grid.

*Last modified: 20 March 2023*

## Restrictions

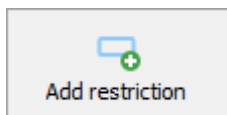


Restrictions can be used to stop users from purchasing items that you do not want them to purchase. This is similar to when a user has an allergy, however, this can be used to restrict the sale of items for other reasons. For example, if you have a user whose parents no longer wish them to buy cakes, you can create and apply a 'No cakes' restriction to the user. The system will then not allow that user to purchase any products that have also had this restriction applied.

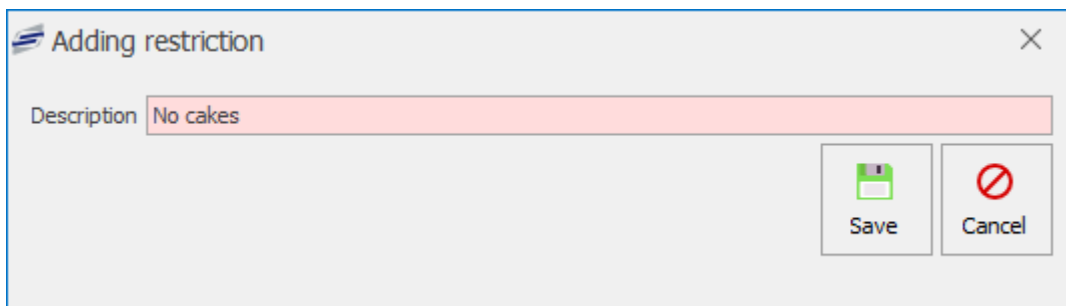


## Creating a new restriction

- Press the **Add restriction** button.



- Enter a name/description for the restriction.



- Press **Save**.



## Adding a user to a restriction

Now that we have created the restriction, we can mark our users against that restriction.



For more information, see the Allergens, diets & restrictions page within the Users section of this manual.

1. Go to the Users screen.
2. Find and select the required user.
3. Press **Edit user**.
4. Go to the 'Allergens, diets & restrictions' tab and tick the checkbox next to the restriction you wish to set.
5. Press **Save & close**.

## Adding a product to a restriction



For more information, see the PLU restrictions section of this manual.

1. From the home screen, select **Products and pricing**.
2. Press **PLUs**.
3. Find and select the PLU from the list and press **Edit PLU**.
4. Navigate to the 'Restrictions' tab and select the required restriction(s) from the list.
5. Press **Save & close**.

*Last modified: 20 March 2023*

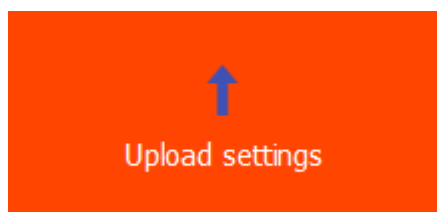
## Upload settings



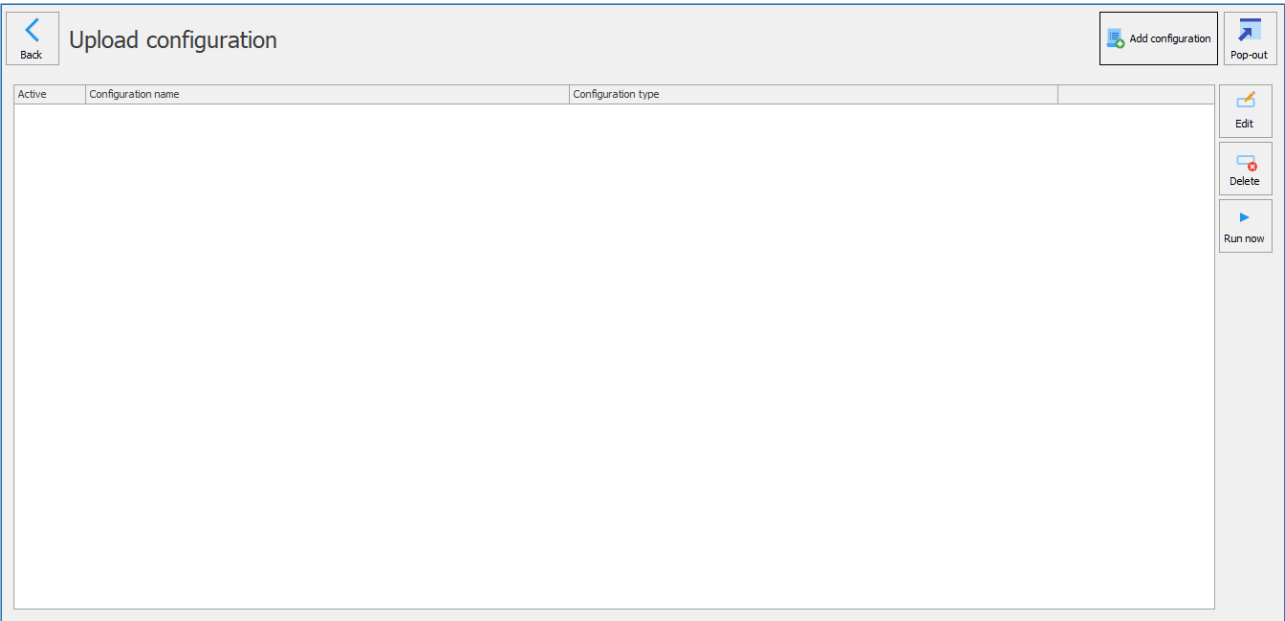
This function relates to any output files created by the CSV export function. These files are only useful if they are accessible to those using systems that need them. Using the SFTP (Secure File Transfer Protocol) we can send information to a destination.

### How to create a new Upload

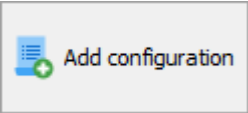
1. Click on the **Upload settings** tile from within the System settings.



2. This will display the Upload configuration overview.



3. Click the **Add configuration** button.



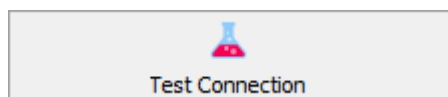
4. Enter the details required.

The screenshot shows a 'Upload Configuration' dialog box. It has a title bar with a close button. Inside, there's a checkbox for 'Active' which is checked. Below it are three input fields: 'Configuration name' (containing 'SFTP Upload'), 'Local folder' (containing 'C:\ProgramData\CRB Cunninghams\Impact\ExportOutput'), and 'Configuration type' (a dropdown menu set to 'SFTP'). Under the 'SFTP settings' section, there are fields for 'Host', 'Username', and 'Password'. To the right of these is a 'Port' field containing '22' and a 'Test Connection' button. Below these are two more fields: 'SSH fingerprint' and 'Remote directory', each with an information icon to its left. At the bottom right, there are 'Save' and 'Cancel' buttons.

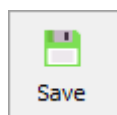
Field	Description
Active	The status of the upload. Active or inactive.
Configuration name	Enter a name for the upload configuration.

<b>Local folder</b>	Select a location of the files to be uploaded.
<b>Configuration type</b>	Select the type of upload. SFTP or a CMD file.
<b>Host</b>	Set the IP address or DNS name of the host server the files will be uploaded to.
<b>Port</b>	Set the port. The default port is set to 22.
<b>Username</b>	Enter the username for the SFTP server.
<b>Password</b>	Set the password for the username.
<b>SSH fingerprint</b>	Enter the unique SSH fingerprint for the SFTP server.
<b>Remote directory</b>	Leaving this blank will drop the files in the root of the server. You may be asked to put these in a specific location. If so, enter this here.

- Click the **Test Connection** to establish the link is working.



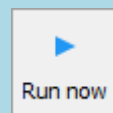
- Click **Save**.



Once configured, the SFTP upload will automatically be processed every 5 minutes. If you want



to process immediately, you can click the **Run now** button.



## Editing an Upload

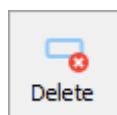
- Select a record from the grid.
- Click the **Edit** button.



- Amend settings accordingly.

## Deleting an Upload

- Select a record from the grid.
- Click the **Delete** button.




- This will delete the record.

*Last modified: 20 March 2023*

## Internet payments



 The internet payments section of Fusion allows users to connect a payment provider to the Fusion system, providing integration between online systems and the Fusion cashless system. This allows parents to add funds and make payments, and in some instances choose school meals, online.

## Navigating internet payments

A brief insight into the main features and information found within the internet payments section of Fusion is given below.

Back

Manage internet payments

Proxy settings

Add provider

Settings

Run

Pin

Pop-out

Payments

Users

Transactions

Logs

Communications

Selected provider

Payimpact

Show inactive?

Start date

02/01/2020

End date

11/04/2022

Status

All

Show hidden?

Internet ID

Name

Unhide payment

Date / Time	Internet user ID	Name	Amount	Year	Class	Payee	Status	When applied	Account name	Internet ID	Comment	Transaction ID	Hidden
-------------	------------------	------	--------	------	-------	-------	--------	--------------	--------------	-------------	---------	----------------	--------

0 records found, last updated 11/04/2022 10:41:15

## Payments

The **Payments** tab is used to view internet payments made by users.

To view payments:

1. Navigate to the **Payments** tab.
2. Select a **Start date** and an **End date** from the drop-down menus for the period you wish to view payments for.
3. Enter any other relevant filters.

Payments Users Transactions Logs Communications  
 Start date 12/04/2022 End date 12/04/2022 Status All ☐ Show hidden?  
 Internet ID Name Bateson

4. A filtered list of payments will be displayed below.

Payments													Users													Transactions													Logs													Communications												
Start date		12/04/2022		End date		12/04/2022		Status		All		<input type="checkbox"/> Show hidden?																																																				
Internet ID				Name		Bateson																																																										
Date / Time		Internet user ID		Name		Amount		Year		Class		Payee		Status		When applied		Account name		Internet ID		Comment		Transaction ID		Hidden																																						
12/04/2022 15:35:32		48173		Cara Bateson		£10.00		11		New		Steven Ashton		Unfiled						3496				0		<input type="checkbox"/>																																						

## Users

The **Users** tab is used to view and manage users internet payment account status and to ensure their balance is matched between Fusion and their internet payment provider.

To view users:

1. Navigate to the **Users** tab. All users with an internet payments account will be displayed by default.
2. If required, select any relevant filters from the drop-down menus any/or enter a name in the text box.

Payments	<b>Users</b>	Transactions	Logs	Communications
Name <input type="text"/>		Status <b>Unmatched</b>	Match warning level <b>All</b>	

3. A list of relevant users will be displayed below.

Payments Users Transactions Logs Communications										
Name <input type="text"/>		Status <b>Unmatched</b>		Match warning level <b>All</b>						
Surname	Forename(s)	DOB	Year	Class	Is active	Status	Fusion user name			
Bateson	Cara	07/02/2004	11	New	✓	Unmatched				
Christie	Janie	18/10/2007	8	New	✓	Unmatched				
Daly	Helena	13/05/2004	11	New	✓	Unmatched				
Doyle	Conor	03/03/2008	7	New	✓	Unmatched				
Hughes	Leo	01/02/2007	8	New	✓	Unmatched				
Kelly	Oscar	21/11/2008	7	New	✓	Unmatched				
Madden	Erin	29/10/2004	11	New	✓	Unmatched				
McLaughlin	Ben	21/07/2008	7	New	✓	Unmatched				
Slater	Lucy	01/03/2008	7	New	✓	Unmatched				
Watt	Patrick	10/07/2004	11	New	✓	Unmatched				

Further information on the management of users' internet payments can be found [here](#).

## Transactions

The **Transactions** tab is used to view any internet transactions that have occurred against a users account.

To view transactions:

1. Navigate to the **Transactions** tab.
2. Select a **Start date** and an **End date** from the drop-down menus for the period you wish to view transactions for.
3. Enter any other relevant filters.

Payments	Users	<b>Transactions</b>	Logs	Communications
Name <input type="text"/>		Start date 11/04/2022	End date 11/04/2022	
Status <b>All</b>	Transaction no. <input type="text"/>			

4. A list of transactions will be displayed.

Payments   Users   Transactions   Logs   Communications														
Name <input type="text"/>		<input type="button" value="⊕"/>		Start date	<input type="text" value="12/04/2022"/>	<input type="button" value="▼"/>	End date	<input type="text" value="12/04/2022"/>	<input type="button" value="▼"/>					
Status <input type="text" value="All"/>		<input type="button" value="⊕"/>		Transaction no.		<input type="text"/>		<input type="button" value="⊕"/>						
Internet trans ID	Trans ID	Trans det ID	Trans type	User name	Internet user ID	PLU	Qty	Item Paid	Item free	Total paid	Total free	Balance	Trans applied	Uploaded
100000269	100631226	0	PC Revaluer	Allen, Aimee	48168			0	£0.00	£0.00	£0.00	£0.00	£0.00	12/04/2022 15:23
													<input type="checkbox"/>	

## Logs

The **Logs** tab provides details of what has occurred when the **Run** function has been used. More information on the **Run** function can be found below.

To view logs:

1. Navigate to the **Logs** tab.
2. Select a **Start date** and an **End date** from the drop-down menus for the period you wish to view logs for.
3. Enter any other relevant filters.

Payments	Users	Transactions	<b>Logs</b>	Communications
Message <input type="text"/>				
Start date		11/04/2022	End date	11/04/2022
			Log levels	Critical, Error, Warning, Inform...

4. All relevant logs will be displayed below.

Payments

Users

Transactions

Logs

Communications

Message

11/04/2022

End date

11/04/2022

Log levels

Critical, Error, Warning, Inform...

Clear logs

Date / Time	Message	Log level
11/04/2022 10:31:59	Begin processing PayImpact	Information
11/04/2022 10:32:01	Beginning changeset.	Information
11/04/2022 10:32:02	Retrieving updated users from PayImpact.	Information
11/04/2022 10:32:03	Using last date : 11/04/2022 08:49:09	Verbose
11/04/2022 10:32:04	1 Users retrieved.	Verbose
11/04/2022 10:32:05	Updating Fusion.	Verbose
11/04/2022 10:32:06	Attempting to match accounts using MES ID.	Verbose
11/04/2022 10:32:07	Match result OK, newly linked accounts count 0	Verbose
11/04/2022 10:32:08	Sending matched users' Impact User IDs.	Information
11/04/2022 10:32:12	Retrieving Payment Types from PayImpact.	Information
11/04/2022 10:32:14	11 types found.	Verbose
11/04/2022 10:32:15	Retrieving payments from PayImpact.	Information
11/04/2022 10:32:16	Using Last Payment 0	Verbose
11/04/2022 10:32:18	0 payments received.	Verbose
11/04/2022 10:32:19	Acknowledging downloaded payments.	Information
11/04/2022 10:32:20	Attempting to file payments.	Information
11/04/2022 10:32:21	0 payments filed.	Verbose
11/04/2022 10:32:22	Acknowledging applied payments.	Information
11/04/2022 10:32:23	Finding new transactions to send to PayImpact.	Information
11/04/2022 10:32:24	Uploading transactions to PayImpact.	Information
11/04/2022 10:32:25	0 transactions to upload.	Verbose
11/04/2022 10:32:25	End processing PayImpact.	Information
11/04/2022 10:32:26	Updating last run entry.	Information

## Communications

The **Communications** tab provides details about the operations carried out by Fusion when dealing with internet payments.

To view communications:

1. Navigate to the **Communications** tab.
2. Select a **Start date** and an **End date** from the drop-down menus for the period you wish to view communications for.

Payments	Users	Transactions	Logs	<b>Communications</b>
Start date		04/02/2021	End date	

### 3. All communications for the selected period will be displayed below.

Payments Users Transactions Logs Communications					
Start date 04/02/2021		End date 12/04/2022		Inspect	
Logged Date / Time	Method	Operation	Request Content	Response Content	Response Code
09/04/2022 10:30:59	Accounts/GetModified	GET	?Date=1900-01-01T00:00:00.000	[{"SchoolID":234567,"AccountID":48271,"MISID":2000115,"Sur...	200
09/04/2022 10:31:06	PaymentTypes	GET	?fundID=1568&PaymentID=0	[{"PaymentTypeID":7,"Description":"Adjustment"}, {"PaymentTyp...	200
09/04/2022 10:31:10	Payments/GetPaymentsForFund	GET	?fundID=1568&PaymentID=0	[{"PaymentTypeID":7,"Description":"Adjustment"}, {"PaymentTyp...	200
09/04/2022 11:05:52	Accounts/GetModified	GET	?Date=2021-11-30T14:20:00.000	[{"SchoolID":234567,"AccountID":48271,"MISID":2000115,"Sur...	200
09/04/2022 11:05:58	PaymentTypes	GET	?fundID=1568&PaymentID=0	[{"PaymentTypeID":7,"Description":"Adjustment"}, {"PaymentTyp...	200
09/04/2022 11:06:02	Payments/GetPaymentsForFund	GET	?fundID=1568&PaymentID=0	[{"PaymentTypeID":7,"Description":"Adjustment"}, {"PaymentTyp...	200
11/04/2022 10:32:04	Accounts/GetModified	GET	?Date=2022-04-11T08:49:09.323	[{"SchoolID":234567,"AccountID":48173,"MISID":2000017,"Sur...	200
11/04/2022 10:32:10	MatchAccountInternalCodeUploadMatchedAccounts	POST	[{"AccountID":48166,"ImpactUserID":232891}]	[{"PaymentTypeID":7,"Description":"Adjustment"}, {"PaymentTyp...	200
11/04/2022 10:32:12	PaymentTypes	GET	?fundID=1568&PaymentID=0	[{"PaymentTypeID":7,"Description":"Adjustment"}, {"PaymentTyp...	200
11/04/2022 10:32:17	Payments/GetPaymentsForFund	GET	?fundID=1568&PaymentID=0	[{"PaymentTypeID":7,"Description":"Adjustment"}, {"PaymentTyp...	200
11/04/2022 11:32:59	Accounts/GetModified	GET	?Date=2022-04-11T10:59:04.493	[{"SchoolID":234567,"AccountID":48173,"MISID":2000017,"Sur...	200
11/04/2022 11:33:04	PaymentTypes	GET	?fundID=1568&PaymentID=0	[{"PaymentTypeID":7,"Description":"Adjustment"}, {"PaymentTyp...	200
11/04/2022 11:33:08	Payments/GetPaymentsForFund	GET	?fundID=1568&PaymentID=0	[{"PaymentTypeID":7,"Description":"Adjustment"}, {"PaymentTyp...	200



Further details on a communication can be viewed by selecting a communication and clicking the **Inspect** button.

## Internet payments functions

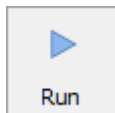
There are a number of functions available in the internet payments section; **Run**, **Unmatched users**, **Linking accounts**, and **Balance Sync**. The first two functions are explained below, and information on the latter two can be found [here](#).

### Run

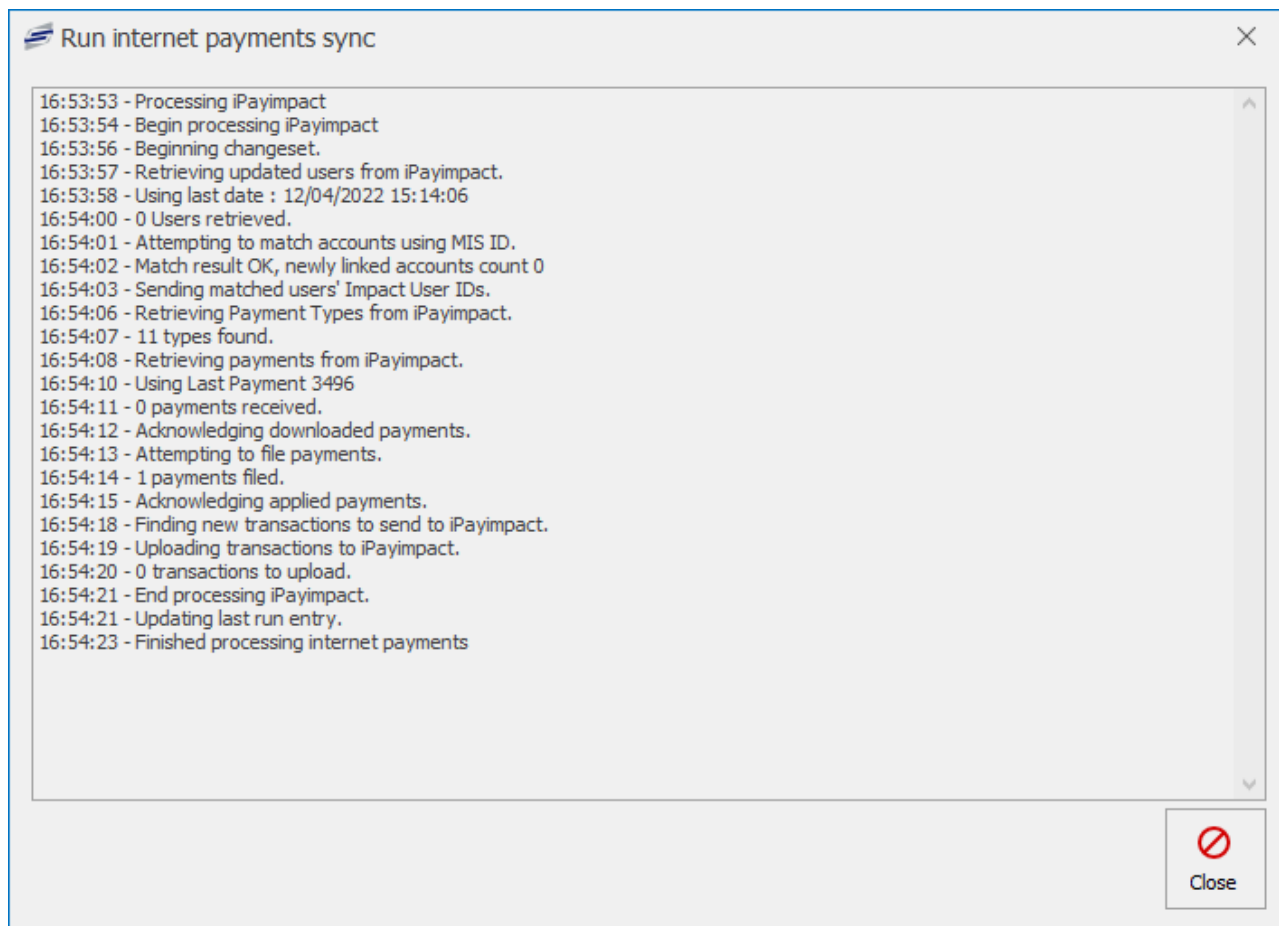
The **Run** function is key to how internet payments work within Fusion. Performing a **Run** will sync up Fusion and the internet payment provider, with users and payments being retrieved from the internet payment provider and transactions being sent to the provider from Fusion.

To run an internet payments sync:

1. Press the **Run** button in the top right hand side of the screen.



2. A screen will appear showing the details and progress of the internet payments sync. Once "finished processing internet payments" is shown the run is complete and you can press **Close**.



## Unmatched users

The **Unmatched users** function generates a report detailing users within Fusion that are not matched with an internet payments account.

To generate an unmatched users report:

1. Press the **Unmatched users** button in the top right hand side of the screen.



2. Select the internet provider and user types you wish to generate a report for.
3. Press **OK**



Select criteria for your report

Internet Payments

Provider: iPayimpact

User

User type: All Types

OK Cancel

4. A report will be generated for your selected criteria. This report can be printed, exported, or emailed from this screen.

Unmatched Users

MIS ID	Payment ID	Surname	Forename	Known as	DOB	User Type	Year	Class
EF60A0F-2-FDA2-4085-BC6C-4085-A39B73678F	EF60A0F2-FDA2-2-FDA2-4085-BC6C-4085-A39B73678F	Alcock	Stuart Robert	Stu	09/09/2002	Staff	0	None
237F894-A288-44C9-A877-44C9-C3D6C78E579F	237F894-A288-A-A288-44C9-A877-44C9-C3D6C78E579F	Allan	Jennie	Jennie	04/03/1967	Staff	0	None
5616C23-6-B7A0-4804-4804-37ADF1FCA134	5616C23-6-B7A0-4804-4804-37ADF1FCA134	Allan	Lara	Lara	02/12/1993	Staff	0	None
AC4CDD-78-E570-43E9-05134C44FDD4	AC4CDD-78-E570-78-E570-43E9-05134C44FDD4	Anderson	Nicole	Nicole	28/08/1993	Staff	0	None
TEST01-212FE70-E-260D-4FAA-FF5F30D09C88	TEST01-212FE70-E-260D-4FAA-FF5F30D09C88	Ashley	Alex	Alex	04/04/1987	Staff	0	None
46FB08A-D-2C9C-458B-9094-C5314E4A8169	46FB08A-D-2C9C-D-2C9C-458B-9094-C5314E4A8169	Baird	Erin	Erin	13/07/2001	Staff	0	None
D849A15-7-CAB2-4EBD-AC19-ED2260FD963C	D849A15-7-CAB2-7-CAB2-4EBD-AC19-ED2260FD963C	Banks	Anna	Anna	17/03/2001	Staff	0	None
82AAB43-C-DAC0-48E4-A3E5-	82AAB43-C-DAC0-C-DAC0-48E4-A3E5-	Barr	Andrew	Andrew	01/01/2010	Staff	0	None

Last modified: 20 March 2023

## Managing users within internet payments

The following section covers the management of users with the internet payments section. This includes how to link a users internet payment accounts with their Fusion account, and how to sync their balances across accounts.

### Linking an account

If a user with an MIS ID is present in both their Fusion and internet payments account the system will automatically link the two accounts when the payment provider is set up and the **Run** function is performed. However, if this is not the case, the users **Status** will be unmatched, and their accounts must be linked manually.

Payments Users Transactions Logs Communications								
Name		Status		Match warning level				
Surname	Forename(s)	DOB	Year	Class	Is active	Status	Fusion user name	
Allen	Aimee	20/05/2008	7	New	✓		Allen, Aimee	
Bateson	Cara	07/02/2004	11	New	✓	Unmatched		
Christie	Janie	18/10/2007	8	New	✓	Unmatched		

To manually link an account:

1. Select a user from the user list by left clicking.
2. Press the **Link account** button on the right hand side of the screen.

Surname	Forename(s)	DOB	Year	Class	Is active	Status	Fusion user name
Allen	Aimee	20/05/2008	7	New	✓		Allen, Aimee
Bateson	Cara	07/02/2004	11	New	✓	Unmatched	
Christie	Jamie	18/10/2007	8	New	✓	Unmatched	
Daly	Helena	13/05/2004	11	New	✓	Unmatched	
Doyle	Conor	03/03/2008	7	New	✓	Unmatched	
Hughes	Leo	01/02/2007	8	New	✓	Unmatched	
Kelly	Oscar	21/11/2008	7	New	✓	Unmatched	
Madden	Brin	29/10/2004	11	New	✓	Unmatched	
McLaughlin	Ben	21/07/2008	7	New	✓	Unmatched	
Slater	Lucy	01/03/2008	7	New	✓	Unmatched	
Watt	Patrick	10/07/2004	11	New	✓	Unmatched	

3. The user selection screen will be displayed. Use the filters to find the user you wish to link. In this example we previously selected "Cara Bateson", so type "Bateson" in the **Name** filter text box.

User type	Person ID	Surname	Forename(s)	Known as	DOB	Year / Class	Start date	Leaving date	Leaver	Future	FSM	Supervisor
Student		Bateson	Cara	Cara		11, C1	09/04/2022					

4. Left click the user account you wish to link, and press the **Select** button in the bottom right hand side of the screen.



5. A prompt will ask for confirmation. Press **Yes** to link the accounts.

6. The Fusion account and internet payment accounts will now be linked.



Multiple users can be linked at once by using ctrl-left click or shift-left click during both instances of user selection.

## User warnings

A user may have a yellow warning sign next to their name in the users section of internet payments. In the example below the system has identified a possible mismatch due to the class names not matching between Fusion and the internet payments provider.

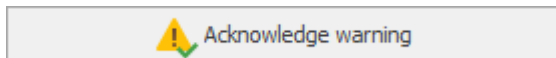
Surname	Forename(s)	DOB	Year	Class	Is active	Status	Fusion user name
Allen	Aimee	20/05/2008	7	New	✓		Allen, Aimee
	Cara	07/02/2004	11	New	✓	Unmatched	
	Jamie	18/10/2007	8	New	✓	Unmatched	
	Helena	13/05/2004	11	New	✓	Unmatched	

A warning may not be relevant, in which case the **Acknowledge Warning** function can be used to

remove the warning sign.

To use **Acknowledge Warning**:

1. Select the user(s) you wish to acknowledge a warning for.
2. Press the **Acknowledge Warning** on the right hand side of the screen.



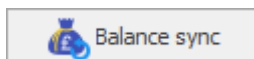
3. The warning sign will no longer be present against that user's name.

## Balance sync

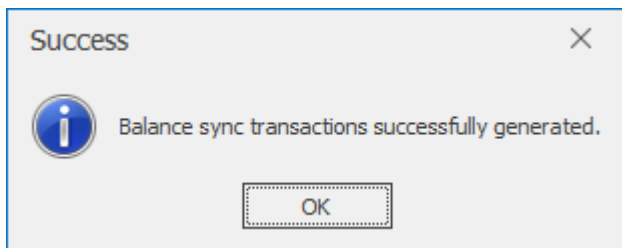
A user may have a discrepancy between their balance on Fusion and their balance on their internet payments account due to a recent payment or transaction. To make sure the accounts have the same value a **Balance sync** can be performed.

To use **Balance sync**:

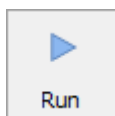
1. Select the user(s) whose balances you wish to sync up.
2. Press the **Balance sync** button on the right hand side of the screen.



3. Press **OK** on the pop up that appears.



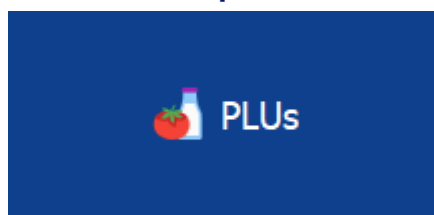
4. Now, use the **Run** function.



5. The internet payments account balance will now match with that of Fusion.

## PLUs and prices

*Last modified: 20 March 2023*



The PLUs screen is where all of the management of your products and pricing is performed. It is accessed by pressing the 'PLUs' tile from your user dashboard. This screen will look slightly different depending on the number of active schools that are present in the system, and how many price bands you have configured.



**FUN FACT:** In case you are wondering (many do), PLU is a retail acronym that stands for Price Look-Up.

## Single school system

On single-school systems, the PLU screen will look like the below screenshot.

Impact Back Office - DEVELOPMENT BUILD - INTERNAL USE ONLY

Home Users Reports System settings

PLUs

Price list: Spring/Summer 2023 - (16/03/2023)

Find: Product groups: Breakfast, Condiments & Other, Desserts, Drinks, Extras & Fillings, Grab & Go, Home Baking & Sundries, Main meals, PromotionItems, Sandwiches/Baguettes/Wraps, Test, Vending

PLU number	Name	Group	Students Price	Staff Price	Community Price	Cost price
100154	Apple Juice	Drinks	£0.60	£0.72	£0.72	£0.00
100216	Appletizer	Drinks	£1.00	£1.20	£1.20	£0.00
100098	Arrabbiata Pasta Pot	Grab & Go	£1.50	£1.80	£1.80	£0.00
100256	Bacon	Breakfast	£0.50	£0.60	£0.60	£0.00
100314	Bacon Sandwich	Breakfast	£1.20	£1.44	£1.44	£0.00
100009	Bagel with Cheese	Breakfast	£1.20	£1.44	£1.44	£0.00
100321	Baguette - Brown Bread	Extras & Fillings	£0.30	£0.36	£0.36	£0.00
100320	Baguette - White Bread	Extras & Fillings	£0.30	£0.36	£0.36	£0.00
-12	Baguette meal deal	PromotionItems	£2.20	£2.64	£2.64	£0.00
100263	Baked Beans	Breakfast	£0.30	£0.36	£0.36	£0.00
100134	Baked Potato	Grab & Go	£1.50	£1.80	£1.80	£0.00
100128	Baked Potato with Ratatouille	Grab & Go	£1.80	£2.16	£2.16	£0.00
100319	Banana	Home Baking & Sundries	£0.60	£0.72	£0.72	£0.00
100277	Banana Split	Desserts	£1.00	£1.20	£1.20	£0.00
100139	BBQ Chicken Baguette	Sandwiches/Baguettes/Wraps	£1.80	£2.16	£2.16	£0.00
100097	BBQ Chicken Flatbread	Main meals	£2.00	£2.40	£2.40	£0.00
100138	BBQ Chicken Sandwich	Sandwiches/Baguettes/Wraps	£1.50	£1.80	£1.80	£0.00
100245	BBQ Dip	Condiments & Other	£0.20	£0.24	£0.24	£0.00
100311	BBQ Sauce	Condiments & Other	£0.10	£0.12	£0.12	£0.00
100248	Beans	Extras & Fillings	£0.50	£0.60	£0.60	£0.00
100315	Beans on Toast	Breakfast	£1.00	£1.20	£1.20	£0.00
100300	Beef Chili	Extras & Fillings	£0.50	£0.60	£0.60	£0.00
100120	Beef Curry and Rice	Main meals	£2.00	£2.40	£2.40	£0.00
100132	Beef Roast Dinner	Main meals	£2.00	£2.40	£2.40	£0.00
100275	Beef Wellington	Main meals	£2.00	£2.40	£2.40	£0.00
100261	Black Pudding	Breakfast	£0.50	£0.60	£0.60	£0.00
100269	Boiled Egg	Breakfast	£0.50	£0.60	£0.60	£0.00
100233	Bread Serving	Extras & Fillings	£0.30	£0.36	£0.36	£0.00
100268	Brown HP Sauce	Condiments & Other	£0.10	£0.12	£0.12	£0.00
100324	Brownie	Desserts	£1.00	£1.20	£1.20	£0.00

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[10] CarLaptop Version 23.02.0.8

## Multi-school system

Whereas on a multi-school system, there is now a “tree-list” visible on the left-hand side which allows the user to choose which price it is that they are viewing/editing.

Impact Back Office - DEVELOPMENT BUILD - INTERNAL USE ONLY

Home Users Reports System settings

PLUs

Price list: Spring/Summer 2023 - (16/03/2023)

Find: Product groups: Breakfast, Condiments & Other, Desserts, Drinks, Extras & Fillings, Grab & Go, Home Baking & Sundries, Main meals, PromotionItems, Sandwiches/Baguettes/Wraps, Test, Vending

Global

Set the global price for PLUs and promotions. These prices will be used everywhere unless overridden.

- Global
  - Primary Schools
    - Ark Kings Primary
    - Breadhead Primary Sch...
    - CRB Cunningham Primary
    - Grendon Primary School
    - Northfield Primary School
    - The Fairway Primary School
    - West Heath Primary
    - Yardley Wood Primary School
  - Secondary Schools
    - Ark Kings Secondary
    - Beverstock
    - CRB Cunningham College
    - CRB Cunningham Second...
    - Dame Elizabeth Cadbury
    - Kings Norton Boys'
    - Kings Norton Girls'
    - St Thomas Aquinas Cathol...
    - Wheeler Lane Boys

Copy prices

PLU number	Name	Group	Students Price	Override	Staff Price	Override	Community & Visitors Price	Override	Cost price
100154	Apple Juice	Drinks	£0.60		£0.72		£0.72		£0.00
100216	Appletizer	Drinks	£1.00		£1.20		£1.20		£0.00
100098	Arrabbiata Pasta Pot	Grab & Go	£1.50		£1.80		£1.80		£0.00
100256	Bacon	Breakfast	£0.50		£0.60		£0.60		£0.00
100314	Bacon Sandwich	Breakfast	£1.20		£1.44		£1.44		£0.00
100009	Bagel with Cheese	Breakfast	£1.20		£1.44		£1.44		£0.00
100321	Baguette - Brown Bread	Extras & Fillings	£0.30		£0.36		£0.36		£0.00
100320	Baguette - White Bread	Extras & Fillings	£0.30		£0.36		£0.36		£0.00
-12	Baguette meal deal	PromotionItems	£2.20		£2.64		£2.64		£0.00
100263	Baked Beans	Breakfast	£0.30		£0.36		£0.36		£0.00
100134	Baked Potato	Grab & Go	£1.50		£1.80		£1.80		£0.00
100128	Baked Potato with Ratatouille	Grab & Go	£1.80		£2.16		£2.16		£0.00
100319	Banana	Home Baking & Sundries	£0.60		£0.72		£0.72		£0.00
100277	Banana Split	Desserts	£1.00		£1.20		£1.20		£0.00
100139	BBQ Chicken Baguette	Sandwiches/Baguettes/Wraps	£1.80		£2.16		£2.16		£0.00
100097	BBQ Chicken Flatbread	Main meals	£2.00		£2.40		£2.40		£0.00
100138	BBQ Chicken Sandwich	Sandwiches/Baguettes/Wraps	£1.50		£1.80		£1.80		£0.00
100245	BBQ Dip	Condiments & Other	£0.20		£0.24		£0.24		£0.00
100311	BBQ Sauce	Condiments & Other	£0.10		£0.12		£0.12		£0.00
100248	Beans	Extras & Fillings	£0.50		£0.60		£0.60		£0.00
100315	Beans on Toast	Breakfast	£1.00		£1.20		£1.20		£0.00
100300	Beef Chili	Extras & Fillings	£0.50		£0.60		£0.60		£0.00
100120	Beef Curry and Rice	Main meals	£2.00		£2.40		£2.40		£0.00
100132	Beef Roast Dinner	Main meals	£2.00		£2.40		£2.40		£0.00
100275	Beef Wellington	Main meals	£2.00		£2.40		£2.40		£0.00
100261	Black Pudding	Breakfast	£0.50		£0.60		£0.60		£0.00
100269	Boiled Egg	Breakfast	£0.50		£0.60		£0.60		£0.00
100233	Bread Serving	Extras & Fillings	£0.30		£0.36		£0.36		£0.00
100268	Brown HP Sauce	Condiments & Other	£0.10		£0.12		£0.12		£0.00
100324	Brownie	Desserts	£1.00		£1.20		£1.20		£0.00

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[10] CarLaptop Version 23.02.0.8

Last modified: 15 August 2023

## Finding PLUs and Promotions

When opening the PLUs screen, this will present all existing products and promotions in a table. This



## Using the 'Zero priced only' and 'Active only' checkboxes

Lastly, there are two checkboxes present to the right of the product groups filter which further enable you to filter the products shown in the table, these are 'Zero priced only' and 'Active only'.

The screenshot shows the Fusion system interface. At the top, there's a 'Price list' dropdown set to 'Spring/Summer 2023 - (16/03/2023)'. Below it is a 'Find' field. To the right of the 'Find' field is a 'Product groups' dropdown menu. To the right of the 'Product groups' dropdown are two checkboxes: 'Zero priced only' (checked) and 'Active only' (checked). Below these are two buttons: 'Edit PLU' and 'Delete PLU'. The main table shows a list of products with columns for 'PLU number', 'Name', 'Group', 'Price', 'Students', 'Staff', and 'Cost price'. The first row is '100154 Apple Juice' with a price of £0.65. The second row is '100216 Appletizer' with a price of £1.00.

## Zero priced only

When checked, this will only show products where the PLU has been set as 'Zero priced'. When products have been set as this, the system will allow this product to be sold for free if the price is set as £0.00. This essentially acts as a safeguard for when a product is intentionally to be sold for free, versus when it's not, but a price has either not been entered or incorrectly set as £0.00. Some schools/caterers will use this for products that they want to record as part of a sale, but not actually charge the user for, such as a free side salad when they take a main meal, or maybe a filling choice on a pre-order where the item is priced on the main item.

## Active only

This checkbox is selected by default, and will only show products that are active. When a product has been set as not active, it will then disappear from view. If you wanted to find this product in the future, you would need to uncheck this checkbox before it will be visible.



**Note:** All the filter items work in conjunction with each other. For example, you could enter 'app' into the find field, select drinks from the 'Product groups' dropdown, and have the 'Zero priced only' and 'Active only' checkboxes selected. In this scenario, only active products that have been set as zero priced, that have the letters 'app' in their name and are in the 'Drinks' product group will be listed.

*Last modified: 11 August 2023*

## Adding PLUs

Before you can start selling a new product to your users, it will first need to be added to the system. A product can either be created manually (which we will cover here) or automatically if your system is linked to Nutmeg to create products from dishes held in Nutmeg.

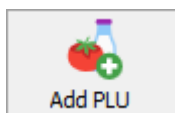


**Note:** After creating a PLU, you will need to set a price for it before it can be used (unless this is intended to be a free item and the 'Zero priced?' checkbox is selected). Information on how to do so can be found here: [Managing prices](#)

## Manually adding a new PLU

Typically, you will be adding the products to Fusion manually, this is achieved by using the process below:

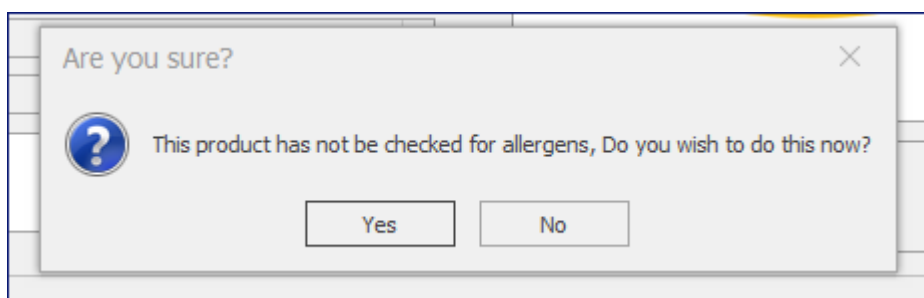
1. Press the **Add PLU** button (located towards the top-right of the PLU screen)





If the 'Add PLU' button is not visible, and you can see a 'Get PLUs' button, then products are being created via a sync with Nutmeg and the ability to create new PLUs has been prevented in the settings.

2. Configure the PLU as required. Any items in red are required, everything else is optional
  - a. Enter the [Basic details](#) for the item, such as the name, sales group
  - b. Enter any allergen/dietary information (such as this item contains nuts, or is suitable for Vegans) or set any restrictions on this product via the [Allergens, Diets, & Restrictions](#) tab.
  - c. Enter any [Nutritional details](#) for the product. This information will be visible to users making pre-orders via the Kiosk or Fusion Online app/website.
3. Once configured, press **Save** or **Save & close**.
  - a. Fusion works best with allergen information for the product being entered correctly and therefore attempts to persuade you to confirm the allergen details of the product when attempting to save and the 'Checked for allergens' checkbox is not ticked. If this checkbox is not ticked, you will be prompted if you wish to do this now. You can always press 'No' to ignore this if you wish. Pressing 'Yes' will navigate you to the [Allergens, Diets, & Restrictions](#) tab where you can update the allergen info and confirm that the product has been checked.



*Last modified: 27 September 2023*

## Basic details

The basic details tab is where we enter the details of the product, such as what the product is and what group it belongs to. The table below covers each of the fields:

Impact Back Office

Home Users Reports System settings Retry bio

CRBCunninghams Secondary School Administrator, Administrator

Adding new PLU

Basic details Prices Allergens, Diets, & Restrictions Nutritional details

Is active? ☒

PLU number 100568

Name

Group Select group

VAT code No VAT code

Scan code

Points 0

Available from free allowance? ☒

Zero priced? ☐

Price override? ☐

Max daily pre-orders available 0

Background colour

Text colour

Description

Image

Clear image

Save Save & close Cancel

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Field name	Required?	Description
Is active?	No	Is this item currently available for purchase?
PLU number	Yes	Every product in the system requires a unique PLU number. When creating a new PLU, the system will automatically use the next available number but this can be edited if you wish to use a specific number. <b>Note:</b> This is a setting configured on a system-by-system basis, if this setting has been disabled for your system, you will need to manually enter a unique PLU number for this item before you can save it. Once the PLU number has been saved, this can not be changed.
Name	Yes	The name of the product. This will be used on all reports and will be sent to any online payment system if one is linked.
Group	Yes	All products must belong to a group. Simply select the group using the dropdown list. For more information, see the section on <a href="#">PLU groups</a> .
VAT code	No	Do you want to set a VAT code against this product? This will be used to calculate how much VAT will be displayed on reports when this item is sold. For example, if this item is to always be non-vatable, such as a bottle of water that is taken away and consumed away from the canteen, you can set this to 'Zero'. If you leave this as 'No VAT code', the VAT code that is used will be the VAT code that is linked to the Price Band of the user making the transaction. For example, typically the Student Price band will have a 0% VAT code attached whereas the Staff band will have a 20% VAT code. <b>Note:</b> This value only affects how VAT is reported for this item, not the price of the item. The price that the user is charged when purchasing this item is dictated by the price band.
Scan codes	No	If your system is using barcode scanners, you can set them here. To modify the barcodes used, click the three dots button.



<b>Points</b>	No	How many points will a user earn if they purchase this item?
<b>Available from free allowance?</b>	No	Defaulted to true, can users use their free allowance to purchase this item? If this is unticked, users must use the cashless balance (or cash if enabled) to purchase this item.
<b>Zero priced?</b>	No	Can this item be sold for free when the price is set to £0.00? When this is not set, this protects the system from selling an item for free when a price has not been set or has accidentally been set as £0.00. However, if you intend for this item to be able to be sold as a free item, you will need to tick this checkbox.
<b>Price override?</b>	No	If an item is set to allow a price override, the operator will be asked to enter a price for the item. This is useful for miscellaneous items or for items that you may wish to charge different amounts for. If the operator does not enter a new price, the product's specified price will be used.
<b>Max daily pre-orders available</b>	No	The maximum number of this item that can be pre-ordered each day. Useful to limit the number of sandwiches (for example) that the kitchen wishes to prepare that day.
<b>Background colour</b>	No	If ticked, the colour set here will be used as the button background colour on the Point of Sale layout. If not ticked, the PLU will use the colour set on the group.
<b>Text colour</b>	No	If ticked, the colour set here will be used as the button text colour on the Point of Sale layout. If not ticked, the PLU will use the colour set on the group.
<b>Description</b>	No	A description of the item can be set here. As the product names tend to be short, this description is presented to users using the pre-order kiosk or the Fusion Online app/website so they can be clearer as to what they are ordering. Therefore, you may wish to include an additional description that may give the user more information, for example, if the item is a 'Cheeseburger' you may want to set a description along the lines of 'Beef burger topped with cheddar cheese and onions on a white floured bun. Served with fries.'
<b>Image</b>	No	This image will be displayed on the Point of Sale buttons and/or to users making pre-orders via the smartboard. It will also be visible to users making pre-orders via a pre-order kiosk and later via the Fusion Online app/website (no due date for release yet.). Fusion has a small library of simple icons/images that can be used, however we suggest that accurate images are sourced/taken.

*Last modified: 14 August 2023*

## Allergens, Diets, & Restrictions

As discussed earlier in the [Allergies, dietary & restrictions](#) within the Users section of the manual and also within the [Restrictions](#) section, you can prevent users from purchasing products where the product has been flagged as containing an allergen that the user is allergic to, or from purchasing products that they are restricted from doing so.

Additionally, for those schools using pre-order kiosks, users making pre-orders will be able to see the full allergen and dietary information of a product while making pre-orders, which will assist you in complying with distance selling regulations.

This section discusses how to set a products allergen and dietary information, as well as applying restrictions to products.

Editing Flapjack

Basic details Prices **Allergens, Diets, & Restrictions** Nutritional details

☒ Checked for allergens (09/03/2022 - Administrator, Administrator)

Allergen	Contains	May contain	Clear
Celery	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Cereals (Containing gluten)	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Crustaceans	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Eggs	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Fish	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Lupin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Milk	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Molluscs	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Mustard	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Nuts	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Peanuts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Sesame seeds	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Soya	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Sulphur dioxide (sulphites)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

Diets	Suitable	Not suitable	Clear
Halal	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Kosher	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Vegan	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Vegetarian	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

Restriction Apply

No cakes	<input type="checkbox"/>
No Fruit	<input type="checkbox"/>
Strawberries	<input type="checkbox"/>

Save Save & close Cancel

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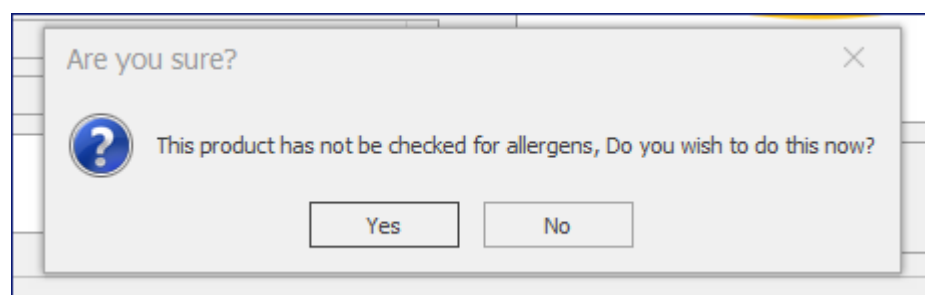
*Last modified: 20 March 2023*

## Allergens

### Checked for allergens

Each PLU will have a 'Checked for allergens' property. This is not mandatory and is used primarily as a reminder to the user to check the allergens within a product. The more accurate the information held against the product the least likely a user purchases an item that they should not.

Whenever a product is edited but the checked for allergens checkbox has not been ticked, the user will be prompted to check the product for allergens.



The checked for allergens checkbox is also used on the pre-order kiosk (and later on the Fusion Online app and website) to present more accurate information to the user. If a product has not been checked for allergens the user will see a disclaimer that the product has not yet had its allergen information confirmed, and if they have allergy concerns, to please speak to the school kitchen before purchasing this item. This helps protect both the school and the user.

**Allergen information**

Allergen information for this product has not yet been confirmed. If you have allergy concerns, please speak to your school's kitchen before purchasing this item.

## Setting allergens

Setting a products allergen information is as simple as:

- Locate the allergens grid
- If the product is known to contain an allergen, click the button within the 'Contains' column for that allergen. If there is potential that the product contains this allergen, select the button within the 'May contain' column.
- Once the allergens have been set, check the 'Checked for allergens' checkbox if not already sone so
- Press 'Save' or 'Save & close' to finalise



To remove an allergen, simply click the 'x' icon next to the allergen to be removed, under the 'Clear' column.

Given that the 'Checked for allergens' checkbox has been checked, users now making pre-orders will see the correct allergen information displayed.

**Allergen information**

**Contains:** Cereals (Containing gluten), Milk, Soya

**May contain:** Nuts, Peanuts

*Displaying the allergen information that is set against the product*

**Allergen information**

None specified

*This product has not been set as containing any allergens and the checked for allergen checkbox has been set*

*Last modified: 20 March 2023*

## Diets

Currently, the dietary suitability of a product is purely informational and is presented to a user making a pre-order when they view the product information page of the pre-order kiosk (and Fusion Online app/Website in near future). This allows those users who may wish to follow a vegan diet to identify if a product is suitable (or not) for their dietary requirements.



There is currently no ability to specify that a user follows a certain diet, therefore it is not possible at the moment to enforce that a user cannot purchase products that are set as not-suitable for that diet, however, we may expand this functionality in the future.

## Setting diet suitability

To set the suitability of a product for a diet:

- Locate the diet table in the top-right of the edit product screen

- For the diet that you wish to set a suitability status for, click the button within the 'Suitable' column if the product is suitable for that diet or click the button within the 'Not suitable' column if it is not.
- Once the dietary information has been set, press 'Save' or 'Save & close'



To remove a diet, simply click the 'x' icon next to the diet to be removed, under the 'Clear' column.



Products that have not had any dietary information set, will simply display a "None specified" note under the 'Dietary information' section of the product information screen.

*Last modified: 20 March 2023*

## Restrictions

When a product is applied with a restriction, users that have been set with that restriction will be unable to purchase the product at the Point of Sale, Pre-order Kiosk, and Fusion Online.



The product will also be restricted at any linked vending machines assuming that the layout is accurate and not using generic "Vending" products.

To apply a restriction to a product:

- Locate the 'Restrictions' table
- Simply apply the applicable restriction(s) using the checklist.
- Once the dietary information has been set, press 'Save' or 'Save & close'

*Last modified: 20 March 2023*

## Nutritional information

The full nutritional details of a product can be stored against each product. This information will be presented to users using the pre-order kiosk (and later Fusion Online) which will allow them to make an informed decision when making pre-orders, and also assist the school in complying with distance selling requirements.



The nutritional information is currently for informational purposes, but if you have suggestions/ideas on how to extend this functionality, for example maybe some reports to use this information, please use our Product Board portal for Fusion and this will be picked up by our product owner.

Home
 Users
 Reports
 System settings
 CRBCunninghams Second

Back
 Editing Chocolate chip cookie

Basic details

Prices

Allergens, Diets, & Restrictions

Nutritional details

Actual portion size (g)

23

grams

millilitres

5 a day count

1

Macro Nutrients	Per 100g	Per each 23g serving	Micro Nutrients
Energy (kJ)	2,050.00	471.50	Alcohol (g)
Energy (kcal)	453.00	104.19	Alpha-carotene (µg)
Fat (g)	23.80	5.47	Alpha-tocopherol (mg)
of which saturates (g)	12.40	2.85	Beta-carotene (µg)
Carbohydrates (g)	62.20	14.31	Beta-sitosterol (mg)
of which sugars (g)	30.90	7.11	Beta-tocopherol (mg)
Fibre (g)	1.90	0.44	Biotin (µg)
Protein (g)	5.70	1.31	Brassicasterol (mg)
Salt (g)	0.49	0.11	Calcium (mg)
			Campesterol (mg)
			Carotene (µg)
			Chloride (mg)
			Cholesterol (mg)
			Copper (mg)
			Cryptoxanthins (µg)
			Delta-5-avenasterol (mg)
			Delta-tocopherol (mg)
			Folate (µg)

Save

Save & close

Cancel

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## Serving size and unit (grams/millilitres)

The serving size is used to calculate the value of each macronutrient per serving. You can leave this as 0. In this instance, the user will only be presented the information per 100g (if nutritional information has been entered).

The serving unit toggle allows you to specify if the product is served in grams or millilitres. This is simply informational and changes if the user sees 100g or 100ml on the serving size and nutritional info.

## “5 a day” count

This value is also presented to users to show how many portions of fruit and veg this product counts towards their “5 a day”.

## Nutrients

We have split our nutrients into two separate tables, macronutrients and micronutrients.

### Macronutrients

This table should look rather familiar, as this is the standard way of presenting nutritional information to users on product labels. Essentially, these are the nutrients that people care most about.



While some of these nutrients, such as salt, aren't technically "macronutrients", this was the easiest way to label them.

If you wish to enter nutrient values, enter these per 100g/ml. Fusion will automatically calculate the values for each serving based on the specified serving size.



Entering a value for one or more nutrients will display the full macronutrients table to the user on the product information screen on the pre-order kiosk. Not entering any information will present a simple "None specified" note to the user instead.

### Micronutrients

This is a list of all other recognised nutrients. These are not typically present on product labelling unless the value is particularly high, for example Vitamin C in orange juice or calcium in milk.

If you wish to enter nutrient values, enter these per 100g/ml. Fusion will automatically calculate the values for each serving based on the specified serving size.



Only those nutrients that have a value set will be presented to the user on the product information screen on the pre-order kiosk.

*Last modified: 14 August 2023*

## Adding promotions



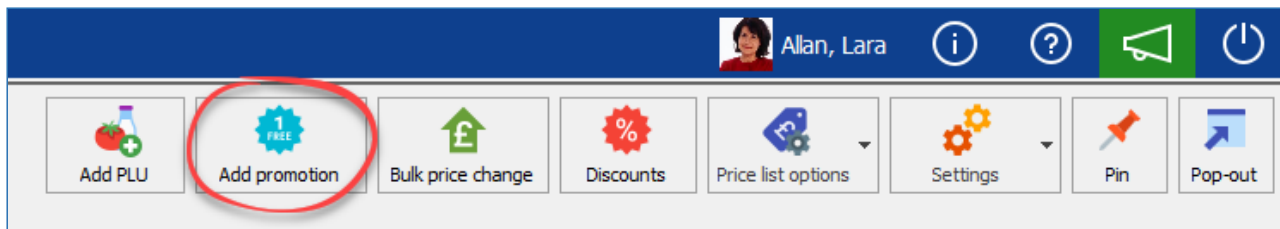
Promotions (commonly referred to as "Meal deals") allow schools to charge a set price when the customer purchases individual related items. For example, a scenario commonly seen in supermarkets would be a meal deal that includes a main such as a sandwich, wrap, or pasta pot, a snack such as a bag of crisps, fruit, or a cookie/flapjack, and a drink. When a customer attempts to purchase an applicable item from each of these categories in the same transaction, if the individual items cost more than the set price, the system will automatically discount them to the specified price.



**Note:** After creating a promotion, you will need to set a price for it before it can be used (unless this is intended to be a free item and the 'Allow zero price' checkbox is selected). Information on how to do so can be found here: [Managing prices](#)

### Adding new Promotion

1. Press the **Add promotion** button from the top-right of the PLU screen.



2. This will display the Promotion configuration dialogue. Configure the promotion as required:

 A screenshot of the 'Promotion' configuration dialog box. The dialog has a title bar 'Promotion' and a close button. It contains several sections:
 

- Promotion name:** A text input field.
- Allowed on cash only sales:** A checkbox that is checked.
- Priority:** A dropdown menu set to '1'.
- Allowed times:** A section with checkboxes for 'All Days' and days of the week (Mon-Sun). Below are 'Start time' (00:00) and 'Finish time' (23:59) dropdowns.
- Promotion date range:** A section with a 'Limit promotion dates' checkbox and 'Start date' and 'Finish date' dropdowns.
- User types:** A section with a list of checkboxes: 'All user types' (checked), 'Student', and 'Staff'.
- Prices:** A section with a 'Price list' dropdown set to 'February 2021 - (25/02/2021)'. Below is a table with columns 'Price group', 'Students (Non-V...', and 'Staff (VAT)'. To the right of the table are 'Add' and 'Delete' buttons.
- Triggers:** A section with a table with columns 'Promo Group Name' and 'Quantity'. To the right of the table are 'Add', 'Edit', and 'Delete' buttons.

 At the bottom right are 'Save' and 'Cancel' buttons.

Section	Field	Description
Basic details	Promotion name	This is what will be presented to operators when the promotion is triggered and what will be visible when viewing the user's activity (including online payment providers). Additionally, it will be displayed on the Product Sales report.
Basic details	Allowed on cash only sales	Can customers in a cash-only transaction access this promotion?
Basic	Allow	If you want this promotion to be sold to a use for free (i.e. when the

<b>details</b>	<b>zero price</b>	promotion is triggered, the user is not charged at all for the applicable items) then select the 'Allow zero price' checkbox. This checkbox prevents promotions from being accidentally sold as free if a price is not entered for a school/price band.
<b>Basic details</b>	<b>Priority</b>	When products are added to the user's basket if those items happen to be eligible for multiple promotions, only a single one can be applied. The priority is used to determine which one wins. With a priority, the lowest number wins, so a promotion with a priority of 1 would trump a promotion with a priority of 2. If two promotions have an equal priority, then the system will apply the promotion that was created first.
<b>Allowed times</b>	<b>Days</b>	Specify on which days the promotion can be triggered. By default, all days are selected, but you may want this promotion to only be available on Fridays, so to do this, untick all days except for Friday.
<b>Allowed times</b>	<b>Start time &amp; Finish time</b>	Set the time that the promotion will be triggered between. By default this is set with a start time of 00:00 and a finish time of 23:59, meaning that the promotion is available all day. If you wish to only have this promotion available for a portion of the day, for example only lunchtime, adjust the times to suit.
<b>Promotion date range</b>	<b>Limit promotion dates</b>	Enable the limiting of this promotion to only be available during a specified date range.
<b>Promotion date range</b>	<b>Start &amp; Finish date</b>	When the 'Limit promotion dates' checkbox is selected, you can specify a start date and end date for this promotion. The promotion will then only be triggered between (inclusive) these dates. This is useful if you only want the promotion to run for a day/week/month/term and don't want to remember to make it inactive.
<b>User types</b>	<b>All user types</b>	By default, promotions are triggered for all user types, however, you may only want this promotion to be triggered for certain user types, if so, unselect the <b>All user types</b> checkbox and then select the user types you want the promotion to be triggered for.
<b>User types</b>	<b>User types checklist</b>	When the 'All user types' checkbox is not selected, you will be able to select which user types are able to access this promotion. If a user type is not selected, users with that type will not be able to have that promotion triggered.
<b>Triggers</b>	<b>Promo group name</b>	The name of the group of items (e.g. Main). How to create triggers is covered here: <a href="#">Promotion triggers</a>
<b>Triggers</b>	<b>Quantity</b>	The number of items from the promo group that need to be purchased to meet this trigger requirement.
<b>Allowed on</b>	<b>Schools checklist</b>	<b>Note:</b> If you are a user on a multi-school system and your login has access to two or more schools, you will also see an 'Allowed on



**schools**

schools' section that will list all the schools that you can access. Here you can specify which schools are able to use this promotion by simply selecting the school(s) from the list.

3. Press **Save** to complete the creation of the promotion.



**Note:** After creating a promotion, you will need to set a price for it. Information on how to do so can be found here: [Managing prices](#)

*Last modified: 27 September 2023*

## Promotion triggers

Triggers are what the system uses to determine if a promotion should be applied. Using our earlier example of a common supermarket meal deal, we would create three triggers (Mains, Snacks, Drinks) each with a quantity of 1. We would then add the applicable “main” items to the Mains group, the snacks to the Snacks group, and the drinks to the Drinks group. Setting the quantity for each group to 1 means that a user would need to purchase an item from each group before the promotion will be applied.

Another example may be that you can buy multiple items at a set price, such as two bottles of water for £1. In this scenario, we would create a single promo group, with a single bottle of water PLU contained within it, but we would then set the quantity to 2, therefore a user would need to purchase two bottles of water in that transaction for the system to trigger the promotion.



Before a promotion will be applied, all triggers must be met.

Triggers

Promo Group Name	Quantity
Breakfast Mains	1
Breakfast Fruit	1
Drinks	1

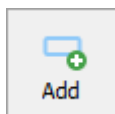
Add
  

Edit
  

Delete

## Add Triggers

1. Press the **Add** button.



2. Enter a **Group name** for the promo group and enter the **Trigger quantity**

Promotion trigger group

Group name: Desserts

Trigger quantity: 1

Trigger items

Type	Name
------	------

Add

Edit

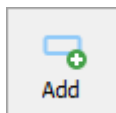
Delete

Save

Cancel

## Trigger Items

1. Press the Add button.



2. Find and select either a **PLU** or **Product Group**.

**Promotion group item select**

PLUs Groups

Find  ☒ Active only

PLU number	Name	Group
1	Apple	Fresh Fruit
7	Bacon Sandwich	Breakfast
30	Baguette - Brown	Cold Meals
34	Baguette - White	Cold Meals
64	Baked Beans	Breakfast
59	Baked Potato	Hot Meals
9	Banana	Fresh Fruit
76	BBQ	Sandwich - Salad/Sauce
4	Cereal & Milk	Breakfast
47	Cheese	Sandwich - Fillings
5	Cheese on Toast	Breakfast
74	Cheese Sandwich	Sandwiches
46	Chicken	Sandwich - Fillings
72	Chicken Sandwich	Sandwiches

3. You can continue to add more PLUs or groups.

Type	Name
PLU	Chocolate Cake
PLU	Cinnamon Roll
PLU	Cookies
PLU	Cupcake
PLU	Ice Cream

4. Press **Save**.



Be aware if you add a Group and already have items from that group in the trigger items section you will receive a notification that items from that group are already in use.

## Edit Triggers

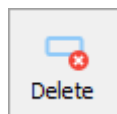
1. Select a Trigger from the list and press the **Edit** button.



2. You can **Add**, **Edit** or **Delete** any PLUs in the Trigger items section. If needed you can also amend the Group name or Trigger quantity.
3. Press **Save**.

## Delete Triggers

1. Select a Trigger from the list and press the **Delete** button.



2. This will remove the Promo group from the Triggers section.
3. Press **Save**.

*Last modified: 14 August 2023*

## Editing & Deleting PLUs and Promotions

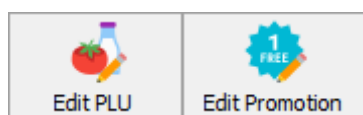
After a PLU or promotion has been created, if you later wish to make changes to them, or delete them from the system if they are not required, you can do so by first finding and selecting the PLU/promotion from the list and then:



For information on how to find PLUs/promotions, see the: Finding PLUs and Promotions section of this manual.

### Editing a PLU or promotion

1. Press the **Edit PLU** button if a PLU is selected, or press the **Edit promotion** button if a promotion is selected.



2. Edit the PLU or promotion as required

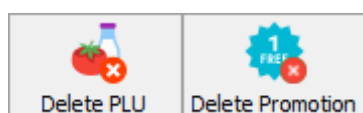


See the relevant sections of this manual for information on what the different fields mean. **PLUS:** Basic details, Allergens, Diets, & Restrictions, Nutritional information; **Promotions:** Details, Triggers

3. Press **Save** or **Save & close** to save your changes.

### Deleting a PLU or promotion

1. Press the **Delete PLU** or **Delete promotion** button.



If the PLU has been previously sold in a transaction, you will be presented with a message stating that you are unable to remove it. PLUs that have been used in previous transactions cannot be deleted. Promotions can be deleted at any time.  
If the PLU is currently present on an active layout, you will be presented with a different



message stating this. In this scenario, you will first need to remove the product from any layouts where this product is present. For more information, see the Layouts section. Alternatively, you can edit the product and set it as inactive.

- If the PLU/Promotion can be deleted, you will be asked to confirm that you are sure. Press **Yes** to confirm. The PLU/promotion will now be deleted.

*Last modified: 15 August 2023*

## Managing prices



This section covers the process of pricing PLUs and promotions in the Fusion cashless catering system. Depending on the set-up of your system, the process of pricing may be very simple, to a little more complex. For example, if your system contains a single school and all users are to pay the same price, then against each PLU/promotion there will be a single price set and that is it. However, in a multi-school environment where the same PLU/promotion is priced differently depending on the school the user is at and also their user type, there can be multiple prices set.

Before we cover how to price PLUs/promotions, let's quickly provide an overview of the pricing system

### Price lists

Put simply, a price list is a list of all the prices to be charged for each PLU/promotion. A price list has a name (e.g. Autumn term 2023) and a start date. There will always be an active price list, and the system uses the start date to determine if the price list is the active one, or a past/future one. When opening the PLU screen, you will always be presented with the Active price list.

Home Users Reports System settings							
Back		PLUs					
Price list		Spring/Summer 2023 - (16/03/2023)					
Find		Product groups Breakfast, Condiments & Other, Desserts, Drinks, Extras & Fillings, Grab & Go, Home Baking &...					
	PLU number	Name	Group	Students Price	Staff Price	Community ... Price	Cost price
<input type="checkbox"/>	100154	Apple Juice	Drinks	£0.65	£0.72	£1.00	£0.00

For more information on price lists, read here: [Price lists](#)

### Price bands and price rules

A price band is used to specify the different prices to be charged for that item, and price rules are used to determine which price the user will pay depending on their user type and/or their allowance eligibility. A system may just have a single price band set, or alternatively may have two or more. Typically, most schools/colleges will operate with a 'Students' (or 'non-VAT') price that a student user will pay, and a 'Staff' (or VAT) price that staff will pay. However, sometimes a staff member may pay the 'Student' price if they are eligible for a supervisory allowance.

In the below example, there are three price bands, a 'Students' price, a 'Staff' price, and a

‘Community & Visitors’ price.

	PLU number	Name	Group	Students	Staff	Community ...	Cost price
				Price	Price	Price	Price
<input type="checkbox"/>	100154	Apple Juice	Drinks	£0.65	£0.72	£1.00	£0.00
<input type="checkbox"/>	100216	Appetizer	Drinks	£1.00	£1.20	£1.50	£0.00
<input type="checkbox"/>	100098	Arrabiata Pasta Pot	Grab & Go	£1.50	£1.80	£2.00	£0.00
<input type="checkbox"/>	100256	Bacon	Breakfast	£0.50	£0.60	£0.75	£0.00
<input type="checkbox"/>	100314	Bacon Sandwich	Breakfast	£1.20	£1.44	£2.00	£0.00



Price bands will be configured for you as part of your initial system implementation. If you wish to alter these price bands (and the rules which dictate which price a user will be charged) then please contact the CRB Cunninghams support team.

## Cost price

Lastly, against each PLU you can specify a cost price. Entering this price is completely optional and often ignored. However, when it is used, this allows the system to calculate simple profit/loss margins on some reports.

*Last modified: 14 August 2023*

## Price lists



As mentioned previously, a price list is simply a list of all the prices to be charged by the system to users when they purchase items. As prices change over time, the price lists feature in Fusion allows you to create a new price list and have those prices become active from a specified date. A major benefit of price lists means that you can create a new price

list, set/update your prices, and have those prices become active when the start date comes around without any further manual activation. For example, if your prices are going up next term, you can create a new price list days/weeks ahead and set the start date as the first day of term. Then, when the new term starts, the system will automatically use the new prices specified on the new price list. An additional benefit of creating price lists is that it allows you to refer back to what the price used to be for a given item.

The system determines which price list is the current one using the start dates on them. When there is only a single price list on the system, then this is automatically the current one. However, when more than one price list exists, the system will use the one with the most recent start date.

## Selecting a price list

When you open the PLU screen, the currently active price list is selected by default. The active price list is indicated by the fact that there is a circular, green-tick icon present next to the selection dropdown.

The screenshot shows the PLUS system interface. At the top, there is a navigation bar with icons for Home, Users, Reports, and System settings. Below this, the main header area displays 'Back' and 'PLUS'. A 'Price list' dropdown menu is highlighted with a red box, showing the selected option 'Spring/Summer 2023 - (16/03/2023)' with a green checkmark icon. Below the dropdown, there is a 'Find' search bar and a 'Product groups' section with a list of categories: Breakfast, Condiments & Other, Desserts, Drinks, Extras & Fillings, Grab & Go, Home Baking & etc. A table below this shows product details for '100154 Apple Juice' under the 'Drinks' group. The table has columns for 'Students', 'Staff', 'Community ...', and 'Cost price', with corresponding price values: £0.65, £0.72, £1.00, and £0.00.

PLU number	Name	Group	Students Price	Staff Price	Community ... Price	Cost price
100154	Apple Juice	Drinks	£0.65	£0.72	£1.00	£0.00

To switch between price lists, simply click on the dropdown and select the price list from the available options. The dropdown selection will display the name of the price list followed by the start date of the price list in brackets. For example, 'Spring/Summer 2023 - (16/03/2023)'.

This screenshot shows the 'Price list' dropdown menu expanded. The selected option is 'Spring/Summer 2023 - (16/03/2023)' with a green checkmark. Other visible options include 'Autumn/Winter 2023 - (04/09/2023)', 'Spring/Summer 2023 - (16/03/2023)', and 'Autumn/Winter 2022 - (01/09/2022)'. The background shows a partial view of the product list with '100256 Bacon' visible.

After selecting a price list, the prices present on that list will be presented. When you have selected a future price list, you will notice an amber forward icon to the left of the price list dropdown, and when you have selected a historic price list, you will see a red backwards icon instead.

This screenshot shows the 'Price list' dropdown menu with the selected option 'Autumn/Winter 2023 - (04/09/2023)'. An orange forward icon is visible to the left of the dropdown, indicating it is a future price list.

*Orange icon signifying that this is a future price list*

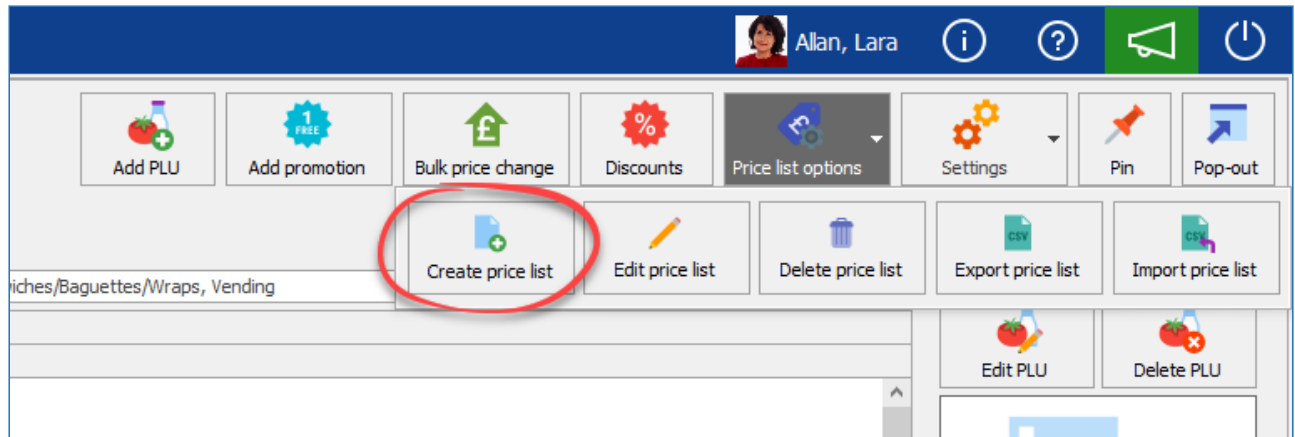
This screenshot shows the 'Price list' dropdown menu with the selected option 'Autumn/Winter 2022 - (01/09/2022)'. A red backward icon is visible to the left of the dropdown, indicating it is a historic price list.

*Red icon signifying that this is a historic price list*

## Creating a new price list

To create a new price list;

1. Click on the **Price list options'** dropdown button towards the top-right of the screen, and select **\*Create price list**.



2. Enter and name and a start date for the price list

 A screenshot of a 'Create price list' dialog box. The dialog has a title bar with a close button. Inside, there is a 'Name' field with the text 'Autumn/Winter 2023'. Below it is a 'Start date' field with a dropdown arrow, showing '05/09/2023'. There are two radio buttons: 'Copy from existing price list' (selected) and 'Start with no prices'. Below the radio buttons is a 'Copy from' dropdown menu showing 'Spring/Summer 2023 - (16/03/2023)'. At the bottom right are 'Save' and 'Cancel' buttons.


If you set the start date to be a past date or today's date, you will be prompted to confirm if this is what you wish to do.

3. Next, you will need to decide what you would like your initial prices to be;
  - a. Copy from existing price list: This is the default option and will take the prices from the selected price list (defaulted to the current price list) as your starting point
  - b. Start with no prices: Sets the price for all PLUs and promotions to £0.00
4. Press **Save** to confirm.

## Editing a price list

After creating a price list, you may wish to update the name or the start date of that list. You can do this by;

1. Selecting the price list from the dropdown selector



The screenshot shows the 'PLUs' interface. At the top, there is a navigation bar with 'Home', 'Users', 'Reports', and 'System settings'. Below this, a 'Price list' dropdown menu is highlighted with a red box, showing 'Spring/Summer 2023 - (16/03/2023)'. Below the dropdown, there is a 'Find' field and a 'Product groups' dropdown menu. A table of PLUs is displayed below, with columns for 'PLU number', 'Name', 'Group', 'Students Price', 'Staff Price', 'Community Price', and 'Cost price'. The first row shows '100154 Apple Juice' under the 'Drinks' group, with prices of £0.65, £0.72, £1.00, and £0.00.

- Click on the **Price list options'** dropdown button towards the top-right of the screen, and select **\*Edit price list**.

The screenshot shows the 'Price list options' dropdown menu. The 'Edit price list' option is highlighted with a red circle. Other options include 'Add PLU', 'Add promotion', 'Bulk price change', 'Discounts', 'Price list options', 'Settings', 'Pin', 'Pop-out', 'Create price list', 'Delete price list', 'Export price list', 'Import price list', 'Edit PLU', and 'Delete PLU'.

- Edit the name and/or start date as required.

The screenshot shows the 'Edit price list' dialog box. It has a title bar with a close button. The 'Name' field contains 'Autumn/Winter 2023' and the 'Start date' field contains '04/09/2023'. At the bottom, there are 'Save' and 'Cancel' buttons.

**i** If you set the start date to be a past date or today's date, you will be prompted to confirm if this is what you wish to do.

- Press **Save** to confirm.

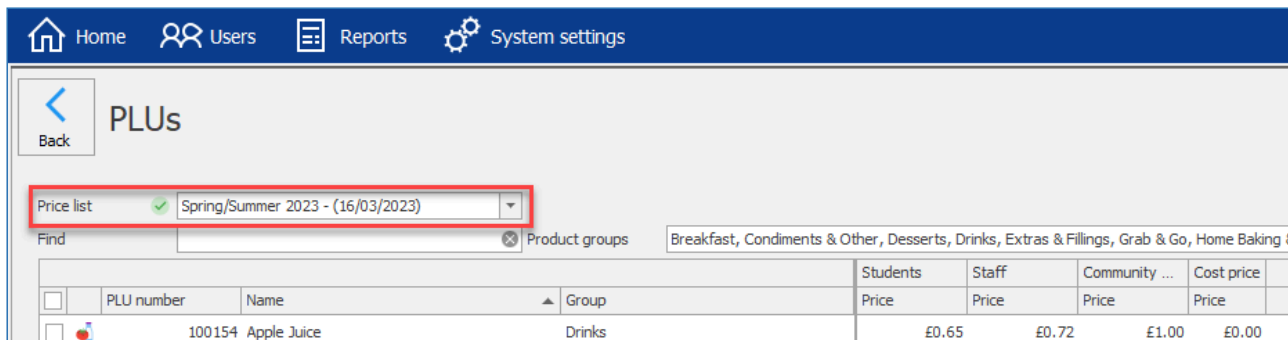
## Deleting a price list

Price lists that are not required can be deleted.

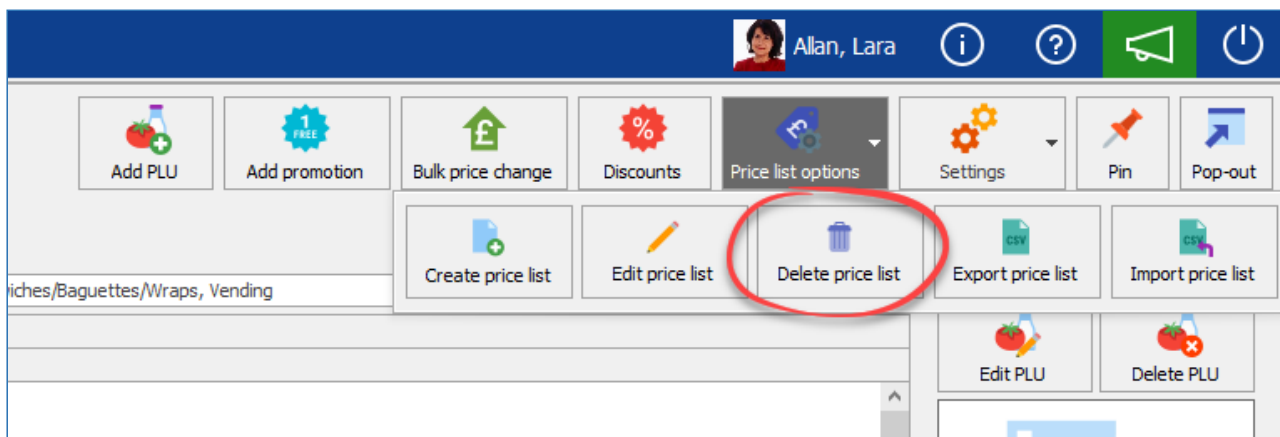


You are unable to delete past or current price lists.

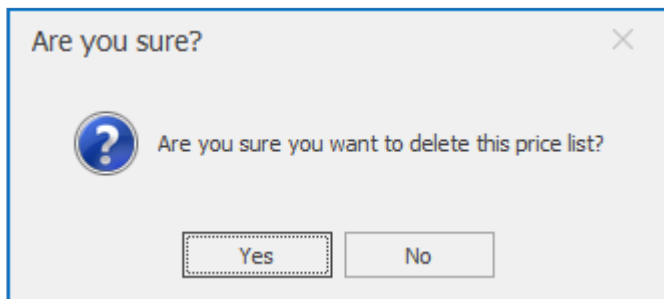
- Selecting the price list from the dropdown selector



- Click on the **Price list options'** dropdown button towards the top-right of the screen, and select **\*Delete price list**.



- If the selected price list is a future one, then you will be asked if you are sure that you want to delete the price list, press **Yes**.



*Last modified: 14 August 2023*

## Exporting and Importing a Price list

Some clients like to manage the prices of their products in Excel and to import these into the system via a .csv import. Fusion allows for price lists to be exported as a .csv file, and then imported after the changes have been made.

### Exporting a price list

TBC

### Importing a price list

TBC

*Last modified: 14 August 2023*

## Updating prices

As mentioned previously, a single product or promotion can have different prices depending on various factors, such as the type of user that is purchasing the item (Student or staff, upper school or lower school etc.) and which school the user is purchasing the item at (on a multi-school system). So for example, a single 'Lasagne' PLU may be charged at £2.00 for students at a primary school, whereas the same PLU is charged at £3.00 for staff at a secondary school. Using the table displayed on the PLU screen is where we can specify these prices.

As the method of pricing PLUs is slightly different in a single-school system versus a multi-school system, we have split the pricing over two different sections.



Since the release of Fusion v23.1, there is no longer a requirement to save changes after they are made. When changing a price, the change is saved to the database instantly. Therefore, when making changes, we recommend that you always create a new Price List as this will act as a backup and allow you to refer back to the old prices. Refer to the Price lists section for information on how to create a new price list.

*Last modified: 15 August 2023*

## Single-school systems

On a single-school system, you do not need to specify at which level the price is to be set, as the price will always be the global price. You will just need to set the price for each price band configured.

PLU number	Name	Group	Students Price	Staff Price	Cost price
100154	Apple Juice	Drinks	£0.65	£0.72	£0.00
100216	Appetizer	Drinks	£1.00	£1.20	£0.00
100098	Arrabiata Pasta Pot	Grab & Go	£1.50	£1.80	£0.00
100256	Bacon	Breakfast	£0.50	£0.60	£0.00
100314	Bacon Sandwich	Breakfast	£1.20	£1.44	£0.00
100009	Bagel with Cheese	Breakfast	£1.20	£1.44	£0.00
100321	Baguette - Brown Bread	Extras & Fillings	£0.30	£0.36	£0.00
100320	Baguette - White Bread	Extras & Fillings	£0.30	£0.36	£0.00
-12	Baguette meal deal	PromotionItems	£2.25	£2.64	£0.00
100263	Baked Beans	Breakfast	£0.30	£0.36	£0.00
100134	Baked Potato	Grab & Go	£1.50	£1.80	£0.00
100128	Baked Potato with Ratatouille	Grab & Go	£1.80	£2.16	£0.00
100319	Banana	Home Baking & Sundries	£0.60	£0.72	£0.00
100277	Banana Split	Desserts	£1.00	£1.20	£0.00
100139	BBQ Chicken Baguette	Sandwiches/Baguettes/Wraps	£1.80	£2.16	£0.00
100097	BBQ Chicken Flatbread	Main meals	£2.00	£2.40	£0.00
100138	BBQ Chicken Sandwich	Sandwiches/Baguettes/Wraps	£1.50	£1.80	£0.00
100245	BBQ Dip	Condiments & Other	£0.20	£0.24	£0.00

**Apple Juice Details:**

- Active? ☒
- PLU number: 100154
- Group: Drinks
- VAT code: Not overridden
- Background colour:
- Text colour:
- Available from free? ☒
- Zero priced? ☒
- Price override? ☐

1. Using the price list dropdown, select the price list that you want to set the price on



Since the release of Fusion v23.1, there is no longer a requirement to save changes after they are made. When changing a price, the change is saved to the database instantly.



Therefore, when making changes, we recommend that you always create a new Price List as this will act as a backup and allow you to refer back to the old prices. Refer to the Price lists section for information on how to create a new price list.

2. Locate the PLU or promotion that you need to set a price for. Or, if you are making updates to all products, you can simply start at the top of the list and work down.



For information on how to find PLUs/promotions, see the: Finding PLUs and Promotions section of this manual.

3. Click in the price band column to be updated and set the new price as required.
4. Repeat for each PLU/price band as required

*Last modified: 15 August 2023*

## Multi-school systems

Setting prices on a multi-school system is a little more complicated and will depend a little on how your system is configured and the number of schools using it. When viewing the PLU screen as a user that has access to two or more schools, you will see a list of all the schools that you can update the prices for down the left-hand side, broken down into different levels. Since the release of Fusion v23.1, the system uses these levels to specify the price of a PLU at the connected schools.



Since the release of Fusion v23.1, there is no longer a requirement to save changes after they are made. When changing a price, the change is saved to the database instantly. Therefore, when making changes, we recommend that you always create a new Price List as this will act as a backup and allow you to refer back to the old prices. Refer to the Price lists section for information on how to create a new price list.



### Global level

At the top of this list, you will see the word 'Global' with a globe icon next to it. As you may have guessed, any prices set at this level will be used by all schools in the system, unless there has been an override enabled and a different price on a school area or at an individual school (discussed when covering the School area level and the School level).

### Setting the global price

Setting the global price is pretty much the same as setting a price on a single school system. In the below GIF, I am setting a new global price on the 'Banana' PLU for both the Student and Staff price bands on the future 'Autumn/Winter 2023' price list.

The screenshot shows the 'PLU' screen in the CRB Cunningham's Fusion software. The interface includes a top navigation bar with 'Home', 'Users', 'Reports', and 'System settings'. A sidebar on the left lists various school areas under 'Global'. The main area displays a table of PLUs with columns for 'PLU number', 'Name', 'Group', 'Students Price', 'Override', 'Staff Price', and 'Cost price'. The 'Apple Juice' PLU is selected, and its details are shown on the right, including an image of a glass of juice and a red apple. The 'Active?' checkbox is checked, and the 'Price override?' checkbox is unchecked.

1. Ensure that the global level is selected (selected by default when opening the PLU screen) from the list on the left of the screen
2. Using the price list dropdown, select the price list that you want to set the price on
3. Locate the PLU or promotion that you need to set a price for. Or, if you are making updates to all products, you can simply start at the top of the list and work down.



For information on how to find PLUs/promotions, see the: Finding PLUs and Promotions section of this manual.

4. Click in the price band column to be updated and set the new price as required.
5. Repeat for each PLU/price band as required

## Price override notification

When viewing the global level prices, you may notice a notification icon next to the price within a price band column. This icon notifies you that this price is being overridden at one or more schools or school areas. You can view where this price is being overridden by clicking on the icon.



## School areas (optional)

Depending on your system's configuration, the schools on your system may be grouped into school areas. When schools are grouped into areas, when the price for an item is to differ from the global price for all schools within that area, you can set an override on this product or promotion. Once set, all schools within the area will use this price instead of the one set at the global level.

## Setting a price override on a school area

In the below GIF, I am setting an override on the 'Secondary schools' school area on the 'Banana' PLU for the Student and Staff price bands on the 'Autumn/Winter 2023' price list. You will notice, that the initial price for the Students and Staff price bands are those set when updating the Global price



above. As there are no overrides enabled on that PLU to begin, you will notice that the price is displayed in grey italics and it cannot be edited until the override toggle is enabled for that price band. When an override is enabled and a new price set, all schools that are contained within this school area will use this new price (unless an override is set on those schools (discussed below)).

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1. Select the required school area from the list on the left of the screen
2. Using the price list dropdown, select the price list that you want to set the price on
3. Locate the PLU or promotion that you need to set a price for
4. If an override is already set on the product or promotion, you can update the price. If not, you will need to click on the toggle in the override column to enable the override and then you will be able to set the price. You can also disable an override and return to using the global price by setting the override toggle to off.

In this example, the 'Banana' PLU does not have an override enabled on the Student price band which is why the price is listed in grey italics. This shows that the price is inherited from the level above (global) and cannot be edited. On the 'Banana split' PLU there is an override enabled on the Student price band, therefore the price is shown in regular black text and can be updated.

	PLU number	Name	Group	Students		Staff		Cost price
				Price	Override	Price	Override	
<input type="checkbox"/>	100319	Banana	Home Baking & Sundries	£0.65	<input type="checkbox"/>	£0.77	<input type="checkbox"/>	£0.00
<input type="checkbox"/>	100277	Banana Split	Desserts	£1.20	<input checked="" type="checkbox"/>	£1.20	<input checked="" type="checkbox"/>	£0.00

5. Repeat for each PLU/price band as required



## Schools

Schools can either be listed directly beneath the global level or grouped into a school area (discussed above). When a school is not part of a school area, it will inherit the global prices directly, and when

a school is part of a school area, it will inherit the school area price if an override is set at the school area level, otherwise, it will inherit the global price.

Just like with school areas, if you want to charge a different price for a product at a school, you can set enable an override and specify a new price for it.

## Setting an override on a school

Finally, in the below GIF, I am setting an override at the school level for Baverstock school on the 'Banana' PLU for the Student price band on the 'Autumn/Winter 2023' price list. As this school is a member of the 'Secondary Schools' school area, you will notice, that the initial price for the Students and Staff price bands are those set when updating the School area price above. After enabling an override for the Student price band and setting a new price, I then disable the override which returns this school to charging the inherited price from the school area.

The screenshot shows the 'PLUs' screen in the Fusion software. The left sidebar contains a tree view of school areas, including 'Global', 'Primary Schools', and 'Secondary Schools'. The main table lists products with columns for 'PLU number', 'Name', 'Group', 'Students Price', 'Override', 'Staff Price', and 'Cost price'. The 'Banana' product (PLU 100319) is selected, and its price is being overridden for the Student price band. The right sidebar shows details for the selected product, including its name, group, and various override options.

PLU number	Name	Group	Students Price	Override	Staff Price	Cost price
100154	Apple Juice	Drinks	£0.65		£0.72	£0.00
100216	Appletizer	Drinks	£1.00		£1.20	£0.00
100098	Arrabiata Pasta Pot	Grab & Go	£1.50		£1.80	£0.00
100256	Bacon	Breakfast	£0.50		£0.60	£0.00
100314	Bacon Sandwich	Breakfast	£1.20		£1.44	£0.00
100009	Bagel with Cheese	Breakfast	£1.20		£1.44	£0.00
100321	Baguette - Brown Bread	Extras & Fillings	£0.30		£0.36	£0.00
100320	Baguette - White Bread	Extras & Fillings	£0.30		£0.36	£0.00
-12	Baguette meal deal	Promotion/Items	£2.25		£2.64	£0.00
100263	Baked Beans	Breakfast	£0.30		£0.36	£0.00
100134	Baked Potato	Grab & Go	£1.50		£1.80	£0.00
100128	Baked Potato with Ratatouille	Grab & Go	£1.80		£2.16	£0.00
100319	Banana	Home Baking & Sundries	£0.60		£0.72	£0.00
100277	Banana Split	Desserts	£1.00		£1.20	£0.00
100139	BBQ Chicken Baguette	Sandwiches/Baguettes/Wraps	£1.80		£2.16	£0.00
100097	BBQ Chicken Flatbread	Main meals	£2.00		£2.40	£0.00
100138	BBQ Chicken Sandwich	Sandwiches/Baguettes/Wraps	£1.50		£1.80	£0.00
100245	BBQ Dip	Condiments & Other	£0.20		£0.24	£0.00
100311	BBQ Sauce	Condiments & Other	£0.10		£0.12	£0.00
100248	Beans	Extras & Fillings	£0.50		£0.60	£0.00
100315	Beans on Toast	Breakfast	£1.00		£1.20	£0.00
100300	Beef Chili	Extras & Fillings	£0.50		£0.60	£0.00
100120	Beef Curry and Rice	Main meals	£2.00		£2.40	£0.00
100132	Beef Roast Dinner	Main meals	£2.00		£2.40	£0.00

1. Select the required school from the list on the left of the screen
2. Using the price list dropdown, select the price list that you want to set the price on
3. Locate the PLU or promotion that you need to set a price for
4. If an override is already set on the product or promotion, you can update the price. If not, you will need to click on the toggle in the override column to enable the override and then you will be able to set the price. You can also disable an override and return to using the global price by setting the override toggle to off.
5. Repeat for each PLU/price band as required

*Last modified: 18 August 2023*

## Bulk price change

When it comes to changing prices, this can sometimes be a time-consuming task. Fusion has a function called the 'Bulk price change' which as you may have guessed, allows for multiple prices to be updated at once. This utility allows for prices to be updated by a percentage (for example move prices

up by 5%), by a value (move prices up by 10p), or set prices to a specified amount (set price of selected products to £2.00).

The Bulk price change functionality received an overhaul in v23.1 of Fusion and now guides you through the process more closely, allowing you to be clearer on what the tool will do, removing confusion and reducing the opportunity for errors. The tool can be used for both single and multi-school systems.

## Using the Bulk price change tool

The Bulk price change tool attempts to guide the user through the process in a “wizard” style process:

### Step 0: Select products and start

1. Using the grid, select the PLUs and/or promotions that you wish to update



When running the Bulk price change tool, you can choose to update all products and promotions, or just those that are selected. If you want to update all, you can skip step 1.

2. Then start the Bulk price change process by either using the **Bulk price change** button towards the top-right of the PLU screen or by right-clicking on a PLU in the grid and selecting ‘Bulk price change’ from the context menu.

### Step 1: Select a price list

The first stage of the Bulk price change wizard is choosing which price list to use. We recommend creating a new price list and this is the default option, however you are free to update an existing price list if you wish. For example, you may have already created a new price list and are running the Bulk price change tool for a second time after selecting a different set of products to update.



**Bulk price change** [X]

**Select price list**  
Choose to create a new price list (recommended) or select which price list to make changes to.

☒ Create new price list (recommended)

Name: Autumn/Winter 2023

Start date: 05/09/2023 ▼

Copy from: ✓ Spring/Summer 2023 - (16/03/2023) ▼

☐ Update existing price list

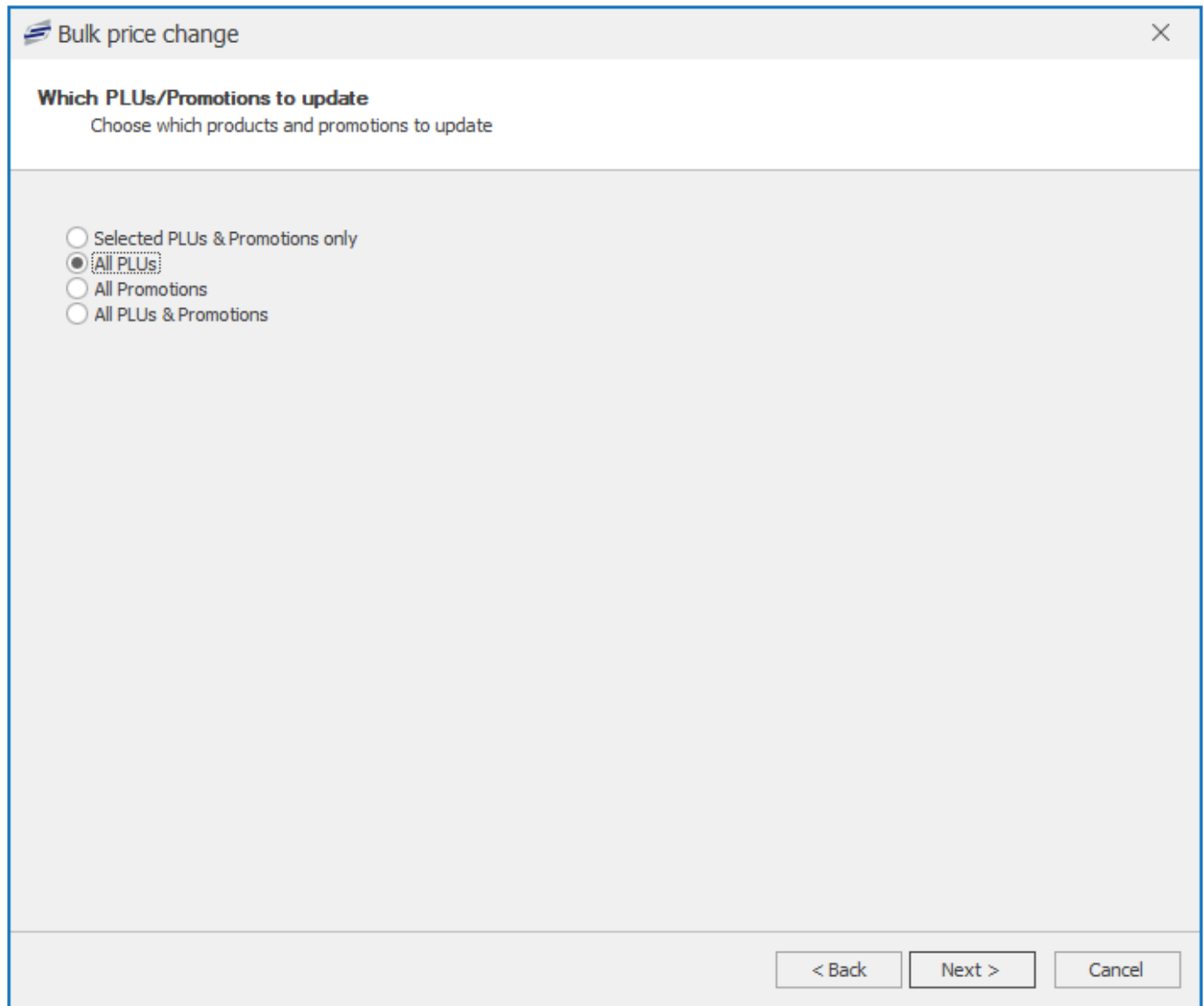
Price list: ✓ Spring/Summer 2023 - (16/03/2023) ▼

< Back   Next >   Cancel

1. Select if creating a new price list (recommended) or if you are wanting to update an existing one.
  - a. When selecting to create a new price list:
    - i. Enter a name for the new price list
    - ii. Enter a start date for the new price list
    - iii. Select which price list you wish to copy the starting prices from.
  - b. When selecting to update an existing price list:
    - i. Select the price list that you wish to update.
2. Press **Next** to proceed.

## Step 2: Which PLUs/Promotions to update

At this stage, you need to specify which PLUs and/or promotions you want to update.



**Bulk price change**

**Which PLUs/Promotions to update**  
Choose which products and promotions to update

☐ Selected PLUs & Promotions only

☒ All PLUs

☐ All Promotions


☐ All PLUs & Promotions

< Back   Next >   Cancel

1. Using the radio buttons, select which PLUs/promotions you want to update:
  - a. **Selected PLUs & Promotions only:** This will only update the items selected in Step 0.
  - b. **All PLUs:** This option will update all PLUs in the system, regardless if you selected them in Step 0 or not.
  - c. **All promotions:** This option will update all Promotions in the system.
  - d. **All PLUs & Promotions:** This option will update all PLUs and all promotions in the system.
2. Press **Next** to proceed

### Step 3: Specify if changing the prices by a percentage, value, or set to amount?

At this stage, you can specify how you are updating the prices. This can either be by a percentage of the current price, by adding/subtracting a value to the current price, or setting the items to a specified price. The options available to you will vary on which option you have selected.

 **Bulk price change** X

**Percentage, value or set amount?**  
 How do you want to update the prices on these items?

☐ **By percentage**  
 Update the price by a percentage of the current price  
 Move prices   
 By   
 Rounding   
 To the nearest

☒ **By value**  
 Update the price by adding or subtracting a value from the current price  
 Move prices   
 By

☐ **Set to amount**  
 Update the price to be a set amount  
 New price

1. Using the radio buttons, choose how you wish to update the price, 'By percentage', 'By Value', or 'Set to amount'
2. Specify your changes
  - a. **By percentage**
    - i. **Move prices:** Select if you are moving the prices up or down
    - ii. **By:** Enter the percentage value that you want to move the prices up or down by.
    - iii. **Rounding:** If after changing the price by a percentage of the original price, the new price would become more than 2 decimal places, select if you want to round up or down
    - iv. **To the nearest:** After rounding has been performed, round to the nearest value. For example, if rounding £0.65 by 5% (£0.6825) and I choose to round UP to the nearest £0.01, the new price would be £0.69. If I choose to round up to the nearest £0.05, this would take the price to £0.70 as this is the closest multiple of 5p.
  - b. **By value**
    - i. **Move prices:** Select if you are moving the prices up or down
    - ii. **By:** Enter the value that you want to move the prices up or down by. For example, setting this to £0.05 and if I chose to move prices UP, this will add 5p to the current price.

## c. Set to amount:

- i. **New price:** Enter the new price for the items. This option ignores the current price and instead will set the items to whatever is entered here.

3. Press **Next** to continue**Step 4: Select which levels to update**

At this stage, you will need to specify which price level(s) you wish to update.



You can select multiple levels if required. If your system is a single-school system, this stage will be skipped entirely. Please proceed to step 5.

1. If you want to update the global price, select the 'Update global price' checkbox
2. If you want to update school areas, select the 'Update school area overrides' checkbox and then select the school area(s) that you wish to update



**Note:** This will only update those items where an override is already enabled at the selected school areas and a price is specified. It will not enable overrides.

3. If you want to update schools, select the 'Update school overrides' checkbox and then select

the school(s) that you wish to update



**Note:** Just like with school areas, this will only update those items where an override is already enabled at the selected schools and a price is specified. It will not enable overrides.

4. Press **Next** to proceed.

## Step 5: Select which price bands to update

This stage allows you to specify which price band(s) you wish to update.

**Bulk price change**

**Which price bands to update**  
Select which price bands you would like the new prices to be applied to

Apply to


☒ Students  
☐ Staff

< Back   Next >   Cancel

1. Use the checkboxes to select which price band(s) are to be updated
2. Press **Next** to continue

## Step 6: Review and confirm

The review stage is the final one. It gives you an opportunity to review your selections and view an example as to how the prices will be affected before you confirm the changes.

 Bulk price change

**Review**  
 Review your choices before confirming to update the prices.

**Select price list**  
 Create new price list: Autumn/Winter 2023 - (05/09/2023)

**Which PLUs/Promotions to update**  
 All PLUs

**Percentage, value or set amount?**  
 By percentage: up by 5.0% rounding up to nearest £0.01

**Which levels to update**  
 Update global price

**Which price bands to update**  
 Apply to: Students

**Example**

PLU number	Name	Group name	Old price	New price
100001	Flapjack	Home Baking & Sundries	£0.60	£0.63
100002	Plain Muffin	Home Baking & Sundries	£1.00	£1.05
100003	Muffin	Home Baking & Sundries	£1.00	£1.05
100004	Plain Cookie	Home Baking & Sundries	£1.00	£1.05
100005	Chocolate chip cookie	Home Baking & Sundries	£0.60	£0.63

< Back

Confirm

Cancel

1. Carefully review your selections.
  - a. If you need to rectify a previous selection, you can use the **Back** button to navigate back to that section and update as required.
2. Once you are happy, press the **Confirm** button. The system will update the prices as specified.

*Last modified: 27 September 2023*

## Discounts

Discounts allow operators to reduce the cost of eligible transactions at the Point of Sale. Fusion supports three types of discount; Line-item, Subtotal, and Redeem. Each discount type has some differences in what they can do and how they are applied by the operator.

### Line-item

A Line-item discount is a type of discount that is applied directly to a single item in the basket. It can be used to either reduce the item by a fixed value or by a percentage.

**Scenario:** This would allow schools to apply an “Own mug” discount when buying a hot drink. So if the user purchases a coffee, but if they use their own mug they get 10p off the full price, the operator would add the coffee to the transaction and then apply the discount which would discount that particular item but other items in the basket are not discounted.

## Subtotal

A Subtotal discount applies to all items in the basket at the point of application. Subtotal discounts can only be a percentage, not a fixed value.

**Scenario:** This allows for schools that want to discount all items in the basket for a particular user, such as if a certain user is entitled to 10% off. The operator would need to add all items to the basket and then apply the discount. This would discount all items in the basket. If required, the operator can add additional items to the basket after pressing the discount button. These items will not be discounted unless the operator applies another discount to these items.

## Redeem

Not technically a “discount” as such, as it isn’t applied to items in the basket and can even be used without any other items in the basket, this type of discount essentially works like a negatively priced PLU would in Impact.

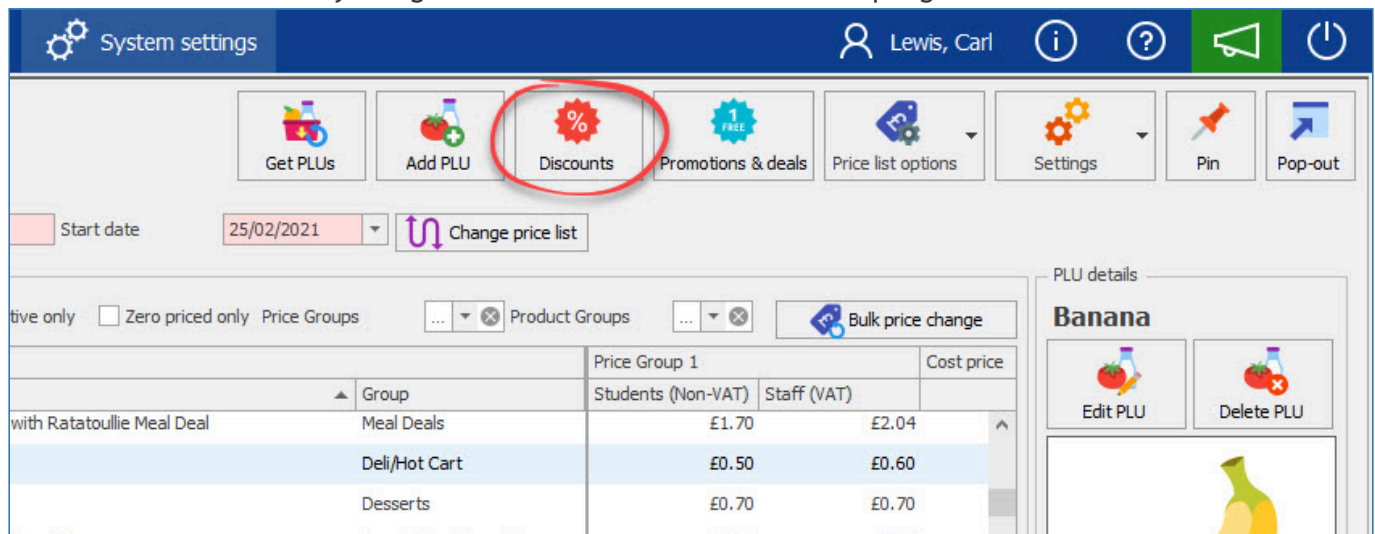
**Scenario:** This discount could be used in Scotland to assist with the ‘Zero-waste’ bottle return scheme. In this scheme, when purchasing drinks in bottles/cans, part of the sale value would be a deposit (e.g. 5p). Upon returning a bottle/can, the operator can open a sale and when pressing this discount it would take 5p off the transaction value. If the transaction total with the discount applied is a positive amount (for example the user returned the bottle but didn’t purchase anything), the money would be added to the user’s account, or if a cash transaction, the cash drawer would open and the operator could hand them the required money. It could also be used to allow for the redemption of vouchers or stamped loyalty cards.

*Last modified: 20 March 2023*

## Managing discounts

As schools will use a variety of discounts, rather than providing generic discounts and the operator entering the amount at the PoS, Fusion allows schools to create and manage the discounts that they require. This method also allows for better reporting, as you can specifically name the discounts and generate reports to see how they are being used.

Discounts are accessed by using the **Discounts** button from the top-right of the PLUs screen.



The screenshot shows the Fusion POS interface. At the top, there is a dark blue header bar with 'System settings' on the left and user information 'Lewis, Carl' on the right. Below the header is a row of icons: 'Get PLUs', 'Add PLU', 'Discounts' (circled in red), 'Promotions & deals', 'Price list options', 'Settings', 'Pin', and 'Pop-out'. Below this row is a 'Start date' field set to '25/02/2021' and a 'Change price list' button. The main area displays a table with columns for 'Group', 'Price Group 1', and 'Cost price'. The table lists items like 'with Ratatouille Meal Deal', 'Meal Deals', 'Deli/Hot Cart', and 'Desserts' with their respective prices. On the right side, there is a 'PLU details' section for 'Banana' with 'Edit PLU' and 'Delete PLU' buttons.


Group	Price Group 1	Cost price
	Students (Non-VAT)	Staff (VAT)
with Ratatouille Meal Deal		
Meal Deals	£1.70	£2.04
Deli/Hot Cart	£0.50	£0.60
Desserts	£0.70	£0.70

Pressing this button will display a list of the currently created discounts.


Name	Type	Active
Bottle return	Redeem	<input checked="" type="checkbox"/>
Own mug	LineItem	<input checked="" type="checkbox"/>
VIP	Subtotal	<input checked="" type="checkbox"/>
10% off voucher	LineItem	<input checked="" type="checkbox"/>
End of Day	Subtotal	<input checked="" type="checkbox"/>

## Adding a discount


1. To add a new discount, press the **Add** button.
2. Enter a name for the discount. This name will be displayed on the PoS and used on reports.

 Names for discounts must be unique. If attempting to use a name that is already being used, you will not be able to save the discount.


3. Using the dropdown, select the type of discount that you want to create. The differences are discussed [here](#).

 If selecting a Line-item, you can choose whether this is a percentage or value discount by using the toggle.

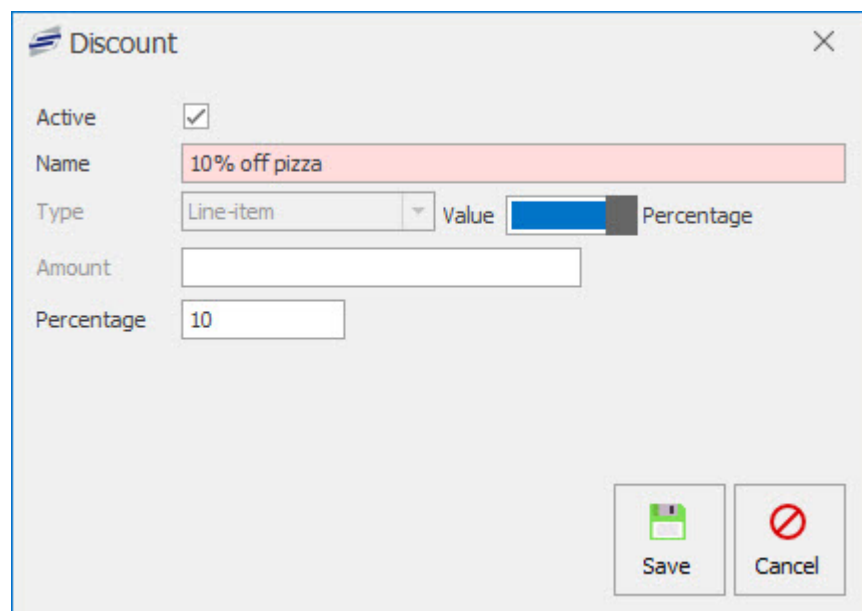
4. Enter the amount or percentage that this discount will apply.

 If using a Redeem type discount, you can apply a 2nd amount if required. If used, when the operator applies this at the Point of Sale, they will be asked which rate to apply.

5. When happy, press the **Save** button. You will be warned that once saved, you will be unable to change the type. Press **Yes** to continue.

 Once a discount has been created, you will need to add it to your layout before it can be used at the Point of Sale. You can read about this [here](#).



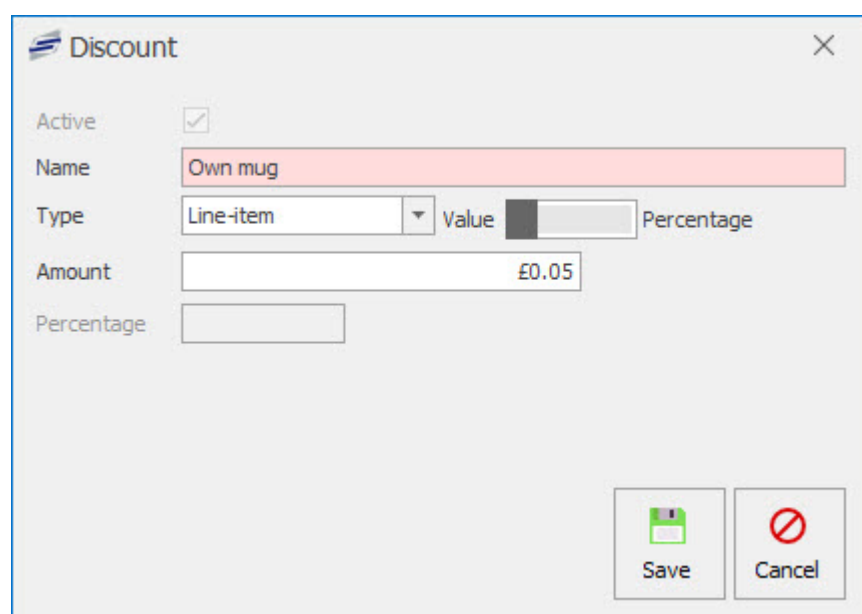


The 'Discount' dialog box is shown with the following settings:

- Active: ☒
- Name: 10% off pizza
- Type: Line-item (dropdown menu)
- Value: A slider bar is positioned at 10%.
- Percentage: 10

Buttons: Save, Cancel

*Example of a line-item discount set to allow 10% off*

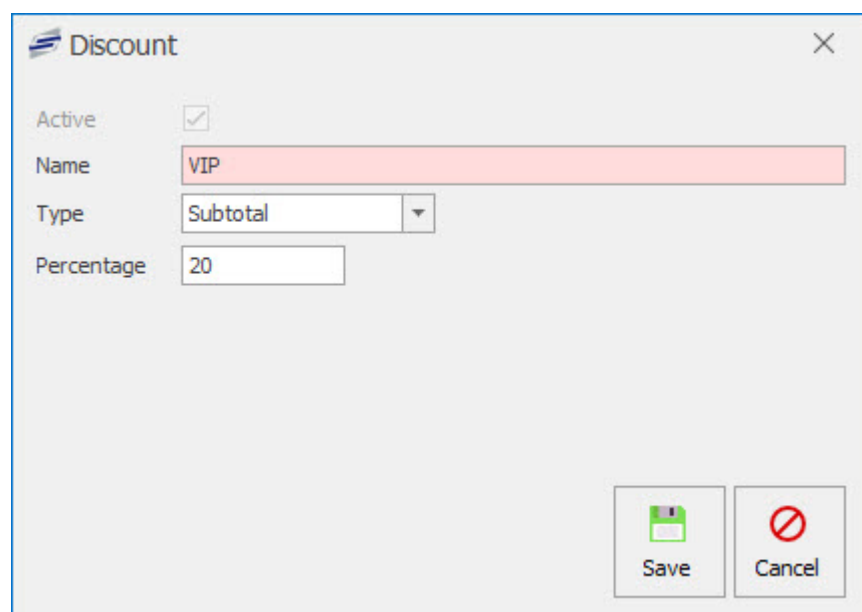


The 'Discount' dialog box is shown with the following settings:

- Active: ☒
- Name: Own mug
- Type: Line-item (dropdown menu)
- Value: A slider bar is positioned at 5p.
- Amount: £0.05
- Percentage: (empty field)

Buttons: Save, Cancel

*Example of a line-item discount set to allow 5p off*

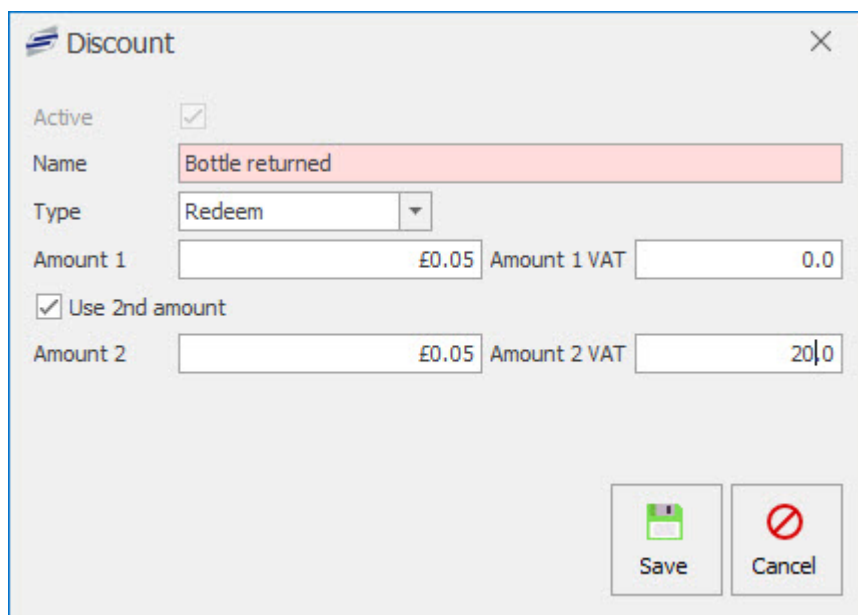


The 'Discount' dialog box is shown with the following settings:

- Active: ☒
- Name: VIP
- Type: Subtotal (dropdown menu)
- Percentage: 20

Buttons: Save, Cancel

### Example of a subtotal discount that would allow 20% off



**Discount**

Active ☒

Name

Type

Amount 1  Amount 1 VAT

☒ Use 2nd amount

Amount 2  Amount 2 VAT

Example of a redeem discount, set to allow two different rates, both at 5p but with different VAT rate

## Editing discounts

Once a discount has been created, it can be edited by selecting it from the list, and pressing the **Edit** button. Everything except the type can be edited. Once you are happy with your changes, press **Save**.

## Deleting discounts

It is not possible to delete discounts. Once a discount is no longer required, it can be set as inactive. This is done by editing the discount and unselecting the 'Active' checkbox.



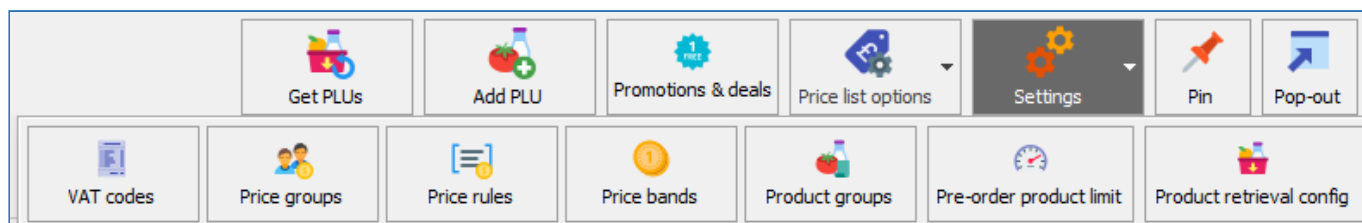
Before a discount can be marked as inactive, it must not be present on any active layouts.

## Settings

Last modified: 20 March 2023



The PLU Settings button is where you can manage existing and new VAT codes, Price groups, Price rules, Price bands and Product groups.



Get PLUs	Add PLU	Promotions & deals	Price list options	Settings	Pin	Pop-out
VAT codes	Price groups	Price rules	Price bands	Product groups	Pre-order product limit	Product retrieval config

## VAT codes

This is where you can manage current VAT amounts. These are usually defaulted to the current legal VAT rates. 0% for those not paying VAT and 20% to those who are.

## Price groups

This allow you to create multiple price groups. If you have a Secondary and Primary school using the same Price list you can apply a price for the Secondary and a different price for the Primary using the

same PLU. You need a least one price group.

## Price rules

This is where you can create rules for price bands and user types. Typically the default price band will be set to Student (0% VAT) and a rule created for Staff to use the Staff price band (20%).

## Price bands

The default price bands are Student which will use VAT code Zero and Staff that use VAT code Standard (20%). You can amend or add new price bands.

## Product groups

You can manage your PLU product groups from here. All PLU's need a product group.

## Pre-order product limit

Allows you to quickly manage the number of pre-orders that can be placed for products.

## Product retrieval config

This is where the settings for the importing of PLUs from a different system are configured.

## VAT codes

*Last modified: 20 March 2023*



On each sale, VAT will be calculated for reporting purposes depending on which VAT code is to be used for that transaction. Typically the 'Zero' VAT code will be used when a student makes a purchase and the 'Standard' (currently 20%) will be used when a staff member makes a purchase. However, VAT rates can be set against each individual PLU. For example, when a 0% VAT code is set against a bottle of water, the system will not report any VAT for that item.

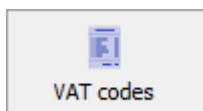


The VAT code associated with the transaction does not alter the price that the user pays, this is controlled by the Price bands and the Price rules. The VAT code simply tells the system how much of the transaction was VAT for the purposes of reporting.

## Adding a new VAT code

Just in case the Inland Revenue announce an additional tier for VAT, Fusion allows for additional VAT codes to be added.

1. Press the **Settings** button and select **VAT codes** button.

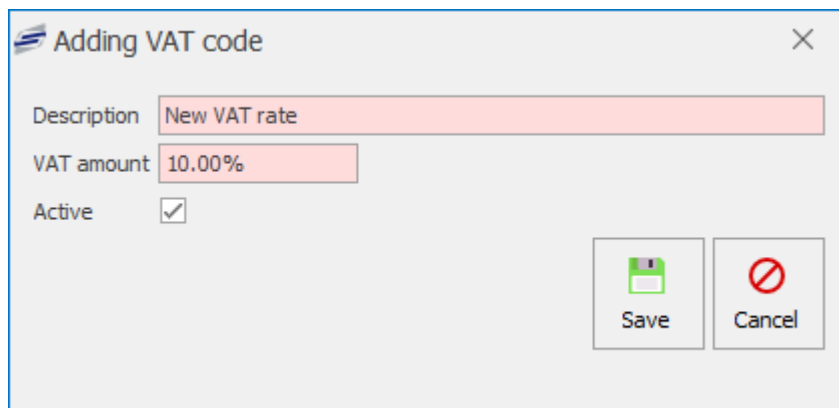


2. From within the VAT codes screen, click the **Add** button.



3. Enter a description and the VAT amount and press the 'Active' check box if you want it to be

available right-away.



**Adding VAT code**

Description: New VAT rate

VAT amount: 10.00%

Active: ☒

Save Cancel

4. Press **Save**.



Once VAT codes have been created, they cannot be deleted, however they can be edited and marked as inactive.

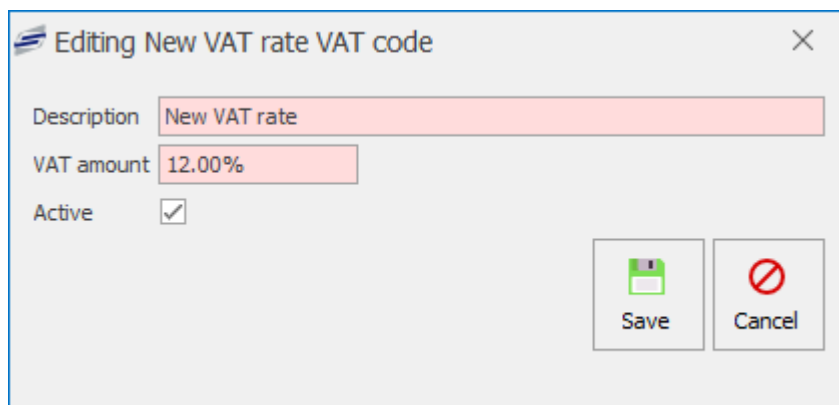
## Editing a VAT code

Although rare, the VAT rate may change over time, so Fusion needs to be able to allow for the new rate to be used.

1. From within the VAT codes screen, select the VAT code and click the **Edit** button.



2. Enter a new description if required and change the VAT amount.



**Editing New VAT rate VAT code**

Description: New VAT rate

VAT amount: 12.00%

Active: ☒

Save Cancel

3. Press **Save**.

*Last modified: 20 March 2023*

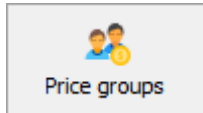
## Price groups



Price groups allow you to manage what price you are selling your products and to which price band. For example, a bottle of water for a Student could cost 50p and to a member of Staff that price would also include VAT and cost 60p. You can also create multiple Price groups. For example, the school might have both secondary and primary students and want different price groups for this. A bottle of water could cost 40p for primary students and 50p for secondary students.

## Adding a new Price group

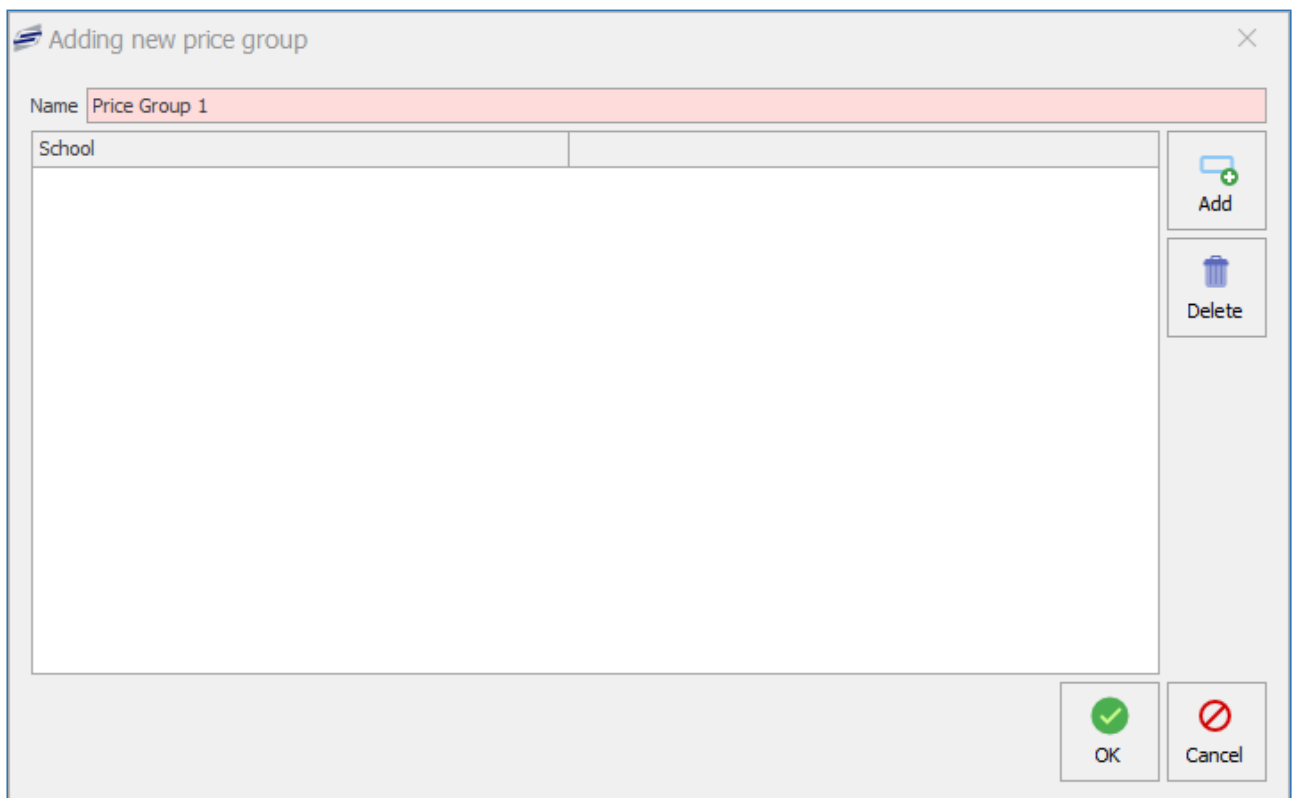
1. Press the **Settings** button and select **Price groups**.



2. Press the **Add** button.

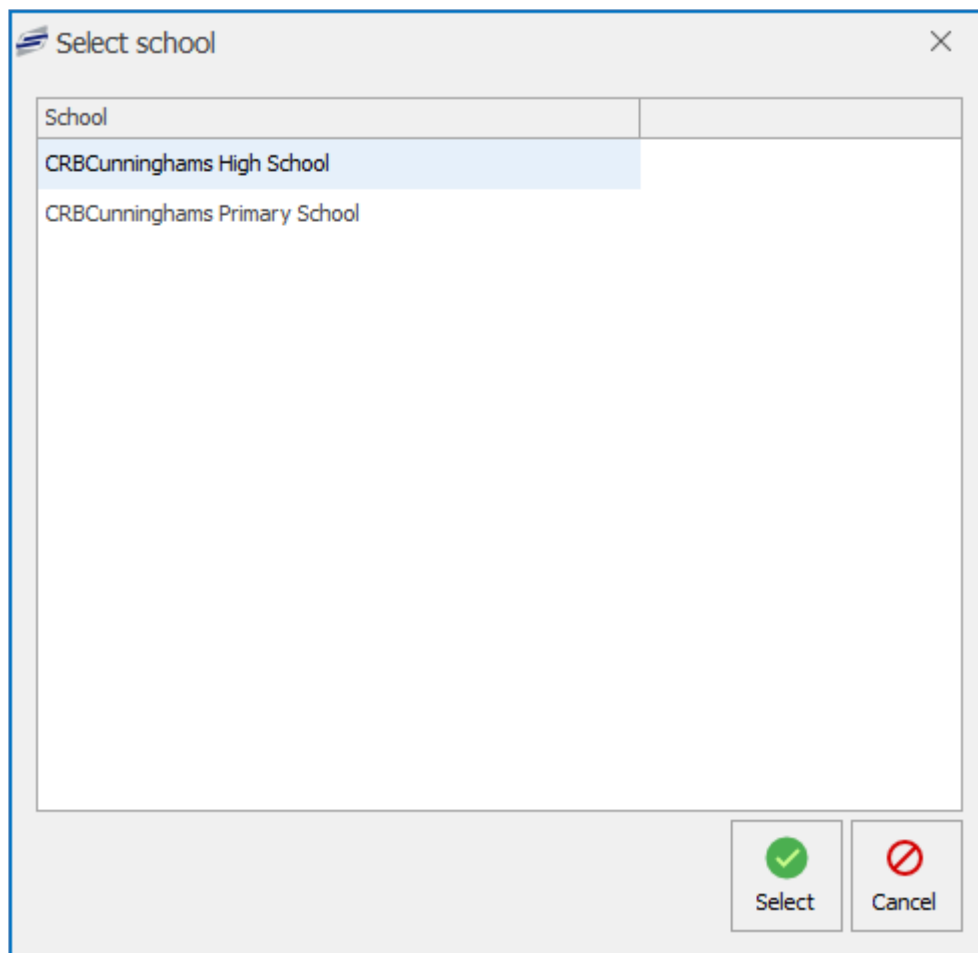


3. Type a new name for the price group.

A dialog box titled "Adding new price group" with a close button (X) in the top right corner. It contains a "Name" field with the text "Price Group 1" and a "School" field. Below the "School" field is a large empty text area. On the right side of the dialog, there are two buttons: "Add" (with a blue document icon and a green plus sign) and "Delete" (with a blue trash can icon). At the bottom right, there are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

4. Press **Add** to select a school to associate the price group to.





5. Press **OK**.



You can only assign one price group to one school. You cannot assign more than one price group to a school.

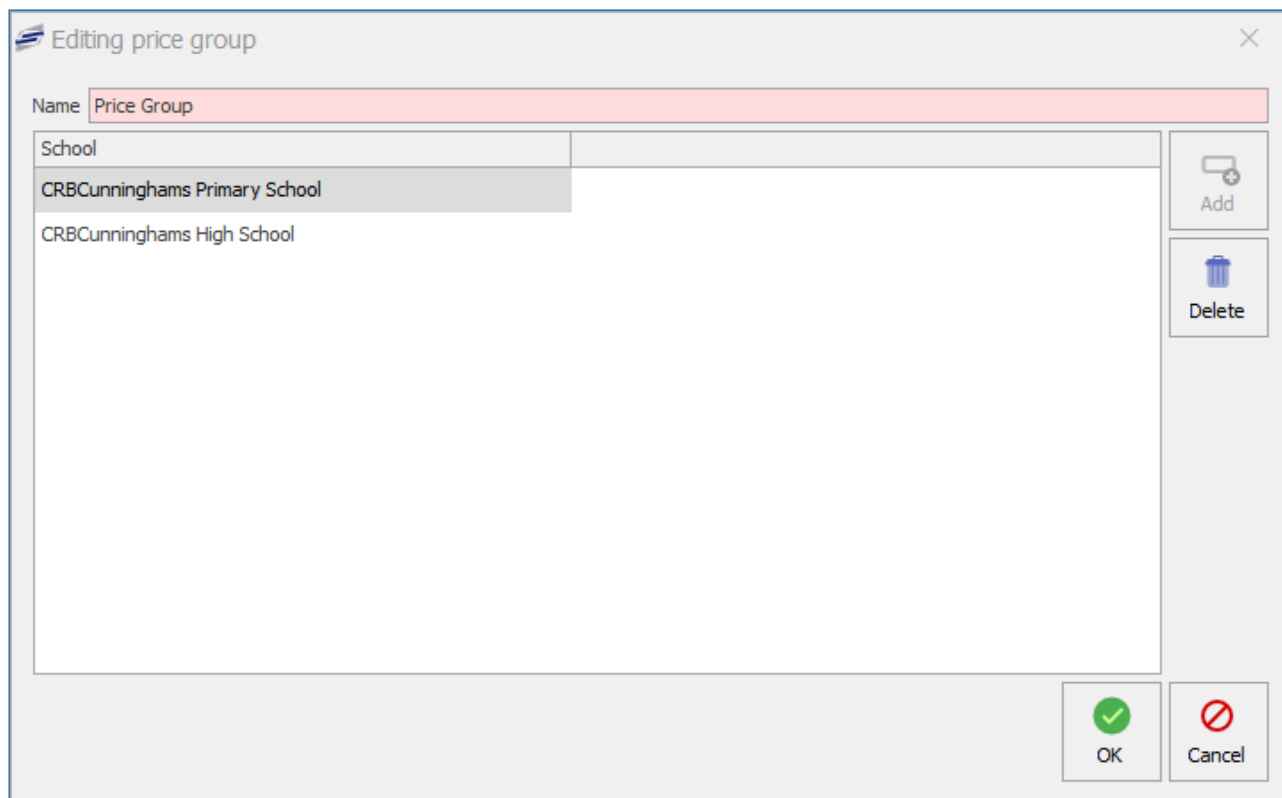
## Editing a Price group

You can only change the name of the price group, add & delete associated schools.

1. Press the **Edit** button.



2. Rename or **Delete** or **Add** a school.



Editing price group

Name Price Group

School	
CRBCunninghams Primary School	
CRBCunninghams High School	

Add

Delete

OK

Cancel

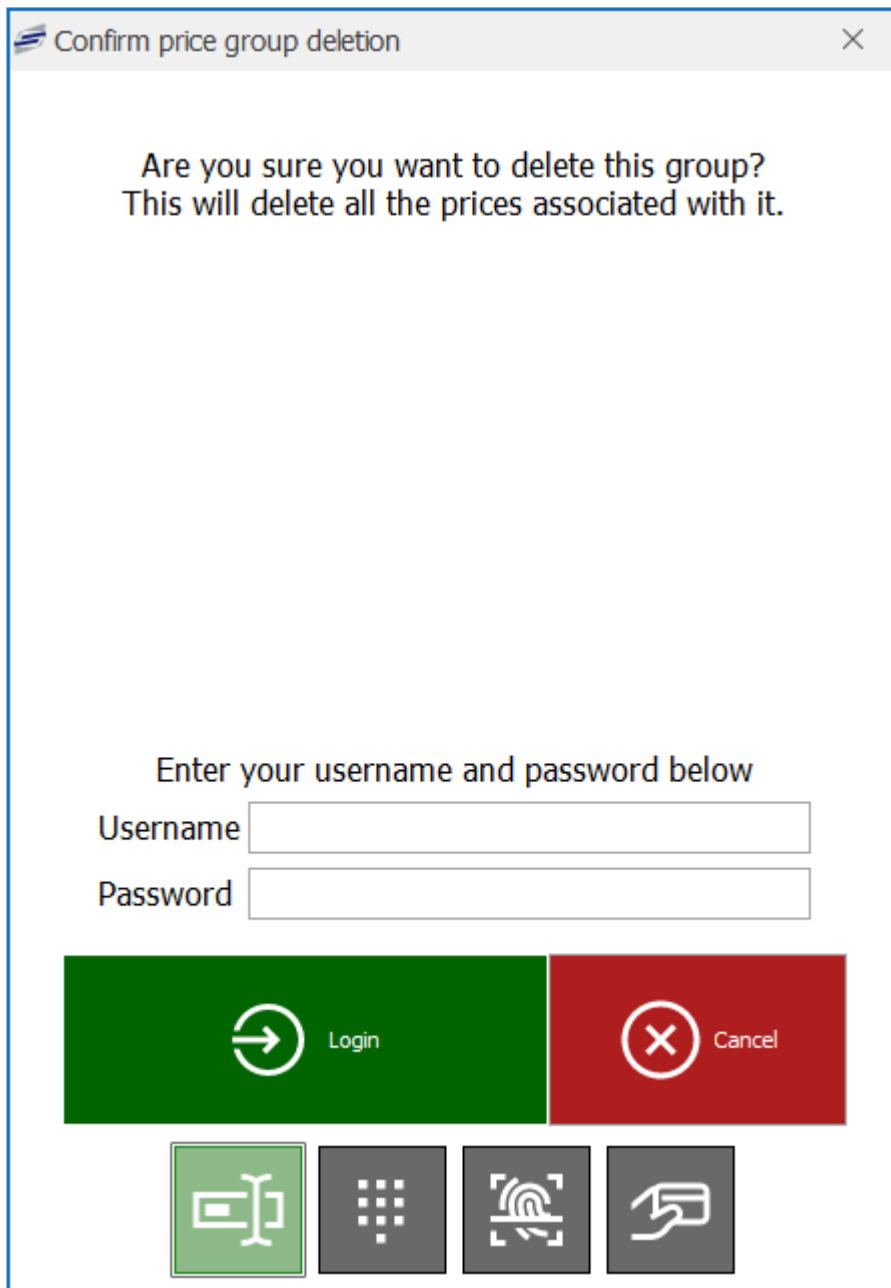
3. Press **OK** to confirm any changes.

## Deleting a Price group

1. Press the **Delete** button.



2. Enter the Fusion username and password to confirm the delete action.




Confirm price group deletion


Are you sure you want to delete this group?  
This will delete all the prices associated with it.


Enter your username and password below

Username

Password

 Login

 Cancel



3. The price group will be deleted.

## Price rules

*Last modified: 20 March 2023*



Price rules tie User types or meal statuses to Price Bands. The default price band is usually the Student (0% VAT). The first rule created would typically be for Staff user types to be associated to the Staff (20% VAT) price band.

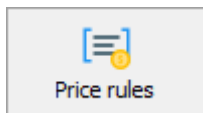
## Adding New Price Rules



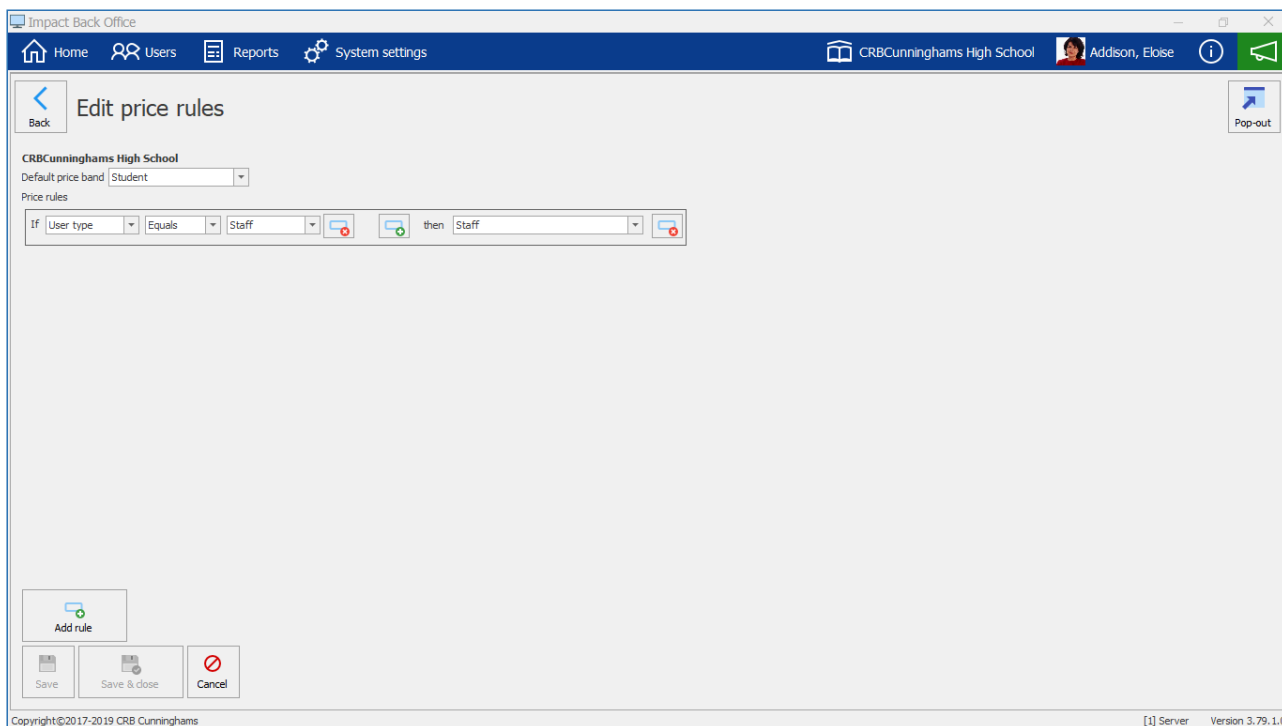
The default price band is usually set to Student (0% VAT). It will be in very rare circumstances that this will be different.

1. Press the **Settings** and select the **Price rules** button.





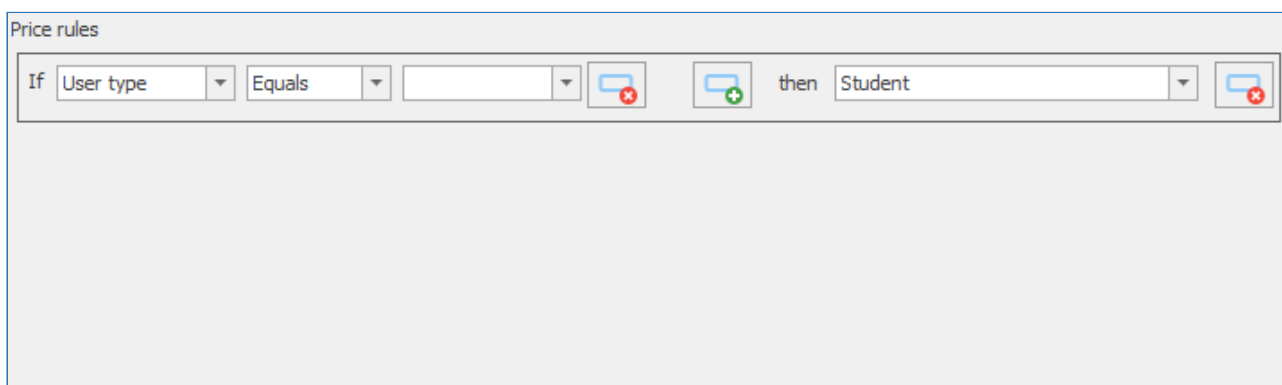
2. This will show the edit price rules overview. In the image below it will show a typical setup.



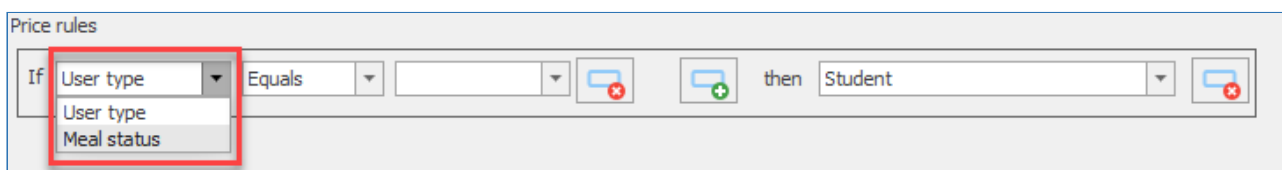
3. Press the Add rule button.



4. This will add a new price rule line to the list.



5. Select either User type or Meal choice.



6. Select either Equals or Not equal.

Price rules

If      then

7. If you selected **User type** in step 5, select a user type from the dropdown. If you selected **Meal status** in step 5, select either **Free** or **Not free**.

Price rules

If      then

Staff  
Catering  
Hospitality  
Admin

Price rules

If      then

Free  
Not free



You can add multiple rules to a price band by pressing the  button. If you want to remove a line from the rule press the  button.

8. Lastly, select which price band the rule will associate to.

Price rules

If      then

Price Band  
Student  
Staff  
Community

9. Press **Save** or **Save & close**.

## Deleting a Price rule

1. Press the **Delete** button.

Price rules

If      then

2. This will remove the rule from the list.

*Last modified: 20 March 2023*

## Price bands



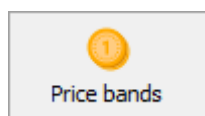
Price bands represent what user types will be using VAT codes. The default setup would usually consist of Students using a Zero VAT code, Staff and Community using a Standard (20%) VAT code.

Name	VAT code	Active
Student	Zero	<input checked="" type="checkbox"/>
Staff	Standard	<input checked="" type="checkbox"/>
Community	Standard	<input checked="" type="checkbox"/>

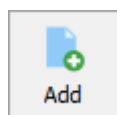
Buttons: Add, Edit, Close

## Adding a Price band

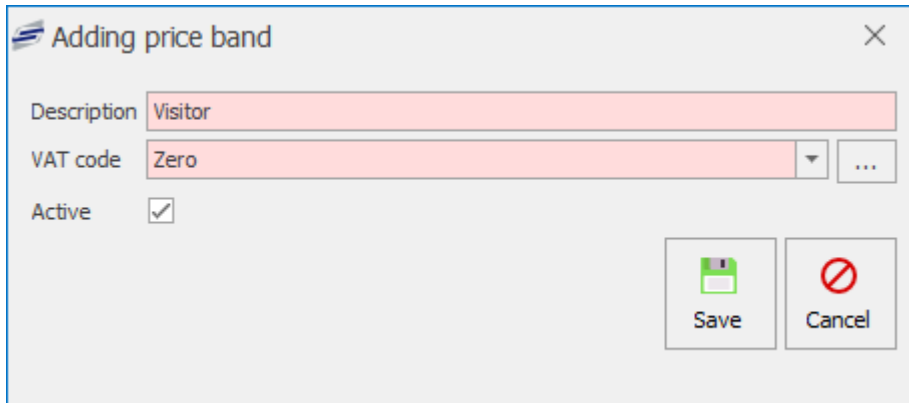
1. Press the **Settings** and select **Price bands**.



2. Press the **Add** button.



3. Enter a description for the new price band and select a VAT code. You will also need to select the Active checkbox for the price band to become live.



Adding price band

Description

VAT code  ...

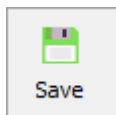
Active ☒

Save Cancel



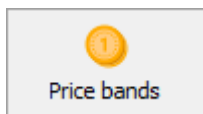
You can also create a new VAT code by pressing the ... button. Click on the link for more information regarding VAT codes.

4. Press **Save** button.



## Editing a Price band

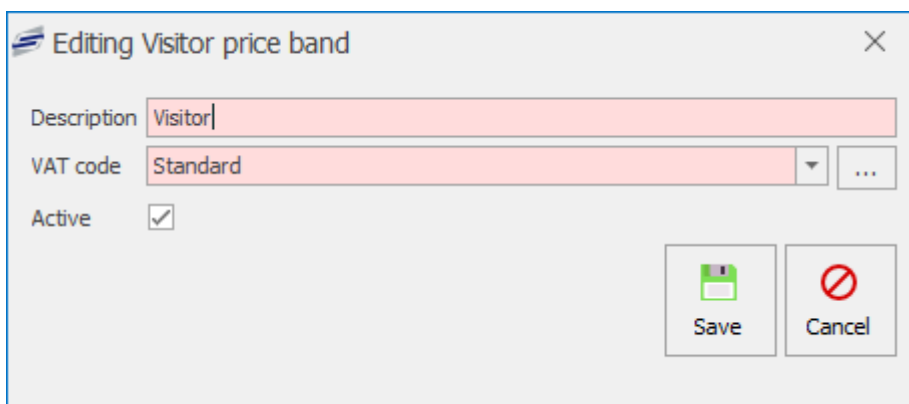
1. Press the **Settings** and select **Price bands**.



2. Select a price band and Press the **Edit** button.



3. You can rename the description, select an alternative VAT code or activate/inactivate the price band.



Editing Visitor price band

Description

VAT code  ...

Active ☒

Save Cancel

4. Press **Save** button.





Once you create a price band it cannot be deleted. If you no longer wish to use a price band you can mark it as inactive by using the edit function.

*Last modified: 20 March 2023*

## Product groups

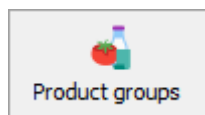


PLU groups allow you to easily group products. This allows for easier management of products and the ability to report on how many products were sold from that group. For example, using the 'Item sales mix' report, you could see that 20% of your sales were from the 'Drinks' group.

The screenshot shows a window titled 'Groups' with a close button (X) in the top right corner. Inside the window, there is a table with a single column labeled 'Name'. The table contains the following rows: 'Breakfast', 'Cold Meals', 'Cold Snacks', 'Desserts', 'Drinks', 'Fresh Fruit', 'Hot Meals', 'Hot Snacks', and 'Misc.'. To the right of the table are three buttons: 'Add' (with a plus icon), 'Edit' (with a pencil icon), and 'Delete' (with a trash can icon). At the bottom right of the window are two buttons: 'Select' (with a green checkmark icon) and 'Cancel' (with a red X icon).

## Accessing PLU groups

Within the PLU's tile select the **Settings** button and select the **Product groups** button.

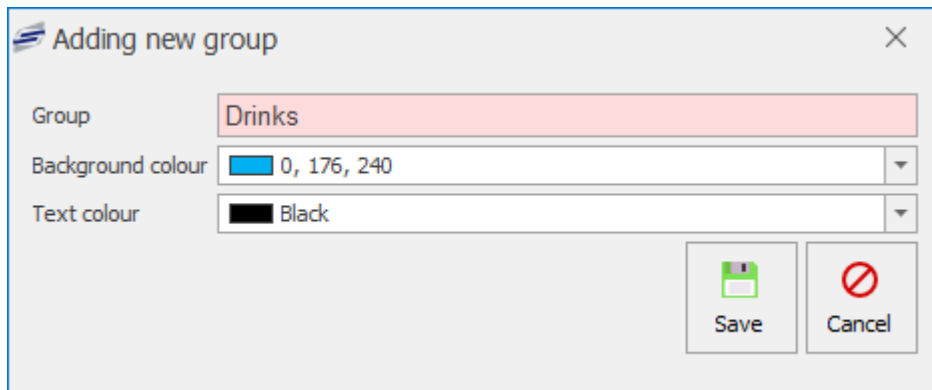


## Creating a new group

1. Press the Add button.



2. Enter a name for the group and use the drop-downs to set the default background and text colours for any new products added to this group.



Adding new group

Group: Drinks

Background colour: 0, 176, 240

Text colour: Black

Save Cancel



These colours will be used when you add the button to the layout, and this saves you from having to individually set the colour of each button. It also means that the button will be the same colour on all menus.

3. Press **Save**.

## Editing a group

1. Select the group from the list and press the **Edit** button.



2. Edit as required.
3. Press **Save**.

## Deleting a group



You can only delete a group if it is not being used by any PLUs.

1. Select the group from the list and press the **Delete** button.



2. Press **Yes** to confirm.

*Last modified: 20 March 2023*

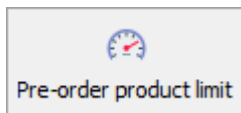
## Pre-order product limit



The pre-order product limit setting allows the user to quickly limit the number of each item that can be pre-ordered. This means that over ordering for particular items can be avoided.

## How to set a pre order product limit via PLU settings.

1. Press the **Settings** button and select **Pre-order product limit**.



2. A list of all PLUs will be displayed. Find the PLUs you wish to set a pre-order limit for.

Pre-order product limit

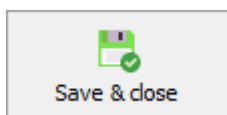
PLU number	Name	Group	Limit
100256	Bacon	Breakfast	
100263	Baked Beans	Breakfast	
100261	Black Pudding	Breakfast	
100269	Boiled Egg	Breakfast	
100254	Breakfast a Breakfast	Breakfast	
100266	Fried Bread	Breakfast	
100258	Fried Egg	Breakfast	
100260	Fried Mushrooms	Breakfast	
100253	Full House Breakfast	Breakfast	
100262	Grilled Tomato	Breakfast	
100257	Poached Egg	Breakfast	
100255	Sausage	Breakfast	
100259	Scrambled Egg	Breakfast	
100265	Slice of Toast (Brown)	Breakfast	
100264	Slice of Toast (White)	Breakfast	10
100344	Snickers	Chocolate Bars	50
100343	Twix	Chocolate Bars	
100233	Bread Serving	Cold Items	
100272	Cornell	Cold Items	
100274	Croissant	Cold Items	
100079	Fr Yog/Slush Mix	Cold Items	
100025	Fresh Fruit	Cold Items	
100077	Frozen Yoghurt	Cold Items	
100026	Fruit Pail 2oz	Cold Items	
100027	Fruit Pail 4oz	Cold Items	
100271	Jelly	Cold Items	
100232	Side Salad Serving	Cold Items	
100076	Slush	Cold Items	
100245	Test Product	Cold Items	
100016	Yoghurt - Low Fat Natural	Cold Items	
100017	Yoghurt - Muller Peach	Cold Items	
100170	Yoghurt - Muller Strawberry	Cold Items	
100168	Yoghurt - Rowan Glen Apricot	Cold Items	
100171	Yoghurt - Rowan Glen Strawberry	Cold Items	
100172	Yoghurt - Rowan Glen Toffee	Cold Items	
100147	Yoghurt Options	Cold Items	
100246	BBQ Dip	Condiments	
100311	BBQ Sauce	Condiments	
100268	Brown HP Sauce	Condiments	
100270	Hollandaise	Condiments	
100267	Ketchup	Condiments	

Save Save & close Cancel

3. Click on the box under the **Limit** header next to your chosen PLU and enter the value you wish to set the limit as.

PLU number	Name	Group	Limit
100256	Bacon	Breakfast	25
100263	Baked Beans	Breakfast	
100261	Black Pudding	Breakfast	

4. Repeat for any other PLUs that need a limit set.  
5. Press **Save** or **Save and Close** to save your changes



Last modified: 20 March 2023

## Layouts



Layouts are how the system displays the products to the user. There are currently two types of layouts that Fusion utilises;

## Point of Sale

This layout displays products to the operator on the Point of Sale. It is typically split into menus that group similar items together either by service time (break, lunch etc.) or by type/area (drinks, sandwich bar etc.).

## Pre-order

A pre-order layout displays products to the user who is making an order via a Pre-order kiosk or the Fusion Online pre-order mobile application.

## Smart Board

This layout is predominately used for Primary Schools. The students or staff can select products via the Smart Board in the morning ready for collection at lunch period.

Just like [price lists](#), layouts also have a start date. The system will use the start dates of the layouts to determine which is the current layout.

Impact Back Office

Home Users Reports System settings Retry bio

CRBCunninghams Secondary School Administrator, Administrator

Layouts

Back

Layout ID Name Start date No. weeks Associated schools

Location type: Point of sale

Layout ID	Name	Start date	No. weeks	Associated schools
53	POS Layout - Luke Todd	02/08/2019	0	Luke Todd Secondary School
52	POS Layout - Nick Phelps	02/08/2019	0	Nick Phelps Secondary School
51	POS Layout - Gareth Hunter	02/08/2019	0	Gareth Hunter Secondary School
50	POS Layout - Sarah Littlechild	02/08/2019	0	Sarah Littlechild Secondary School
49	POS Layout - Paul Banks	02/08/2019	0	Paul Banks Secondary School
48	POS Layout - Paul Tennant	02/08/2019	0	Paul Tennant Secondary School
47	POS Layout - Jamie Roberts	02/08/2019	0	Jamie Roberts Secondary School
22	POS Layout	02/08/2019	0	CRBCunninghams College, CRBCunninghams Prima

Location type: Pre-order

Layout ID	Name	Start date	No. weeks	Associated schools
40	Pre Order Layout	21/06/2021	0	CRBCunninghams College, CRBCunninghams Prima

Location type: Smart board

Layout ID	Name	Start date	No. weeks	Associated schools
23	Smart Board Layout	06/08/2019	0	CRBCunninghams Primary School, Gareth Hunter P...

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[90] Alex Hay Laptop Version 22.03.0.0

*Last modified: 20 March 2023*

## Assigning layouts to schools

Impact Fusion is designed in a way that allows for multiple schools to use a single system. For this reason, when creating a layout, you will need to assign the schools that are able to use the layout.



Impact Back Office

Home Users Reports System settings Retry bio

CRBCunninghams Secondary School Administrator, Administrator

Layouts

Show archived

Layout ID	Name	Start date	No. weeks	Associated schools
<b>Location type: Point of sale</b>				
53	POS Layout - Luke Todd	02/08/2019	0	Luke Todd Secondary School
52	POS Layout - Nick Phelps	02/08/2019	0	Nick Phelps Secondary School
51	POS Layout - Gareth Hunter	02/08/2019	0	Gareth Hunter Secondary School
50	POS Layout - Sarah Littlechild	02/08/2019	0	Sarah Littlechild Secondary School
49	POS Layout - Paul Banks	02/08/2019	0	Paul Banks Secondary School
48	POS Layout - Paul Tennant	02/08/2019	0	Paul Tennant Secondary School
47	POS Layout - Jamie Roberts	02/08/2019	0	Jamie Roberts Secondary School
22	POS Layout	02/08/2019	0	CRBCunninghams College, CRBCunninghams Prima...
<b>Location type: Pre-order</b>				
40	Pre Order Layout	21/06/2021	0	CRBCunninghams College, CRBCunninghams Prima...
<b>Location type: Smart board</b>				
23	Smart Board Layout	06/08/2019	0	CRBCunninghams Primary School, Gareth Hunter P...

Pre Order Layout

Current layout

Pre-order

Rename Edit Copy

Archive Delete Export

Associated schools

- ☒ CRBCunninghams Secondary School
- ☒ CRBCunninghams Primary School
- ☒ CRBCunninghams College
- ☒ Paul Tennant Primary School
- ☒ Paul Tennant Secondary School
- ☒ Paul Banks Primary School
- ☒ Paul Banks Secondary School
- ☒ Jamie Roberts Primary School
- ☒ Jamie Roberts Secondary School
- ☒ Sarah Littlechild Primary School
- ☒ Sarah Littlechild Secondary School
- ☒ Gareth Hunter Primary School
- ☒ Gareth Hunter Secondary School
- ☒ Nick Phelps Primary School
- ☒ Nick Phelps Secondary School
- ☒ Luke Todd Primary School
- ☒ Luke Todd Secondary School

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When selecting a layout from the list, the 'Associated schools' section on the right side of the window tells you which schools are assigned to this layout. If your school is not there you will need to follow the below process;

## Adding a School

1. Find the school you wish to assign a layout to in the list on the right hand side of the screen.

Associated schools

- ☒ CRBCunninghams Secondary School
- ☒ CRBCunninghams Primary School
- ☒ CRBCunninghams College
- ☐ Paul Tennant Primary School
- ☐ Paul Tennant Secondary School

2. Click on the check box next to the chosen school.

Associated schools

- ☒ CRBCunninghams Secondary School
- ☒ CRBCunninghams Primary School
- ☒ CRBCunninghams College
- ☒ Paul Tennant Primary School
- ☐ Paul Tennant Secondary School

3. The school will now be added to the layout.

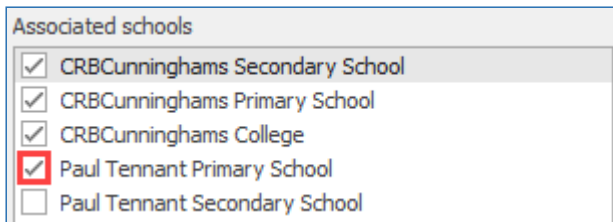
## Removing a School

1. Select a school from the list.

Associated schools

- ☒ CRBCunninghams Secondary School
- ☒ CRBCunninghams Primary School
- ☒ CRBCunninghams College
- ☐ Paul Tennant Primary School
- ☐ Paul Tennant Secondary School

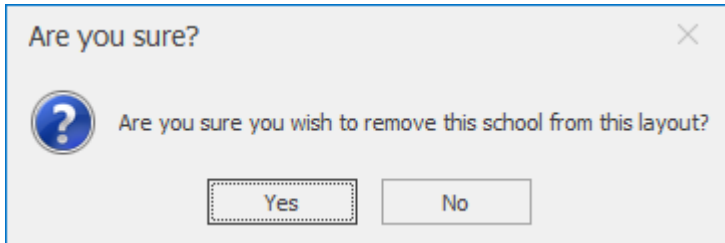
- Click the check box next to the school you wish to remove from the layout.



Associated schools

<input checked="" type="checkbox"/>	CRBCunninghams Secondary School
<input checked="" type="checkbox"/>	CRBCunninghams Primary School
<input checked="" type="checkbox"/>	CRBCunninghams College
<input checked="" type="checkbox"/>	Paul Tennant Primary School
<input type="checkbox"/>	Paul Tennant Secondary School

- Press the **Yes** or **No** to confirm the action.



Are you sure?

Are you sure you wish to remove this school from this layout?

**Yes** **No**

## Creating new layouts

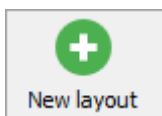
*Last modified: 20 March 2023*

### Creating a new layout

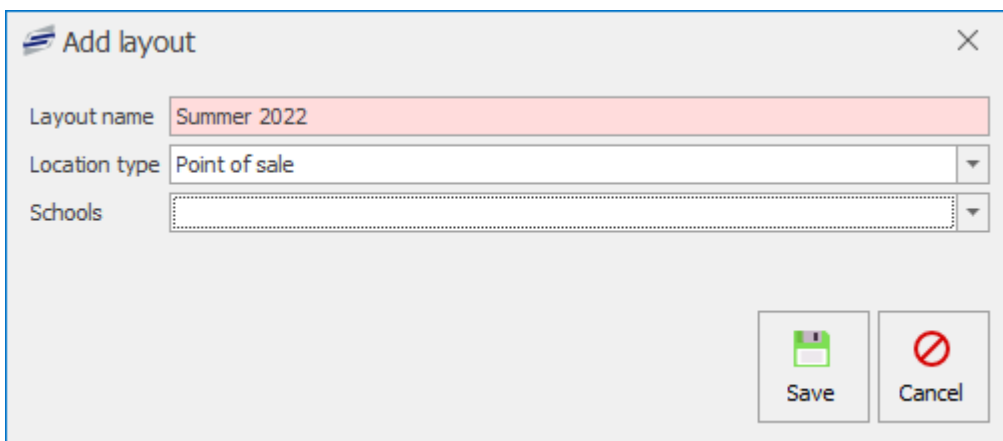
Layouts can be created either from scratch or from copying an existing layout;

### Creating a brand new layout from scratch

- Press the **New layout** button.



- Enter a name and choose the type of layout that you wish to create.



Add layout

Layout name: Summer 2022

Location type: Point of sale

Schools: [dropdown menu]

**Save** **Cancel**

- Select the schools you wish to assign to the layout from the dropdown menu.

**Add layout**

Layout name: Summer 2022

Location type: Point of sale

Schools:

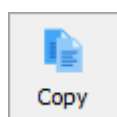
- ☒ (Select All)
- ☒ CRBCunninghams Secondary School
- ☒ CRBCunninghams Primary School
- ☐ CRBCunninghams College
- ☐ Paul Tennant Primary School
- ☐ Paul Tennant Secondary School
- ☐ Paul Banks Primary School

OK Cancel

4. Press **Save**.
5. The layout will be created and you will be taken to the layout editor.

### Creating a layout by copying an existing layout

1. Select the layout that you wish to copy and press the **Copy** button.



2. Enter a name for the layout and press **Save**.
3. The layout will be created and you will be taken to the layout editor.

### Editing an existing layout

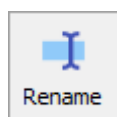
1. Select the required layout and press **Edit** button.



2. You will be taken to the editor for that type of layout.

### Renaming an existing layout

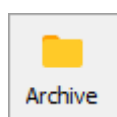
1. Select the layout you wish to rename and press the **Rename** button.



2. Enter a new description for the layout and press **Save**.

### Archiving a layout

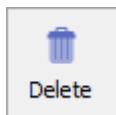
1. Select the layout to be deleted and press the **Archive** button.



2. The layout will be archived.

## Deleting a layout

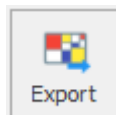
1. Select the layout to be deleted and press the **Delete** button.



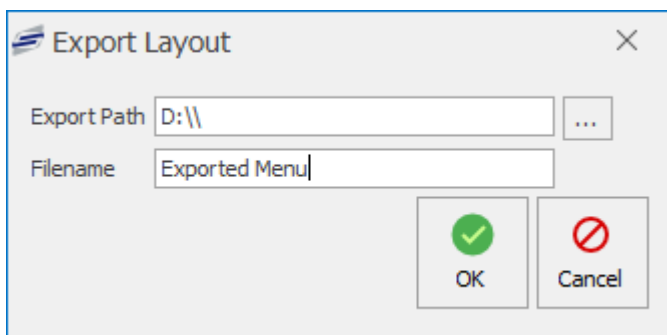
2. Enter your username and password to confirm.
3. The layout will be deleted.

## Export a layout

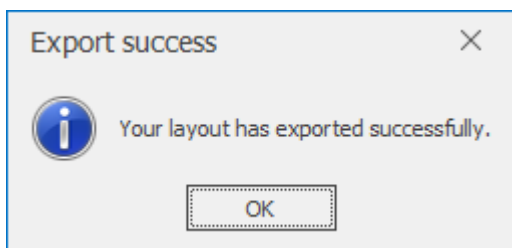
1. Select the layout you wish to export and press the **Export** button.



2. Browse to a directory you would like to send the export and give the file a name.



3. Press **OK** and the layout will export successfully.

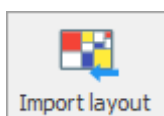


## Importing a layout

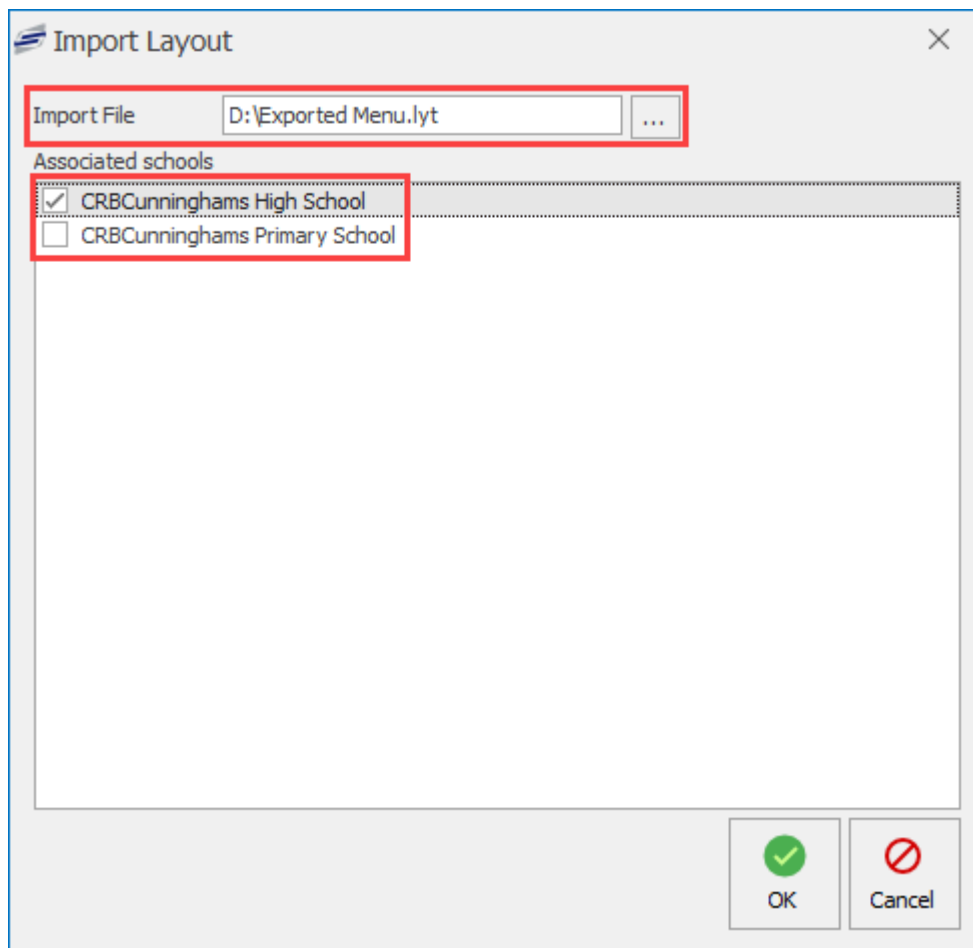


You can only import layouts of the same Fusion version or below. You will receive errors if the layout has been exported from a newer version of Fusion.

1. Press the **Import layout** button.



2. Select an Import File by browsing for a **.lyt** file created from an export and select an associated school.



3. Press **OK**. If the layout has the same name it will ask if you want to overwrite.
4. Fusion will now ask you to map your groups. VAT Groups, price bands, price lists and price groups.
5. Press **OK** to Import successful.

*Last modified: 20 March 2023*

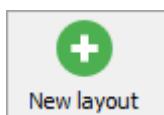
## Point of Sale layouts



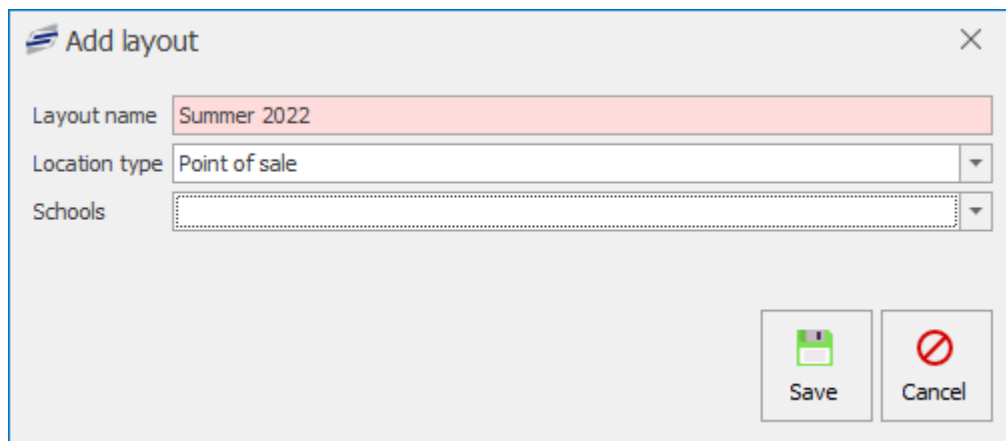
POS Screen Layouts can be applied to multiple POS tills at once, or each POS till can have their own individual layout that is custom designed specifically for them. Weekly rotation menus can provide the till layout with a different menu depending on which week and day they are being used.

## Creating a new POS layout

1. Press the **New layout** button.



2. Enter a name for the new menu and select **Point of sale** from the location type drop-down list.



**Add layout**

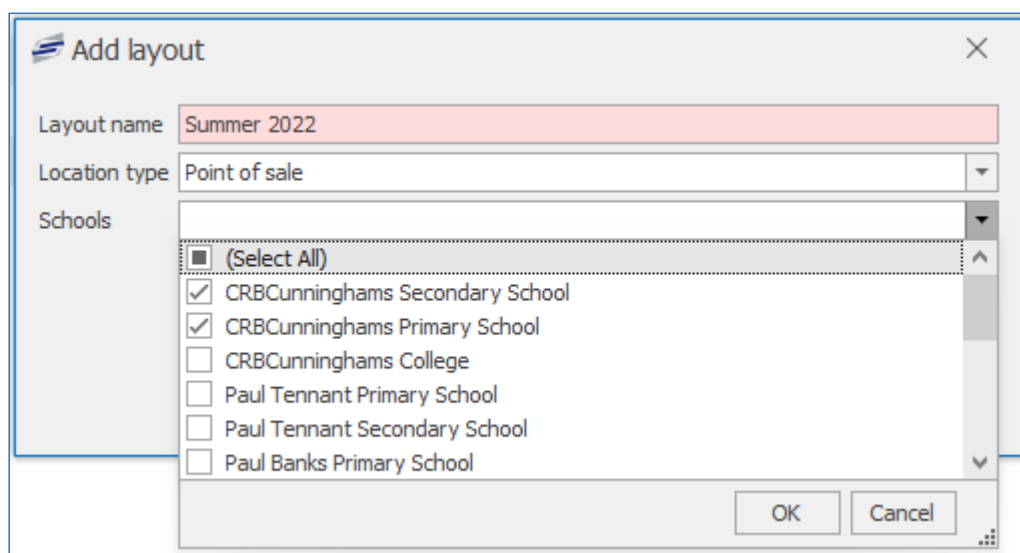
Layout name: Summer 2022

Location type: Point of sale

Schools:

Save Cancel

3. Select the schools you wish to assign to the layout from the dropdown menu.



**Add layout**

Layout name: Summer 2022

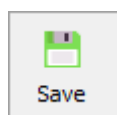
Location type: Point of sale

Schools:

- ☒ (Select All)
- ☒ CRBCunninghams Secondary School
- ☒ CRBCunninghams Primary School
- ☐ CRBCunninghams College
- ☐ Paul Tennant Primary School
- ☐ Paul Tennant Secondary School
- ☐ Paul Banks Primary School

OK Cancel

4. Press the **Save** button.



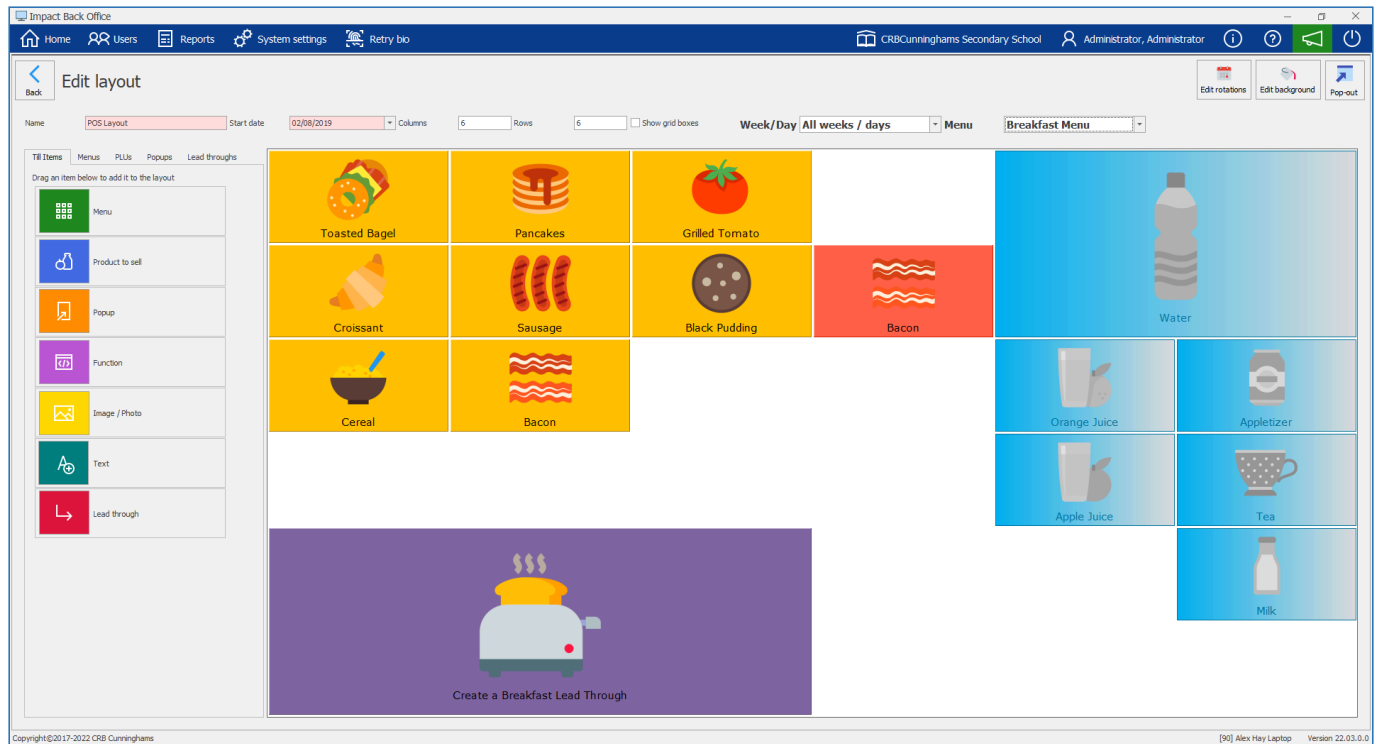
5. This will take you to the edit layout overview.

## Editing a PoS layout

*Last modified: 20 March 2023*



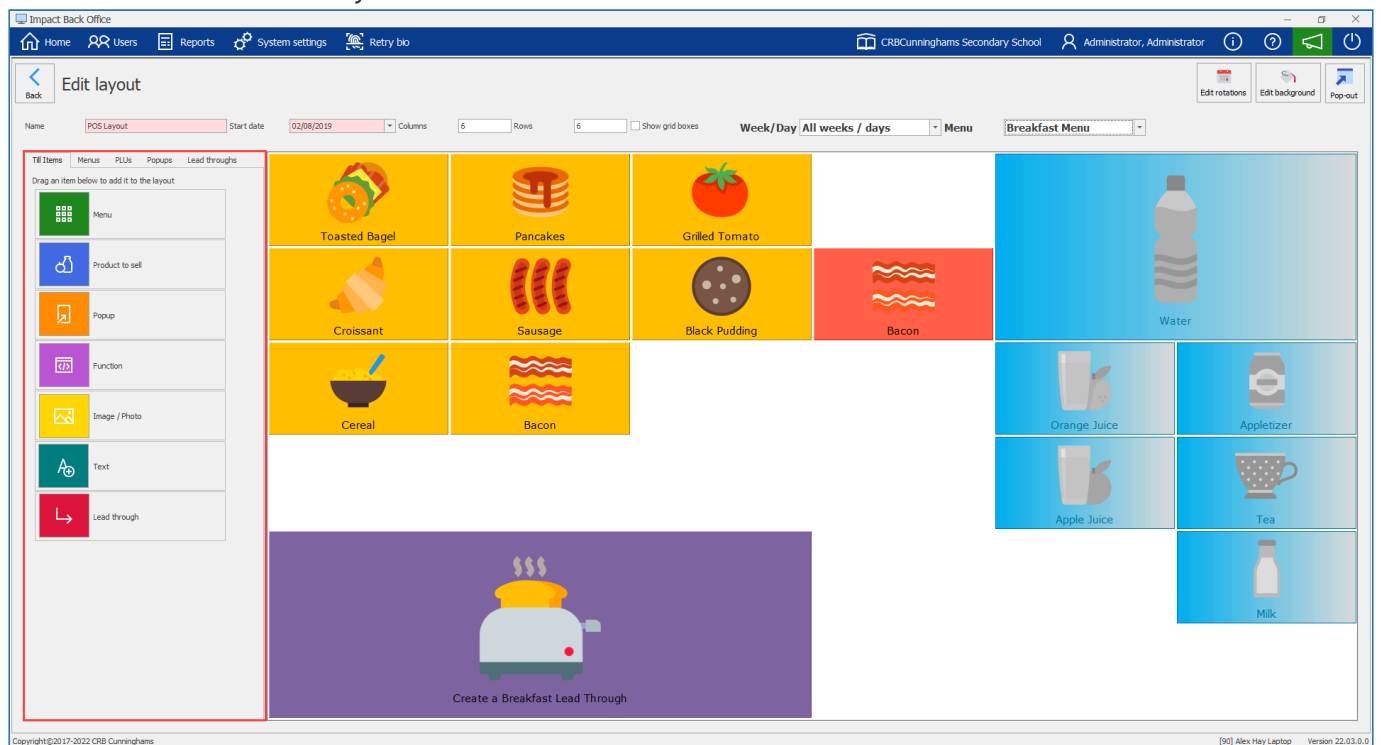
The layout designer allows for the creation of customised layouts. The layouts can be as simple or as complicated as you require.



The functions of the layout designer have been broken down and split into their own sections. Only the most common/simple features are covered in this version of the user manual.

## Function Bar

There is a number of functions you can use when editing a Point of Sale layout. These functions can be found on the left of the layout.





**Menu:** You can add a shortcut to access a menu on the layout.



**Product to sell:** You can add PLUs to the menu to sell.



**Popup:** You can add a popup function to the menu. Multiple PLUs can be stored within a Popup.



**Function:** You can add a function button which allows you to update a photo or view a totaliser report.



**Image / Photo:** You can add an image/photo to a tile on the layout.



**Text:** You can add text to a tile on the layout.



**Lead through:** You can add a lead through function that has a chain of PLUs to select before finishing.

*Last modified: 20 March 2023*

## Layout properties



At the top of the layout designer, the properties of the layout are accessed. Alter these values as required.

The screenshot shows the 'Edit layout' interface with the following fields and controls:

- Back** button
- Name:** Input field with value 'k'
- Start date:** Date picker showing '03/02/2020'
- Columns:** Input field with value '10'
- Rows:** Input field with value '10'
- Show grid boxes:** Checkbox (unchecked)
- Week/Day:** Dropdown menu showing 'All weeks / days'
- Menu:** Dropdown menu showing 'All menus'
- Buttons:** 'Edit rotations', 'Edit background', and 'Pop-out'

- **Name:** The name of the layout.
- **Start date:** The date from which the layout will become active.
- **Columns:** The number of columns on the layout.
- **Rows:** The number of rows on the layout.
- **Show grid boxes:** Display the grid boxes that menu items can be placed in.
- **Week/Day:** Allows for the selection of different menus for different weeks/days.
- **Menu:** Allows for the selection of a particular menu.
- **Edit rotations:** Manage weekly menu rotations. Click the link for more information regarding [Edit rotations](#).
- **Edit background:** Set a background on the layout. Click the link for more information regarding [Edit background](#).

*Last modified: 20 March 2023*



## Layout rotations



Many schools operate a “rotating” menu, meaning that ‘Week 1 - Monday’ will be a different layout to ‘Week 2 - Monday’. Impact Fusion allows you to create these rotations and set which dates will use which week.

**Menu rotations**

Generate weeks

Start date: 03/09/2018

End date: 31/12/2018

Weeks: 4

Mode: Replace all rotations

**Generate**

Week 1

Week 2

Week 3

Week 4

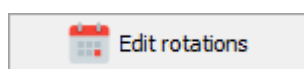
Week start	Week number
03/09/2018	1
10/09/2018	2
17/09/2018	3
24/09/2018	4
01/10/2018	1
08/10/2018	2
15/10/2018	3
22/10/2018	4
29/10/2018	1
05/11/2018	2
12/11/2018	3
19/11/2018	4
26/11/2018	1

**Save** **Cancel**

To configure the layout rotations;

### Generate cycle

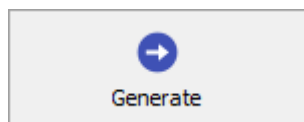
1. Press the **Edit rotations** button.



2. In the ‘Generate weeks’ section;

- a. **Start date:** The date that the rotations will be generated from. This will be ‘Week 1’ by default.
- b. **End date:** The date at which the rotations will be generated to.
- c. **Weeks:** The number of weeks in the rotation cycle. For example, entering ‘4’ will generate a 4 week rotating menu.
- d. **Mode:** Choose to either ‘Replace all rotations’ with the entered information or choose to ‘Add to rotations’.

3. Press **Generate** to create the rotation cycle.



## Customise rotations

You can update the generated menu rotation by dragging a week button into the list of generated weeks. For example, if I wanted the week starting 17/09/2018 to use the 'Week 2' layout, I would click and drag the 'Week 2' button into the slot next to 17/09/2018 on the list.

**Menu rotations**

Generate weeks

Start date: 03/09/2018

End date: 31/12/2018

Weeks: 4

Mode: Replace all rotations

Generate

Week 1  
Week 2  
Week 3  
Week 4

Week start	Week number
03/09/2018	1
10/09/2018	2
17/09/2018	3
24/09/2018	4
01/10/2018	1
08/10/2018	2
15/10/2018	3
22/10/2018	4
29/10/2018	1
05/11/2018	2
12/11/2018	3
19/11/2018	4

Week start	Week number
03/09/2018	1
10/09/2018	2
17/09/2018	2
24/09/2018	4
01/10/2018	1
08/10/2018	2

Last modified: 20 March 2023

## Layout background

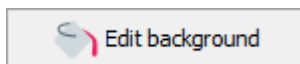


Fusion uses a white background on the Point of Sale by default. This can be changed if desired so that it is unique to your school.

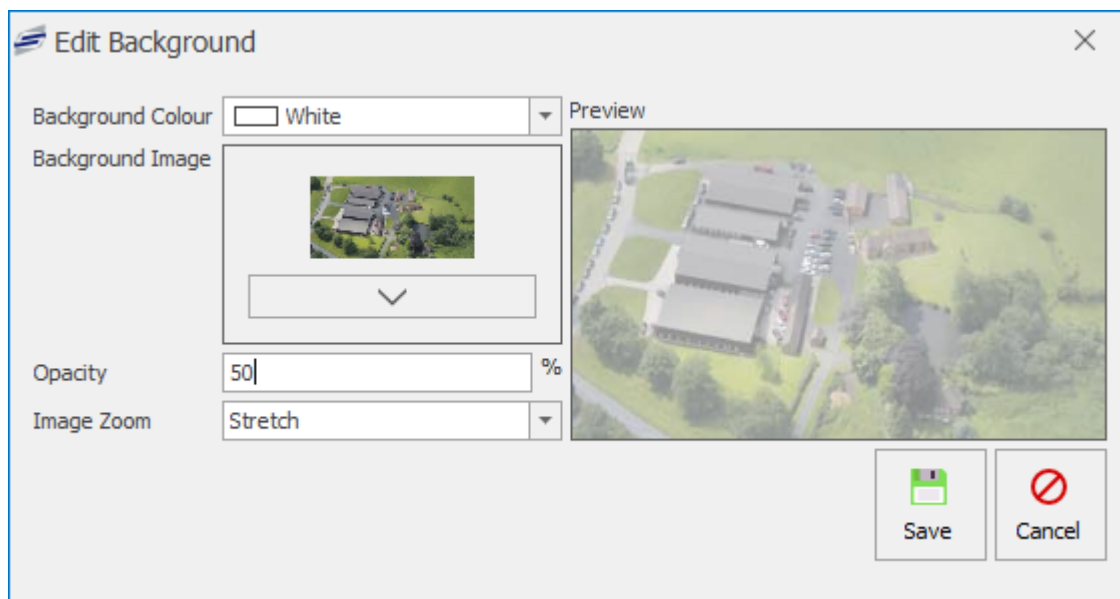


The background of the layout can be changed by;

1. Press the **Edit background** button.



2. Configure the background as required:



- a. **Background colour:** Set the required background colour.

- b. **Background image:** If desired, set an image file to use for the background.
- c. **Opacity:** If using a background image, set the opacity level. This is a value between 0 (Image full see through) and 100 (Image fully visible).
- d. **Image zoom:** If using a background image, choose a zoom setting.

*Last modified: 20 March 2023*

## Creating and editing menus



A layout will normally consist of multiple menus. Menus are used to display similar items. In most schools, these are typically “Breakfast”, “Morning break”, and “Lunch”, meaning that all items sold at breakfast are on a single menu and so on, but they could also be used to display products by type such as “Hot food”, “Cold food”, “Snacks”, and “Drinks”.



Some schools may even use a menu for different locations in the school. For example, if the school has a tuck shop, they may create a menu that only includes those items that are sold in that location.

The menus section can be accessed by navigating to the ‘Menus’ tab on the left hand side of the layout designer screen.

## Adding a new menu

**Menu**

Title:

Preorder Only ☐

**Weeks Available**

☒ All Weeks

☐ Week 1

☐ Week 2

☐ Week 3

☐ Week 4

**Days Available**

☒ All Days

☐ Sunday

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

1. Click the **Add** button at the bottom of the Menus section.



2. Enter a title for the menu, e.g. 'Lunch' or 'Grab 'n' Go'.
3. If this menu is only to be used with till pre-order (also known as 'Snappy Snacks'), click the 'Preorder Only' check box, if not leave it un-ticked.
4. If this menu will be available on all weeks of a menu cycle, leave the 'All Weeks' tick box selected, else deselect it and choose the weeks that the menu will be used.
5. If this menu will be available on all days of a menu cycle, leave the 'All Days' tick box selected, else deselect it and choose the days that the menu will be used.
6. Press **Save** to finish adding the new menu.

## Editing an existing menu

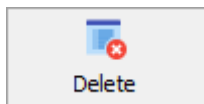
1. Select the menu to be edited and press the **Edit** button.



2. Configure the menu as required. (See the section on adding a new menu for more information if needed).
3. Press **Save** once complete.

## Deleting a menu

1. Select the menu to be deleted and press the **Delete** button.



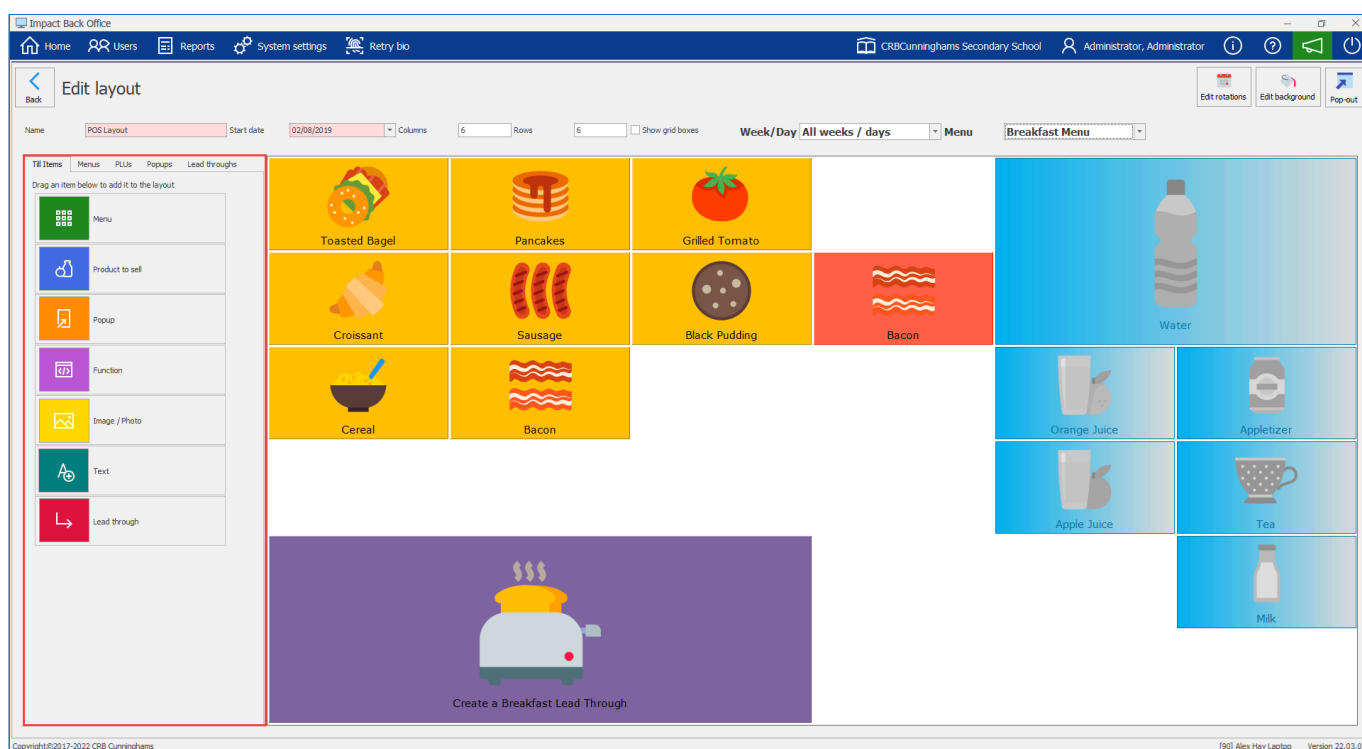
2. Press **Yes** to confirm and press **OK** to complete the process.

*Last modified: 20 March 2023*

## Adding items to menus

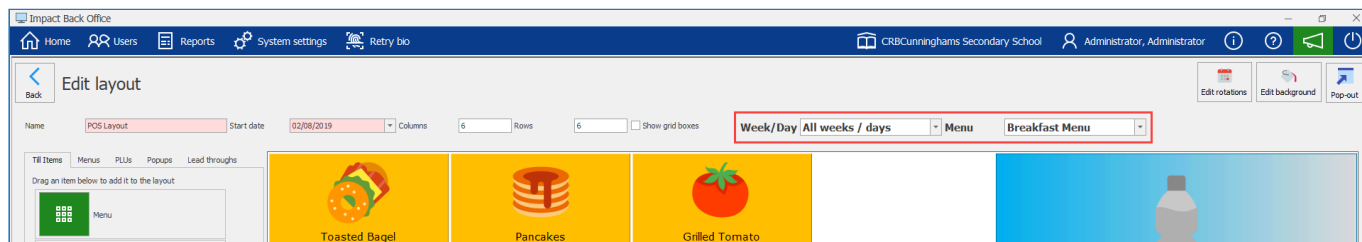


Multiple types of objects can be added onto a menu. This obviously includes buttons that are used to sell products, but also buttons for other menus and even text and images.



## Selecting a menu and weeks/days

Before you can add items to a menu, you need to select the menu and the days that you wish to add the items to. You can do this by using the two drop-down menus above the layout designer.



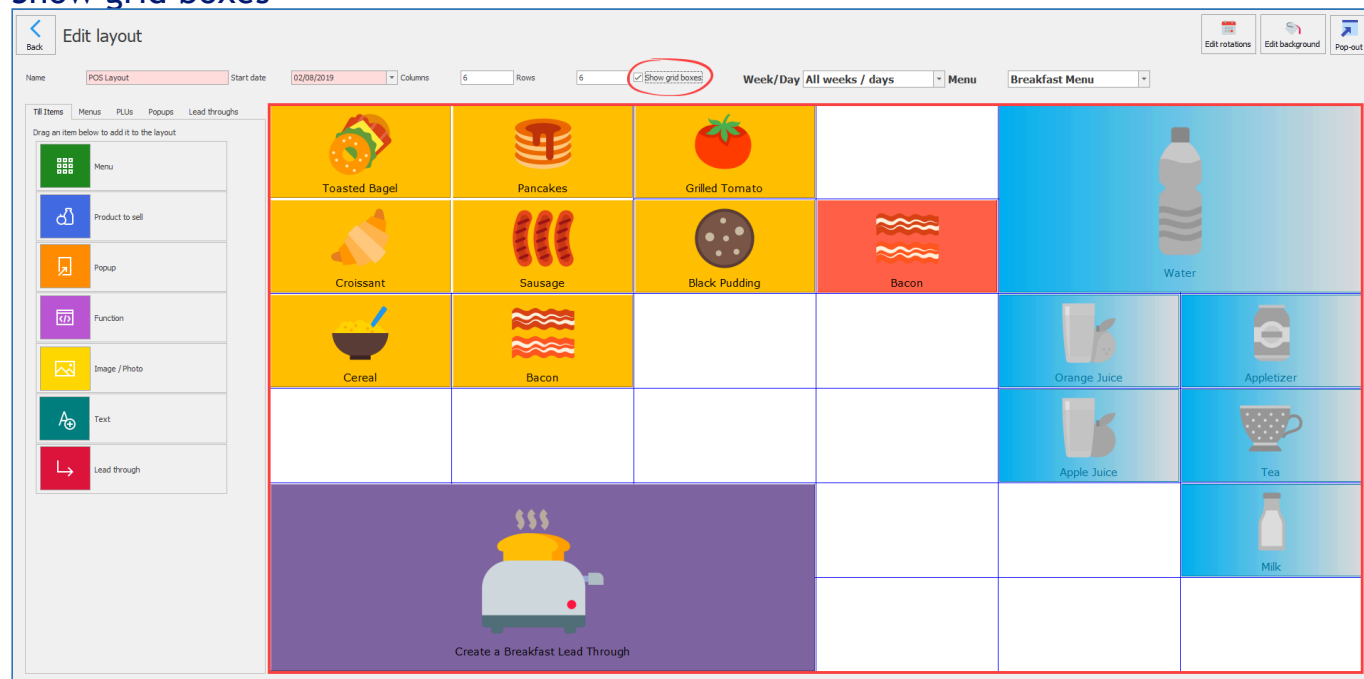
## Week/Day

Select the week and day that you wish to add the items to. Setting the drop-down as 'All weeks / days' will add the items to every day of every week for the configured menu cycle.

## Menu

Select the menu that you wish to add the items to. Setting the drop-down as 'All menus' will add the items to every menu. This is useful for items like drinks which are available all day.

## Show grid boxes



By selecting **Show grid boxes** this will outline all the boxes on the layout referring to what values are in the columns and rows settings in the layout properties. Click the link for more information regarding [Layout properties](#).

*Last modified: 20 March 2023*

## Adding Menu buttons to a menu



Most schools will only switch menus between services. For example, before break starts they will switch to their break menu and that menu will stay on the till until lunch. If this is the case, it is probably best to just use the menu button at the bottom of the screen to save cluttering your menu layout.

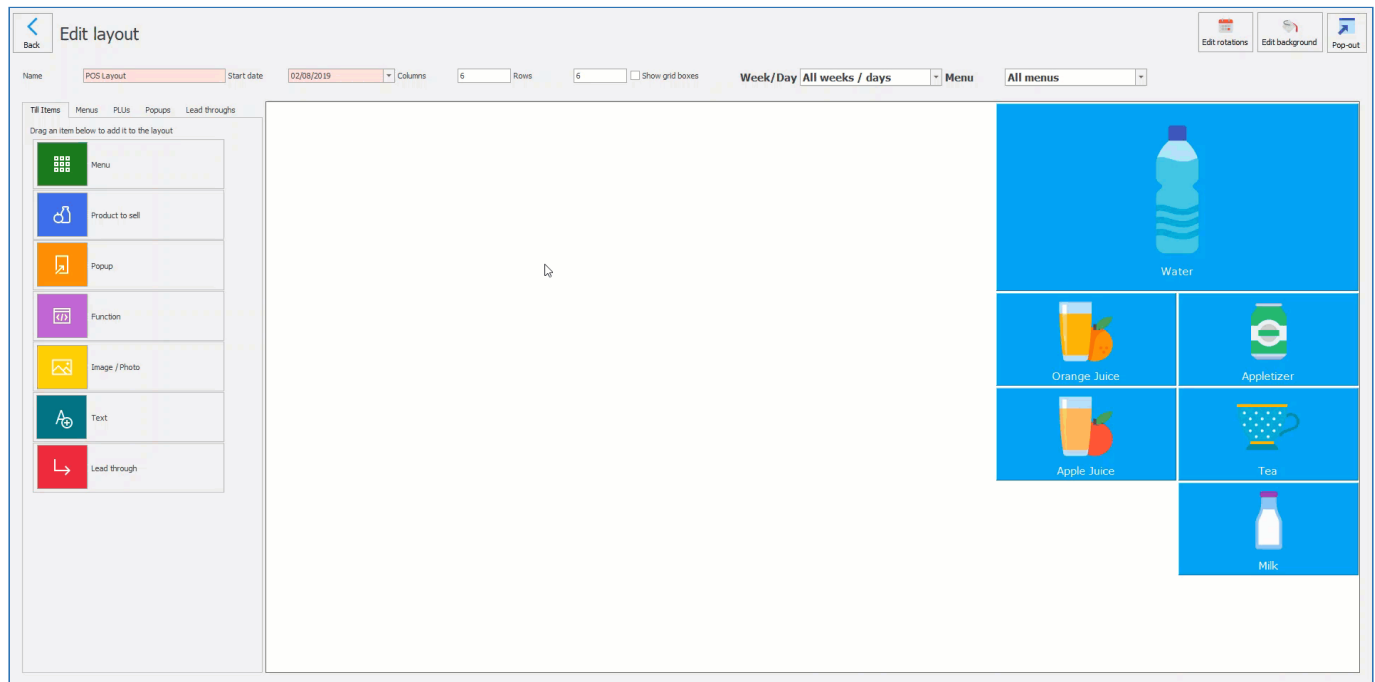
For those schools that require constant switching between menus (separate drinks, hot food, cold food menus etc.), it may be useful to add buttons that help switching between menus quicker and easier.



It is suggested that any menu buttons are added to the 'All weeks / days', 'All menus' menu so that they appear on every menu.

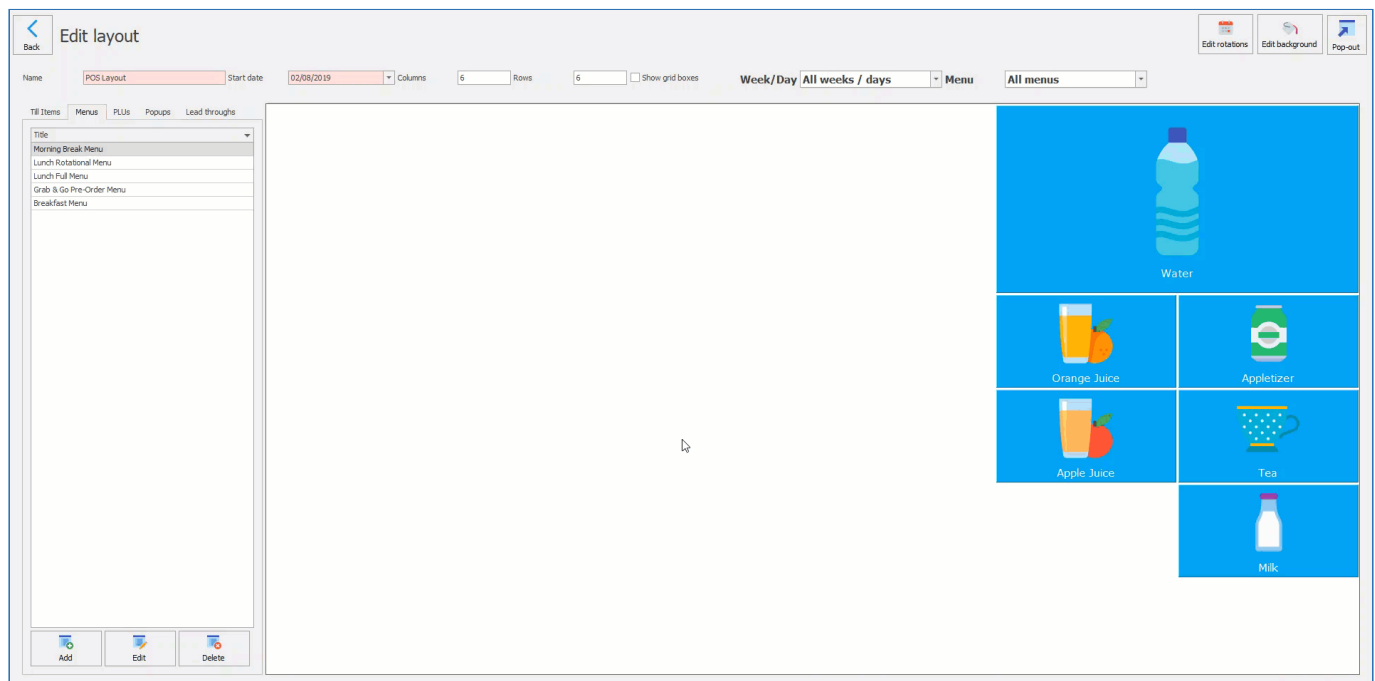
There are two methods of adding products to the layout and the one that you use most will be down to personal preference.

## Method 1



1. From the 'Till items' tab, click and drag the **Menu** tile onto the layout, release the mouse when the button is where you would like it to be.
2. The 'Link to existing menu' window will appear. Select the required menu and press **Select**.

## Method 2



1. Navigate to the **Menus** tab.
2. Click and drag the required menu from the list onto the layout designer.

*Last modified: 20 March 2023*



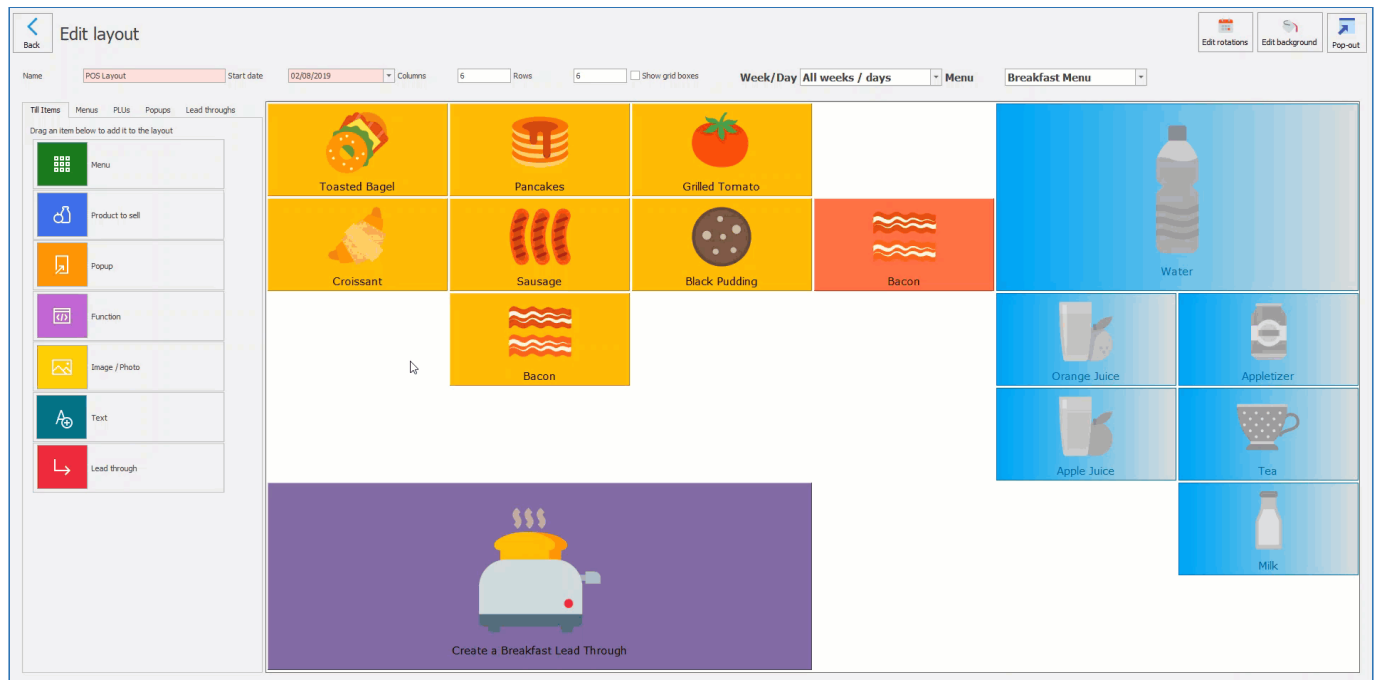
# Adding PLU buttons to a menu



The most common buttons on a till menu will be product buttons. These are the buttons that the operator will press to sell these products to the user.

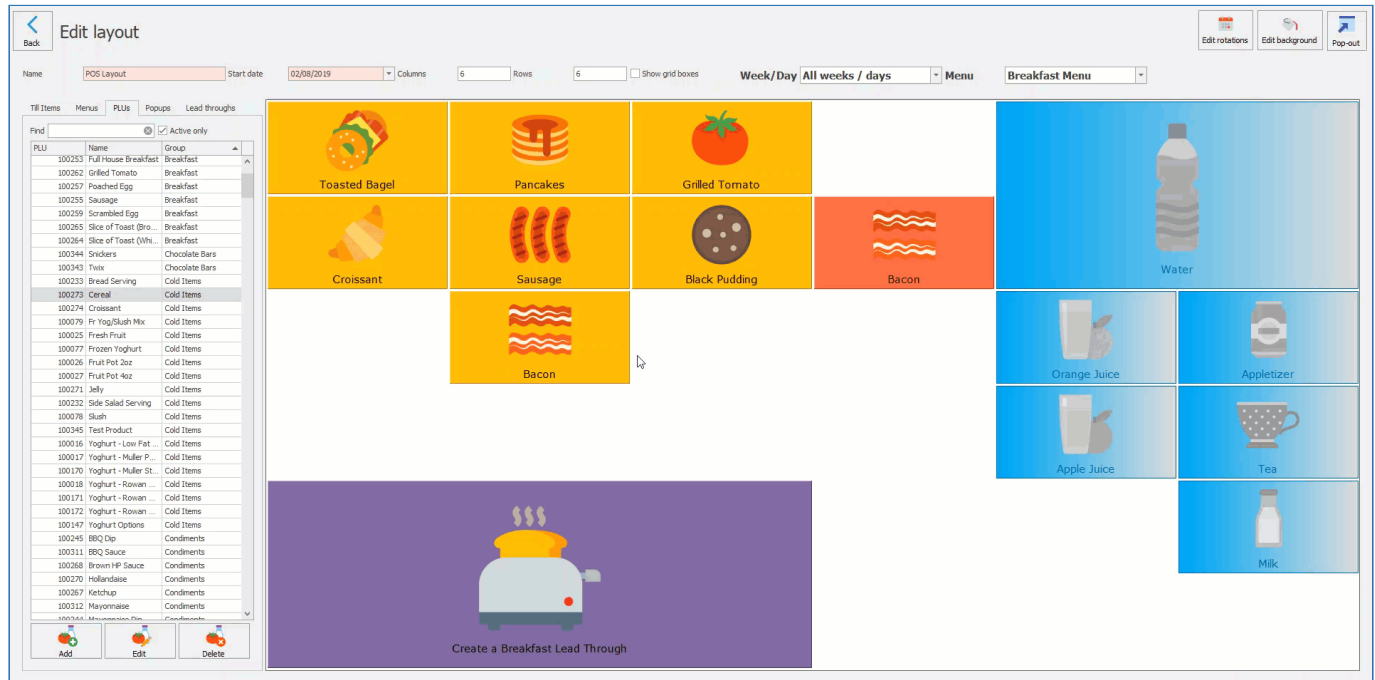
There are two methods of adding products to the layout and the one that you use most will be down to personal preference.

## Method 1



1. From the 'Till items' tab, click and drag the **Product to sell** tile onto the layout, release the mouse when the button is where you would like it to be.
2. The 'Select PLU' window will appear. Select the required PLU and press **OK**.

## Method 2



1. Navigate to the **PLUs** tab.
2. Find the required PLU from the list and drag it onto the layout designer.

*Last modified: 20 March 2023*

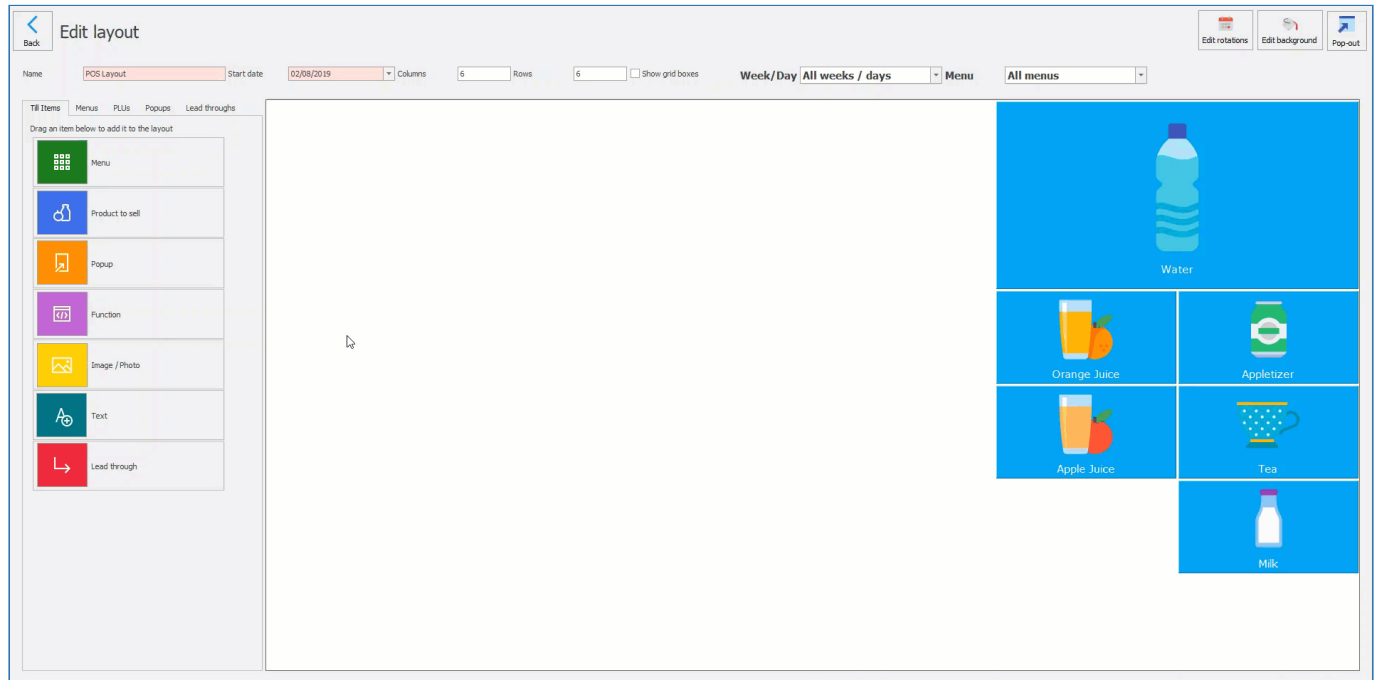
## Adding Popup buttons to the menu



A popup button is a very useful way of grouping multiple PLUs in one button. This is usually useful when the menu is crowded and limited space is available.

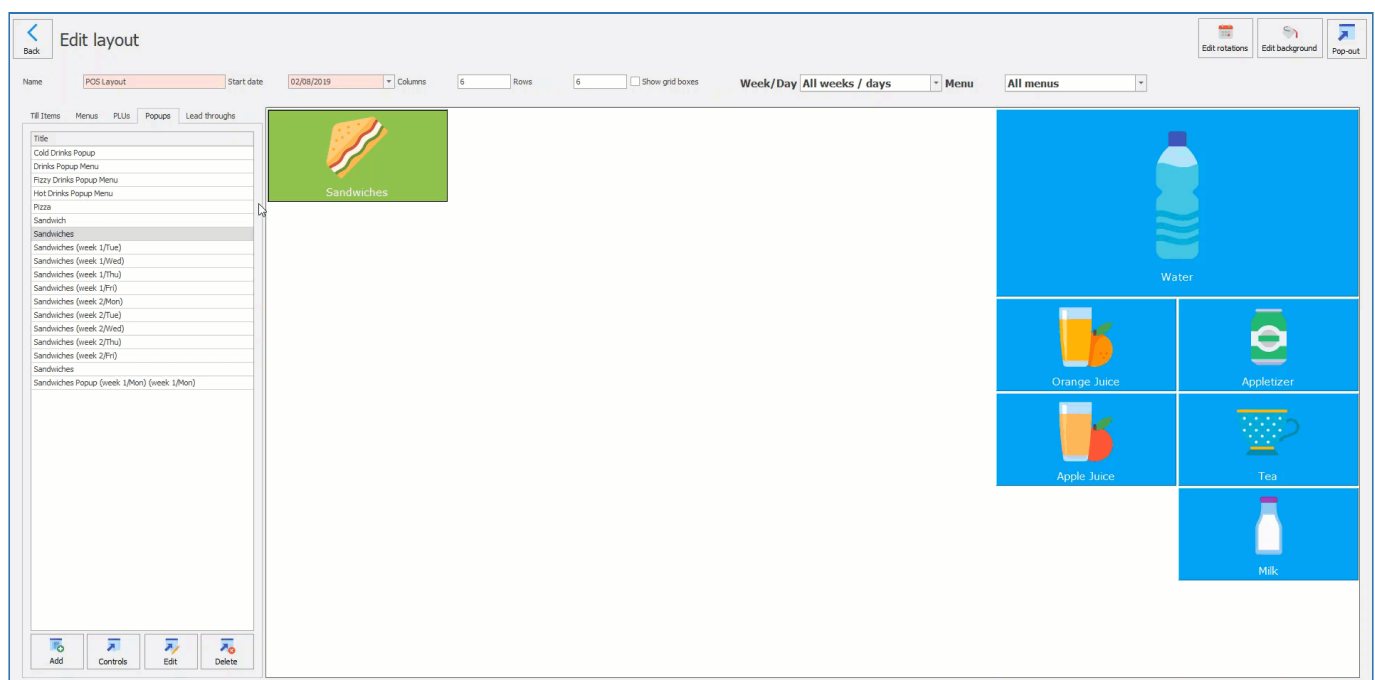
There is only one method of adding a popup to the layout. There are two methods that can be used to amend the controls and settings of the popup tile.

# Add Popup to layout



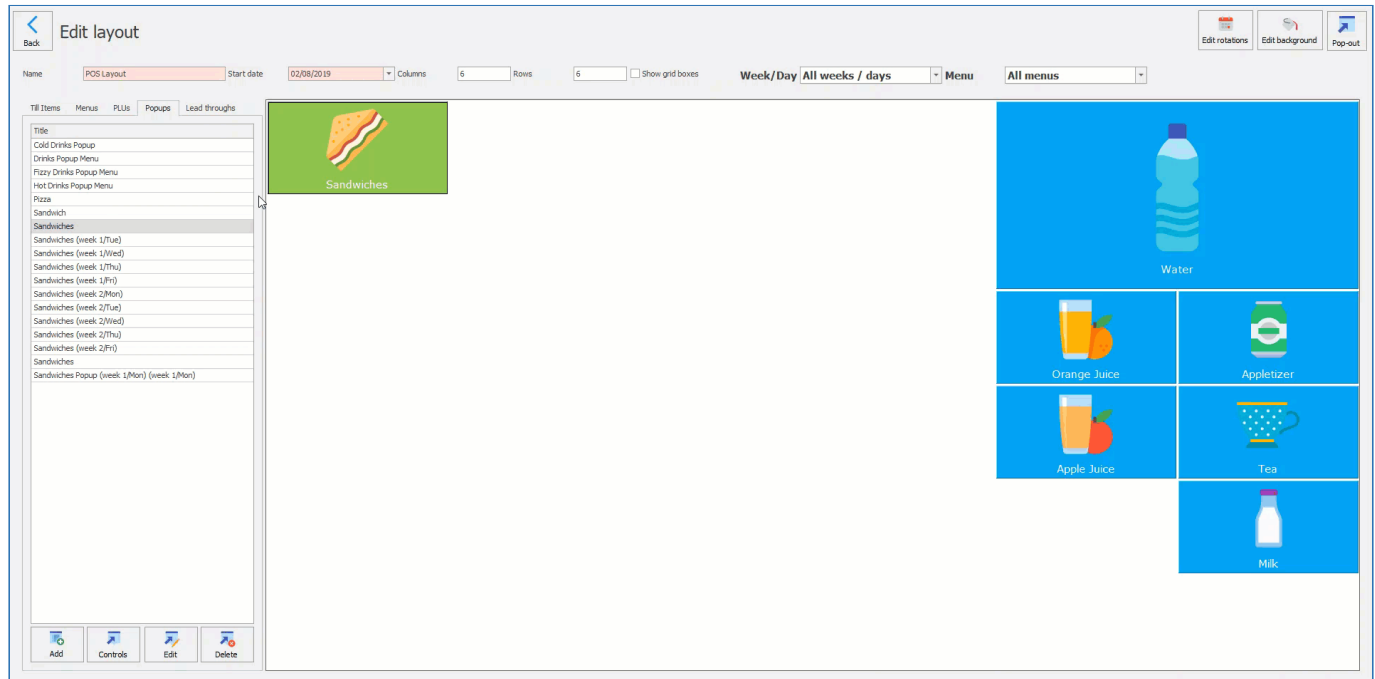
1. From the 'Till items' tab, click and drag the **Popup** tile onto the layout, release the mouse when the button is where you would like it to be.
2. Select **New Popup** or choose an existing popup.
3. If you have selected new popup type a description for the Popup title.
4. Adjust the width or height of the tile.
5. (Optional) Amend font, colour and image if necessary.
6. Press **Save**.

## Popup Controls - Method 1



1. Right click on the popup tile on the layout and select **Edit popup controls**.
2. Drag **Product to sell** into the popup window and select or search using the find bar the product you wish to add. You can repeat this process and change the size of the popup window by amending the values in the popup width and popup height boxes.
3. Press **Close**.

## Popup Controls - Method 2



1. Select the **Popups** tab.
2. Select the popup you wish to edit.
3. Press **Controls**.
4. Drag **Product to sell** into the popup window and select or search using the find bar the product you wish to add. You can repeat this process and change the size of the popup window by amending the values in the popup width and popup height boxes.
5. Press **Close**.

*Last modified: 20 March 2023*

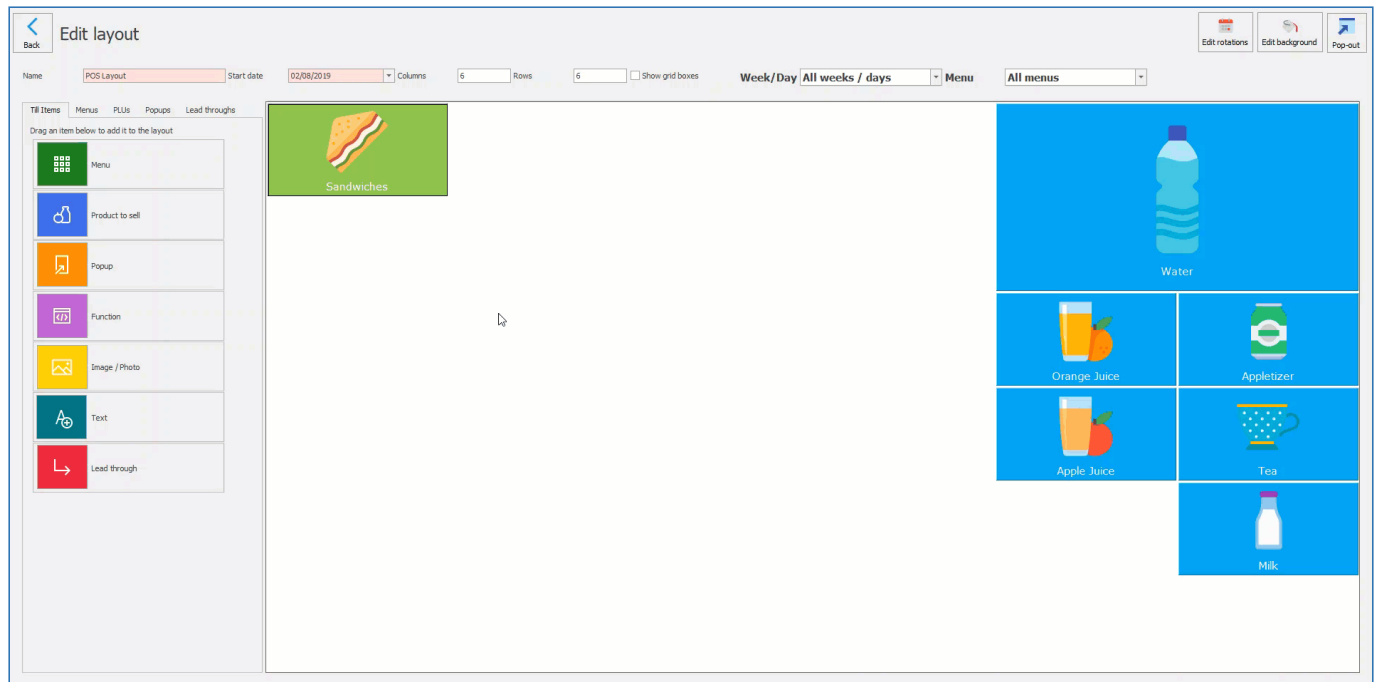
## Adding Function, Image/Photo and Text to the layout

Additional items, such as function shortcuts, images and text can also be added onto a layout.

### Adding a Function to the layout



Adding a function on the layout allows for the updating of photos on the cashless system and the viewing of live sales reports on the till.

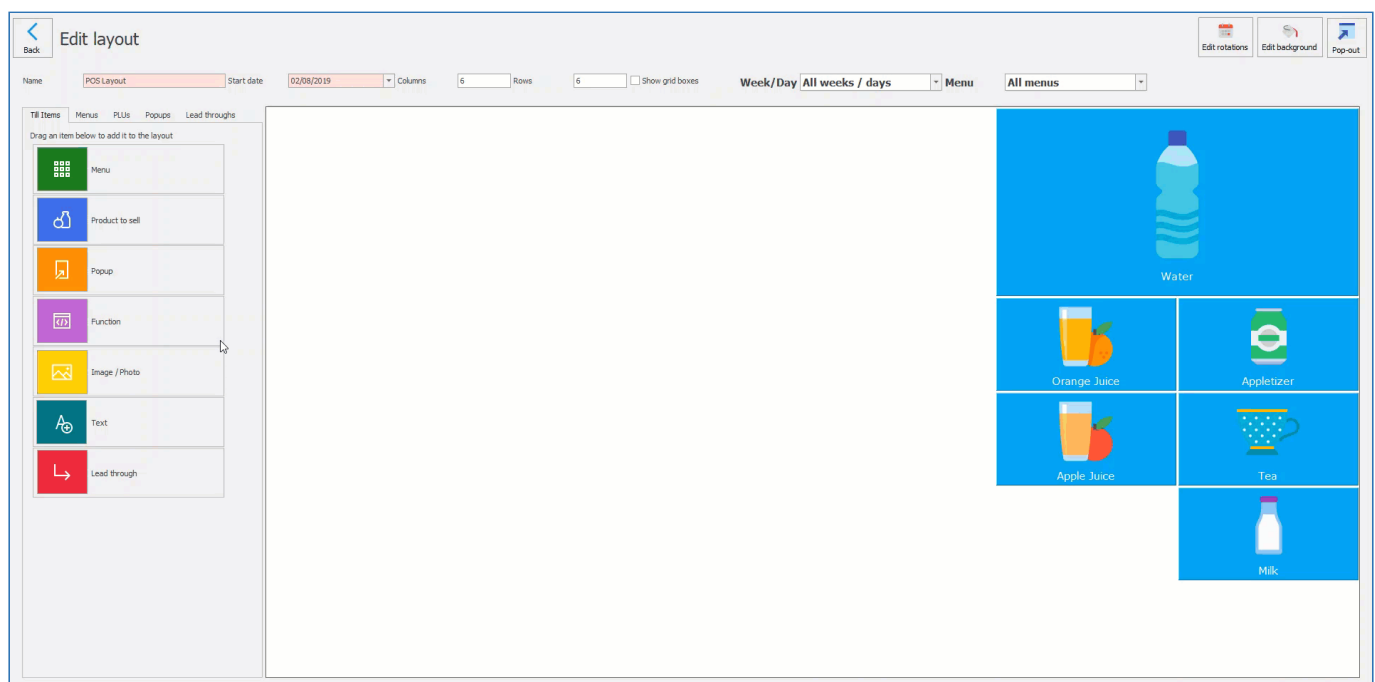


1. From the 'Till items' tab, click and drag the **Function** tile onto the layout, release the mouse when the button is where you would like it to be.
2. Select a function. Either **Update photo** or **View totaliser report**.
3. Press **Save**.

## Adding an Image/Photo to the layout



You can add a single image/photo to the layout like a school logo, catering company logo or a meal from the menu.



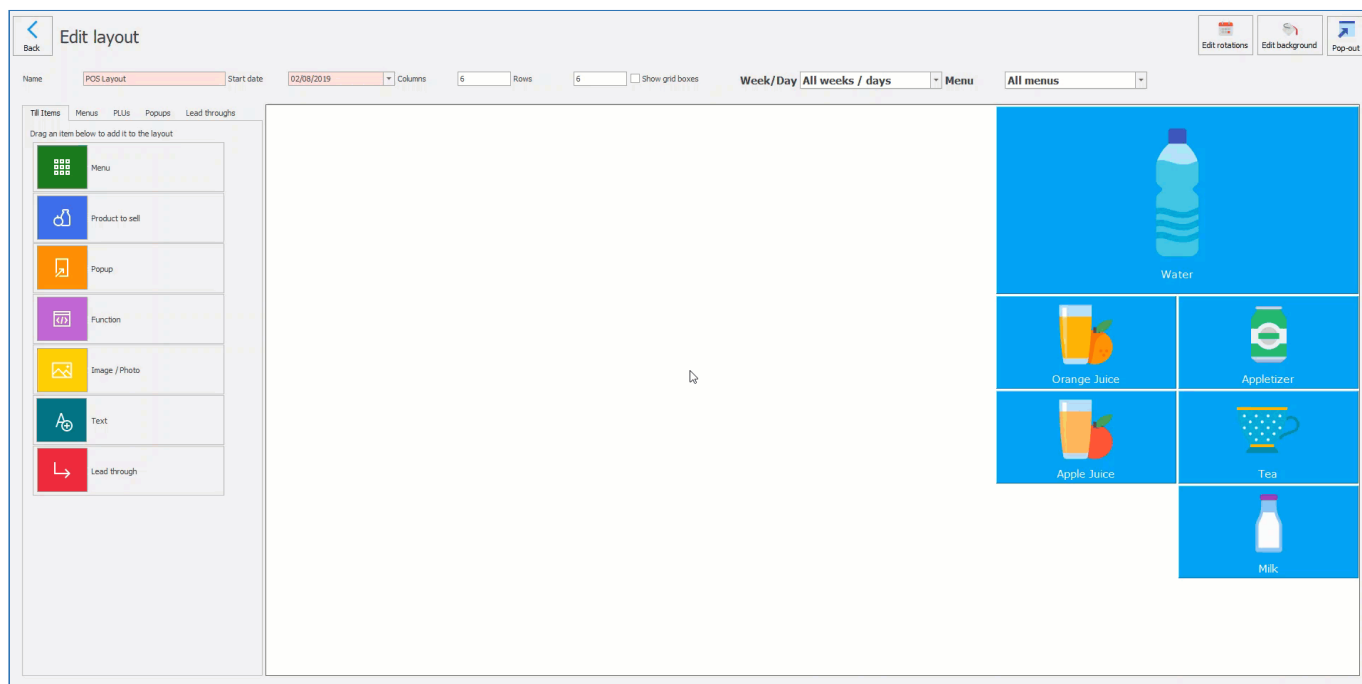
1. From the 'Till items' tab, click and drag the **Image / Photo** tile onto the layout, release the mouse when the button is where you would like it to be.

2. Press **Select Image** and select an image.
3. Press **Save**.

## Adding Text to the layout



You can add text to a tile on the layout. Maybe a themed day description or school announcement.



1. From the 'Till items' tab, click and drag the **Text** tile onto the layout, release the mouse when the button is where you would like it to be.
2. Enter the text you wish to display on the tile.
3. Press **Save**.

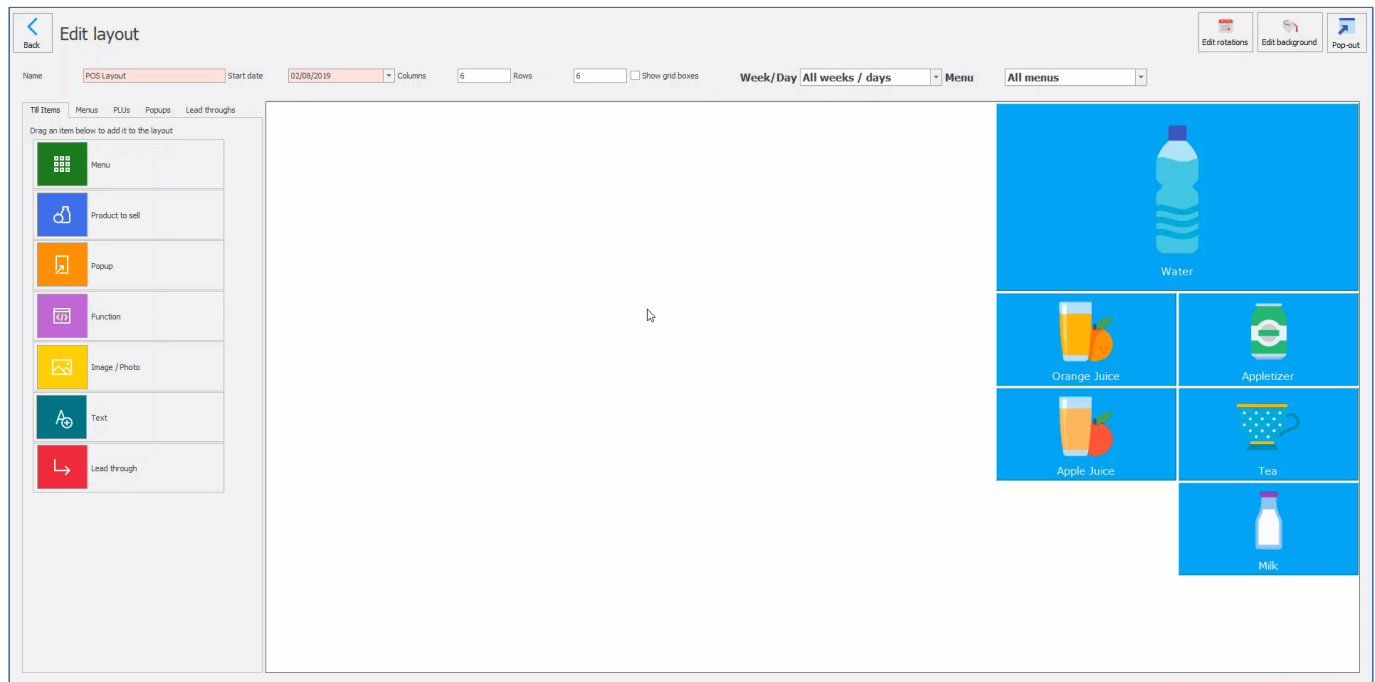
*Last modified: 20 March 2023*


## Adding Lead through to the layout



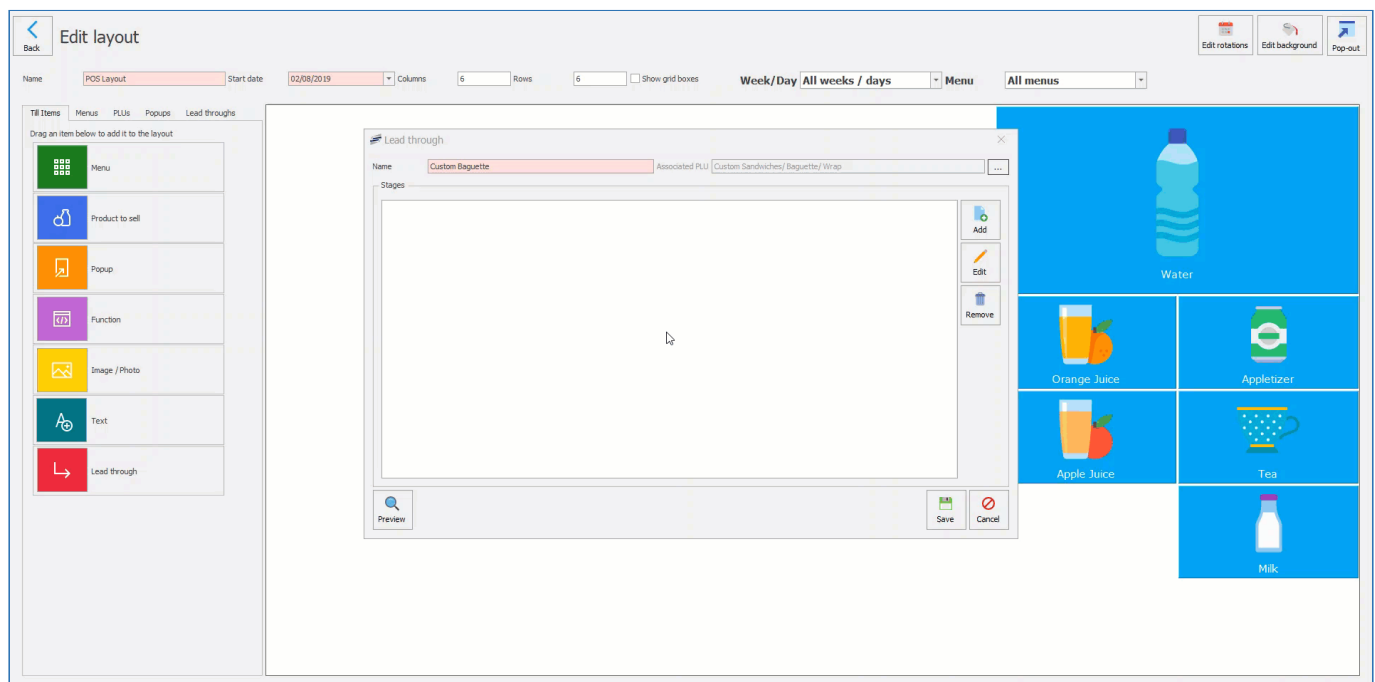
The lead through button is used to create a menu tile that allows for the selection of multiple products in stages. The stages can have a variety of requirement settings, ranging from wholly optional stages to those with strict restrictions on the minimum or maximum number of products that can be selected.

## Adding a Lead through to the layout



1. From the 'Till items' tab, click and drag the **Lead through** tile onto the layout, release the mouse when the button is where you would like it to be.
2. Choose an existing lead through, or select **New Lead through**
3. Enter a **Name** for the lead through.
4. Select a associated PLU by pressing . Select a PLU from the product list.

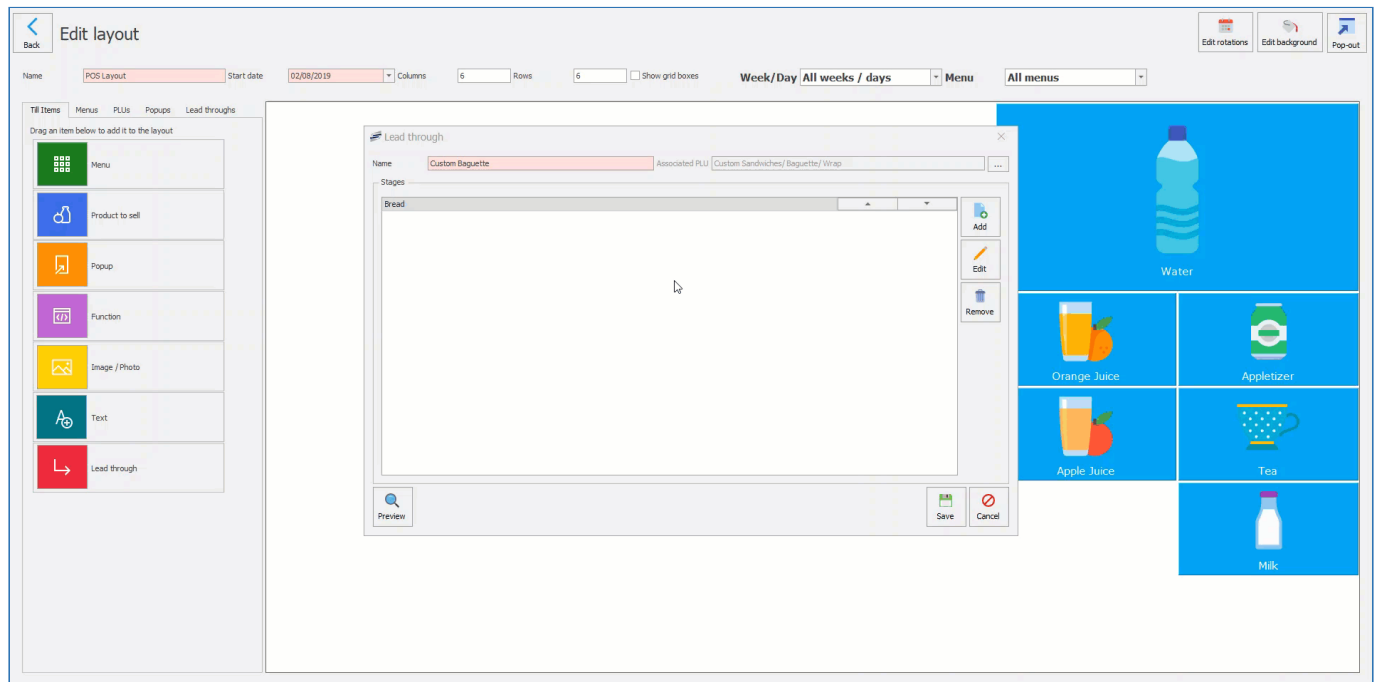
## Adding Stages to a Lead through



1. Press **Add** in the stages section.
2. Enter a **Name** for the Stage name.

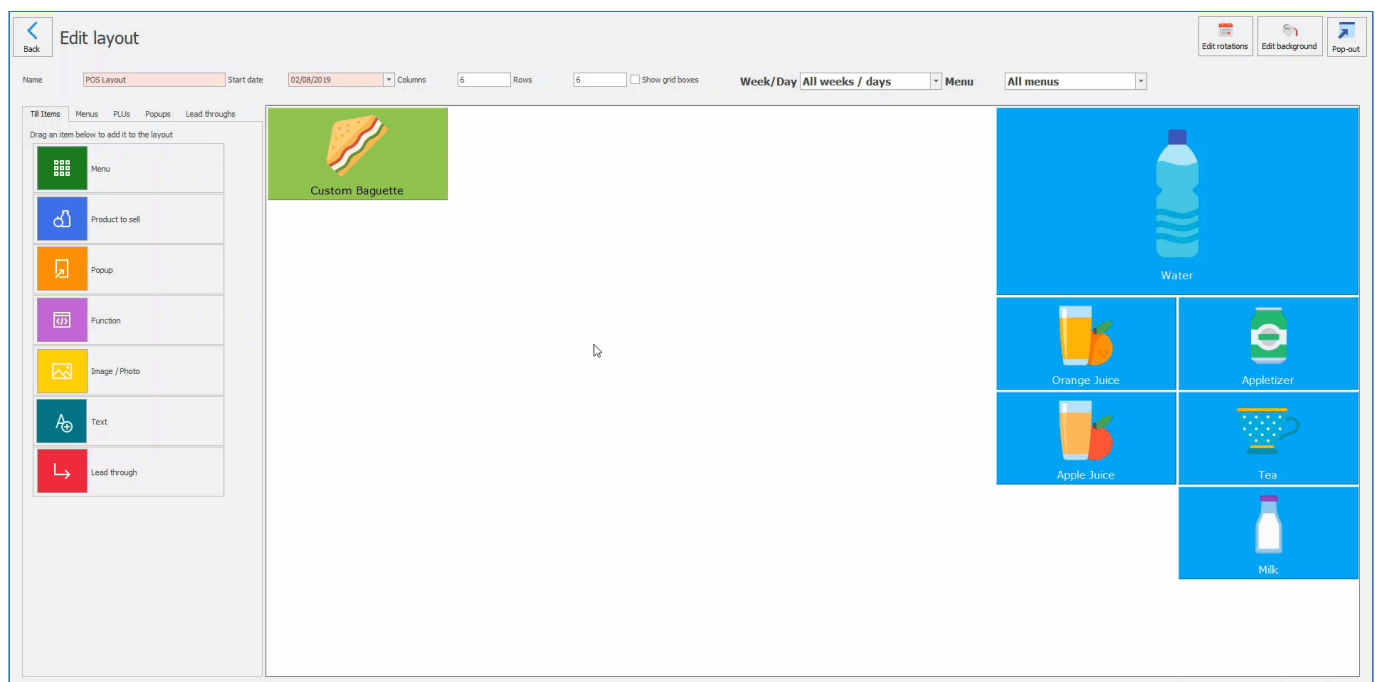
3. Enter a Minimum and Maximum selection value.
4. Press **Add** and selection a PLU from the product list.
5. Press **Save**.

## Saving a Lead through



1. Press **Save** and this will place the tile on the layout.

## Editing a Lead through button



1. Right click on the **Lead through** tile on the layout and select **Edit lead through**.
2. You can make amendments to the lead through properties or stages.



3. You can **Add**, **Edit** or **Delete** stages.
4. You can **Add** or **Remove** PLU's within the stages.
5. Press **Save** to commit any changes.

*Last modified: 20 March 2023*

## Adding Discount buttons to a menu

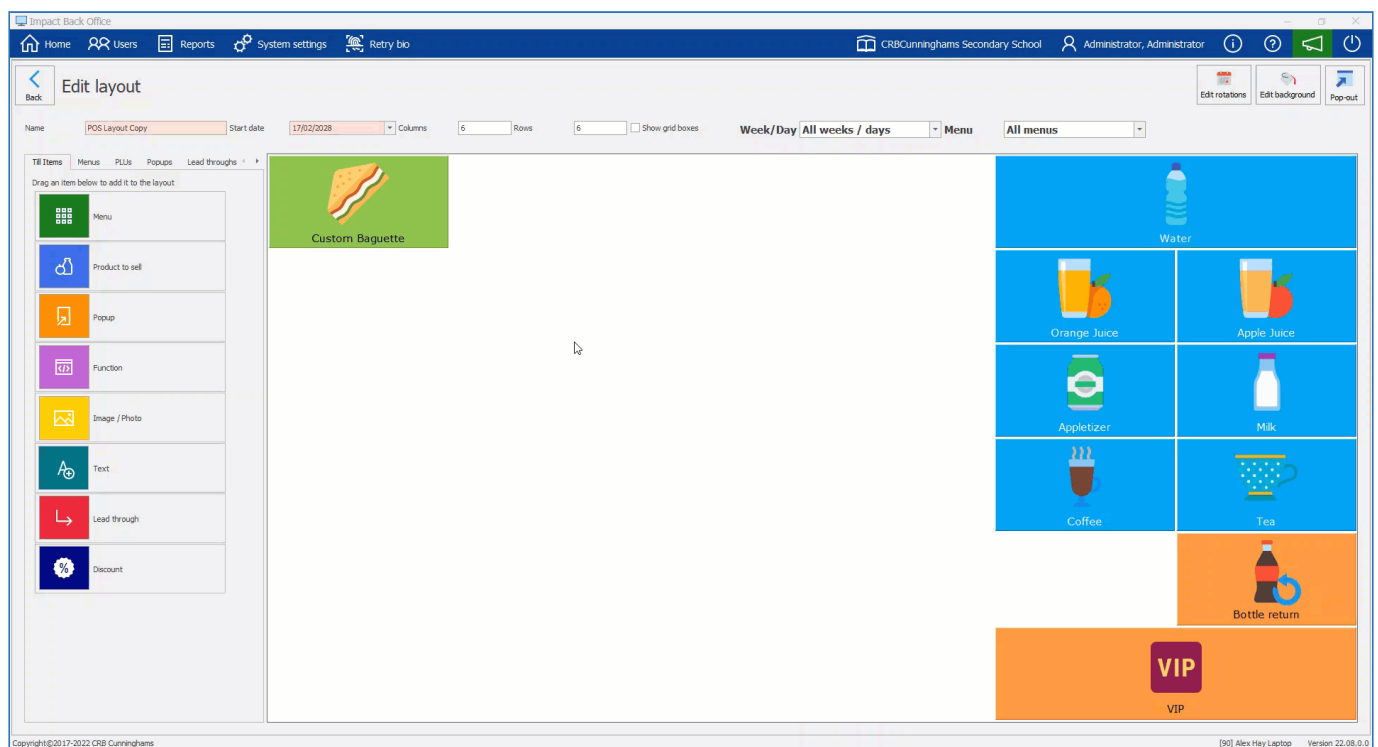
Before discounts can be used by the operators at the Point of Sale, buttons need to be added to the layout. When the operator presses these buttons, the discount will be applied to the selected item(s).

There are two methods of adding discounts to the layout and the one that you use most will be down to personal preference.



It is also possible to create/edit discounts from within the layout editor. Simply press the **Add** buttons that are present when adding discounts to the layout. If you need more information on how to create discounts, [click here](#). Once discounts have been added to the layout, [they can be used in transactions](#).

### Method 1



1. From the 'Till items' tab, click and drag the **Discount** tile onto the layout, release the mouse when the button is where you would like it to be.
2. The 'Discount' window will appear. Select the required discount and press **Select**.

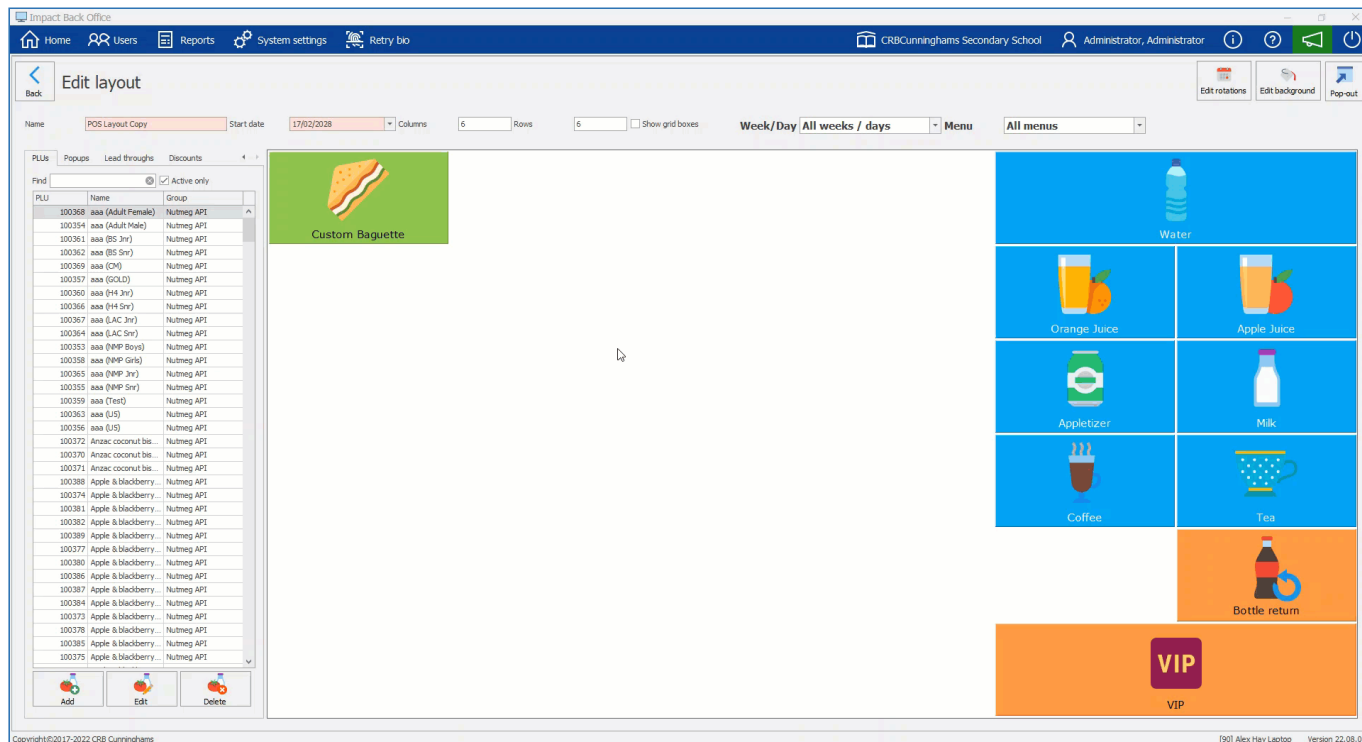


Right-click on the button and select **Properties** to edit the button properties such as colour, font, text size and alignment etc. Additionally, an image can be added by selecting the **Edit**



image option and pressing **Select** and choosing the image to be used.

## Method 2



1. Navigate to the **Discounts** tab.
2. Find the required Discount from the list and drag it onto the layout designer.



Discounts can also be added to a Popup menu to group discounts into a single button. Read more about Popups [here](#).

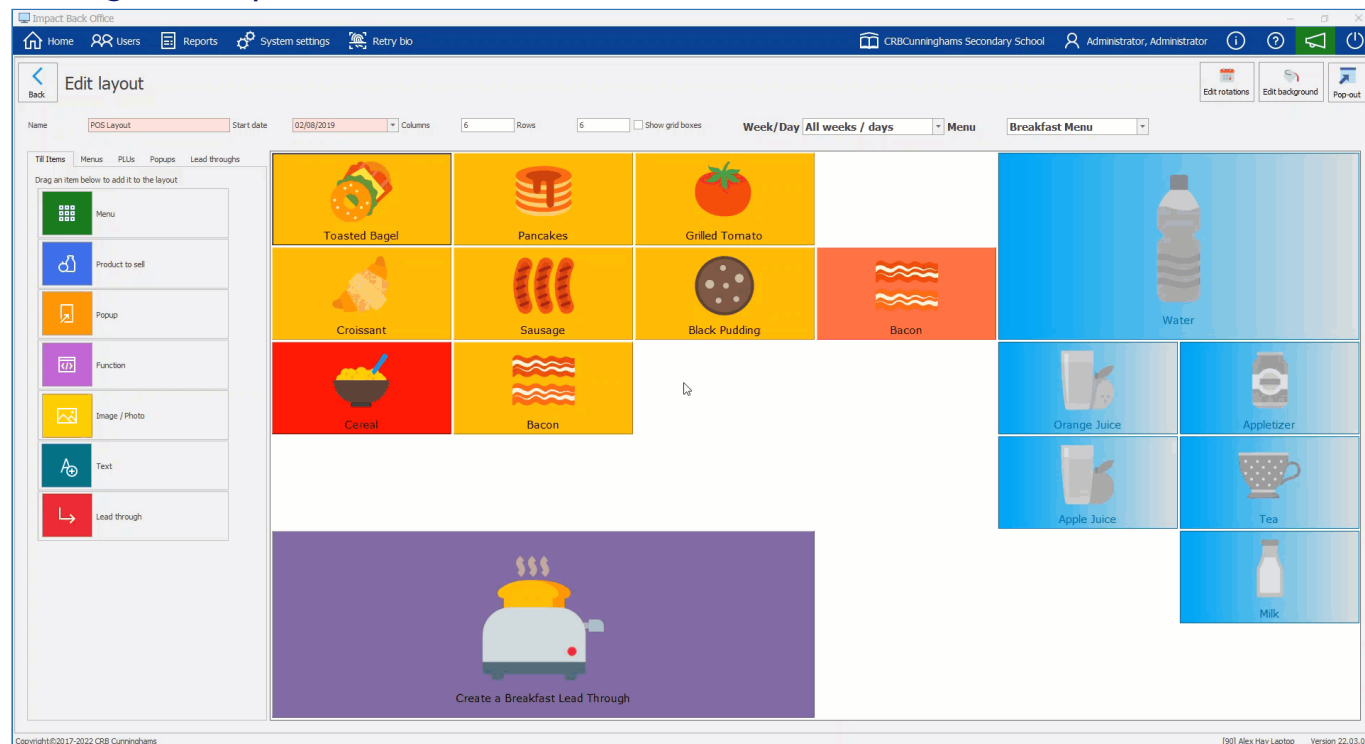
*Last modified: 20 March 2023*

## Editing items on menus



When items have been added to the menu, their properties - such as background colour, button width and height, font size and style - can be edited as required. This allows you to customise your layout to suit your needs, for example, you may want the items that are sold most commonly to have larger buttons and text than those that are sold less frequently.

## Editing the Properties of an Item



1. Right click on an item on the layout and press **Properties**.
2. This will display the items tile properties.

**Properties**

Width: 1

Height: 1

Column position: 0

Row position: 0

Font: Verdana

Text size: 11

Foreground colour: 0, 0, 0

Background Colour: 255, 255, 128

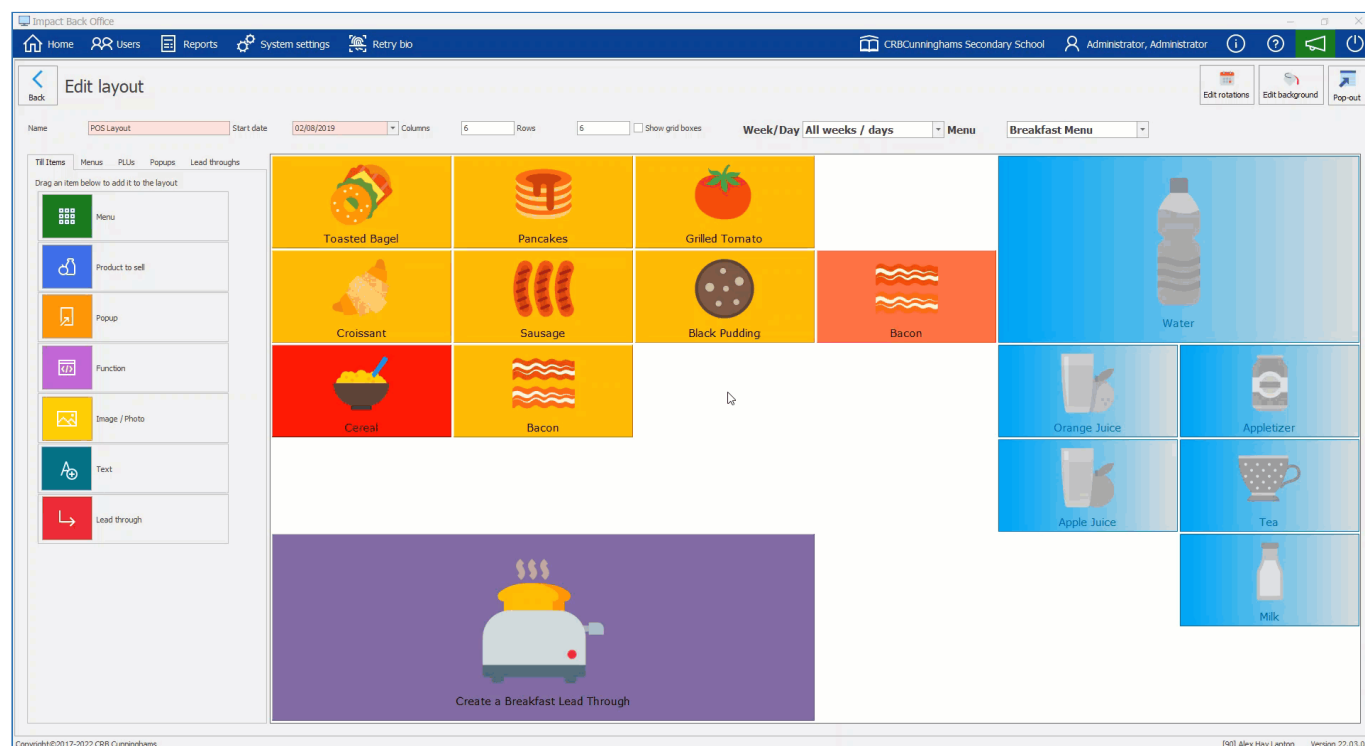
Text align: TopCenter

Word wrap: ☒

Save Cancel

## Width

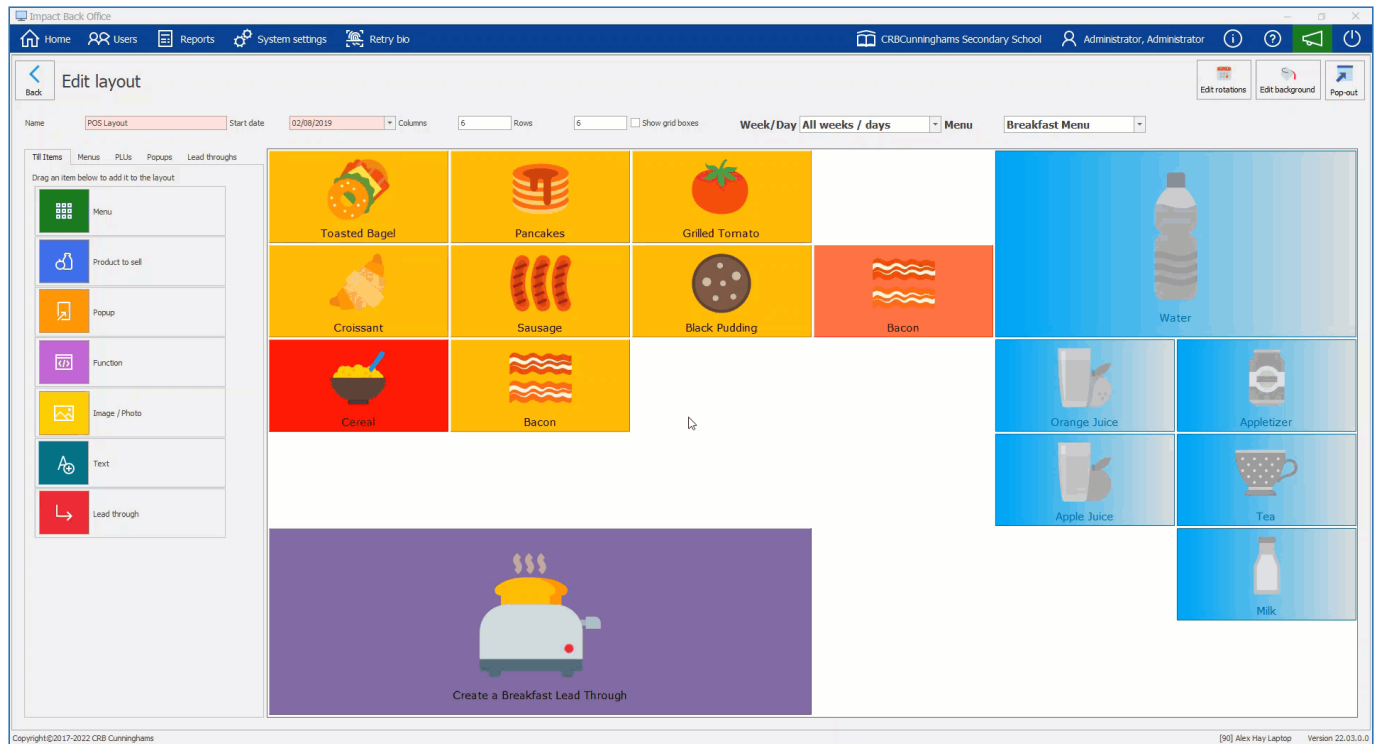
You can change the width size of the tile by using the up or down arrows. This can be useful if you want to show a button that is more popular on the menu.



1. Right click on the item and press **Properties**.
2. Press the Up or down arrows to amend the values to the width.
3. Press **Save**.
4. The tile will change in size on the layout.

## Height

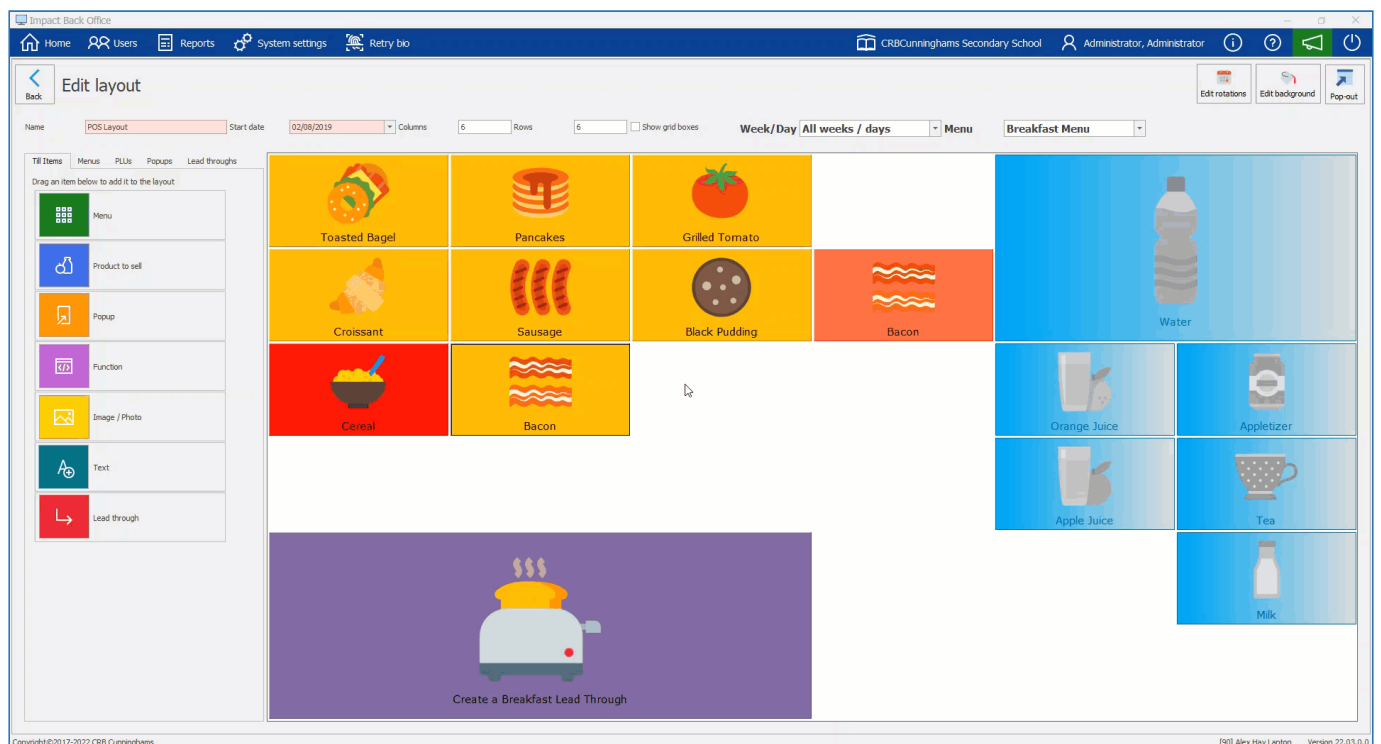
You can change the height size of the tile by using the up or down arrows. This can be useful if you want to show a button that is more popular on the menu.



1. Right click on the item and press **Properties**.
2. Press the Up or down arrows to amend the values to the height.
3. Press **Save**.
4. The tile will change in size on the layout.

## Column position

The tile will move to the column you select by using the up or down arrows. Alternatively you can drag the tile to your desired space on the layout.

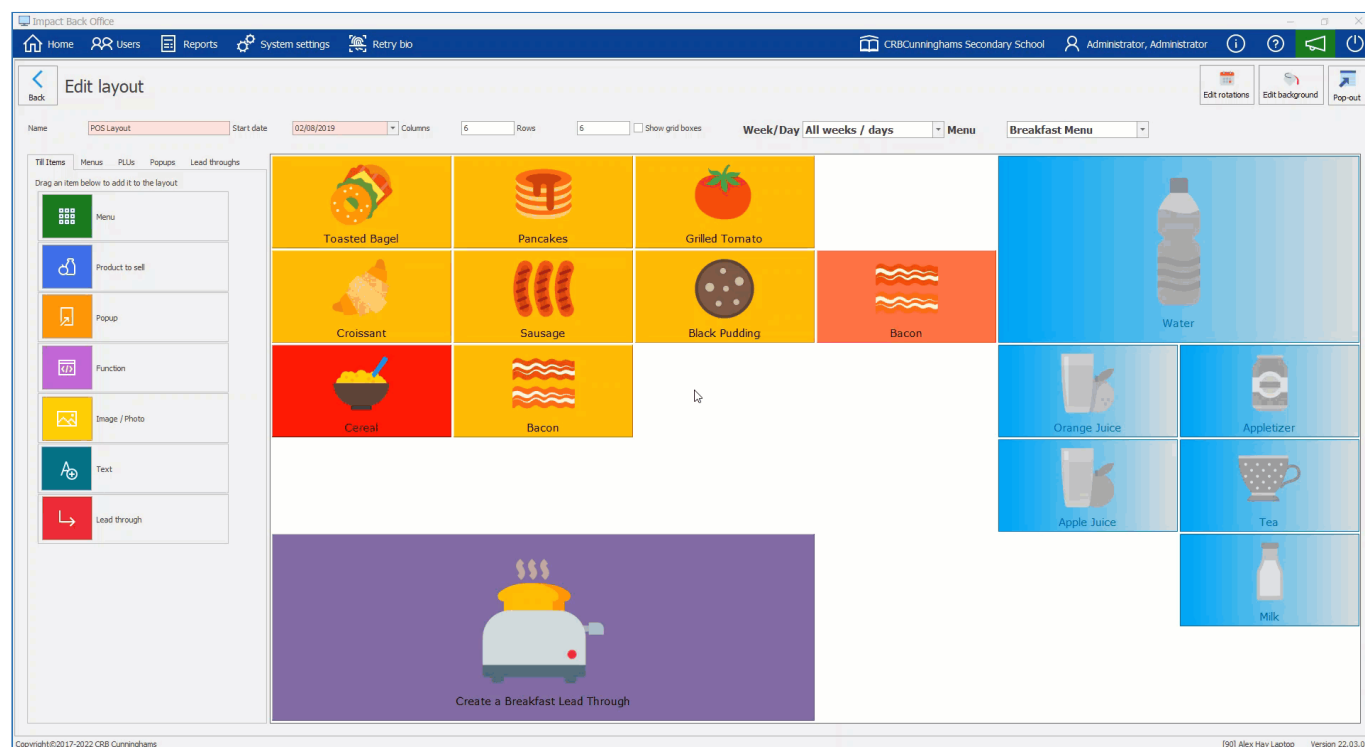


1. Right click on the item and press **Properties**.

2. Press the Up or down arrows to amend the values to the column position.
3. Press **Save**.
4. The tile will move to the column selected.

## Row position

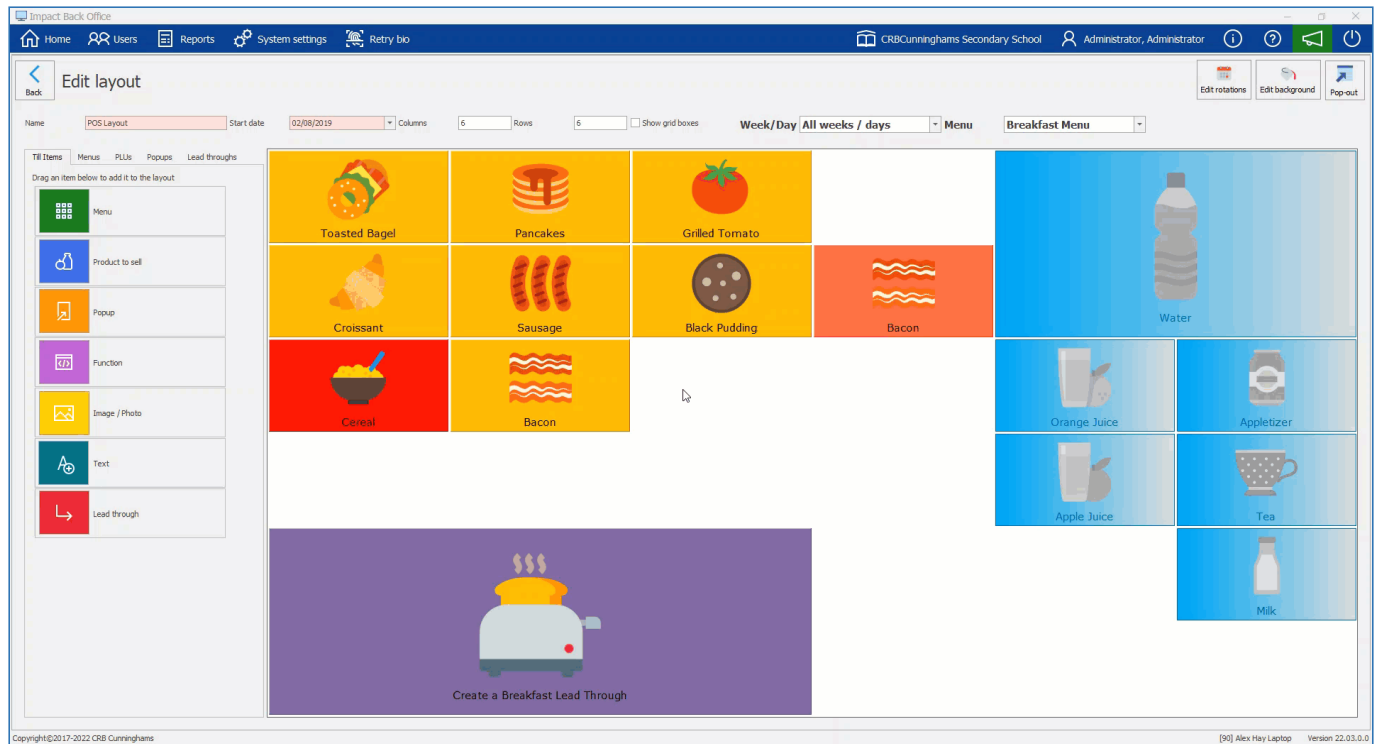
The tile will move to the row you select by using the up or down arrows. Alternatively you can drag the tile to your desired space on the layout.



1. Right click on the item and press **Properties**.
2. Press the Up or down arrows to amend the values to the row position.
3. Press **Save**.
4. The tile will move to the row selected.

## Font

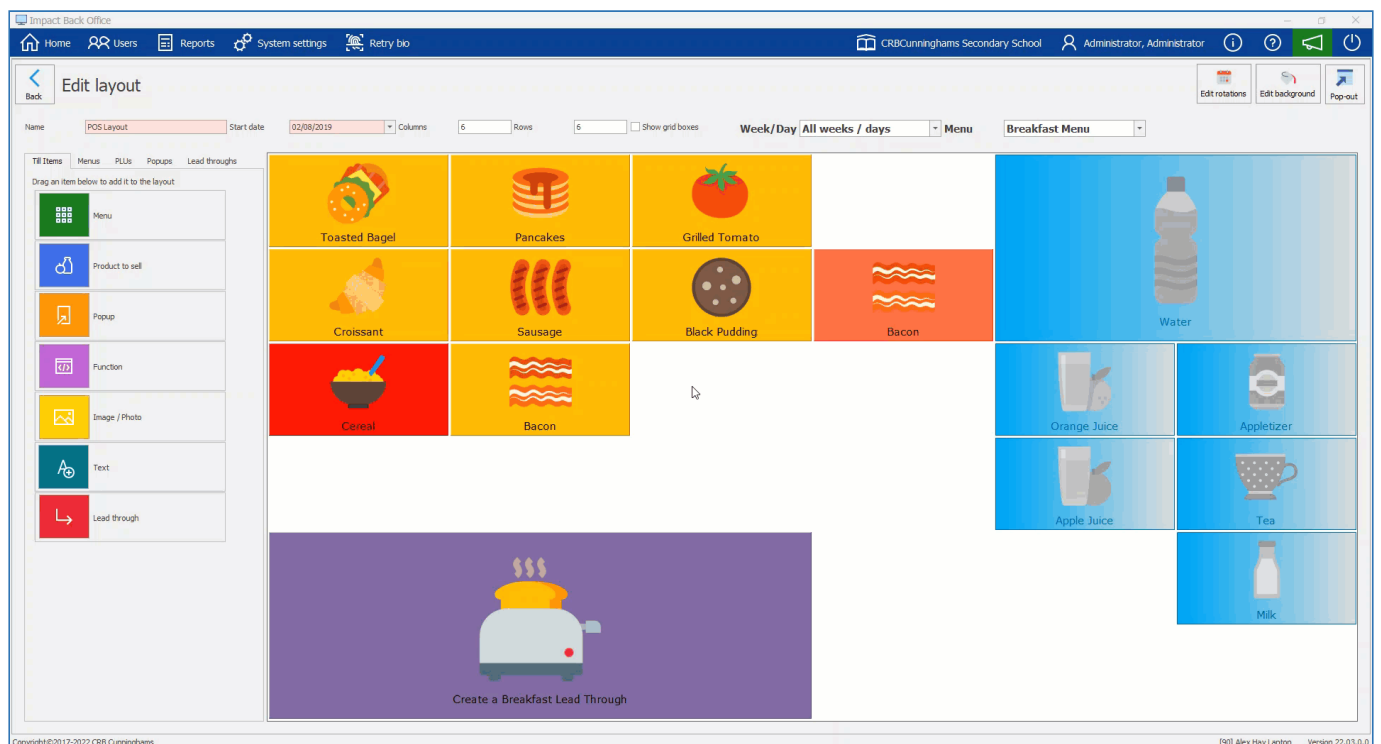
Select a font from the drop down list you wish to use. Fonts can be useful if you want a particular item to stand out on the menu and to make certain items more attractive to readers.



1. Right click on the item and press **Properties**.
2. Press the down arrow for the font list.
3. Select a font you wish to use.
4. Press **Save**.

## Text size

One reason larger sizes for text and other user interface elements is important is because it helps adjust the visual display to match the physical one, providing more comfort for users.

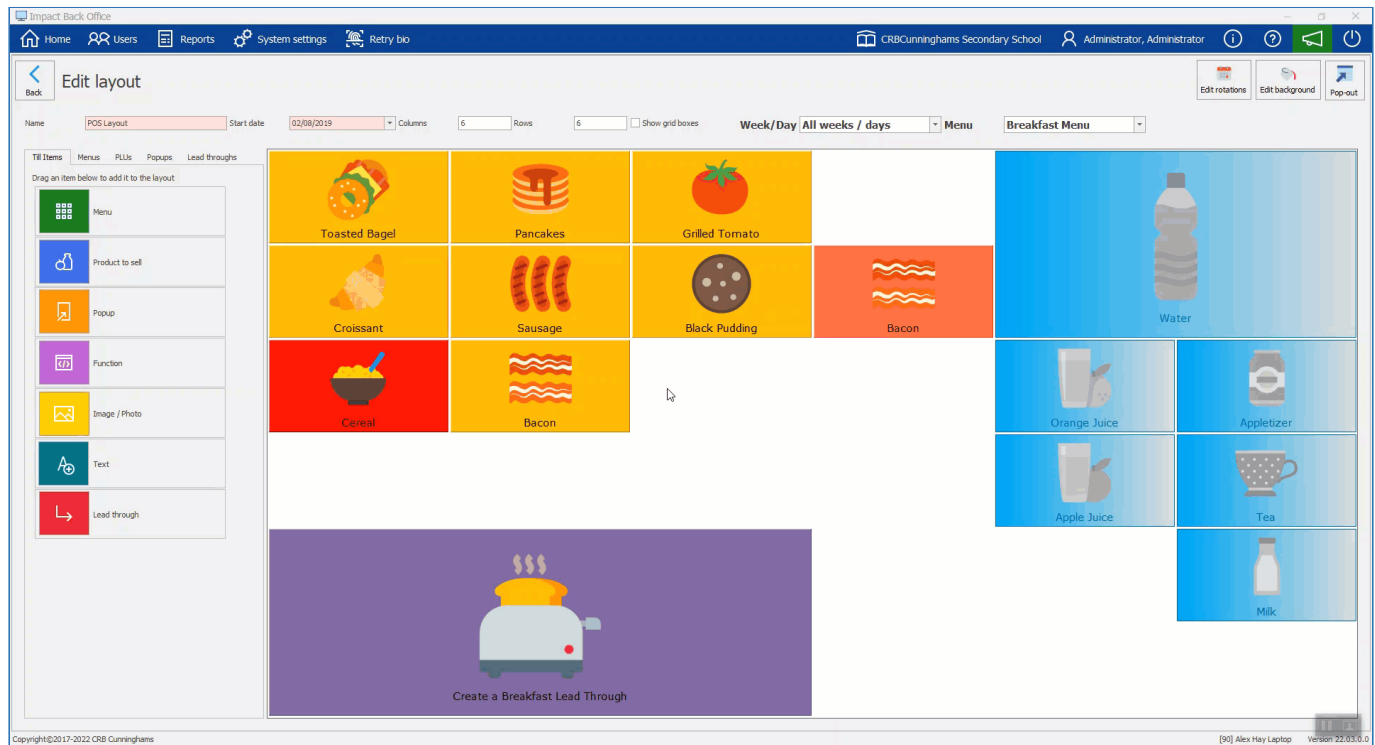


1. Right click on the item and press **Properties**.

2. Press the Up or down arrows to amend the values to the font size.
3. Press **Save**.
4. The size of the font on the tile will change.

## Foreground colour

This is a key aspect to consider. It can be tempting to change font colours for effect, however it is important to consider the impact of this. For example, yellow text on a white background is particularly difficult to read and so a clear contrast such as black on white works well.

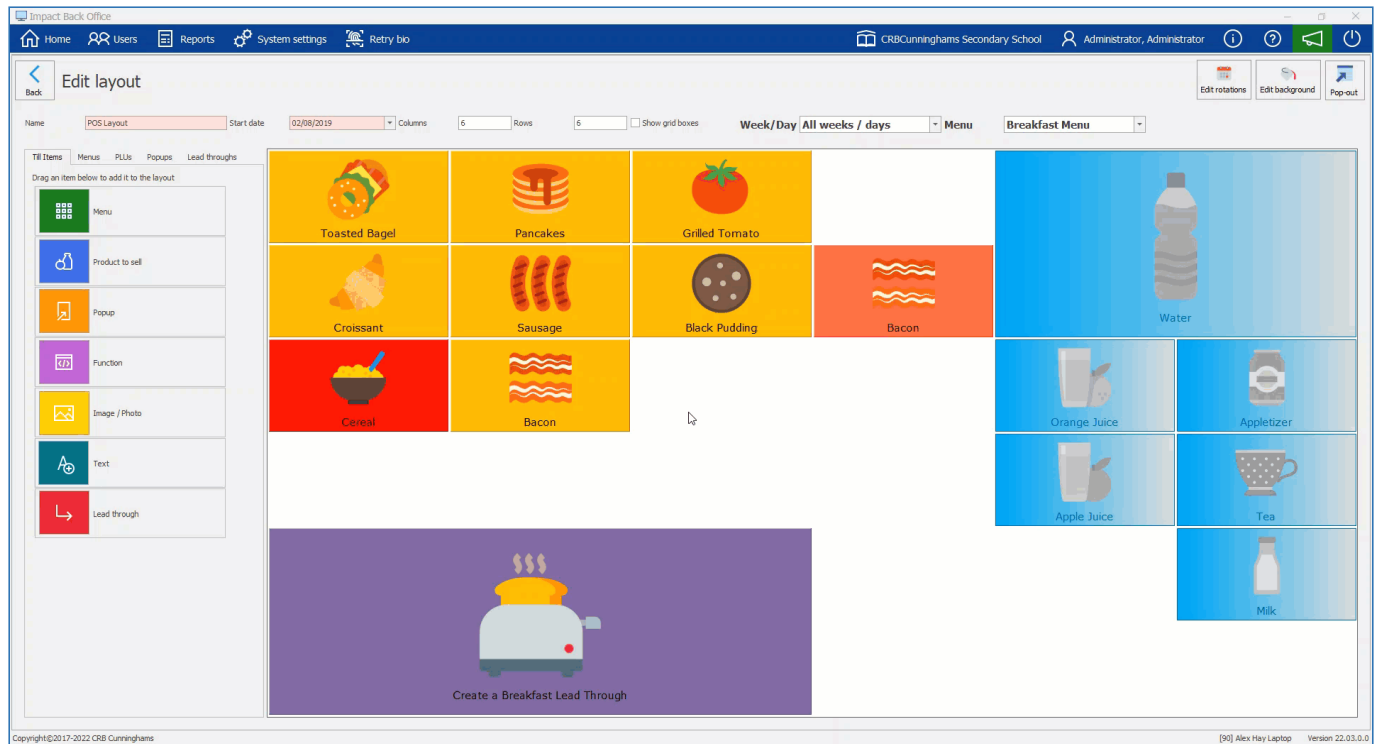


1. Right click on the item and press **Properties**.
2. Press on the down arrow to show the foreground colour palette drop-down.
3. Select a colour.
4. Press **Save**.

## Background colour

You can change your items background colours to help set a tone, make certain areas stand out on the menu, or reinforce your products.

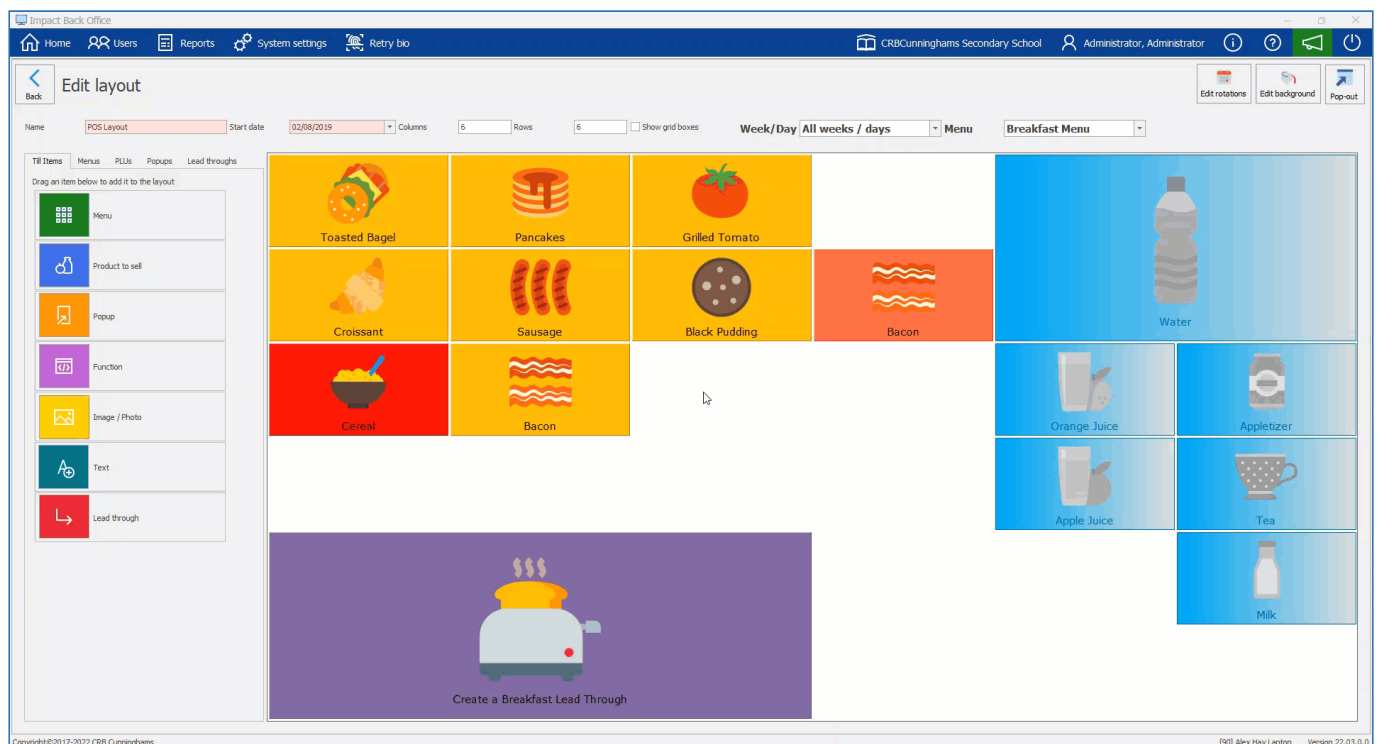




1. Right click on the item and press **Properties**.
2. Press on the down arrow to show the background colour palette drop-down.
3. Select a colour.
4. Press **Save**.

## Text align

This option will move the text to a different location on the tile. It can be more pleasing on the eye to read the text from a different point of view.

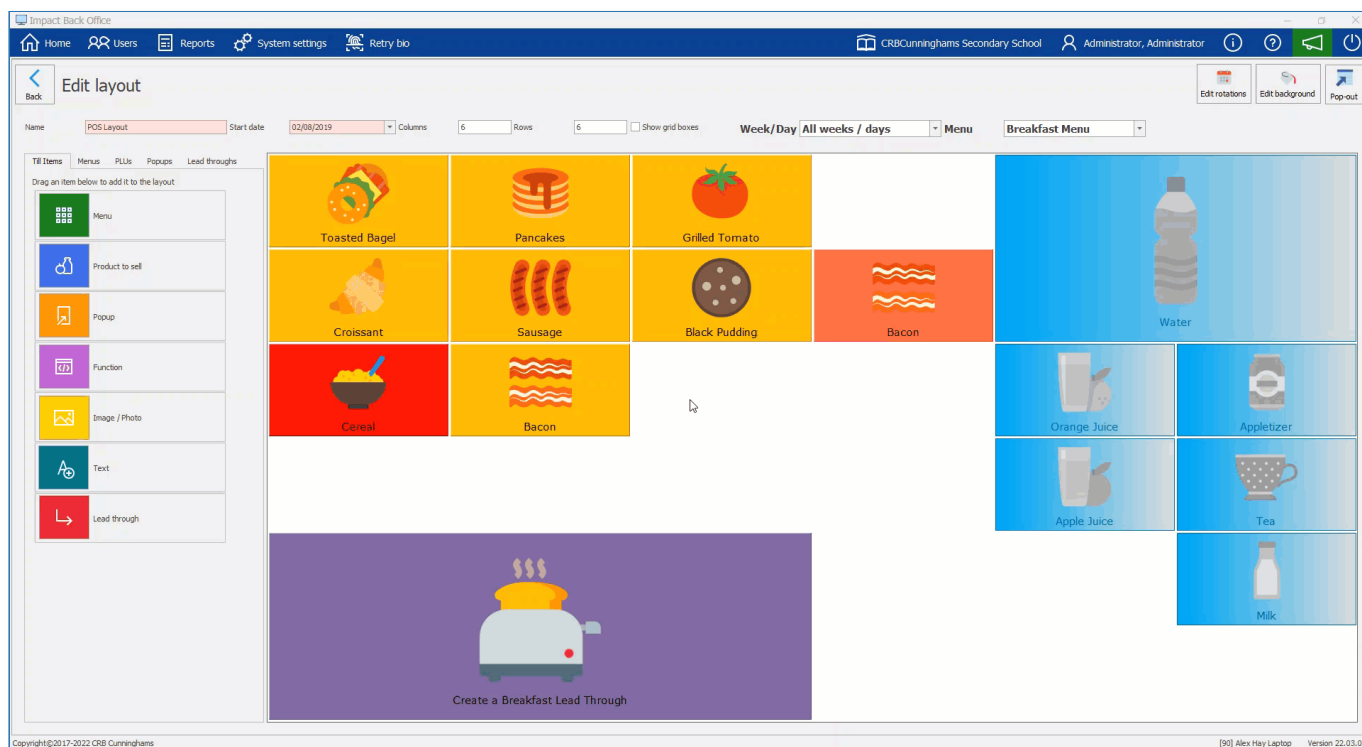


1. Right click on the item and press **Properties**.

2. Press on the down arrow to show a list of text alignments.
3. Select an alignment.
4. Press **Save**.

## Word wrap

Word wrap is a word processing feature that forces all text to be confined within defined margins. When a line of text is filled, the word processor automatically moves the text to the next line, so the user doesn't have to press the return key after every line. This feature is active by default.



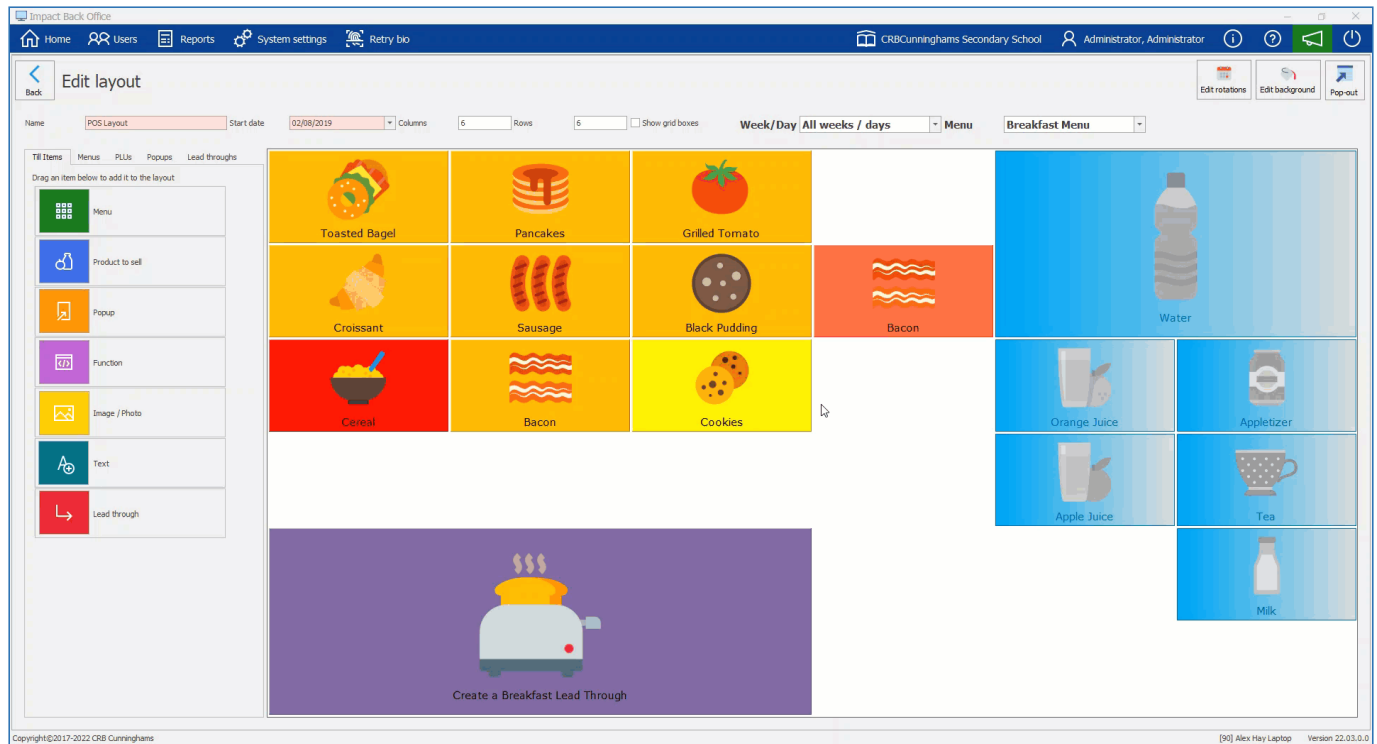
1. Right click on the item and press **Properties**.
2. Press the **Word wrap** tick box to make it active or inactive.
3. Press **Save**.

*Last modified: 20 March 2023*

## Removing from the layout



From time to time you may want to remove items from the layout. There is an easy way to remove items from the menus.



1. Right click on an item on the menu and select **Delete**.
2. This will remove the item from the layout.

*Last modified: 20 March 2023*

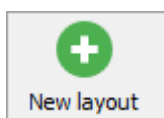
## Pre-order layouts



Self-service kiosks have proved a revolutionary innovation in making life easier and that is no different in schools. Students have the ability to to order the day before or the morning before lunch to make ordering and purchasing a whole lot easier.

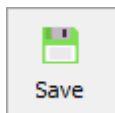
## Creating a new Pre-Order layout

1. Press the **New layout** button.



2. Enter a name for the new layout and select **Pre-order** from the location type drop-down.

3. Press **Save**.



- This will take you to the Edit pre-order periods section.

*Last modified: 20 March 2023*

## Adding Pre-order periods



Pre-Order periods are the service times you can make a pre-order for. Lunch would be the most common period to order for however this could also be for a different period like Breakfast and Morning Break.

## Pre-Order Period Properties

This is where you will select a start date to make the pre-order layout active and setup the weekly menu rotations if needed.

Name	Pre-order	Start date	23/05/2019	Edit rotations
------	-----------	------------	------------	----------------

## Start Date

- Select a **Start date** for the pre-order layout to become active. Press the down arrow and select a date from the calendar.

Start date	23/05/2019	Edit ro
------------	------------	---------

24 May 2019

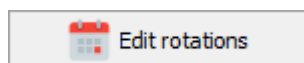
May 2019

MO	TU	WE	TH	FR	SA	SU
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Clear

## Edit Pre-Order Rotations

- Press the **Edit rotations** button.



- Select a **Start date** and an **End date** for the the menu rotations in the **Generate weeks** section.
- Select how many weeks will be rotated.
- Press the **Generate** button.

Menu rotations

Generate weeks

Start date

24/05/2019

End date

24/08/2019

Weeks

3

Mode

Replace all rotations

Generate

Week 1

Week 2

Week 3

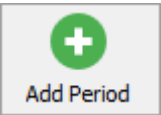
Week start	Week number
20/05/2019	1
27/05/2019	2
03/06/2019	3
10/06/2019	1
17/06/2019	2
24/06/2019	3
01/07/2019	1
08/07/2019	2
15/07/2019	3
22/07/2019	1
29/07/2019	2
05/08/2019	3
12/08/2019	1

Save

Cancel

Adding a New Period

1. Press Add Period.



**Pre-order period**

Period name:

Week:

Days:

☒ All Days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Times:

**Period time**

**Cut off time** ☐  **Previous days**

**Cancel cut off time** ☐  **Previous days**

Order limits:

**Minimum selections** ☐  **Maximum selections** ☐

**Minimum spend** ☐  **Maximum spend** ☐

Collection points:

☒ All collection points allowed

**Allowed collection points**

**Save** **Cancel**

2. Enter a **Period name** for the pre-order period.
3. Select a **Week** from the drop-down list.
4. Select which days the pre-order periods will be available.
5. Select a **Period time** for this period to start.
6. Activate a **Cut off time** which will determine when you can pre-order up to.
7. Set a **Cancel cut off time** if required.
8. You can also set a minimum and maximum selection value and a minimum and maximum spend limits.
9. Limit the **Collection points** the period is allowed for if required.
10. Press **Save**.

The period will be added to the pre-order menu.

Impact Back Office

Home Users Reports System settings

CRBCunninghams High School Addison, Eloise

Back Edit pre-order periods Add Period

Name Pre-order Start date 23/05/2019 Edit rotations

Week: 1

Lunch

Week 1, All

13:00

Period Name: Lunch

Edit Layout Copy Delete


Copyright©2017-2019 CRB Cunninghams [1] Server Version 3.79.1.0

## Editing a Pre-order Period

1. Press the **Edit** button.



2. Edit the period accordingly.

 Pre-order period ×

Period name

Week  ▼

Days

☒ All Days
☒ Mon
☒ Tue
☒ Wed
☒ Thu
☒ Fri
☒ Sat
☒ Sun

Times

*Period time*  ▼

Cut off time ☐  ▼ *Previous days*

Cancel cut off time ☐  ▼ *Previous days*

Order limits


Minimum selections ☐ 
Maximum selections ☐


Minimum spend ☐ 
Maximum spend ☐

Collection points

☒ All collection points allowed

Allowed collection points  ▼

 Save

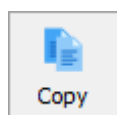
 Cancel

3. Press Save.




## Copying a Pre-order Period

1. Select the Pre-order Period you wish to copy.
2. Press the Copy button.



3. Edit the period accordingly.



 Pre-order period ×

Period name

Week

Days

☒ All Days
☒ Mon
☒ Tue
☒ Wed
☒ Thu
☒ Fri
☒ Sat
☒ Sun

Times

*Period time*

Cut off time ☐  *Previous days*

Cancel cut off time ☐  *Previous days*

Order limits


Minimum selections ☐ 
Maximum selections ☐


Minimum spend ☐ 
Maximum spend ☐

Collection points

☒ All collection points allowed

Allowed collection points

 Save

 Cancel

4. Press Save.



## Deleting a Pre-order Period

1. Select the Pre-order Period you wish to delete.
2. Press the **Delete** button.



3. Press **Yes** or **No** to confirm.
4. This will delete the Period.

*Last modified: 20 March 2023*

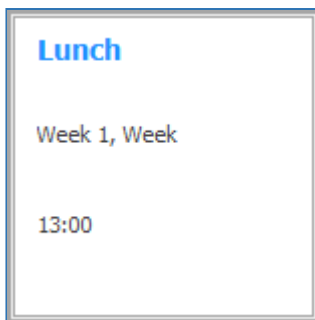
## Editing the Pre-order layout & Creating new Menus & Items



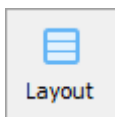
A Pre-order layout will normally consist of multiple menus with lead through items within them. The most common period would be lunch and a typical menu would be a grab and go bag consisting of a main item like a sandwich, a snack like a flapjack, and a drink like a bottle of water. Once a transaction has been made for a pre-order the customer will receive a receipt to claim the purchase from a collection point. The kitchen will have a specific time that they will usually print off the pre-order receipts to begin building the transactions in time for pick-up.

The first step to creating your pre-order layout will be to add a menu and link PLUs to that menu.

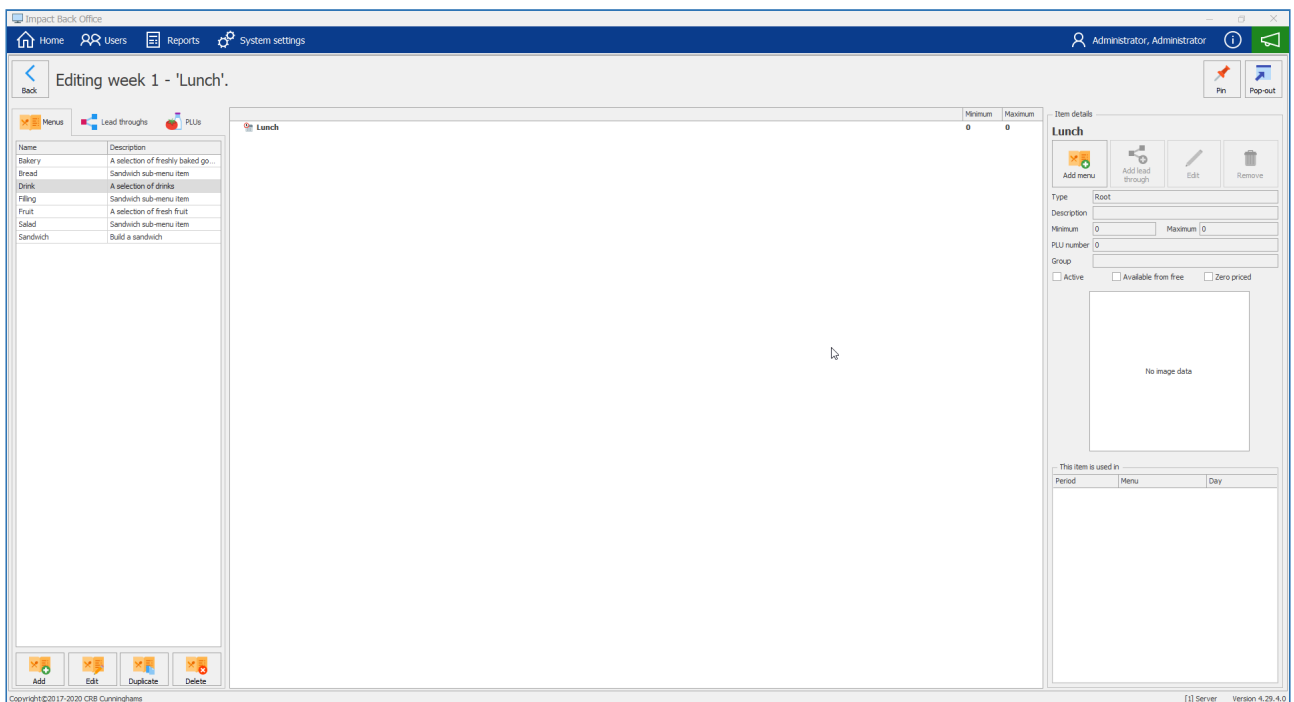
1. Select the Period you wish to create a layout for from the period grid.



2. Press the **Layout** button.




3. This will display the Pre-order layout screen.





The screenshot above already has a few menus already set up. In this example we will show you how to add a new menu to this pre-order layout

Pre-order Management Section


In this section you can manage the pre-order functions. Adding, Editing, Duplicating and Deleting Menus, Lead throughs and PLUs.


Menus


Lead throughs


PLUs

Name	Description
Bakery	A selection of freshly baked go...
Bread	Sandwich sub-menu item
Drink	A selection of drinks
Filling	Sandwich sub-menu item
Fruit	A selection of fresh fruit
Salad	Sandwich sub-menu item
Sandwich	Build a sandwich

Add

Edit

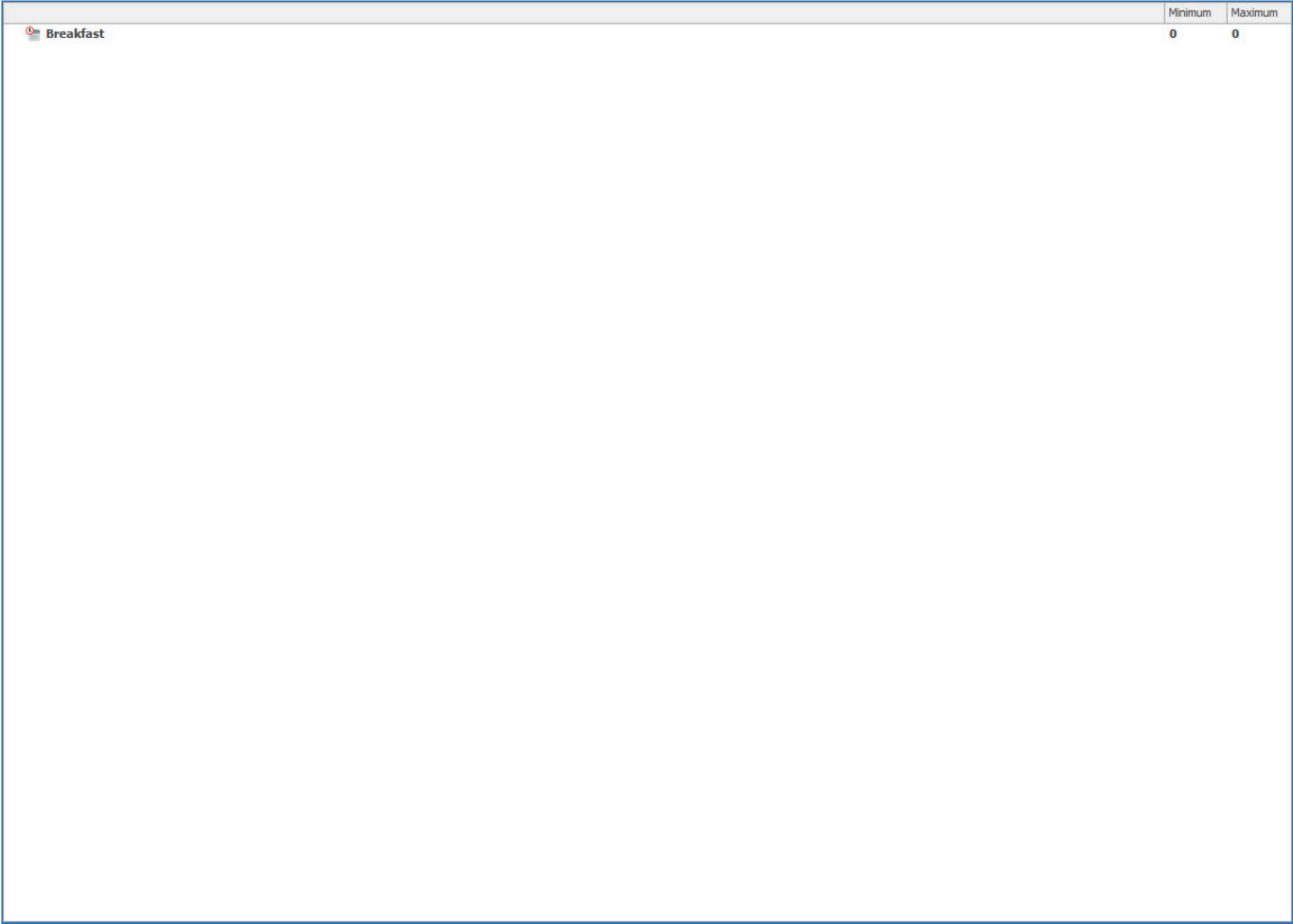
Duplicate

Delete

Pre-order Layout Section

The Pre-order layout section is where you can create and manage menus and PLUs that are available

for pre-ordering. By dragging menus and PLUs in the layout section you can easily organise the look of the pre-order layout.



Period, Menu & Item Management Section


In this section you can manage the menu items that have been selected on the pre-order layout and add new menus and items to the layout. You can also view an overview of what has been selected.

Item details


Lunch




Add menu



Add lead through



Edit



Remove

Type

Root

Description

Minimum

0

Maximum

0

PLU number

0

Group

☐ Active

☐ Available from free

☐ Zero priced

No image data

This item is used in

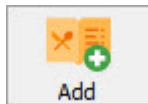
Period	Menu	Day
--------	------	-----

*Last modified: 20 March 2023*


## Creating, Editing and Deleting Menus for the Pre-order layout


## Creating Menus for the Pre-order layout

1. Press the **Add** button under the Menu tab.



 Menus

 Lead throughs


 PLUs

Name	Description
Bakery	A selection of freshly baked go...
Bread	Sandwich sub-menu item
Drink	A selection of drinks
Filling	Sandwich sub-menu item
Fruit	A selection of fresh fruit
Salad	Sandwich sub-menu item
Sandwich	Build a sandwich

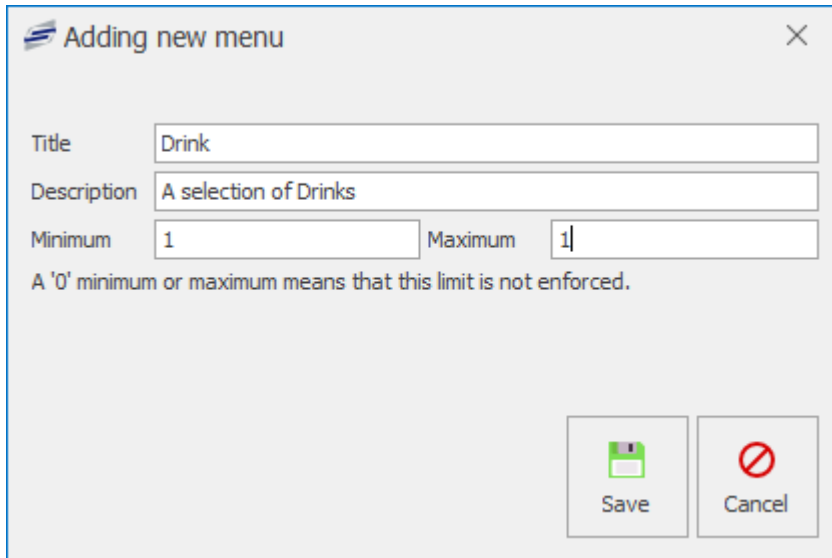
 Add

 Edit

 Duplicate

 Delete

2. Enter a **Title** for the new menu and select the **Minimum & Maximum selections** allowed.



**Adding new menu**

Title: Drink

Description: A selection of Drinks

Minimum: 1 Maximum: 1

A '0' minimum or maximum means that this limit is not enforced.

Save Cancel

3. Press the **OK** button.

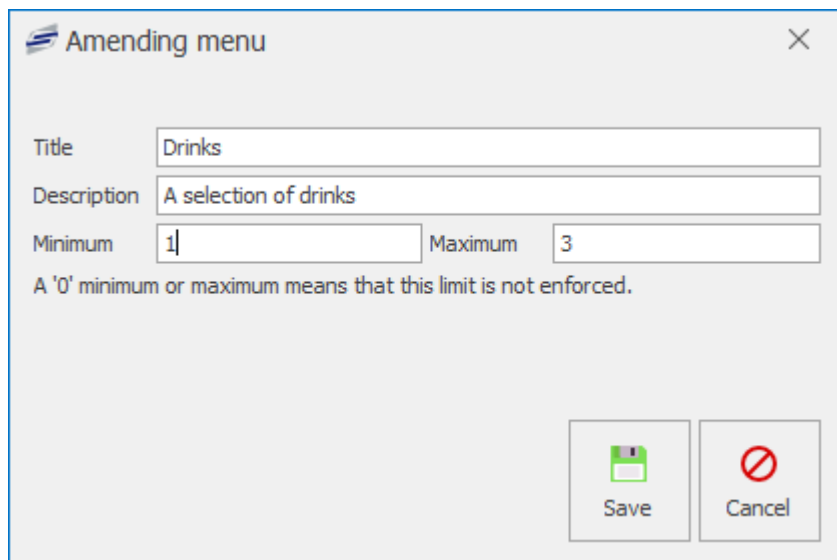
## Editing an existing menu on the Pre-order layout

1. Select the menu you wish to edit and press the **Edit** button under the menu tab.



2. You can change the **Name** of the menu and change the **Minimum & Maximum selections** requirements.







The image shows a dialog box titled "Amending menu" with a close button (X) in the top right corner. It contains the following fields and controls:


- Title:** A text box containing the word "Drinks".
- Description:** A text box containing the text "A selection of drinks".
- Minimum:** A text box containing the number "1".
- Maximum:** A text box containing the number "3".
- Help text:** Below the input fields, it says "A '0' minimum or maximum means that this limit is not enforced."
- Buttons:** At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with a red circle and slash icon).

## Deleting a menu from the Pre-order layout


1. Select the menu you wish to delete from the layout and press the **Delete** button under the menu tab.


Menus


Lead throughs


PLUs

Name	Description
Bakery	A selection of freshly baked go...
Bread	Sandwich sub-menu item
Drink	A selection of drinks
Filling	Sandwich sub-menu item
Fruit	A selection of fresh fruit
Salad	Sandwich sub-menu item
Sandwich	Build a sandwich

Add

Edit

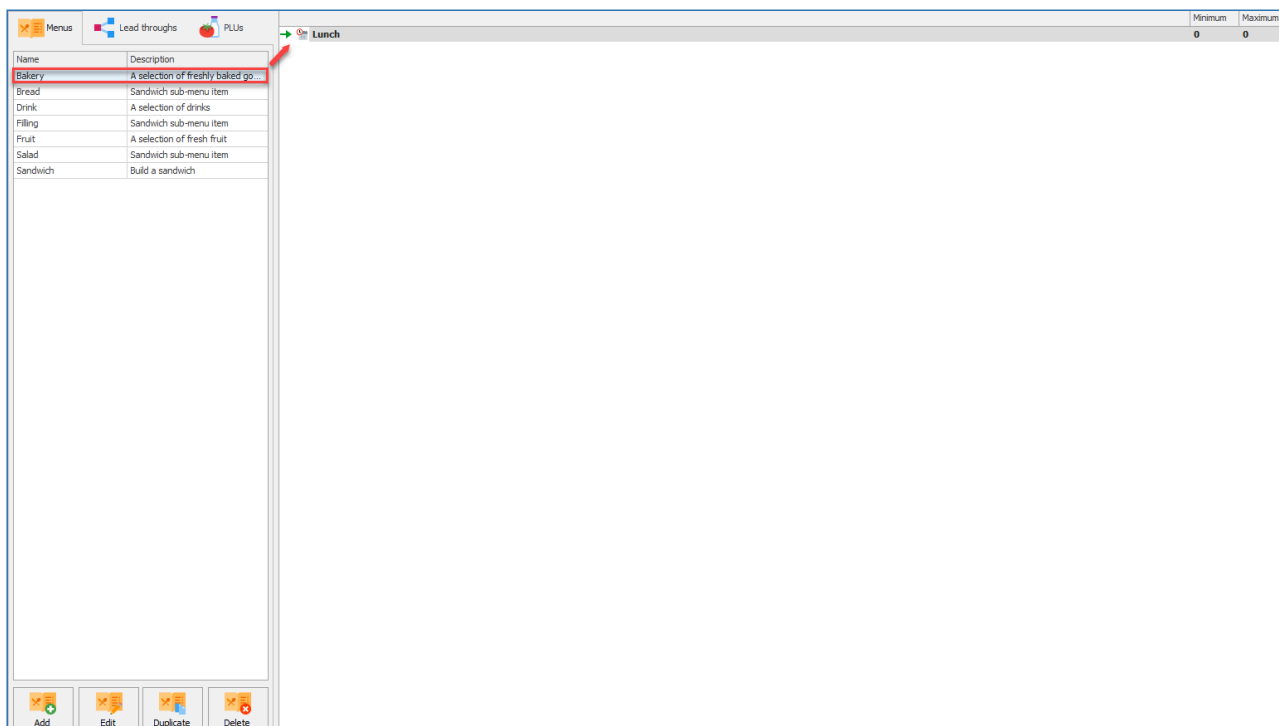
Duplicate

Delete

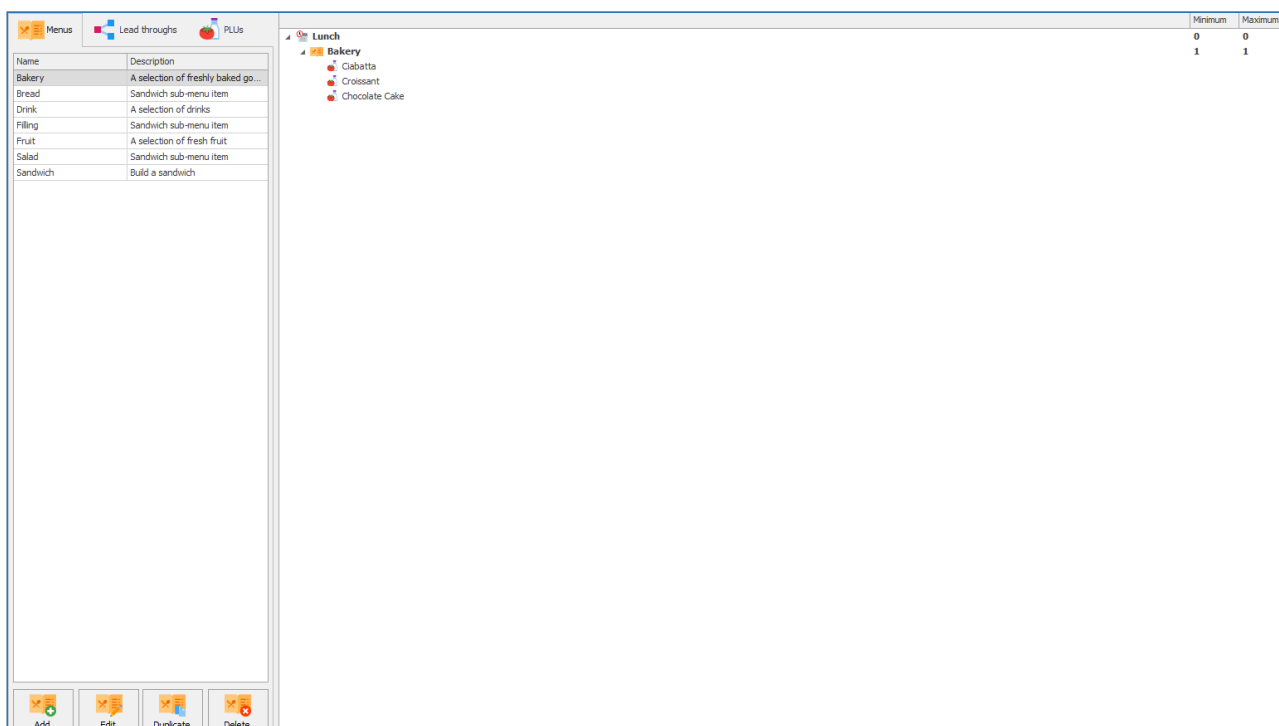
Last modified: 20 March 2023

# Adding Menus to the Pre-order period

1. To add a menu to the pre-order period, simply left click the menu from the menu tab and drag it next to the pre-order period.



2. The chosen menu will then be displayed underneath the pre-order period.



The chosen menu must be dragged onto an existing element of the layout to be added. An arrow to the left of the element you are dropping the menu onto gives an indication of the position that the menu will be displayed in.

Last modified: 20 March 2023

## Linking PLUs to Pre-order Menus



Once a menu has been created you will need to add items to sell against them. There are two methods you can use. You can simply add a standard PLU to a menu or you can add a lead through.

### Linking a PLU to a Pre-order menu

1. Select the PLU you wish to link to a menu from under the PLU tab.

The screenshot shows the 'PLUs' tab selected in the top navigation bar. On the left, a table lists various PLUs. The 'Brownie' PLU (ID 20, Group: Bakery) is highlighted with a red box. On the right, the 'Lunch' menu is displayed, showing a list of items: Bakery, Ciabatta, Croissant, and Chocolate Cake. A red arrow points from the 'Brownie' PLU in the left pane to the 'Lunch' menu in the right pane.

PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

	Minimum	Maximum
Lunch	0	0
Bakery	1	1

2. Left click the PLU you wish to link to the Pre-order menu.
3. Drag the selected PLU and drop it next to the menu you wish to add it to. This will add the PLU to the menu.

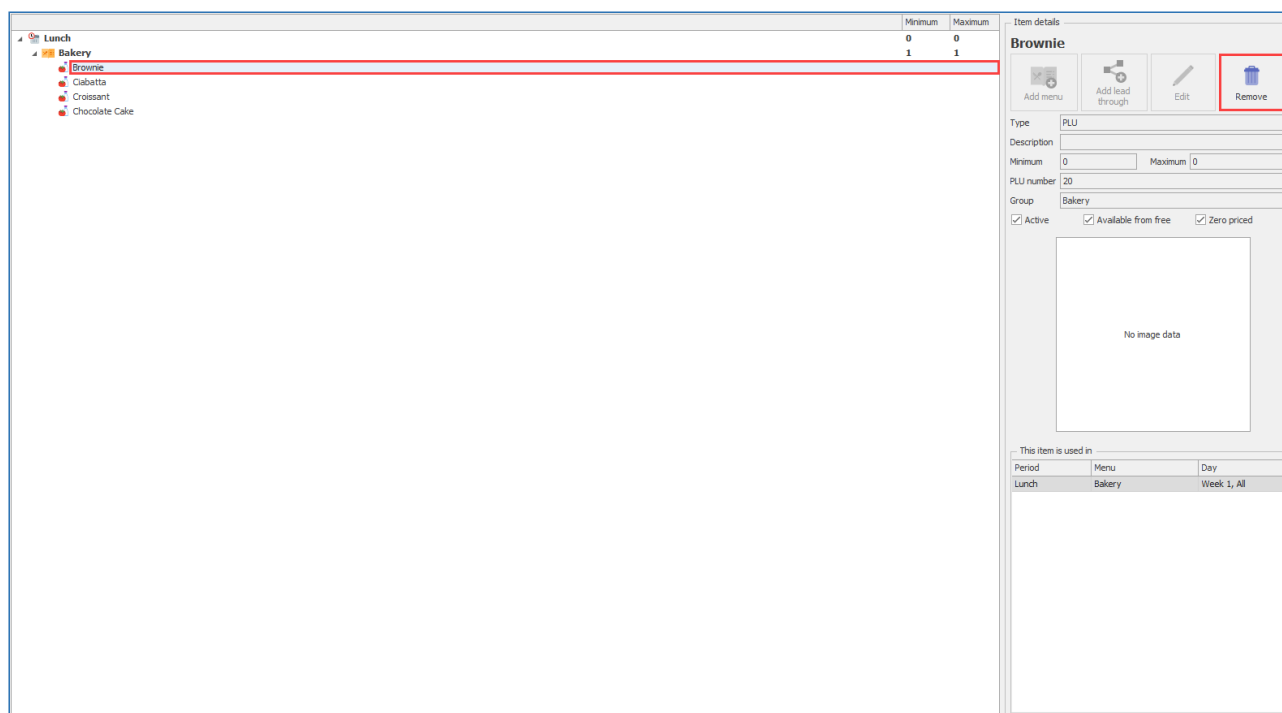
The screenshot shows the same interface as before, but now the 'Brownie' PLU has been added to the 'Lunch' menu. In the right-hand pane, under the 'Bakery' category, 'Brownie' is listed along with 'Ciabatta', 'Croissant', and 'Chocolate Cake'. The 'Brownie' PLU is still highlighted in the left-hand pane.

PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

	Minimum	Maximum
Lunch	0	0
Bakery	1	1

## Removing a PLU from the Pre-order menu

1. Left click the PLU you wish to remove from the menu.
2. Press the remove button under item details on the right hand side of the screen.



3. The PLU will be removed from the pre-order menu.

## Add New PLU to a Pre-order menu

1. Press the **Add** button under the PLU tab.

Menus
 Lead throughs
 PLUs

Find  ☒ Active only

PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

Add

Edit

Delete

- This will take you to **Adding new PLU** screen. Click the link for more information regarding [Adding a New PLU](#), [Basic details](#), [Prices](#), [Nutritional details](#) and [Restrictions](#).
- Press **Save & Close** to add the new PLU to the menu.

## Edit a PLU for use in the Pre-order menu

1. Left click your chosen PLU from the list under the PLU tab.
2. Press the **Edit** button under the PLU tab.



The screenshot shows the 'PLUs' tab in a software interface. At the top, there are three tabs: 'Menus', 'Lead throughs', and 'PLUs'. Below the tabs is a search bar with the text 'Find' and a checkbox labeled 'Active only'. A table lists various items with columns for 'PLU', 'Name', and 'Group'. The 'Edit' button at the bottom is circled in red.

PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

At the bottom of the interface, there are three buttons: 'Add', 'Edit', and 'Delete'. The 'Edit' button is circled in red.

3. This will take you to **Editing PLU** screen. Click the link for more information regarding [Editing a PLU](#), [Basic details](#), [Prices](#), [Nutritional details](#) and [Restrictions](#).

4. Press **Save & Close** to save any changes you have made to the chosen PLU.

## Deleting a PLU

1. Left click your chosen PLU from the list under the PLU tab.
2. Press the **Delete** button under the PLU tab.



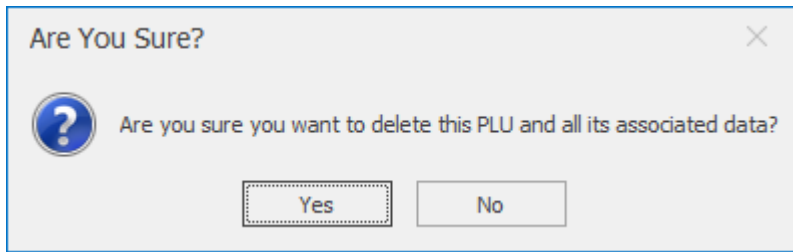
The screenshot shows the 'PLUs' tab selected in the top navigation bar. Below the navigation bar is a search bar with the text 'Find' and a search icon. To the right of the search bar is a checkbox labeled 'Active only' which is checked. Below the search bar is a table with three columns: 'PLU', 'Name', and 'Group'. The table contains 20 rows of data. The row with 'PLU' 20 and 'Name' 'Brownie' is highlighted. Below the table is a large empty space. At the bottom of the interface are three buttons: 'Add', 'Edit', and 'Delete'. The 'Delete' button is circled in red.

PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

Buttons: Add, Edit, Delete



3. A prompt will be given asking if you are sure. Press yes to proceed and delete the PLU.



A PLU cannot be deleted if it currently in use in another layout elsewhere in Fusion.

*Last modified: 20 March 2023*

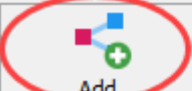

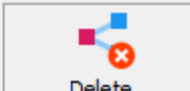
## Adding a Lead through to the Pre-order menu



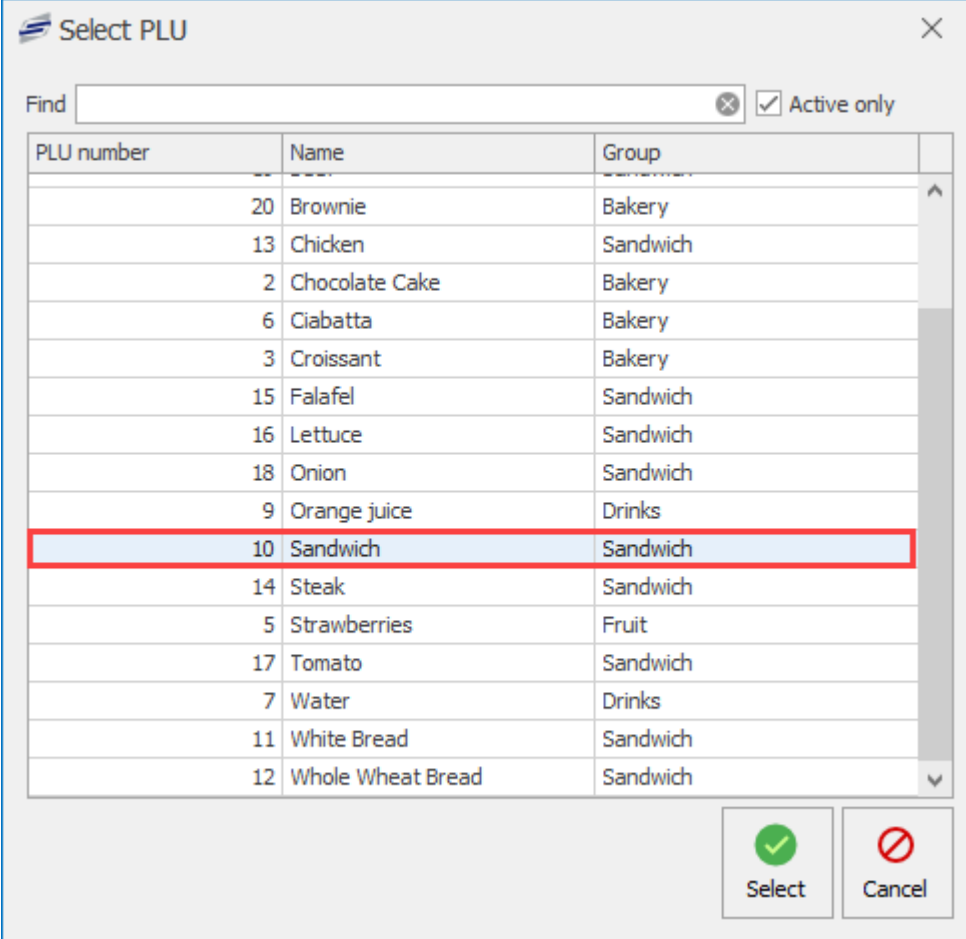
A lead through is an item you can add to the Pre-order menu that has a string of other sub-menus and PLUs within it. You could use this to create a main item of “Build a Sandwich” and add sub menus like “Bread Type”, “Fillings” etc.

## Creating a Lead through

1. Press the **Add** button under the Lead through tab.

Menus		Lead throughs		PLUs	
Name	Description				
 Add		 Edit		 Delete	

2. Select the PLU you wish to associate with the Lead through.

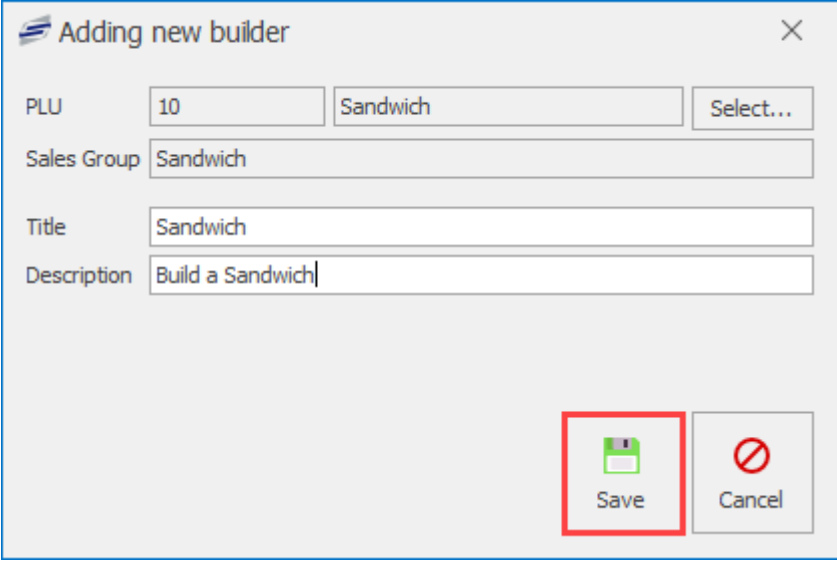
 Select PLU

Find  ☒ Active only

PLU number	Name	Group
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

☒ Select ☐ Cancel

3. Press **Save**.

 Adding new builder

PLU

Sales Group

Title

Description

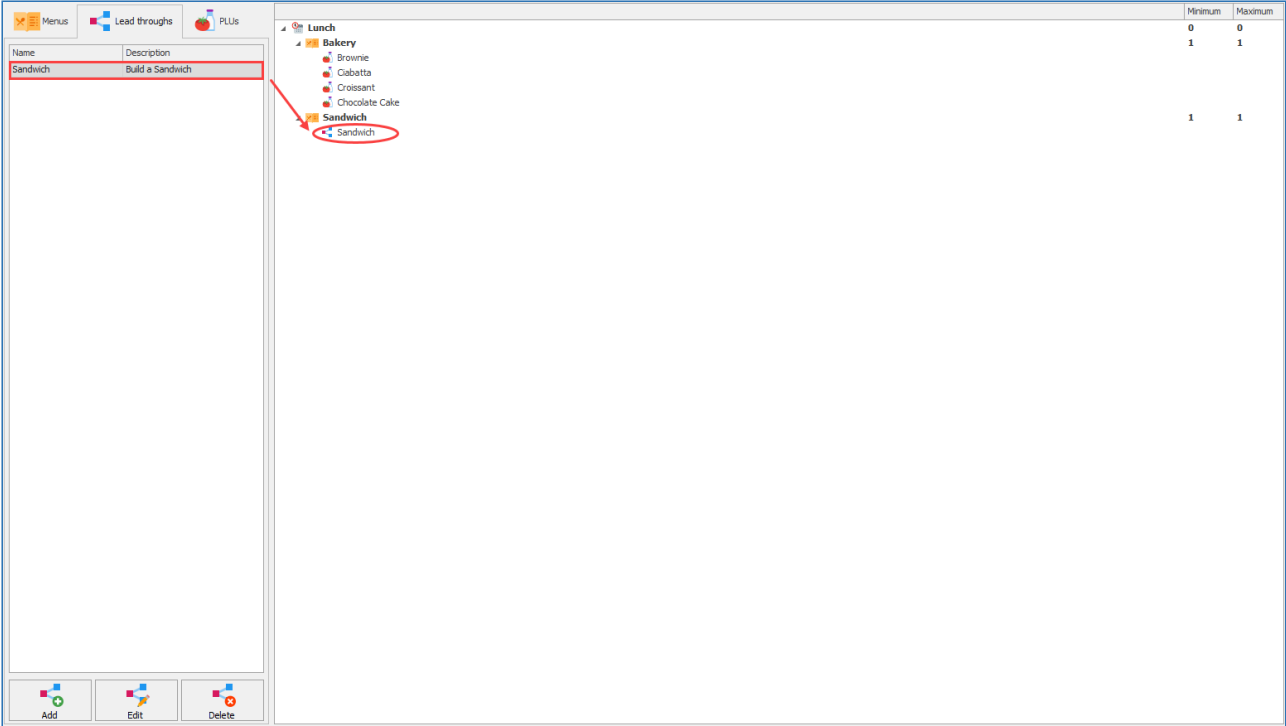
☒ Save ☐ Cancel



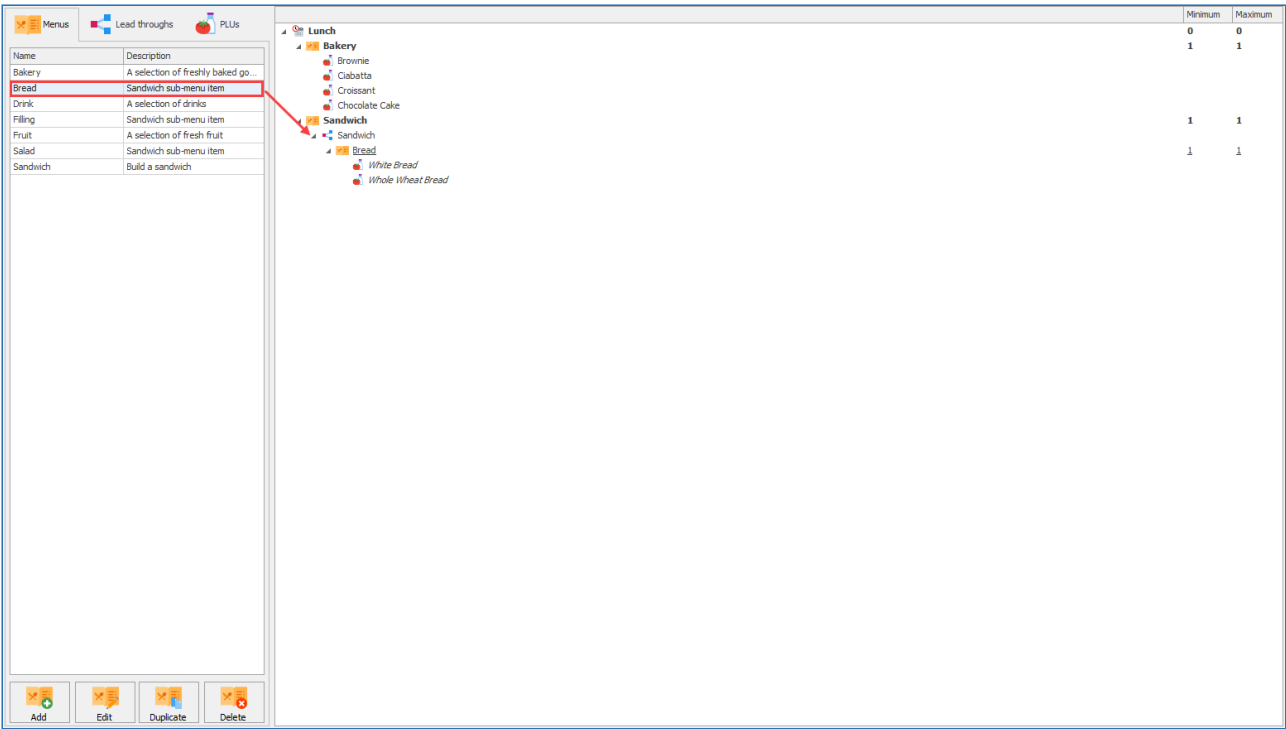
You may need to create a new PLU to associate to the Lead through. Click the link for more information regarding Adding a new PLU.

## Adding PLUs and Sub-menus to a Lead through

1. Left click your chosen Lead through from under the Lead throughs tab and drag it onto the menu you wish to add it to.



2. Add sub-menus by dragging and dropping menus from the menu tab onto your lead through.



3. Repeat the process of adding sub-menus until you have a complete lead through.

	Minimum	Maximum
<b>Lunch</b>	<b>0</b>	<b>0</b>
<b>Bakery</b>	<b>1</b>	<b>1</b>
Brownie		
Ciabatta		
Croissant		
Chocolate Cake		
<b>Sandwich</b>	<b>1</b>	<b>1</b>
<b>Bread</b>	<b>1</b>	<b>1</b>
White Bread		
Whole Wheat Bread		
<b>Filling</b>	<b>1</b>	<b>1</b>
Falafel		
Steak		
Beef		
Chicken		
<b>Salad</b>		<b>3</b>
Lettuce		
Onion		
Tomato		



It is important to be aware of the order sub-menus are in, as the highest sub-menu in the list will be displayed to the customer first. For our example of the sandwich, bread is the first sub-menu as that is the first thing the customer would wish to select.

*Last modified: 20 March 2023*

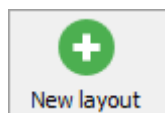
## Smart Board layouts



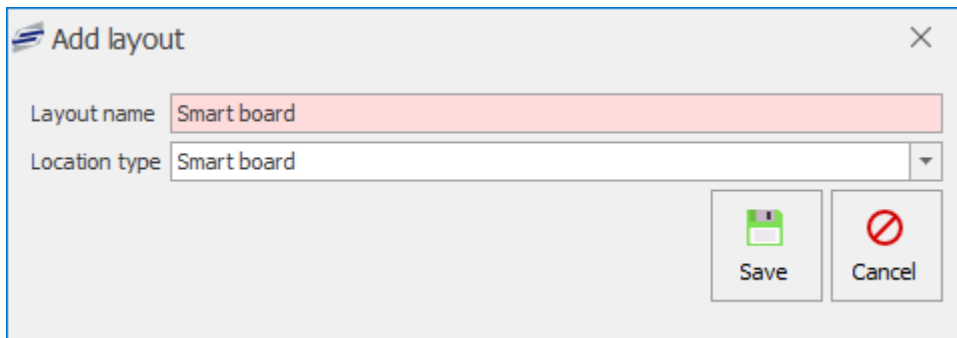
Smart boards are predominately used in Primary schools. They provide the teacher with an easy interface to find a student and select a meal.

### Creating a new Smart Board layout

1. Press the **New layout** button.



2. Enter the name of the new layout and select **Smart board** from the location type drop-down list.



**Add layout**

Layout name:

Location type:

3. Press **Save**.



4. This will take you to the Edit smart board periods section.

*Last modified: 20 March 2023*

## Adding Smart board Periods



Smart board periods are the service times you can make a pre-order for. Lunch would be the most common period to order for however this could also be for a different period like Breakfast and Morning Break.

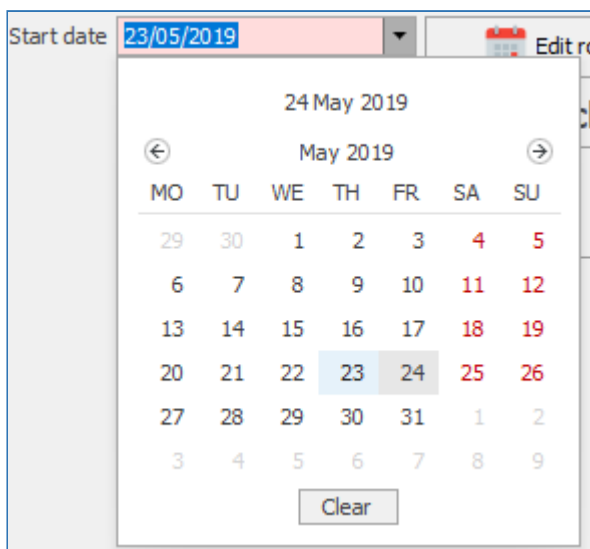
## Smart board Period Properties

This is where you will select a start date to make the smart board layout active and setup the weekly menu rotations if needed.

Name	<input type="text" value="Smart Board"/>	Start date	<input type="text" value="29/04/2019"/>	<input type="button" value="Edit rotations"/>
------	--	------------	---	---

## Start Date

1. Select a **Start date** for the smart board layout to become active. Press the down arrow and select a date from the calendar.



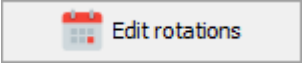
Start date:

24 May 2019

May 2019						
MO	TU	WE	TH	FR	SA	SU
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

## Edit Smart board Rotations

1. Press the **Edit rotations** button.



- 2. Select a **Start date** and an **End date** for the the menu rotations in the **Generate weeks** section.
- 3. Select how many weeks will be rotated.
- 4. Press the **Generate** button.

Menu rotations

Generate weeks

Start date

24/05/2019

End date

24/08/2019

Weeks

3

Mode

Replace all rotations

Generate

Week 1

Week 2

Week 3

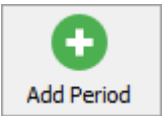
Week start	Week number
20/05/2019	1
27/05/2019	2
03/06/2019	3
10/06/2019	1
17/06/2019	2
24/06/2019	3
01/07/2019	1
08/07/2019	2
15/07/2019	3
22/07/2019	1
29/07/2019	2
05/08/2019	3
12/08/2019	1

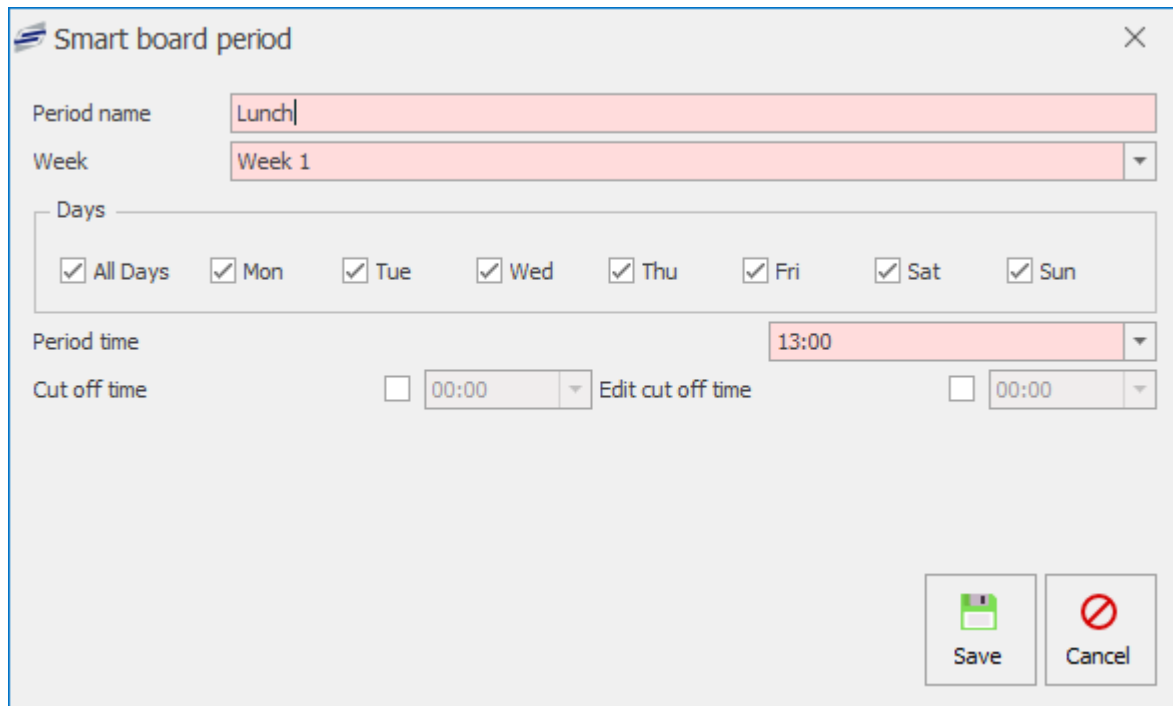
Save

Cancel

Adding a New Period

- 1. Press **Add Period**





**Smart board period**

Period name:

Week:

Days:

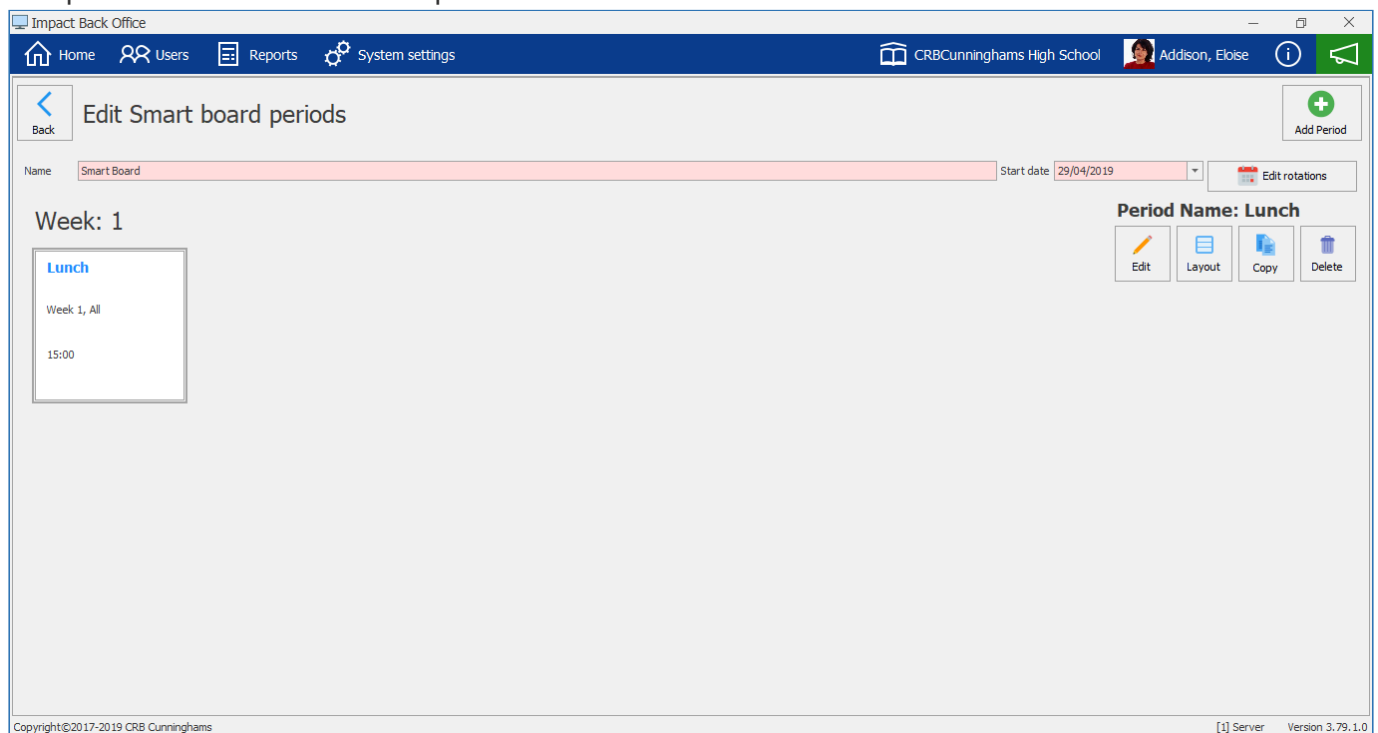
☒ All Days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Period time:

Cut off time: ☐  Edit cut off time ☐

2. Enter a **Period name** for the smart board period.
3. Select a **Week** from the drop-down list.
4. Select which days the smart board period will be available.
5. Select a **Period time** for this period to start.
6. You can activate a **Cut off time** which will determine when you can pre-order up to.
7. Press **Save**.

The period will be added to the pre-order menu.



Impact Back Office

Home Users Reports System settings CRBCunninghams High School Addison, Eloise

**Edit Smart board periods**

Name:  Start date:  Edit rotations

Week: 1

**Lunch**

Week 1, All

15:00

**Period Name: Lunch**

Copyright©2017-2019 CRB Cunninghams [1] Server Version 3.79.1.0

## Editing a Pre-order Period

1. Press the **Edit** button.





2. Edit the period properties.

**Smart board period** [X]

Period name:

Week:  [v]

Days:

☒ All Days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Times:

☒ Period time:  [v]

☒ Cut off time:  [v]

☐ Cancel cut off time:  [v]

Collection points:

☒ All collection points allowed

Allowed collection points:

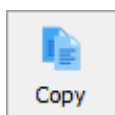
[Save] [Cancel]

3. Press **Save**.

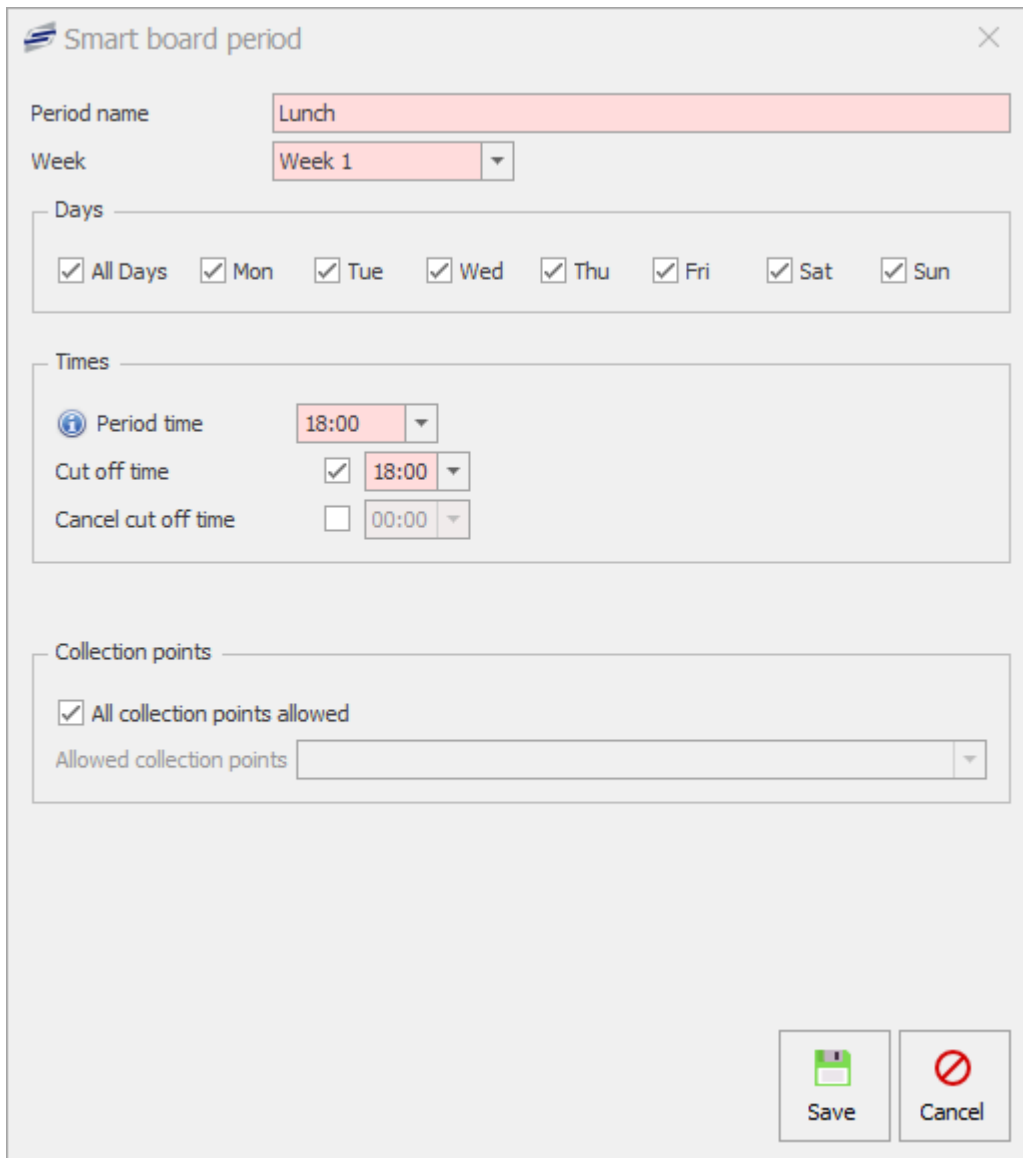


## Copying a Pre-order Period

1. Select the Smart board Period you wish to copy.
2. Press the **Copy** button.



3. Edit the period accordingly.



**Smart board period** [X]

Period name:

Week:  [v]

Days:

☒ All Days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Times:

Period time:  [v]

Cut off time: ☒  [v]

Cancel cut off time: ☐  [v]

Collection points:

☒ All collection points allowed

Allowed collection points:

[Save] [Cancel]

4. Press **Save**.

## Deleting a Smart board Period

1. Select the Smart board period you wish to delete.
2. Press the **Delete** button.



3. Press **Yes** or **No** to confirm.
4. This will delete the period.

## Editing the Smart board layout & Creating new Menus

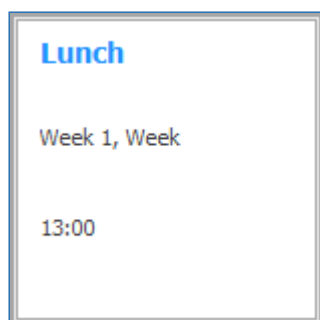
*Last modified: 20 March 2023*



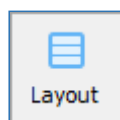
A Smart board layout will normally consist of multiple menus. The most common menu would usually be the lunch menu which would display a few meal choice options.

The first step to creating a menu in your smart board layout will be to add a menu and link PLUs to that menu.

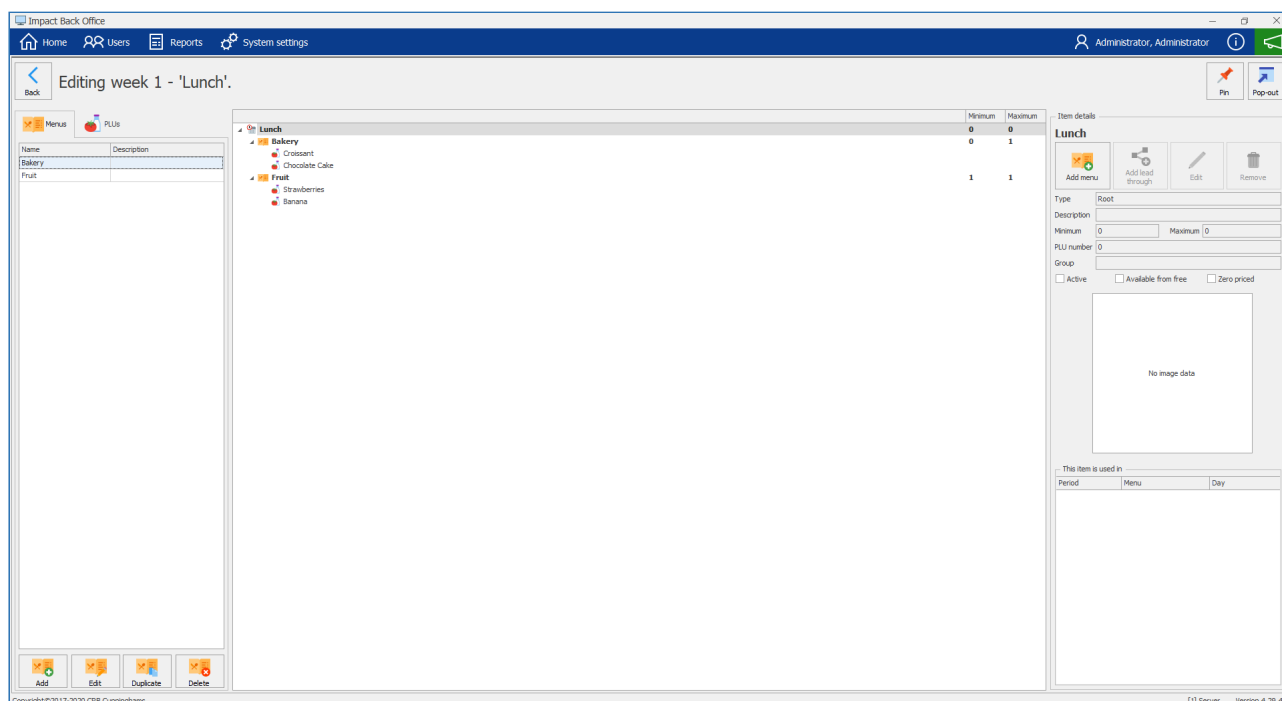
1. Select the Period you wish to create a layout for from the period grid.



2. Press the **Layout** button.




3. This will display the Smart board layout screen.




The screenshot above already has a few menus already setup. In this example we will show you how to add a new “drinks” menu to this smart board layout.


## Adding Menus to the Smart board layout


1. Press the **Add** button from under the menu tab.


 Menus


 PLUs

Name	Description
Bakery	
Fruit	

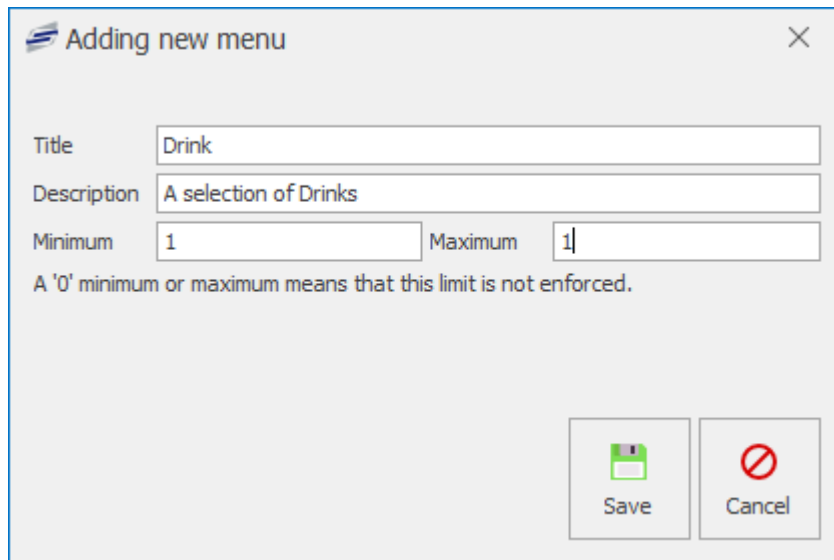
 Add

 Edit

 Duplicate

 Delete

2. Enter a **Title** for the new menu and select the **Minimum & Maximum selections** allowed.



**Adding new menu**

Title: Drink

Description: A selection of Drinks

Minimum: 1 Maximum: 1

A '0' minimum or maximum means that this limit is not enforced.





Save Cancel

3. Press the **OK** button.

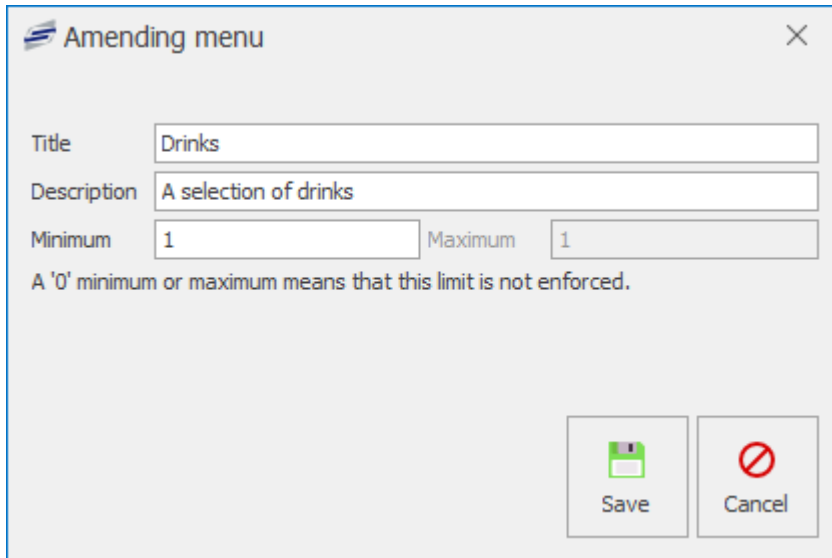
## Editing an existing menu on the Smart board layout

1. Select the menu you wish to edit and press the **Edit** button from under the menu tab.

Name	Description
Bakery	
Drinks	A selection of drinks
Fruit	

 Add  Edit  Duplicate  Delete

2. You can change the **Name** of the menu, change the **Description** of the menu and change the **Minimum & Maximum selections** requirements.

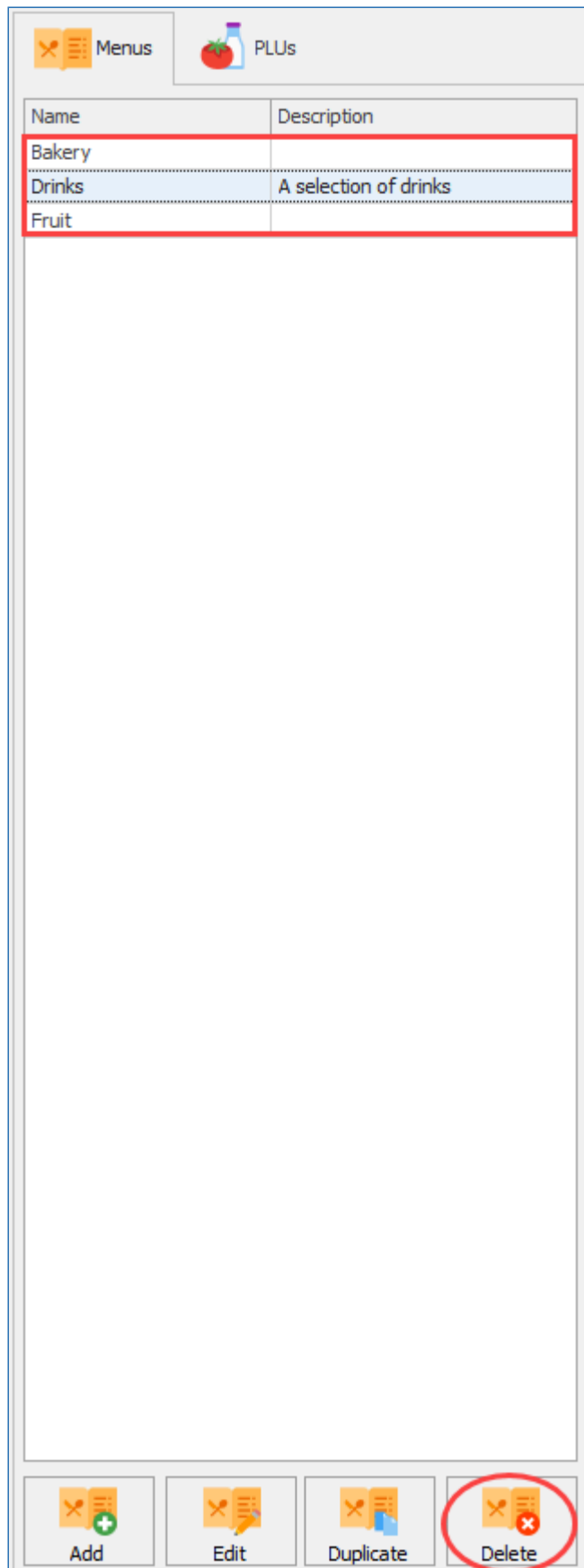


The image shows a dialog box titled "Amending menu" with a close button (X) in the top right corner. It contains the following fields and controls:

- Title:** A text box containing the word "Drinks".
- Description:** A text box containing the text "A selection of drinks".
- Minimum:** A text box containing the number "1".
- Maximum:** A text box containing the number "1".
- Help text:** Below the input fields, it says "A '0' minimum or maximum means that this limit is not enforced."
- Buttons:** At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with a red circle and slash icon).

## Deleting a menu from the Smart board layout

1. Select the menu you wish to delete from the layout and press the delete button from under the menu tab.

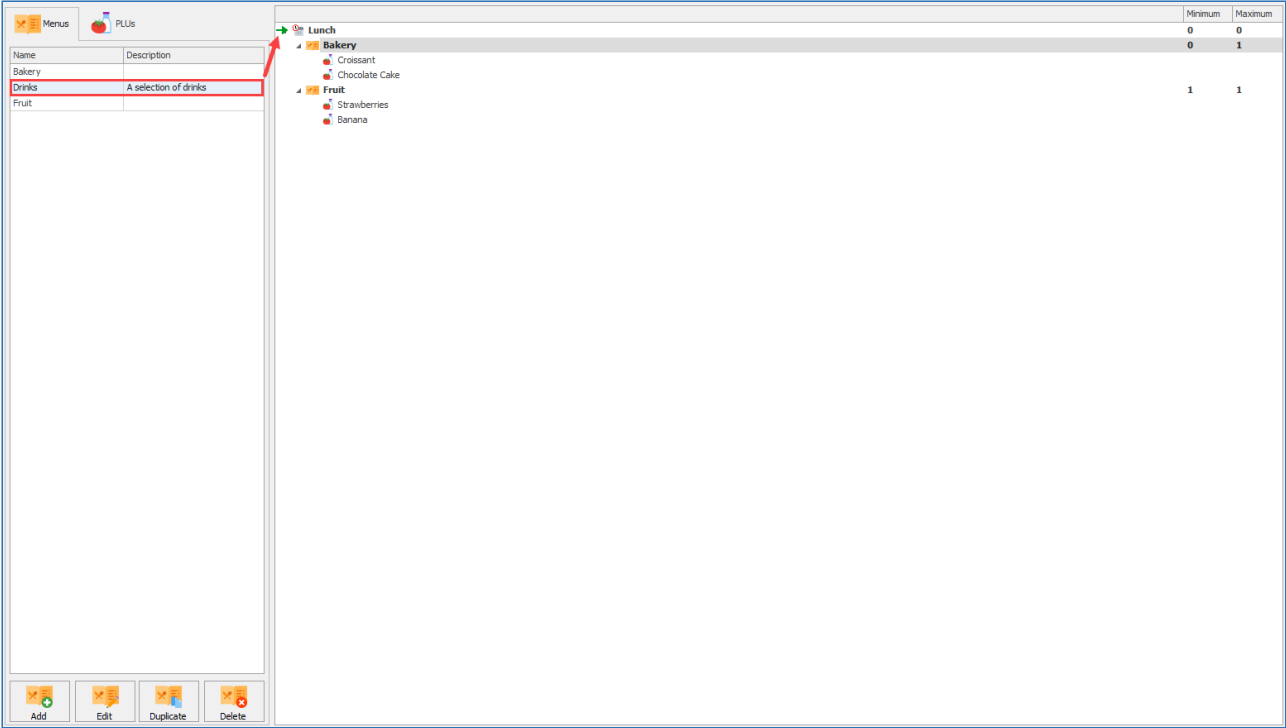


*Last modified: 20 March 2023*

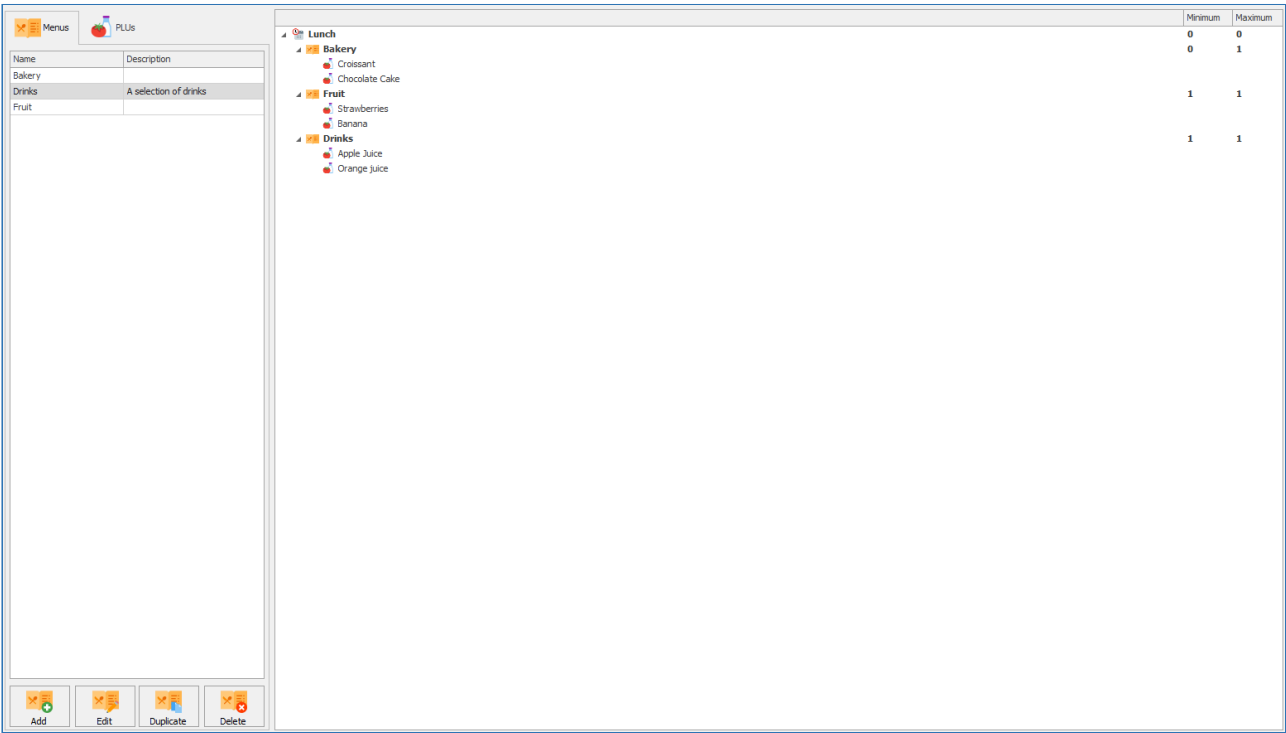
## Adding Menus to the Smart board layout


1. To add a menu to the Smart board layout, simply left click the menu from the menu tab and drag it next to the Smart board period.





2. The chosen menu will then be displayed underneath the Smart board period.





The chosen menu must be dragged onto an existing element of the layout to be added. An arrow to the left of the element you are dropping the menu onto gives an indication of the position that the menu will be displayed in.

## Linking PLUs to Smart board Menus



Once a menu has been created you will need to add items to sell against them. There are two methods you can use. You can simply add a standard PLU to a menu or you can add a multi-part item.

### Linking a PLU to a Smart board menu

1. Select the PLU you wish to link to a menu from under the PLU tab.

The screenshot shows the 'PLUs' tab in the software. On the left, a table lists various PLUs. The 'Drinks' group is expanded, and '9 Orange juice' is highlighted with a red box. A red arrow points from this item to the 'Drinks' category in the menu structure on the right. The menu structure shows 'Lunch' with sub-categories 'Bakery', 'Fruit', and 'Drinks'. The 'Drinks' category currently contains 'Apple Juice'.

PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

2. Left click the PLU you wish to link to the Pre-order menu.
3. Drag the selected PLU and drop it next to the menu you wish to add it to. This will add the PLU to the menu.

The screenshot shows the same software interface as before, but now '9 Orange juice' has been added to the 'Drinks' category in the menu structure on the right. The 'Drinks' category now contains both 'Apple Juice' and 'Orange juice'.

PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

## Removing a PLU from the Smart board menu

1. Left click the PLU you wish to remove from the menu.
2. Press the remove button under item details on the right hand side of the screen.

The screenshot displays the Smart board menu interface. On the left, a tree view shows the menu structure: Lunch, Bakery (Croissant, Chocolate Cake), Fruit (Strawberries, Banana), and Drinks (Apple Juice, Orange Juice). The 'Orange Juice' item is highlighted with a red box. On the right, the 'Item details' panel for 'Orange juice' is visible. It includes buttons for 'Add menu', 'Add lead through', 'Edit', and 'Remove'. The 'Remove' button is highlighted with a red box. Below the buttons, the 'Type' is set to 'PLU', 'Description' is empty, 'Minimum' is 0, 'Maximum' is 0, 'PLU number' is 9, and 'Group' is 'Drinks'. There are checkboxes for 'Active', 'Available from free', and 'Zero priced'. A large empty box labeled 'No image data' is present. At the bottom, a table shows 'This item is used in' with columns for 'Period', 'Menu', and 'Day'. The table shows 'Lunch' under 'Period', 'Drinks' under 'Menu', and 'Week 1, All' under 'Day'.


Period	Menu	Day
Lunch	Drinks	Week 1, All

3. The PLU will be removed from the Smart board menu.

## Add New PLU to a Smart board menu

1. Press the Add button under the PLU tab.

 Menus
 


 PLUs

Find  ☒ Active only

PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

 Add



 Edit


 Delete

- This will take you to **Adding new PLU** screen. Click the link for more information regarding [Adding a New PLU](#), [Basic details](#), [Prices](#), [Nutritional details](#) and [Restrictions](#).
- Press **Save & Close** to add the new PLU to the menu.




## Edit a PLU for use in the Smart board menu

1. Left click your chosen PLU from the list under the PLU tab.
2. Press the **Edit** button under the PLU tab.

 Menus
  PLUs

Find   ☒ Active only

PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

 Add
  Edit
  Delete


3. This will take you to **Editing PLU** screen. Click the link for more information regarding [Editing a PLU](#), [Basic details](#), [Prices](#), [Nutritional details](#) and [Restrictions](#).


4. Press **Save & Close** to save any changes you have made to the chosen PLU.

## Deleting a PLU

1. Left click your chosen PLU from the list under the PLU tab.
2. Press the **Delete** button under the PLU tab.

 Menus
 

 PLUs

Find   ☒ Active only

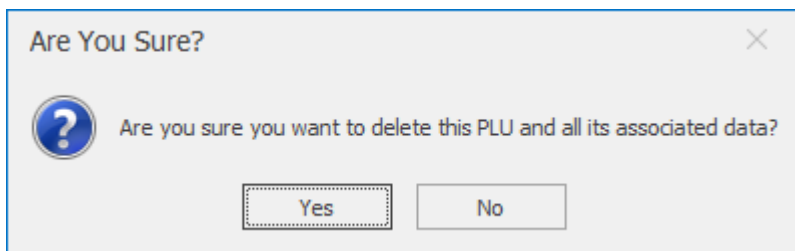
PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

 Add

 Edit

 Delete

3. A prompt will be given asking if you are sure. Press yes to proceed and delete the PLU.



A PLU cannot be deleted if it is currently in use in another layout elsewhere in Fusion.

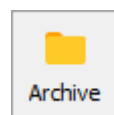
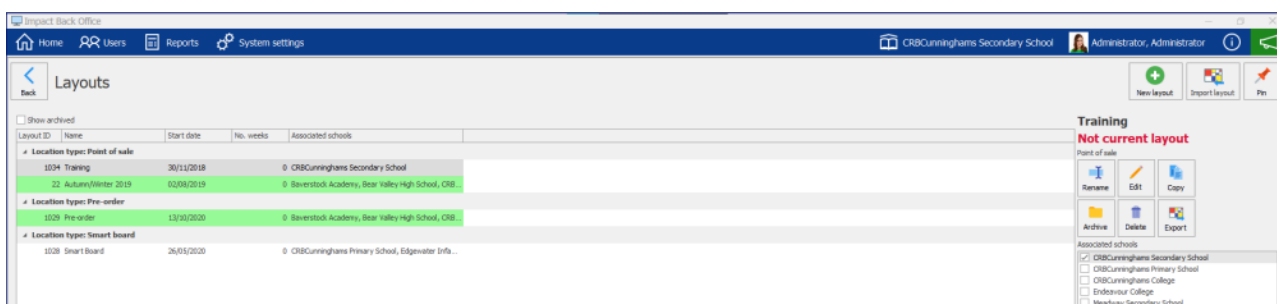
*Last modified: 20 March 2023*

## Archiving layouts

You may wish to archive old layouts to make the layout screen easier to navigate without having delete layouts that are no longer in use.

### How to archive a layout

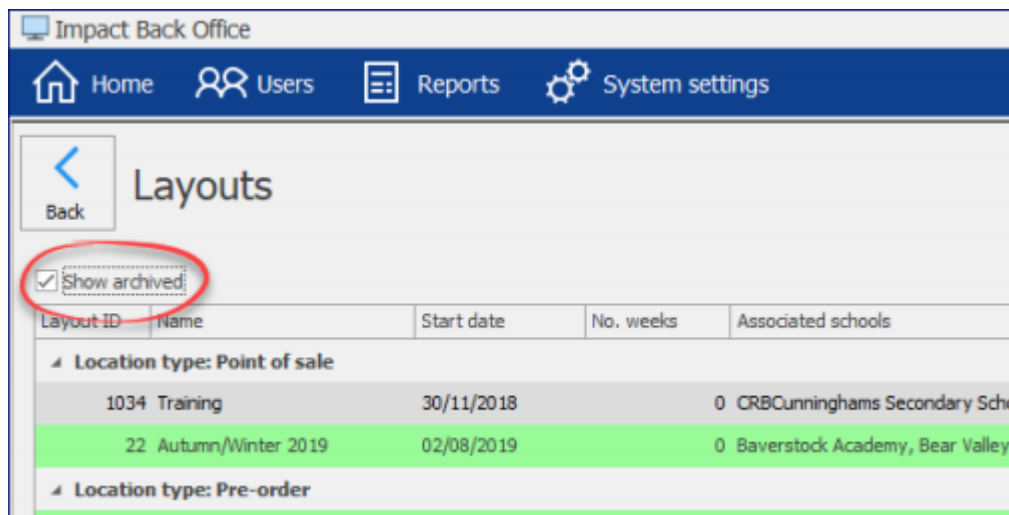
1. Select the layout you wish to archive from the layouts screen. This cannot be an active layout for any schools and must have a start date that is in the past.



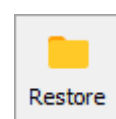
2. Press the **Archive** button on the right hand side of the screen.
3. The layout will be archived.

### How to restore an archived layout

1. Check the **Show archived layouts** checkbox on the layouts screen.



2. Select the layout to be restored (archived layouts are show in italics).



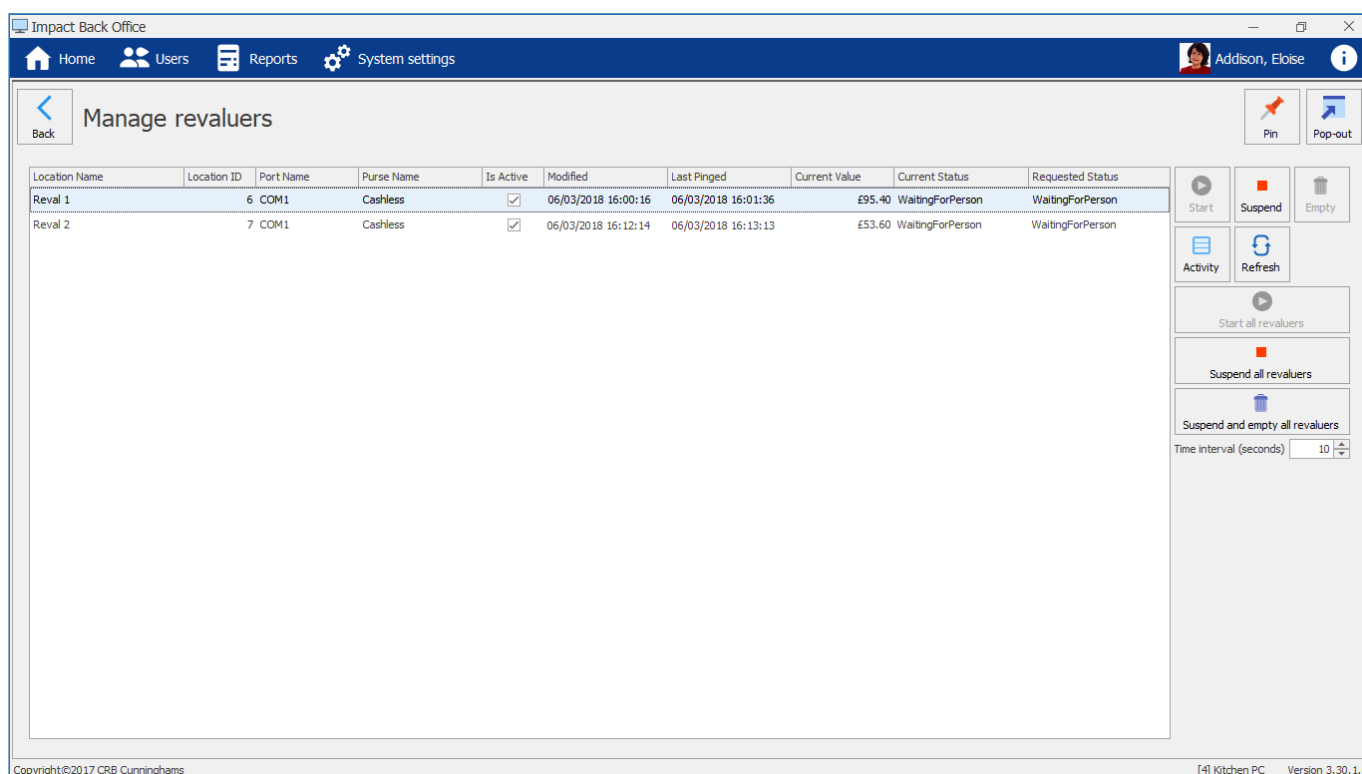
3. Press the **Restore** Button on the right hand side of the screen.

*Last modified: 20 March 2023*

## Revaluation units



The revaluation units (often referred to as Revaluers or Revals) are the metal boxes that the users use to manually top up their cashless accounts. We can control these machines through the Impact Office. This allows us to Start/Suspend them, empty them, and even view the activity on them.



## Starting and suspending the revaluers

Revaluers can be started and suspend either all at the same time or individually. Users will not be



able to use the machines unless they are started.

**i** If the revaluers are already running, you will only have the option to suspend and vice versa.

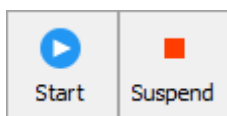
## Starting / suspending all revaluers

1. Press the **Start all revaluers** or the **Stop all revaluers** button from the right hand side.



## Starting / suspending individual revaluers

1. Select the required revaluer(s) from the list.
2. Press the **Start** or **Suspend** button from the right hand side.



## Emptying the revaluers

You may wish to empty the revaluation machines from time to time. The engineers will often do this before they work on the units.

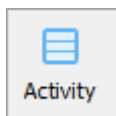
**i** Emptying the revaluers in this fashion simply sets the current value to £0.00. To reconcile the monies from inside each revaluer, you will need to run the cash up procedure.

**i** Revaluers can only be emptied while they are suspended.

1. Press the **Suspend and empty all revaluers** button to empty all of the revaluers or find and select the required revaluer(s) and press the **Empty** button.

## Viewing a revaluer's activity

1. Select the required revaluation unit from the list and press the **Activity** button.



2. All of the activity for today will be displayed. Change the information by using the filter. Expanding a row will show the details of that transaction.

Impact Back Office

Home Users Reports System settings Retry bio

CRBCunninghams Secondary School Administrator, Administrator

### Activity history for Reval 1

Start date: 01/01/2019 End date: 13/06/2022 Type: All Types

ID Method: All Hide fully refunded: Client transaction guid

Transaction number

Date / Time	Date / Time applied	Transaction	Type	Payment type	Paid	Free	VAT	Location name	User name	Entered by	ID method	Fully r...
05/03/2021 14:36:59	05/03/2021 14:36:59	100588791	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
08/03/2021 16:18:46	08/03/2021 16:18:46	100588961	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Administrator, Admi...	Administrator, Admi...		<input type="checkbox"/>
29/03/2021 13:39:24	29/03/2021 13:39:24	100591578	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
01/04/2021 14:56:23	01/04/2021 14:56:23	100592126	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
26/04/2021 14:25:30	26/04/2021 14:25:30	100595199	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
26/05/2021 09:53:04	26/05/2021 09:53:04	100599244	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
02/06/2021 13:32:59	02/06/2021 13:32:59	100600147	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
23/06/2021 09:22:46	23/06/2021 09:22:46	100602830	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
08/07/2021 15:10:55	08/07/2021 15:10:55	100604859	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
19/07/2021 15:42:10	19/07/2021 15:42:10	100606193	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
11/08/2021 13:33:17	11/08/2021 13:33:17	100609206	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Phelps, Nick	Phelps, Nick		<input type="checkbox"/>
30/09/2021 10:28:46	30/09/2021 10:28:46	100615742	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
07/10/2021 13:46:19	07/10/2021 13:46:19	100616669	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
11/11/2021 09:50:08	11/11/2021 09:50:08	100620360	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
18/11/2021 14:42:36	18/11/2021 14:42:36	100620893	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Roberts, Jamie	Roberts, Jamie		<input type="checkbox"/>
07/01/2022 13:56:28	07/01/2022 13:56:28	100623688	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Administrator, Admi...	Administrator, Admi...		<input type="checkbox"/>
07/01/2022 14:25:13	07/01/2022 14:25:13	100623690	Reset manua...		£0.00	£0.00	£0.00	Reval 1	Administrator, Admi...	Administrator, Admi...		<input type="checkbox"/>

17 records found, last updated 13/06/2022 13:29:53

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[n] Alex Hay Laptop Version 22.03.0.0

Last modified: 20 March 2023

## Pre-order Kiosks



Pre-order kiosks can be controlled from this tile. You can change a pre-order status by making them active or inactive. This process will determine whether the users can access their accounts on the kiosks or not.

Impact Back Office

Home Users Reports System settings

CRBCunninghams High School Addison, Eloise

### Pre-order kiosks

Pin Pop-out

Location ID	Name	Computer name	Active
8	Kiosk	HIT-10058	<input checked="" type="checkbox"/>

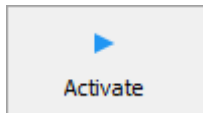
Activate Deactivate

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[1] Server Version 3.79.1.0

## Activate

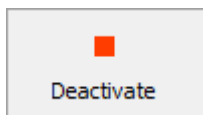
1. Select the Kiosk from the list.
2. Press the **Activate** button.



- This will turn the Pre-order kiosk active and users can start making transactions if it is in the active time period.

## Deactivate

- Select the Kiosk from the list.
- Press the **Deactivate** button.



- This will make the Pre-order kiosk deactivate and users will not be able to make any pre-order transactions.

*Last modified: 20 March 2023*

## Pre-order transactions



The pre-order transactions tile gives you access to all of the recorded pre-orders made on the system. You can mark orders collected status and perform refunds. You also have options to print order receipts, including duplicates receipts.

Impact Back Office

Home Users Reports System settings Retry bio CRBCunninghams Secondary School Administrator, Administrator

### Pre-order transaction history

Find pre-orders: Start date 06/12/2019 End date 13/06/2022 Pre-order number Name

Collection status All Printed Show cancelled/refunded

Clear Filters Select all

Date / Time	Date / Time applied	Pre-order	Transaction	Total	Order source	User name	Entered by	Collected	Receipt printed	Collection point	Marked collected by
15/05/2020 13:00:00	14/05/2020 11:38:25	2	100551446	-£4.06	Pre-Order Kiosk	Ashley, Alex	Ashley, Alex			Del Bar T18 Collec...	

PLU No.	PLU	Group	Quantity	Price level	Total Paid	Free	VAT	Disc.	Points	Refunded
100336	Subway Meatball Marinara	Del/Hot Cart	1	2	£0.00		£0.00	£0.00	0	
100321	Baguette - Brown Bread	Sandwiches/Baguettes	1	2	£0.00		£0.00	£0.00	0	
100256	Bacon	Breakfast	1	2	£0.00		£0.00	£0.00	0	
100308	Chicken	Sandwiches/Baguettes	1	2	£0.00		£0.00	£0.00	0	
100184	Cucumber	Sandwiches/Baguettes	1	2	£0.00		£0.00	£0.00	0	
100179	No Mayo	Sandwiches/Baguettes	1	2	£0.00		£0.00	£0.00	0	
100311	BBQ Sauce	Condiments	1	2	£0.00		£0.00	£0.00	0	
100324	Brownie	Desserts	1	2	£0.00		£0.00	£0.00	0	

Date / Time	Date / Time applied	Pre-order	Transaction	Total	Order source	User name	Entered by	Collected	Receipt printed	Collection point	Marked collected by
07/01/2021 16:00:00	07/01/2021 16:35:21	1	100582364	-£2.84	Canteen T11	Ashley, Alex	Ashley, Alex			Del Bar T18 Collec...	
07/01/2021 16:00:00	07/01/2021 16:37:29	2	100582366	-£1.20	Canteen T11	Ashley, Alex	Ashley, Alex	24/03/2021 15:55:47		Del Bar T18 Collec...	Administrator, Administrator
11/02/2021 13:00:00	11/02/2021 14:20:08	1	100586202	-£5.48	Paul Tennant's Laptop POS	Alcock, Stu	Allan, Jennie			Dining hall	
19/02/2021 13:00:00	19/02/2021 16:31:40	1	100587129	-£2.10	Paul Tennant's Laptop POS	Allen, John	Tennant, Paul			Dining hall	
22/02/2021 14:00:00	22/02/2021 10:58:15	1	100587292	-£3.10	Jamie Roberts's Laptop POS	Campbell, Todd	Roberts, Jamie			Del Bar T18 Collec...	
24/02/2021 13:00:00	24/02/2021 12:16:32	1	100587618	-£3.30	Paul Tennant's Laptop POS	Ali, Emily	Allan, Jennie	10/03/2021 10:07:52		Dining hall	Administrator, Administrator
08/03/2021 16:00:00	08/03/2021 16:02:59	1	100588959	-£4.00	Alex Ashley's Laptop T11	Ashley, Alex	Administrator, Administrator			Dining hall	
17/03/2021 13:00:00	17/03/2021 13:37:08	1	100590125	-£2.60	Paul Tennant's Laptop POS	Allen, John	Allan, Jennie			Dining hall	
22/03/2021 11:02:41	22/03/2021 11:02:45	1	100590636	-£0.50	Nick Phelps's Laptop POS	Phelps, Nick	Phelps, Nick	22/03/2021 11:03:51		Del Bar T18 Collec...	Phelps, Nick
25/03/2021 14:00:00	25/03/2021 11:11:27	1	100591105	-£2.00	Jamie Roberts's Laptop POS	Roberts, Jamie	Roberts, Jamie			Del Bar T18 Collec...	
26/03/2021 13:00:00	26/03/2021 15:10:39	6	100591392	-£2.10	Paul Tennant's Laptop POS	Ali, Terry	Allan, Jennie			Dining hall	
26/03/2021 13:00:00	26/03/2021 15:11:55	7	100591393	-£0.50	Paul Tennant's Laptop POS	Bray, Scott	Allan, Jennie			Dining hall	
29/03/2021 13:00:00	29/03/2021 09:40:37	1	100591568	-£2.90	Paul Tennant's Laptop POS	Bray, Scott	Tennant, Paul			Dining hall	
29/03/2021 13:00:00	29/03/2021 09:40:51	2	100591569	-£1.10	Paul Tennant's Laptop POS	Bray, Scott	Tennant, Paul			Dining hall	
28/04/2021 14:00:00	28/04/2021 07:10:38	1	100595561	-£2.40	Jamie Roberts's Laptop POS	O'Connor, Rhys	Roberts, Jamie			Del Bar T18 Collec...	
28/04/2021 14:00:00	28/04/2021 07:17:43	2	100595562	-£2.50	Jamie Roberts's Laptop POS	Dean, Nellie	Roberts, Jamie			Del Bar T18 Collec...	
28/04/2021 14:00:00	28/04/2021 07:18:51	3	100595563	-£2.50	Jamie Roberts's Laptop POS	Feenan, George	Roberts, Jamie			Del Bar T18 Collec...	
28/04/2021 14:00:00	28/04/2021 08:57:56	5	100595567	-£2.60	Jamie Roberts's Laptop POS	Norman, Lisa	Roberts, Jamie			Del Bar T18 Collec...	
04/05/2021 13:00:00	04/05/2021 12:44:48	1	100596281	-£3.40	Damon Allen's Laptop POS	Allen, Damon	Allen, Damon	04/05/2021 12:47:51		Del Bar T18 Collec...	Allen, Damon
19/05/2021 13:00:00	19/05/2021 14:10:47	1	100598309	-£2.30	Simon Calland's Laptop POS	Ali, Amy	Calland, Simon			Del Bar T18 Collec...	

47 records found, last updated 13/06/2022 13:39:42

Holding down the CTRL key or the Shift key as you click a row, allows you to select more than one row.

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[90] Alex Hay Laptop Version 22.03.0.0

## Overview

### Filtering Orders

Find pre-orders

Start date 13/06/2022 End date 13/06/2022 Pre-order number Name

Collection status All Printed All Show cancelled/refunded

Field	Description
Start date	Set the start date for orders to be shown.
End date	Set the end date for orders to be shown.
Pre-order number	Enter the pre-order number to show orders.
Name	Enter an account first name or surname to show that accounts pre-orders.
Collection status	Select a collection status, will default to All.
Printed	Select a Printed status, will default to All.
Show cancelled/refunded	Select whether to display cancelled and refunded transactions.

## Pre-order transactions grid columns

Date / Time	Date / Time applied	Pre-order	Transaction	Total	Order source	User name	Entered by	Collected	Receipt printed	Collection point	Marked collected by
15/05/2020 13:00:00	14/05/2020 11:37:00	1	100551444	-£4.66	Pre-Order Kiosk	Ashley, Alex	Ashley, Alex		<input type="checkbox"/>	Del Bar Till C...	

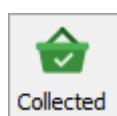
Field	Description
Date / Time	The date and time of which the system recorded the order.
Date / Time applied	The exact date and time the order was made by the customer.
Pre-order	The pre-order number recorded by the system for the order.
Transaction	The database transaction ID.
Total	This will display the total spend on the order by the customer.
Order source	This will display what source the order was made.
User name	The name of the customer who placed the order.
Entered by	The name of the user who entered the order.
Collected	The collected status of the order.
Receipt printed	The status of whether a receipt was printed for the order.
Collection point	The collection point from which the order is to be collected from.
Marked collected by	The user who set the order as collected.

*Last modified: 20 March 2023*

## Pre-order Collection, Refunds, Activity and Receipts

### How to set a pre-order as Collected

1. Select an order from the grid. The record will be highlighted in blue.
2. Select the **Collected** button.



3. The **Collected** and **Marked collected by** fields against the order will be populated accordingly.

Date / Time	Date / Time applied	Pre-order	Transaction	Total	Order source	User name	Entered by	Collected	Receipt printed	Collection point	Marked collected by
15/05/2020 13:00:00	14/05/2020 11:37:00	1	100551444	-£4.66	Pre-Order Kiosk	Ashley, Alex	Ashley, Alex		<input type="checkbox"/>	Deli Bar Till C...	
15/05/2020 13:00:00	14/05/2020 11:38:25	2	100551446	-£4.06	Pre-Order Kiosk	Ashley, Alex	Ashley, Alex		<input type="checkbox"/>	Deli Bar Till C...	
07/01/2021 16:00:00	07/01/2021 16:35:21	1	100582364	-£2.84	Canteen Till 1	Ashley, Alex	Ashley, Alex	07/01/2021 16:36:42	<input type="checkbox"/>	Deli Bar Till C...	Ashley, Alex
07/01/2021 16:00:00	07/01/2021 16:37:29	2	100582366	-£1.20	Canteen Till 1	Ashley, Alex	Ashley, Alex	24/03/2021 15:55:47	<input type="checkbox"/>	Deli Bar Till C...	Administrator, Admini...
11/02/2021 13:00:00	11/02/2021 14:20:08	1	100586202	-£5.48	Paul Tennant's Laptop POS	Alcock, Stuart	Allan, Jennie		<input type="checkbox"/>	Dining hall	
11/02/2021 13:00:00	11/02/2021 15:36:56	2	100586208	-£3.30	Paul Tennant's Laptop POS	Allan, John	Allan, Jennie		<input type="checkbox"/>	Dining hall	

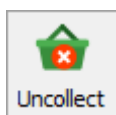
## How to set a pre-order as Uncollected

1. Select an order from the grid. The record will be highlighted in blue.

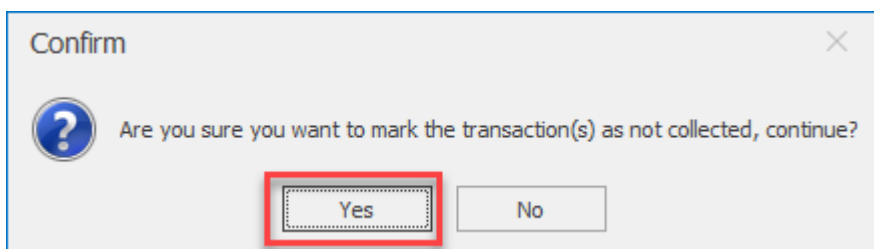


You can only set a pre-order to uncollected if you have already marked it as collected.

2. Select the **Uncollect** button.



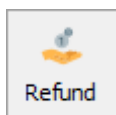
3. Click **Yes** to confirm to mark the order as uncollected.



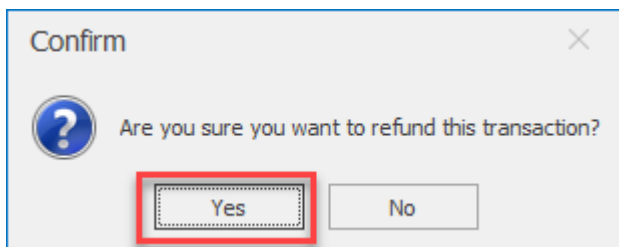
4. The **Collected** and **Marked collected by** fields will return to blank entries.


## How to perform a refund on a pre-order

1. Select an order from the grid. The record will be highlighted in blue.
2. Click the **Refund** button.



3. Click **Yes** to confirm the refund.



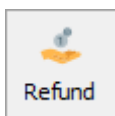
If you click the expand button  on a pre-order you can view the itemised list of the order and you can see the **Refunded** status ticked against the items.

## How to refund a single item from a pre-order

1. Select an order from the grid. The record will be highlighted in blue.
2. Click the expand button on a pre-order.



3. Select an item from the list, click **Refund**.



## Viewing the pre-order details

1. Select an order from the grid. The record will be highlighted in blue.
2. Click the expand button on a pre-order.



3. You will now see a breakdown of the items purchased.

08/03/2021 16:02:40												08/03/2021 16:02:59												1	10058959												-£4.00 Alex Ashley Laptop T11												Ashley, Alex												Administrator, Administrator												<input type="checkbox"/>	Dining...																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																							
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Field	Description
PLU No.	The products database ID number.
PLU	The name description of the product.
Group	The product group that the product is associated with.
Quantity	The number of times this product was purchased by the customer in the pre-order.
Price Level	The price band in which the product was sold.
Total Paid	The total amount spent on the pre-order.
Free	The total amount of Free allowance spent on the pre-order.
VAT	The total VAT calculated on the product.
Disc.	The total amount of discount deducted from the pre-order.
Points	The total amount of points accumulated by the sold product from the pre-order.
Refunded	The refunded status of the product.

08/10/2019 16:00:00	08/10/2019 14:41:20	1	100530663	-£1.80	Canteen T8 1	Ashley, Alex	Ashley, Alex	08/10/2019 14:44:40	<input type="checkbox"/>	Del Bar T8 Collec...
Details list    Purse details list										
Purse	Opening balance				Amount		Closing balance			
Catering					£100.00		-£1.20			
Catering					£98.80		-£0.60			

Field	Description
Purse	The name of the purse used for the product sold associated with the pre-order.
Opening Balance	The opening balance of the customer's account before the product was sold to the customer.
Amount	The value of the transaction(s) that have occurred.
Closing Balance	The closing balance of the customer's account after the product was sold to the customer.

## Receipts

### Kitchen

1. Select a date range or custom filter to view pre-orders.

Find pre-orders

Start date  End date  Pre-order number  Name

Collection status  Printed  Show cancelled/refunded ☐

2. Click the **Kitchen** button.



3. This will start to print all pre-order receipts via the receipt printer for the allocated date range or filter set.

### Duplicate

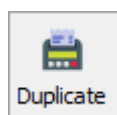
1. Select a date range or custom filter to view pre-orders.

Find pre-orders

Start date  End date  Pre-order number  Name

Collection status  Printed  Show cancelled/refunded ☐

2. Select an order from the grid. The record will be highlighted in blue.
3. Click the **Duplicate** button.



4. This will print an individual duplicate receipt for the order selected.

## Add sales (Family dining)

*Last modified: 20 March 2023*



The **Add sales** or “Family dining” function allows schools to provide a set meal choice for all users, and to charge the users without the user being required to go to a Point of Sale.

Impact Back Office

Home Users Reports System settings Retry bio

CRBCunninghams Secondary School Administrator, Administrator

Back Add sales

Name Labels

Status Current only Allowance All

User type All Year / class 010A, 0None, 0STAFF, 7C1, 7C1, 7C10, 7C10, 7C2, 7C2, 7C3, 7C3, 7C4, 7C4, ...

<input type="checkbox"/>	User type	Person ID	Surname	Forename(s)	Known as	DOB	Year / Class
<input type="checkbox"/>	Staff	EF60A9F2-FA2A-4085-B...	Alcock	Stuart Robert	Stuart	09/09/2002	0, None
<input type="checkbox"/>	Student	717D4C0F-548F-454A-B...	All	Amy	Amy	24/10/2002	11, C4
<input type="checkbox"/>	Student	5C28E011-4E56-4C14-9...	All	Elliot	Elliot	21/03/2004	10, C6
<input type="checkbox"/>	Student	89F79C06-EC03-4150-B...	All	Emily	Emily	06/06/2005	9, C9
<input type="checkbox"/>	Student	DF77BA49-C819-4A66-B...	All	Johnny	Johnny	09/02/2005	9, C10
<input type="checkbox"/>	Student	5185A1EC-FA30-44FF-9...	All	Terry	Terry	06/07/2006	8, C6
<input type="checkbox"/>	Student	011846D7-5B91-4598-B...	Allan	Edward	Edward	03/11/2001	12, C6
<input type="checkbox"/>	Staff	237F694A-42B8-44C3-A...	Allan	Jennie	Jennie	04/03/1967	0, None
<input type="checkbox"/>	Staff	5616C236-87A0-4B04-9...	Allan	Lara	Lara	02/12/1993	0, None
<input type="checkbox"/>	Student	44F0D73B-6638-48F7-B...	Allan	Lisa	Lisa	19/07/2002	12, C4
<input type="checkbox"/>	Student	SALES-05	Allan	Damon	Damon		0, None
<input type="checkbox"/>	Student	56E9CFC-CE54-4723-B...	Allan	Harrison	Harrison	15/09/2002	11, C4
<input type="checkbox"/>	Student	960E77DA-2B63-4985-A...	Allan	John	John	28/12/2006	7, C7
<input type="checkbox"/>	Student	38B3384A-14E2-42F3-B...	Allan	Katherine	Katherine	30/09/2004	9, C10
<input type="checkbox"/>	Student	6E70A467-2C7F-42EC-B...	Allan	Lea	Lea	14/03/2003	11, C10
<input type="checkbox"/>	Student	802ED288-4955-4569-A...	Allan	Leah	Leah	14/11/2006	7, C1
<input type="checkbox"/>	Student	FD313015-F727-4E32-9...	Allan	Susan	Susan	02/05/2003	11, C9
<input type="checkbox"/>	Student	A9251F22-3119-403F-B...	Allan	William	William	12/09/2001	12, C5
<input type="checkbox"/>	Student	90619F02-5003-49FF-9...	Anderson	Alexander	Alexander	29/06/2006	8, C3
<input type="checkbox"/>	Student	B55A14A-3417-454A-9...	Anderson	Daisy	Daisy	04/05/2007	7, C6
<input type="checkbox"/>	Student	B88B464-7920-4EE3-A...	Anderson	Ellie	Ellie	01/02/2005	9, C9
<input type="checkbox"/>	Student	885B7C09-3B44-47ED-9...	Anderson	James	James	06/05/2005	9, C12
<input type="checkbox"/>	Student	43D0855A-1A00-4214-B...	Anderson	Maddison	Maddison	19/04/2002	12, C9
<input type="checkbox"/>	Staff	ACD0D7B-E670-43E9-9...	Anderson	Nicole	Nicole	28/08/1993	0, None
<input type="checkbox"/>	Student	16C5684F-3B42-4743-9...	Anderson	Tilly	Tilly	23/05/2006	8, C3
<input type="checkbox"/>	Student	D03FE241-608D-40C4-9...	Armstrong	Alex	Alex	24/12/2001	12, C11
<input type="checkbox"/>	Student	7C771363-C35A-4A39-9...	Armstrong	Cynthia	Cynthia	28/01/2005	9, C4
<input type="checkbox"/>	Student	883B1E9B-4EE6-40A4-A...	Armstrong	Delta	Delta	25/10/2003	10, C2
<input type="checkbox"/>	Student	E96EA17E-547B-4B6E-A...	Armstrong	Jonathan	Jonathan	26/01/2003	11, C10
<input type="checkbox"/>	Student	C275744B-4492-4215-A...	Armstrong	Julie	Julie	19/11/2001	12, C5

06/02/2022 14:50:21 1249 users found. 0 users selected.

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[90] Alex Hay Laptop Version 21.07.2.0

Saved filters

Selected settings Select some settings...

Save Delete

PLU to sell

Sale date / time 06/02/2022 14:45

Exclude users that have sales for this period and location

Perform sale(s)



The Add sales tile must be added to the dashboard to use this function. The Add sales tile can be found under the Procedures section of the tile explorer. Further information on adding tiles to the dashboard can be found here.

## How to use Add sales

1. Select the users you wish to sell to. The grid can be filtered using the filters shown below. When the desired users are displayed, the users can either be selected individually or all can be selected using the check boxes on the left hand side of the grid.

Name Labels

Status Current only Allowance All

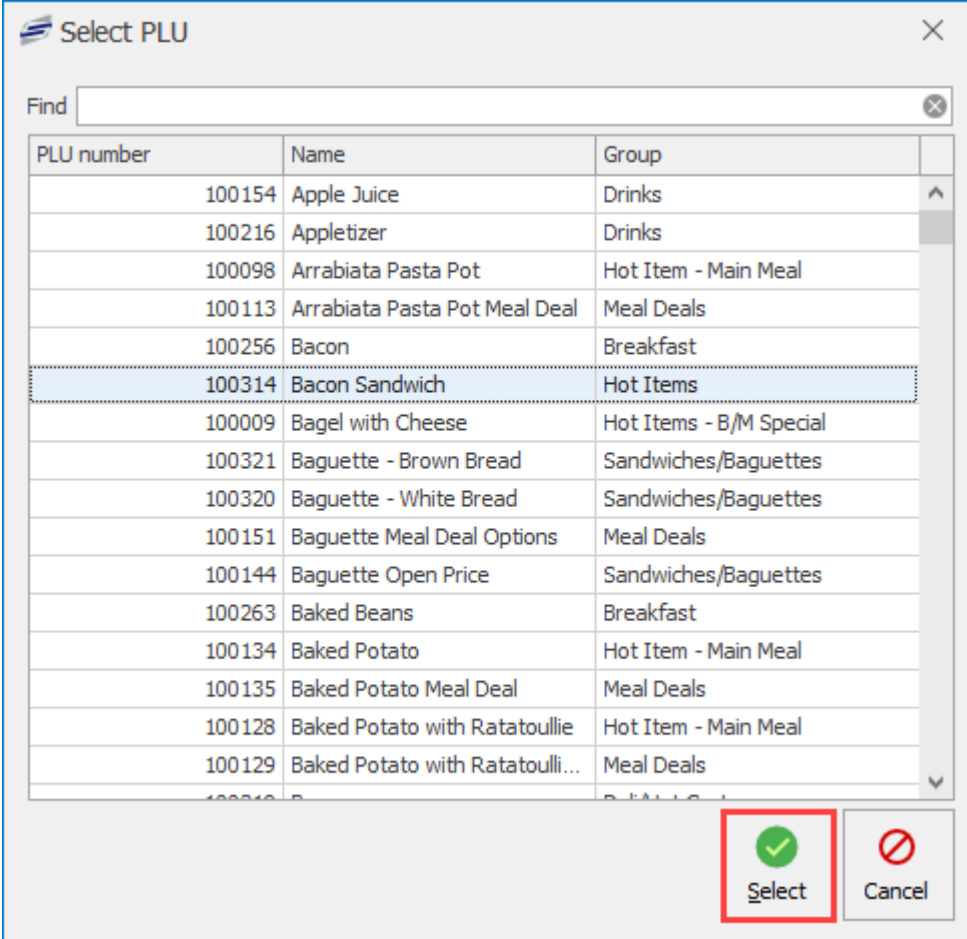
User type All Year / class 010A, 0None, 0STAFF, 7C1, 7C1, 7C10, 7C10, 7C2, 7C2, 7C3, 7C3, 7C4, 7C4, ...

2. Select the PLU you wish to sell. This is done by clicking the magnifying glass next to **PLU to sell** and then selecting a PLU from the list that pops up by clicking on the chosen PLU and pressing the green **Select** button.

PLU to sell

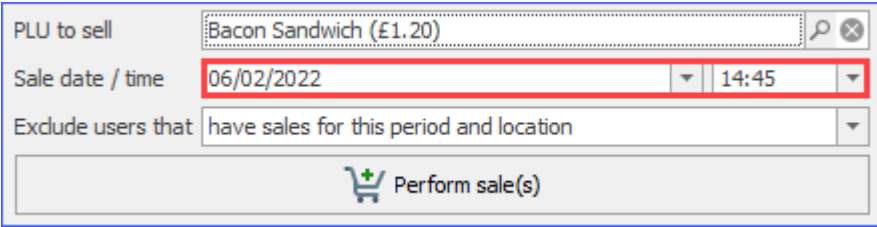
Search icon



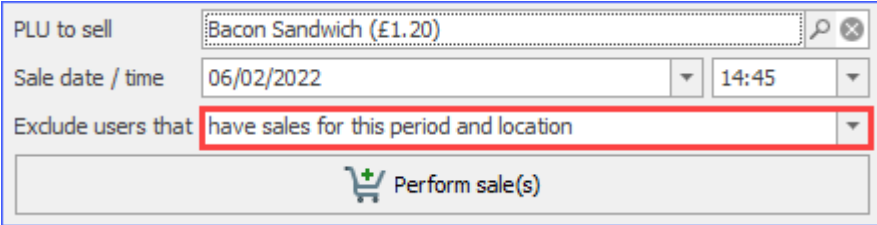
A dialog box titled "Select PLU" with a search bar and a table of items. The table has columns for PLU number, Name, and Group. The item "Bacon Sandwich" with PLU 100314 and Group "Hot Items" is selected. At the bottom, there are "Select" and "Cancel" buttons, with the "Select" button highlighted by a red box.

PLU number	Name	Group
100154	Apple Juice	Drinks
100216	Appetizer	Drinks
100098	Arrabiata Pasta Pot	Hot Item - Main Meal
100113	Arrabiata Pasta Pot Meal Deal	Meal Deals
100256	Bacon	Breakfast
100314	Bacon Sandwich	Hot Items
100009	Bagel with Cheese	Hot Items - B/M Special
100321	Baguette - Brown Bread	Sandwiches/Baguettes
100320	Baguette - White Bread	Sandwiches/Baguettes
100151	Baguette Meal Deal Options	Meal Deals
100144	Baguette Open Price	Sandwiches/Baguettes
100263	Baked Beans	Breakfast
100134	Baked Potato	Hot Item - Main Meal
100135	Baked Potato Meal Deal	Meal Deals
100128	Baked Potato with Ratatoullie	Hot Item - Main Meal
100129	Baked Potato with Ratatoulli...	Meal Deals

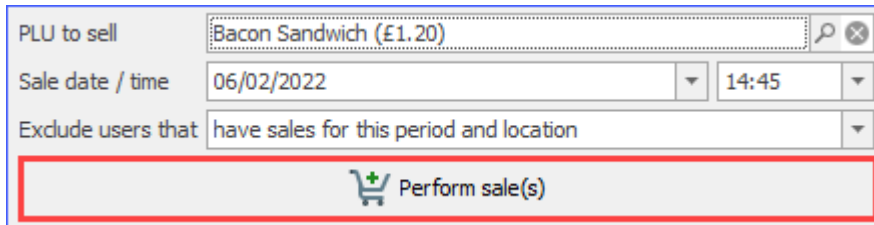
- Configure the sale time if required. This can be edited to allow the transaction to have occurred during a certain time period.

A dialog box for configuring a sale. It includes a "PLU to sell" field with "Bacon Sandwich (£1.20)", a "Sale date / time" field with "06/02/2022" and "14:45", and an "Exclude users that" dropdown menu with the option "have sales for this period and location". A "Perform sale(s)" button is at the bottom.

- Set any exclusions if required using the drop down menu. This allows the prevention of a user being charged again if they already have sales for the selected period.

A dialog box for configuring a sale, similar to the previous one, but with the "Exclude users that" dropdown menu expanded to show the option "have sales for this period and location".


- Press the **Perform sale(s)** button. A dialog box will be displayed confirming the action, press **Yes** to complete the sales.

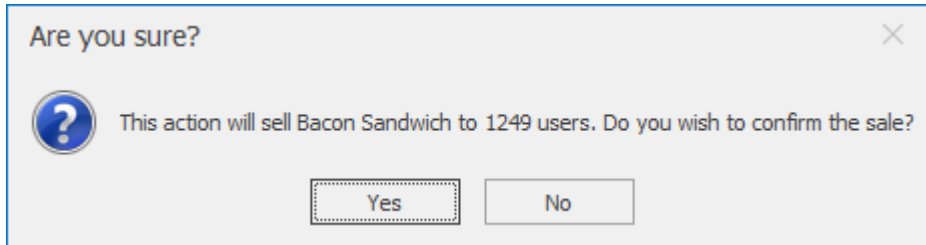


PLU to sell: Bacon Sandwich (£1.20)


Sale date / time: 06/02/2022 14:45

Exclude users that: have sales for this period and location

 Perform sale(s)



Are you sure?

 This action will sell Bacon Sandwich to 1249 users. Do you wish to confirm the sale?

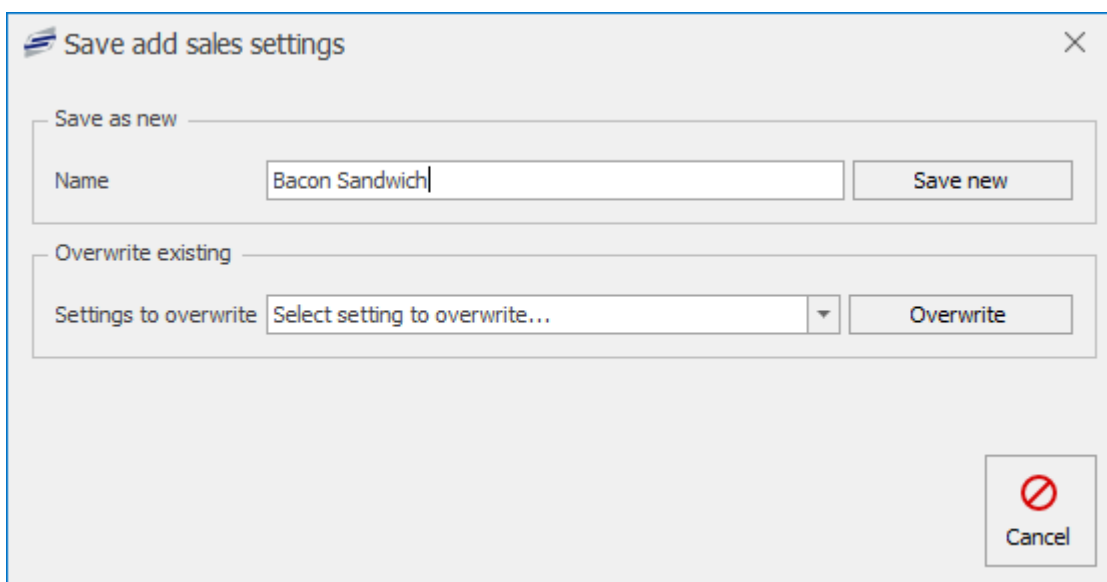
Yes No


## Saved filters

Filters can be saved and reused to speed up the process for future uses.

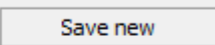
To save a filter:

1. Select the filter options from the quick filter and the PLU to sell.
2. Press the **Save** button under the 'Saved filters' section in the top-right.
3. Either give the filter a name and save as new, or select an existing filter to overwrite.

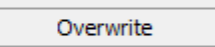



 Save add sales settings

Save as new

Name: Bacon Sandwich 

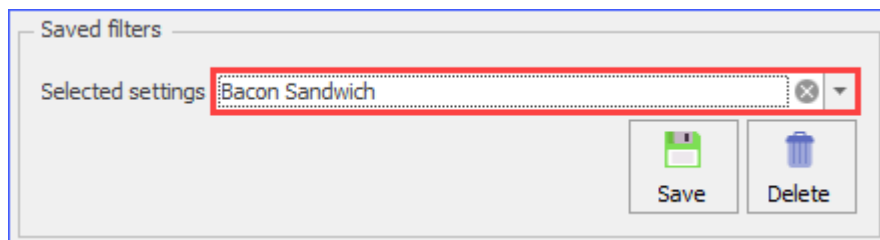
Overwrite existing

Settings to overwrite: Select setting to overwrite... 



To use a saved filter:

1. Select the filter from the dropdown menu in the Saved filters section on the right hand side of the screen.



2. Select users and complete the sale as usual.

## Vending

*Last modified: 20 March 2023*



Certain vending machines can be integrated directly into Fusion, allowing users to purchase items using the cashless account. As part of your installation, an engineer will configure your vending machine for use with the system. After this point, you may need to change which items are sold in the vending machine, or the price of items that are sold.

**Impact Back Office**

Home Users Reports System settings

## Vending setup

Back

PLUs

Find  ☒ Active only

PLU	Name	Group
1	Apple	Fresh Fruit
7	Bacon Sandwich	Breakfast
34	Baguette - White	Meals - Cold
30	Baguette - Whole...	Meals - Cold
64	Baked Beans	Breakfast
59	Baked Potato	Meals - Hot
9	Banana	Fresh Fruit
19	Banana Milkshake	Drinks
76	BBQ	Sandwich - Salad/S...
98	Boost	Vending
102	Bottle - Coke	Vending
105	Bottle - Drench	Vending
103	Bottle - Pepsi Max	Vending
104	Bottle - Robinsons	Vending
79	Brown	Sandwich - Salad/S...
99	Bueno	Vending
108	Can - Cherry Tango	Vending
106	Can - Coke	Vending
107	Can - Diet Coke	Vending
109	Can - Orange Tango	Vending
110	Can - Vimto	Vending

Add Edit Delete

Location: Canteen vendor

Price Band: Student

Add Edit Remove Remove all Copy

		<b>Crisps - Ready Salted</b>
		11
		Cabinet 1
		<b>Haribo Starmix</b>
		21
		Cabinet 2
<b>Kit Kat</b>	£0.75	<b>Mars</b>
30		31
Cabinet 3	Product 1	Cabinet 3
<b>Snack!</b>	£0.80	<b>Twirl</b>
40		41
Cabinet 4	Product 1	Cabinet 4
<b>Bottle - Coke</b>	£1.50	<b>Bottle - Coke</b>
50		51
Cabinet 5	Product 1	Cabinet 5
<b>Can - Coke</b>	£0.85	<b>Can - Coke</b>
60		61
Cabinet 6	Product 1	Cabinet 6

Last update 12:08:13

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## Changing vending prices


Every item in the vending machine is linked to a PLU. To change the price of an item, you simply change the price of the product like you would for any product sold in Fusion. For more information on this process, refer to the [Changing prices](#) section of this manual.

*Last modified: 20 March 2023*

## Cash up





The cash up process allows you to reconcile all of the cash that has been collected through the system since the last cash up was ran. This includes money taken through any Revaluation Machines, Tills with cash drawers or any money taken at a location.



**Cash up**
×


Location	Current status	Requested status	Current value
Reval 1	Stopped	Stopped	£0.00
Server Reval	Stopped	Stopped	£0.00
Alex Ashley Laptop Till			£64.90
Cash			£64.90
Alex Hay Laptop POS			£0.00
Alex Home Laptop POS			£0.00
Canteen Till 1			£0.00
Gareth Hunter Laptop POS			£0.00
Gareth Hunter POS			£0.00
Jamie Roberts Laptop POS			£7.30
Cash			£4.80
PDQ			£2.50
Jamie Roberts POS			£0.00
LACA POS			£0.00
Luke Todd Laptop POS			£0.00
Luke Todd POS			£0.00
Nick Phelps Laptop POS			£4.10


Total received : £279.80, Total for banking: £153.20 Total card: £6.60. Updated 13/06/2022 14:22:34



**Start revals**


**Suspend revals**


**Cash up**


**Report**

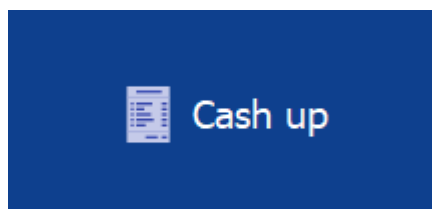

**Variance report**


**Close**

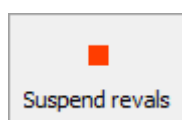
If you have upgraded from the older Impact system, you will be familiar with the “Day End” process that was required to be ran daily. While the Cash Up process shares some similarities to the Day End function in the old system, it is not the same. The Cash Up process has no bearing on any reports (other than the Cash Up report) and does not de-allocate/allocate meal allowances like the Day End did. Also, the Cash Up process can be run at any time of day and even multiples times per day. This is because it is simply allowing you to do a count of how much cash has been taken through the system since the last time the Cash Up was run.

## Running a cash up

1. From the home screen, click on the **Cash up** tile.



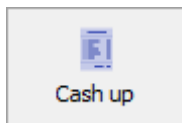
2. (If you do not have revaluation machines you can skip this part) Press the **Suspend revals** button.



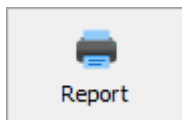


This stops users putting money into the system until you have counted the cash in them and ensures that it balances with what is on the report.

3. Press the **Cash up** button.



4. Press **Yes** to confirm.
5. Press **OK**.
6. Press **Report** to generate the report.



7. Print the report if required then press **Close**.
8. Compare the cash that you have taken through the system to what is displayed on the report and ensure that the values are accurate.
9. If required, start the revaluers back up by pressing the **Start revals** button.
10. Press **Close** to return to the home screen and complete the cash up process.

*Last modified: 20 March 2023*

## Cashing up with cash variance



The cash variance feature allows users to make sure that there are no discrepancies between the values calculated by Fusion and the actual monies received when cashing up.

**Cash up**
✕

Location	Current status	Requested status	Current value
Reval 1	Stopped	Stopped	£0.00
Server Reval	Stopped	Stopped	£0.00
Alex Ashley Laptop Till			£64.90
Cash			£64.90
Alex Hay Laptop POS			£0.00
Alex Home Laptop POS			£0.00
Canteen Till 1			£0.00
Gareth Hunter Laptop POS			£0.00
Gareth Hunter POS			£0.00
Jamie Roberts Laptop POS			£7.30
Cash			£4.80
PDQ			£2.50
Jamie Roberts POS			£0.00
LACA POS			£0.00
Luke Todd Laptop POS			£0.00
Luke Todd POS			£0.00
Nick Phelps Laptop POS			£4.10

Total received : £279.80, Total for banking: £153.20 Total card: £6.60. Updated 13/06/2022 14:22:34

**Start revals**

**Suspend revals**

**Cash up**

**Report**

**Variance report**

**Close**

## Enabling cash variance

To enable cash variance in Fusion:

1. Navigate to the System Settings and click on the Schools tile.

Impact Back Office
Home Users Reports System settings
CRBCunninghams High School Addison, Eloise

Back
Settings

System setup
Locations
Security roles
Dashboards
Logins

School settings
Platform Settings
School calendar
User types
Years / Classes
Meal time periods

Client settings
Schools
Restrictions
Collection points

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[1] Server Version 3.79.1.0

2. Select the school you wish to enable cash variance on and press the edit button on the right

hand side of the screen.



3. Expand the Transactions tab by pressing anywhere on the tab's title.
4. Tick the box labelled 'Enable cash variance'.

▼ Transactions

Enable cash variance ☒

Declare cash variance in PoS ☐

Cash payments
Cash

Cash up report
Revaluation Summary By Cash Up

Cash variance report
Variance Report

Add value maximum amount
£9,999.99

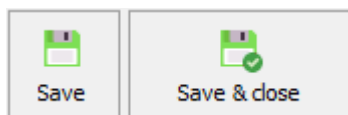
PDQ payments
PDQ
☒ Enable PDQ
☒ Allow cashback

Cheque payments
Cheque

Default add value payment type
Cash


Default add value purse
Catering

5. Press Save or Save and Close to confirm your changes.



The 'Declare cash variance in PoS' box can be ticked to allow till operators to perform cash ups and enter cash values at the PoS. However, this will disable the ability for the cash values to be input for the PoS via the Fusion Back office.





**Transactions**

Enable cash variance ☒

**Declare cash variance in PoS** ☒

Cash payments

Cash up report

Cash variance report

Add value maximum amount

PDQ payments  ☒ Enable PDQ

☒ Allow cashback

Cheque payments

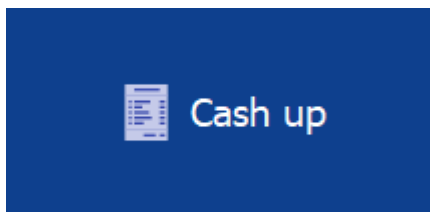
Default add value payment type

Default add value purse

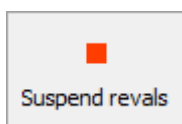
## Performing a cash up with cash variance enabled

To perform a cash up with cash variance enabled:

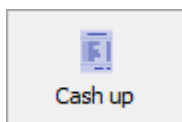
1. From the home screen, click on the **Cash up** tile.



2. (If you do not have revaluation machines you can skip this part) Press the **Suspend revals** button.



3. Press the **Cash up** button.





4. Enter how much cash, cheque and card has been taken at each location.

**Cash variance** ×

Select location: All None Back office Point of sale Revaluer

Select	Location	Cash	Cheque	Card	Empty
<b>Location type: Back office</b>					
<input checked="" type="checkbox"/>	Server	£50.00	£10.00	£12.00	<input type="checkbox"/>
<b>Location type: Point of sale</b>					
<input checked="" type="checkbox"/>	POS 1	£96.30		£18.80	<input type="checkbox"/>
<b>Location type: Revaluer</b>					
<input checked="" type="checkbox"/>	Revaluer 1	£35.00			<input type="checkbox"/>

Cash up: ☐ Yes ☐ No


 Save
 Close

5. Select Yes at the bottom left hand of the screen.

Cash up: ☒ Yes ☐ No

6. Select Yes to continue.

**Are you sure?** ×

 This will empty the units for all selected locations and record an end of day, continue?

Yes
No

7. Press save to complete the cash up.



## Viewing the cash variance report

To view the cash variance report:

1. Press the Reports button on the toolbar at the top left of the screen.



2. Select the Variance Report and either double click it or press the view button on the right hand side of the screen.

Report name	Category	Report type	Created	Modified
All schools income by month	Income	Standard	22/01/2020	05/02/2020
All schools sales by group	Sales	Standard	22/01/2020	05/02/2020
Allowance Usage (Detailed)	Allowances	Standard	22/01/2020	05/02/2020
Allowance Usage (Summary)	Allowances	Standard	22/01/2020	05/02/2020
Balance by range (Template)	Letters	Smart	22/01/2020	05/02/2020
Can Usage	Lists	Standard	22/01/2020	05/02/2020
Daily summary report	Sales	Standard	22/01/2020	05/02/2020
Dashboard	Dashboard	Smart	22/01/2020	05/02/2020
GDPR report	GDPR	Standard	22/01/2020	05/02/2020
Income summary	Sales	Smart	22/01/2020	05/02/2020
Low balances (Template)	Letters	Smart	22/01/2020	05/02/2020
PLU Sales	Sales	Standard	22/01/2020	05/02/2020
PLU Sales (Smart)	Sales	Smart	22/01/2020	05/02/2020
Pre-order Colours Distribution Report	Pre-order	Standard	22/01/2020	05/02/2020
Pre-order Conflicts	Pre-order	Standard	22/01/2020	05/02/2020
Pre-order Distribution Report	Pre-order	Standard	22/01/2020	05/02/2020
Pre-order Preparation Report	Pre-order	Standard	22/01/2020	05/02/2020
Revaluation list	Lists	Standard	22/01/2020	05/02/2020
Revaluation list - order by class	Lists	Standard	22/01/2020	05/02/2020
Revaluation Summary	Receipts	Standard	22/01/2020	05/02/2020
Revaluation Summary By Cash Up	Receipts	Standard	22/01/2020	22/01/2020
Revaluation Summary By Cash Up (With CV)	Receipts	Standard	30/01/2020	05/02/2020
Revaluation Summary By Cash Up (Without CV)	Receipts	Standard	30/01/2020	05/02/2020
Sales summary	Sales	Standard	22/01/2020	05/02/2020
Sales summary (Multi-School)	Central Management	Standard	22/01/2020	05/02/2020
Sales summary by class	Sales	Standard	22/01/2020	05/02/2020
Sales summary by type	Sales	Standard	22/01/2020	05/02/2020
Transactions summary by date	Sales	Smart	22/01/2020	05/02/2020
User History	Lists	Standard	22/01/2020	05/02/2020
Users list	Lists	Standard	22/01/2020	05/02/2020
Users list with purse summary	Lists	Smart	22/01/2020	05/02/2020
Users with no spend	Multi-school Lists	Standard	30/01/2020	05/02/2020
Variance Report	Receipts	Standard	30/01/2020	05/02/2020
Vending Sales by Product	Vending	Standard	30/01/2020	05/02/2020
Vending Sales by Value	Vending	Standard	30/01/2020	05/02/2020
Vending Sales Details	Vending	Standard	30/01/2020	05/02/2020

3. Enter the time frame that you wish to view the cash variance report for and press OK.

Select criteria for your report

General Location User

Date range

Timeframe Custom


Start 12/03/2020

Finish 13/03/2020

OK Cancel

4. You will then be presented with the cash variance report.

Variance Report



13/03/2020 00:00:00 - 13/03/2020 23:59:59 Alex Test

Date	Cash			Cheque			Card			Empty	Performed by
	Entered	Calculated	Difference	Entered	Calculated	Difference	Entered	Calculated	Difference		
<b>Location : POS 1 [Point of sale]</b>											
13/03/2020 08:44 AM	£96.30	£0.00	-£96.30	£0.00	£0.00	£0.00	£18.80	£0.00	-£18.80	Yes	Administrator Administrator
13/03/2020 08:58 AM	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	Yes	Administrator Administrator
<b>Total for Location</b>	£96.30	£0.00	-£96.30	£0.00	£0.00	£0.00	£18.80	£0.00	-£18.80		
<b>Location : Revaluer 1 [Revaluer]</b>											
13/03/2020 08:44 AM	£35.00	£0.00	-£35.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	Yes	Administrator Administrator
13/03/2020 08:58 AM	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	Yes	Administrator Administrator
<b>Total for Location</b>	£35.00	£0.00	-£35.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		
<b>Location : Server [Back office]</b>											
13/03/2020 08:44 AM	£50.00	£0.00	-£50.00	£10.00	£0.00	-£10.00	£12.00	£0.00	-£12.00	Yes	Administrator Administrator
13/03/2020 08:58 AM	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	Yes	Administrator Administrator
<b>Total for Location</b>	£50.00	£0.00	-£50.00	£10.00	£0.00	-£10.00	£12.00	£0.00	-£12.00		
<b>Total</b>	<b>£181.30</b>	<b>£0.00</b>	<b>-£181.30</b>	<b>£10.00</b>	<b>£0.00</b>	<b>-£10.00</b>	<b>£30.80</b>	<b>£0.00</b>	<b>-£30.80</b>		

Page 1 of 1
13/03/2020 08:59

## API

Last modified: 20 March 2023



API is the acronym for Application Programming Interface, which is a software intermediary that allows two applications to talk to each other. In Fusion's case, we need an API to transfer data from the Data Transfer Tool to the Fusion database. We can also use other Third-party CRBCunninghams applications like, iDSuite and Fusion Online, which control the pre-order app connection.



The API partners will be set up by CRBCunninghams engineers and we do not recommend creating or amending existing partner API's without consultation from one of our staff members.

Impact Back Office

Home Users Reports System settings CRBCunninghams Secondary School Administrator, Administrator

## API partners

Back Add new partner Pop-out

Partner ...	Partner name	Associated schools	Generate PIN	FSM generate...
4	Fusion Data Transfer	CRBCunninghams Secondary School, CRBCunninghams Primary School, CRBCunnin...	<input type="checkbox"/>	<input type="checkbox"/>
5	Fusion iDSuite iDBalance	CRBCunninghams College	<input type="checkbox"/>	<input type="checkbox"/>
6	Fusion Online	CRBCunninghams Secondary School	<input type="checkbox"/>	<input type="checkbox"/>
3	iDSuite iDBalance	CRBCunninghams Secondary School, iDSuite School of Excellence	<input type="checkbox"/>	<input type="checkbox"/>
7	iDSuite iDStore Task	iDSuite School of Excellence	<input type="checkbox"/>	<input type="checkbox"/>

Edit Delete Export Test file

Copyright©2017-2021 CRB Cunninghams [67] Alex's Laptop Version 21.01.6.0

Last modified: 20 March 2023

## Editing the Fusion Online API

1. Select the Fusion Online API from the list. The record will be highlighted in blue.

Partner ...	Partner name	Associated schools	Generate PIN	FSM generate...
4	Fusion Data Transfer	CRBCunninghams Secondary School, CRBCunninghams Primary School, CRBCunnin...	<input type="checkbox"/>	<input type="checkbox"/>
5	Fusion iDSuite iDBalance	CRBCunninghams College	<input type="checkbox"/>	<input type="checkbox"/>
6	Fusion Online	CRBCunninghams Secondary School	<input type="checkbox"/>	<input type="checkbox"/>
3	iDSuite iDBalance	CRBCunninghams Secondary School, iDSuite School of Excellence	<input type="checkbox"/>	<input type="checkbox"/>
7	iDSuite iDStore Task	iDSuite School of Excellence	<input type="checkbox"/>	<input type="checkbox"/>

2. Click the **Edit** button.



3. The Edit box will appear. You can change the name of the **Partner name** and view the unique **Partner key**.

Editing Fusion Online

Partner name: Fusion Online Partner key: FAAFFAB8F6554DEFA268AA307DB87602

Allowed schools | Field permissions | Allowed purses | Options

	School	Type	Only edit created by this partner
<input checked="" type="checkbox"/>	CRBCunninghams Secondary School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	CRBCunninghams Primary School	Primary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	CRBCunninghams College	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Endeavour College	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Meadway Secondary School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Freestone Academy	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Baverstock Academy	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	West Bridge Primary School	Primary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Highland High School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Mammoth Technology College	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bear Valley High School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Creek Grammar School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Grand Ridge School for Boys	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Heritage School for Girls	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edgewater Infant School	Primary	<input checked="" type="checkbox"/>

Save Cancel

## Selecting allowed schools

*Last modified: 20 March 2023*

1. Under the **Allowed schools** tab, you can select schools that can use the API by ticking the box to the left of the school name.

Editing Fusion Online

Partner name: Fusion Online Partner key: FAAFFAB8F6554DEFA268AA307DB87602

Allowed schools | Field permissions | Allowed purses | Options

	School	Type	Only edit created by this partner
<input checked="" type="checkbox"/>	CRBCunninghams Secondary School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	CRBCunninghams Primary School	Primary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	CRBCunninghams College	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Endeavour College	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Meadway Secondary School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Freestone Academy	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Baverstock Academy	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	West Bridge Primary School	Primary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Highland High School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Mammoth Technology College	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bear Valley High School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Creek Grammar School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Grand Ridge School for Boys	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Heritage School for Girls	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edgewater Infant School	Primary	<input checked="" type="checkbox"/>

Save Cancel

2. Select the option **Only edit created by this partner** to Edit created records or not.

Editing Fusion Online

Partner name: **Fusion Online** Partner key: **FAAFFAB8F6554DEFA268AA307DB87602**

Allowed schools | Field permissions | Allowed purses | Options

	School	Type	Only edit created by this partner
<input checked="" type="checkbox"/>	CRBCunninghams Secondary School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	CRBCunninghams Primary School	Primary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	CRBCunninghams College	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Endeavour College	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Meadway Secondary School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Freestone Academy	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Baverstock Academy	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	West Bridge Primary School	Primary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Highland High School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Mammoth Technology College	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bear Valley High School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Creek Grammar School	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Grand Ridge School for Boys	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Heritage School for Girls	Secondary	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edgewater Infant School	Primary	<input checked="" type="checkbox"/>

Save Cancel

*Last modified: 20 March 2023*

## Selecting field permissions

1. Under the **Field permissions** tab, select the fields that the API partner can use by ticking the boxes to the left of the field.



Editing Fusion Online

Partner name: Fusion Online Partner key: FAAFFAB8F6554DEFA268AA307DB87602

Allowed schools Field permissions Allowed purses Options

Field permissions list:

- ☒ BiometricId
- ☒ ClassCode
- ☒ DateOfBirth
- ☒ DietaryPreferences
- ☐ EmailAddress
- ☒ FSM
- ☒ FSMEndDate
- ☒ FSMStartDate
- ☒ Gender
- ☒ HasTemplate
- ☒ Initials
- ☒ KnownAs
- ☒ Leaver
- ☒ LeavingDate
- ☒ MagCard
- ☒ MedicalNeeds
- ☒ MISID
- ☒ Notes
- ☒ PaymentID
- ☒ PermanentMessage
- ☒ Picture
- ☒ PIN
- ☒ ProxCard
- ☒ StartDate

Save Cancel

*Last modified: 20 March 2023*

## Selecting Allowed purses

1. Under the **Allowed purses** tab, select the allowed purses that can be used for the API by ticking the boxes to the left of the purse name.

Editing Fusion Online

Partner name: Fusion Online Partner key: FAAFFAB8F6554DEFA268AA307DB87602

Allowed schools Field permissions Allowed purses Options

☐ Ad hoc  
☐ Breakfast  
☒ Catering  
☒ FSM  
☐ Supervisor  
☐ UFSM

Save Cancel

## API Options & Pre-order in advance

Under the **Options** tab.

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Tick the **Generate PIN** box to allow the API to generate PIN numbers.

☒ Generate PIN

Tick the **FSM generates free breakfast** box to allow the API to generate Breakfast allowances for FSM accounts.

☒ FSM generates free breakfast

Tick the **Prevent multiple pre-orders for the same period** box to limit users to a single pre-order during a period.



☒ Prevent multiple pre-orders for the same period

## Pre-order calendar days in advance

1. You can choose whether to **Use days** or **Use weeks** for the Pre-order app order in advance options.

 ☒ Use days ☐ Use weeks

2. Then you can enter a number of days (maximum of 90 days) or a number of weeks (maximum of 12 weeks) in advance for pre-order to be made on the app.

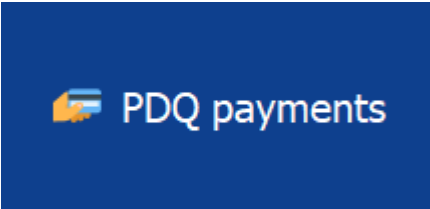
 Pre-order calendar days ahead	<input type="text" value="5"/>	 Pre-order calendar weeks ahead	<input type="text" value="1"/>
---	--------------------------------	--	--------------------------------

## PDQ payments

*Last modified: 20 March 2023*



The PDQ payments screen will display all PDQ payments made between the start date and end date. From here, you can see the full details of the transaction and generate card holder and/or merchant receipts.





Back

## PDQ payments

Start date

27/12/2021



End date

12/12/2022



Location

Carl Laptop



Operator

Payment reference



Transaction number

Date	Location name	Operator	Tran #	Payment ref	Amount	Card number
15/06/2022 01:27	Carl Laptop	Lewis, Carl	100634053	5a9bd3557a7a4af...	£0.50	*****0102
15/06/2022 01:28	Carl Laptop	Lewis, Carl	100634055	9afc97d1e214434...	£0.50	*****0102
15/06/2022 01:30	Carl Laptop	Lewis, Carl	0	9b4fc679534a47f...	£1.60	
15/06/2022 01:32	Carl Laptop	Lewis, Carl	0	a376004d39ad44f...	£1.60	
16/06/2022 12:08	Carl Laptop	Lewis, Carl	100634123	e7ed1f249bc7493...	£0.60	*****0102
16/06/2022 12:10	Carl Laptop	Lewis, Carl	100634125	c8ac3b91e96a4e9...	£1.50	*****0102
16/06/2022 12:10	Carl Laptop	Lewis, Carl	100634127	ca8328e69b684af...	£0.60	*****0102
28/06/2022 03:40	Carl Laptop	Lewis, Carl	0	bbe57870e4374ef...	£1.10	
28/06/2022 04:08	Carl Laptop	Lewis, Carl	0	4550f69baf324d6...	£1.20	
28/06/2022 04:28	Carl Laptop	Lewis, Carl	100634668	49090cfea63b40e...	£0.40	*****0102
28/06/2022 04:28	Carl Laptop	Lewis, Carl	100634670	0a82b717c55a4d7...	£0.60	*****0102
28/06/2022 04:29	Carl Laptop	Lewis, Carl	100634672	627233178503482...	£2.00	*****0102
28/06/2022 04:30	Carl Laptop	Lewis, Carl	100634674	076fb31c750040c...	£2.00	*****0102
28/06/2022 04:30	Carl Laptop	Lewis, Carl	0	7d78233fe527474...	£2.00	*****0102

To find transactions, set the filters at the top of the screen. At a minimum, you need to set the start date and end date (defaults to today's date) and the Location. Additionally, you can filter by operator, payment reference, transaction number, and/or amount.

Select the transaction in the list. To get a cardholder or merchant receipt, select the relevant button on the right. To view the corresponding transaction, press the 'Go to transaction' button.



**Note:** If the transaction was cancelled, then the Go to transaction button will be disabled.

*Last modified: 20 March 2023*

# Point of Sale



The Point of Sale (Pos) is the software that is used at the till point to sell products to customers. Predominantly used in Secondary schools and occasionally in Primary schools.

## Starting the software & logging In

*Last modified: 20 March 2023*



Impact Point of Sale

When you turn on your till, the Impact Fusion Point of Sale software will start automatically. This is indicated by the animated CRB Cunningham's graphic that is displayed while the software loads.

After the software has loaded, you will be presented with the Login screen as below. Before you can use the PoS Software, you must first log into the system.





7	8	9
4	5	6
1	2	3
0	<	C

Login
Cancel

Version 2.100.2.16  
Copyright©2016-2017 CRB Cunningham



The login method(s) that are available for you to use will depend on your system set up. In total, there are four options. The options that are available to you are displayed using the grey tiles at the bottom of the log in screen. The option that is currently selected will be highlighted in green.



## Username & Password

The first option available is by entering your username and password. If you are using a touchscreen till that does not have a keyboard connected to it, an on-screen keyboard will open up to allow you to enter your details. Press the green **Login** button to confirm.



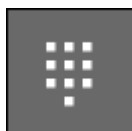
## Biometrics (Fingerprint)

If your system is connected to iDStore, you can use your fingerprint to log onto the Point of Sale. Simply press the Biometric tile from the list and place your finger onto the scanner. If a match is found and your account has access you will be logged in.



## Card

You can also use your card to log into the Impact Fusion Point of Sale software. Select the card icon from the list and place your card onto the connected card reader. If your account has access you will be logged in.



## PIN

The default and the most common method is to use a PIN. Enter your PIN using the on-screen PIN pad and press the green **Login** button to confirm.

*Last modified: 20 March 2023*



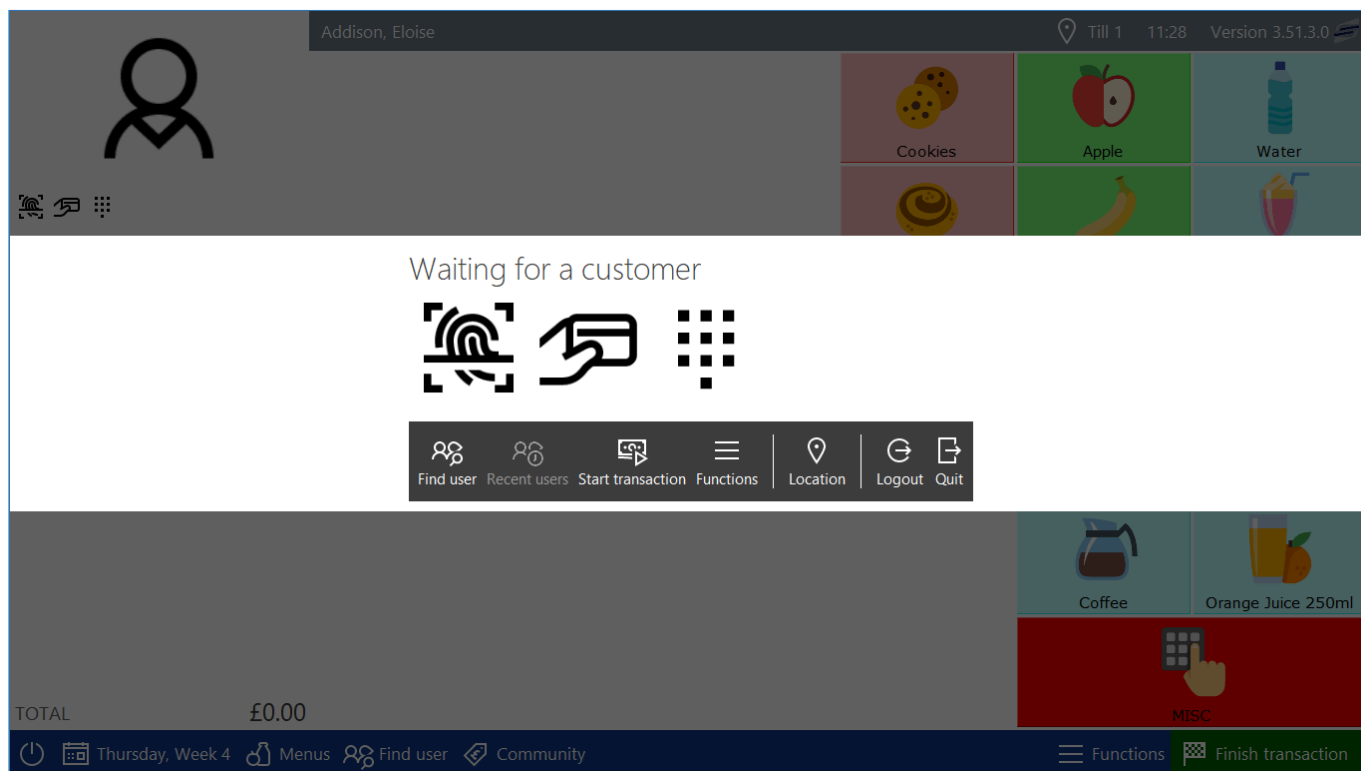
## Performing a sale



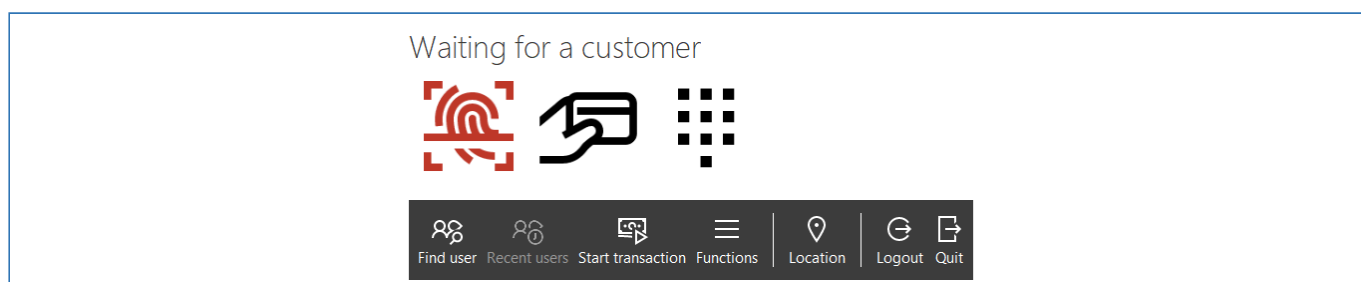
Once logged in, you will be presented with the 'Waiting for a customer' prompt. This prompt will display the methods that a user can use to open their account. For example, if a customer can use a card, the card icon will be displayed.



The login method(s) that the customer will have available will depend on your system setup.



If there is an error with an authentication method, the icon will turn red.



For information on what to do in this scenario, refer to the section [PoS Authentication errors](#).

*Last modified: 20 March 2023*

## Opening a user account



Impact Fusion allows user accounts to be opened using biometrics, cards, PIN, facial recognition and by manually searching for the user. We can even start a transaction without having a user present.

### Using Biometrics(Fingerprints) or Cards

If your system is set to use fingerprints or cards, have the user place their finger or card onto the

relevant reader. As the user's details are being authorised, the icon will turn orange and then green or red depending on whether the account can be opened or not.

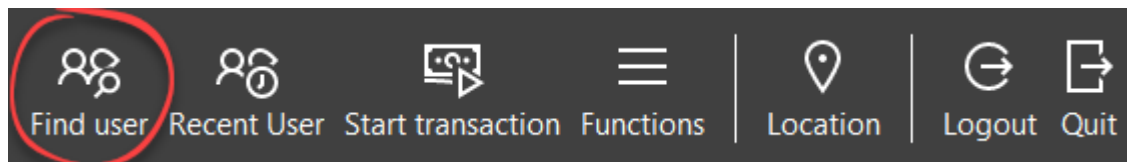


## Using a PIN

The user can use an attached keypad to enter their PIN or the operator can press the PIN icon and enter the PIN using the touchscreen.

## Finding a user manually

If a user does not have a valid card, PIN or fingerprint, we can manually open their account using the **Find User** button.



To find a user manually;

1. Press the **Find user** button from the menu.

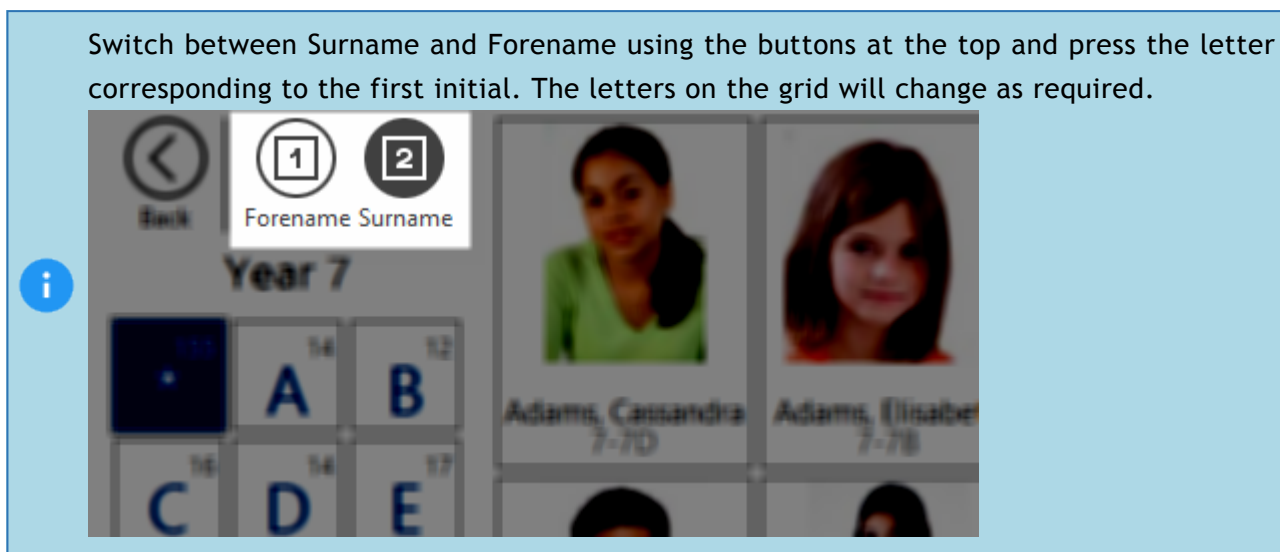


If this is not the first time the Find user feature has been used today, the grid will show the last set of users. You can press the **Back** button from the top-left corner to return to the list of years.

2. Select the user's year from the panel on the left. The panel will change to display a list of letters with a few options at the top.



3. Select the user's first Surname or Forename initial. The grid to the right will update only selecting the filtered users.



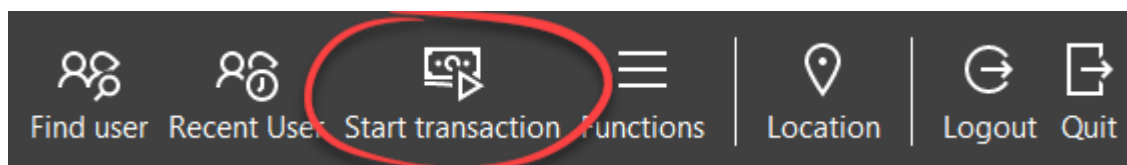
4. Then select the user from the list. The Find user screen will close and the user's account details will be opened on the till.



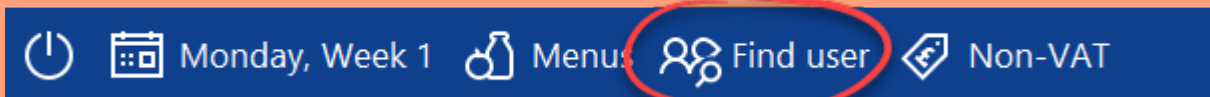
## Start a transaction without a user present

Impact Fusion also allows us to begin a transaction before we even open a user's account. This may be useful when a user is yet to get to the till point but the operator wants to begin ringing the items through.

To do this, you can press the **Start transaction** button from the menu. This will open the till screen without a user present.



You will need to open a user's account before you are able to Finish the transaction. The user can place their finger or card onto the reader or you can manually find an account by pressing the Find user button from the toolbar at the bottom of the screen.



## Opening a user account (Facial Recognition)

*Last modified: 20 March 2023*



User accounts can now be opened at the PoS using facial recognition. This allows for a safe, secure way to open a user's account.



When facial recognition is enabled at the PoS, the feed from the PoS's camera will now be visible on the 'Waiting for a customer' screen.

## How to open a user account at the PoS using facial recognition

1. Have the user look directly into the camera.
2. Click the face of the user whose account you wish to open on the screen (it is best to aim for the nose).
3. You will then be presented with one of three options:

Face not recognised	The template was not accepted and no account will be opened.
The user account is opened	The template was accepted and the user's account will open.
The operator is presented with potential options	Multiple templates were accepted and the operator will be presented with multiple user accounts to open.

## How to add a face template at the PoS

You may wish to add a face template for a user at the PoS if they are yet to have one set. This is done as follows:

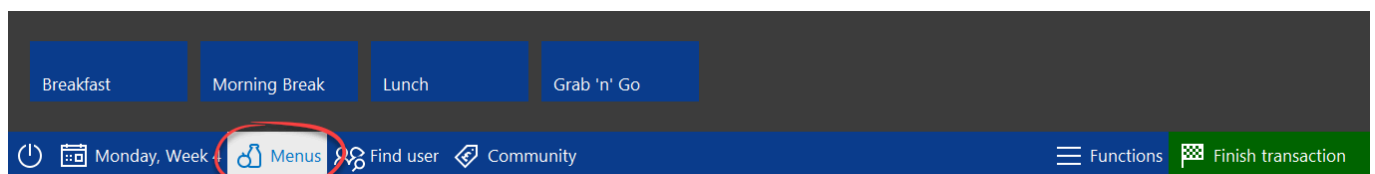
1. Open the relevant user account using one of the methods found [here](#).
2. Press the **Functions** button on the bar in the bottom right hand side of the screen.
3. Press **Add face template**.
4. A camera feed will be shown on the screen. Have the user look directly into the camera.
5. Click the face of the user whose account you wish to add a face template for (it is best to aim for the nose).
6. Press save.

*Last modified: 20 March 2023*

## Selecting a menu



Most commonly, a school may have 100's of products. These products will be added to the touchscreen on different menus. To select the menu that you require, select the **Menus** button from the toolbar at the bottom of the screen and then select the menu that you want to use.



After selecting a menu, the list of menus will disappear and the menu will be displayed on the PoS.



**Adams, Alfredo**

YEAR **10** CLASS **10A**

AVAILABLE **£10.30** LIMIT **£4.00**

TODAY **£0.00** POINTS **0**

MESSAGE

X 1 + -

Addison, Eloise

Till 1 15:53 Version 3.48.3.1

Meat Meal of the Day	Fish Meal of the Day	Main Meal and Dessert	Cinnamon Roll	Banana	Milkshakes
Vegetarian Meal of the Day	Nachos	Cupcake	Grapes	Milk Carton 200ml	Sports Drink
Sushi Box	Hamburger	Pretzel	Coffee	Orange Juice 250ml	MISC
Pasta Meal	Hotdog	Baguettes, Sandwiches, Wraps	Dessert of the day		
Chips	Tacos				

TOTAL £0.00

Monday, Week 4 Menus Find user Student Overspend Functions Finish transaction



The selected menu will stay open until you choose a different menu. This means that you do not need to choose the menu for every transaction.

Last modified: 20 March 2023

## Selling products



To sell items to the open user account, select the item from the menu. Each item that you select will be added to the transaction and is displayed below the user's details on the left hand side of the screen. The total value of the sale is listed at the bottom.

TODAY MESSAGE **£0.00** POINTS **0**

MESSAGE

X 1 + -

Meat Meal of the Day	1	£2.00
Chocolate Milkshake	1	£0.60
Cupcake	1	£0.50

TOTAL **£3.10**

Vegetarian Meal of the Day

Nachos

Sushi Box

Hamburger

Pretzel

Pasta Meal

Hotdog

Chips

Tacos

Baguettes, Sandwiches, Wraps

Thursday, Week 4 Menus Find user Student Overspend

When performing a sale, the most recently selected item is highlighted in the list of transactions. If you want to sell another of these items, you can either press the item again from the menu grid or you can use the + button located just above the list of items.

## Using the multiplier button



Sometimes you may need sell a large number of products to a user. The multiplier makes this easier.

1. Press the X button.

Sell multiple

How many items are you going to sell?

0

7	8	9
4	5	6
1	2	3
0	<	C

✓ OK ✗ Cancel

2. Use the on-screen keypad to enter the quantity to sell.
3. Press OK.
4. Now select the item that you wish to sell from the menu.

Main Meal of the day	1	£2.40
Sports Drink	1	£1.32
Yoghurt	5	£3.60

5. The item and will be added to the list with the entered quantity.

## Voiding items

When performing a sale, the last item that you press from the menu grid will be highlighted in the list of transactions. Often-times you will have selected an item that you want to void.

## Using the minus button



When pressing the minus button, this will take '1' away from the quantity of that item sold.

For example, if you had entered 5 yoghurts and you use the minus button, you will now be left with 4 yoghurts. However, in most cases you will only have entered a '1' yoghurt. Pressing the minus button in this scenario will remove the yoghurt entirely from the list.

## Using the delete row button



The delete row button will remove the entire row from the transaction regardless of whether the quantity was '1' or '100'.

*Last modified: 20 March 2023*

## Applying discounts

Occasionally, you may wish to discount an item(s) in a transaction. Fusion allows for discounts to be created and then applied to transactions.



For information on how to create discounts, visit the [Discounts](#), [Managing discounts](#), and [Adding discount buttons to a menu](#) sections of this manual.

Discounts are applied by simply pressing the discount button on the menu. However, as mentioned in the [Discounts](#) section, the different discount types behave slightly differently. To apply For more detailed information on the application of each discount type, see the relevant sections.

- [Line-item discounts](#)
- [Subtotal discounts](#)
- [Redeem discounts](#)

## Things to note

- An item in the basket can only have one discount applied to it, so you cannot apply a subtotal discount to an item that has already been discounted via a line-item discount (and vice-versa). Additionally, you can't apply multiple subtotal discounts or line-item discounts to a single item.
- Items that are in a promotion (aka meal deals) cannot be discounted.
- Discounts can be applied to the main item in a lead-through item, but not the individual items that make up the lead-through.
- As you need to add the item to the basket first before it can be discounted, if a user does not have enough credit/spend limit remaining for the item at full price but does have enough if it was discounted, the operator will need to allow overspend to add the item (or the user has an overdraft available).


*Last modified: 20 March 2023*

## Line-item discounts

Line-item discounts are applied to a single item in the basket. To apply a line-item discount;

1. Select the item to be discounted in the basket. The selected item is highlighted in a dark blue colour.





**Lewis, Carl**

Carl LaptopPoS 19/07/2022 15:50 Version 22.07.0.40

**Allergen(s):** Crustaceans, Nuts, Peanuts. **Restriction(s):** No cakes, Strawberries, No Fruit. **Dietary message:** Please ensure that this child is ca...

**Alcock, S**

YEAR **0** CLASS **None**

AVAILABLE **£182.64** LIMIT **£200.00**

TODAY **£0.00** POINTS **0**

X 1 + -

Orange Juice	1	£0.60
Croissant	1	£0.60
Coffee	1	£1.08

**Toasted Bagel**

**Pancakes**

Create a Breakfast Lead Through

**Croissant**

**Sausage**

Create a Sandwich\ Baguette\ Wrap

**Cereal**

**Bacon**

**Yoghurt**

Create a Breakfast Lead Through

**Water**

**Apple Juice**

**Orange Juice**

**Milk**

**Appetizer**

**Coffee**

**Tea**

**Own mug**

**Bottle return**

**VIP**

**10% off voucher**


**TOTAL** £2.28

Tuesday, Week 1 Breakfast Menu Find user Staff (VAT) Overspend Functions Finish transaction



By default, the last item added to the basket is selected, however, you can choose a different item by clicking on it in the list if required.

- Once the item is selected, press the discount button to be applied from the menu. This will apply the discount to the selected item. Discounted items appear in a light blue highlight and the applied discount will be listed directly below it.



**Alcock, S**

YEAR 0 CLASS None

AVAILABLE £182.69 LIMIT £200.00

TODAY £0.00 POINTS 0


X 1 + -

Orange Juice	1	£0.60
Croissant	1	£0.60
Coffee	1	£1.08
Own mug	1	-£0.05


Lewis, Carl

Carl LaptopPoS 19/07/2022 15:49 Version 22.07.0.40

Allergen(s): Crustaceans, Nuts, Peanuts. Restriction(s): No cakes, Strawberries, No Fruit. Dietary message: Please ensure that this child is ca...




Toasted Bagel




Pancakes

Create a Breakfast Lead Through




Croissant




Sausage


Create a Sandwich\ Baguette\ Wrap




Cereal




Bacon




Yoghurt




Create a Breakfast Lead Through




Water




Apple Juice




Orange Juice




Milk




Appetizer




Coffee




Tea




Own mug



Bottle return



VIP



10% off voucher

TOTAL £2.23

Tuesday, Week 1 Breakfast Menu Find user Staff (VAT) Overspend

Functions Finish transaction


3. Continue with the transaction as required.

## Subtotal discounts

*Last modified: 20 March 2023*

Subtotal discounts are applied to all the items currently in the basket at the point of application. If you want to apply a subtotal discount to all items in the transaction, simply apply the discount after all items have been added. To apply a subtotal discount;

1. Add items to the basket as required.



**Lewis, Carl**

Carl LaptopPoS 19/07/2022 16:10 Version 22.07.0.40

**Allergen(s):** Crustaceans, Nuts, Peanuts. **Restriction(s):** No cakes, Strawberries, No Fruit. **Dietary message:** Please ensure that this child is ca...

**Alcock, S**

YEAR **0** CLASS **None**

AVAILABLE **£182.64** LIMIT **£200.00**

TODAY **£0.00** POINTS **0**

X 1 + -

Orange Juice	1	£0.60
Croissant	1	£0.60
Coffee	1	£1.08

Toasted Bagel

Pancakes

Create a Breakfast Lead Through

Croissant

Sausage

Create a Sandwich\ Baguette\ Wrap

Cereal

Bacon

Yoghurt

Create a Breakfast Lead Through

Water

Apple Juice

Orange Juice

Milk

Appetizer

Coffee

Tea

Own mug

Bottle return

VIP

10% off voucher

TOTAL £2.28

Tuesday, Week 1 Breakfast Menu Find user Staff (VAT) Overspend Functions Finish transaction



The last item added to the basket is highlighted in dark blue. Subtotal discounts will be applied to the selected item and all items listed above it. If you want to only discount some items in a transaction, add these to the transactions first.

- Once items have been added, press the subtotal discount button from the menu. All items including and above the highlighted item will be discounted. Discounted items appear in a light blue highlight and the applied discount will be listed directly below it.

**Alcock, S**

YEAR 0 CLASS None

AVAILABLE £183.10 LIMIT £200.00

TODAY £0.00 POINTS 0

X 1 + -

Orange Juice	1	£0.60
Croissant	1	£0.60
Coffee	1	£1.08
VIP	1	-£0.46

Lewis, Carl

Carl LaptopPoS 19/07/2022 16:11 Version 22.07.0.40

**Allergen(s):** Crustaceans, Nuts, Peanuts. **Restriction(s):** No cakes, Strawberries, No Fruit. **Dietary message:** Please ensure that this child is ca...

Toasted Bagel

Pancakes

Create a Breakfast Lead Through

Croissant

Sausage

Create a Sandwich\ Baguette\ Wrap

Cereal

Bacon

Yoghurt

Create a Breakfast Lead Through

Water

Apple Juice

Orange Juice

Milk

Appetizer

Coffee

Tea

Own mug

Bottle return

VIP

10% off voucher

TOTAL £1.82

Tuesday, Week 1 Breakfast Menu Find user Staff (VAT) Overspend Functions Finish transaction

3. Continue with the transaction as required.

## Redeem discounts

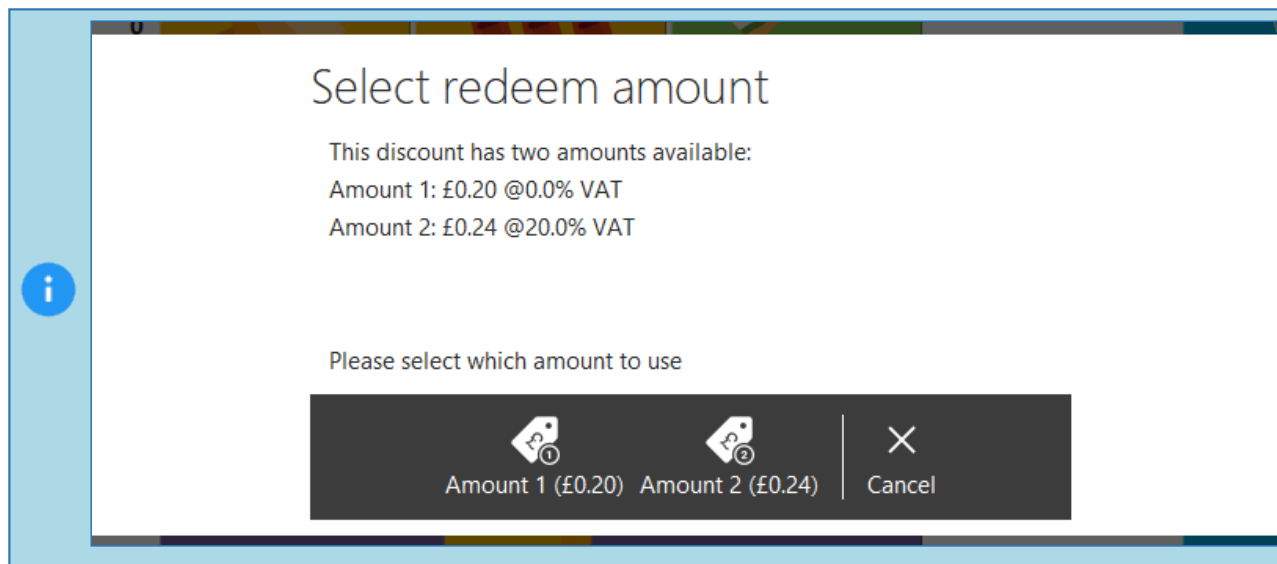
*Last modified: 20 March 2023*

Redeem discounts can be applied to the basket at any point of the transaction, even when there are no items in the basket. This is because this discount type doesn't directly discount items, instead it adds a negatively priced PLU to the basket. To apply a redeem discount;

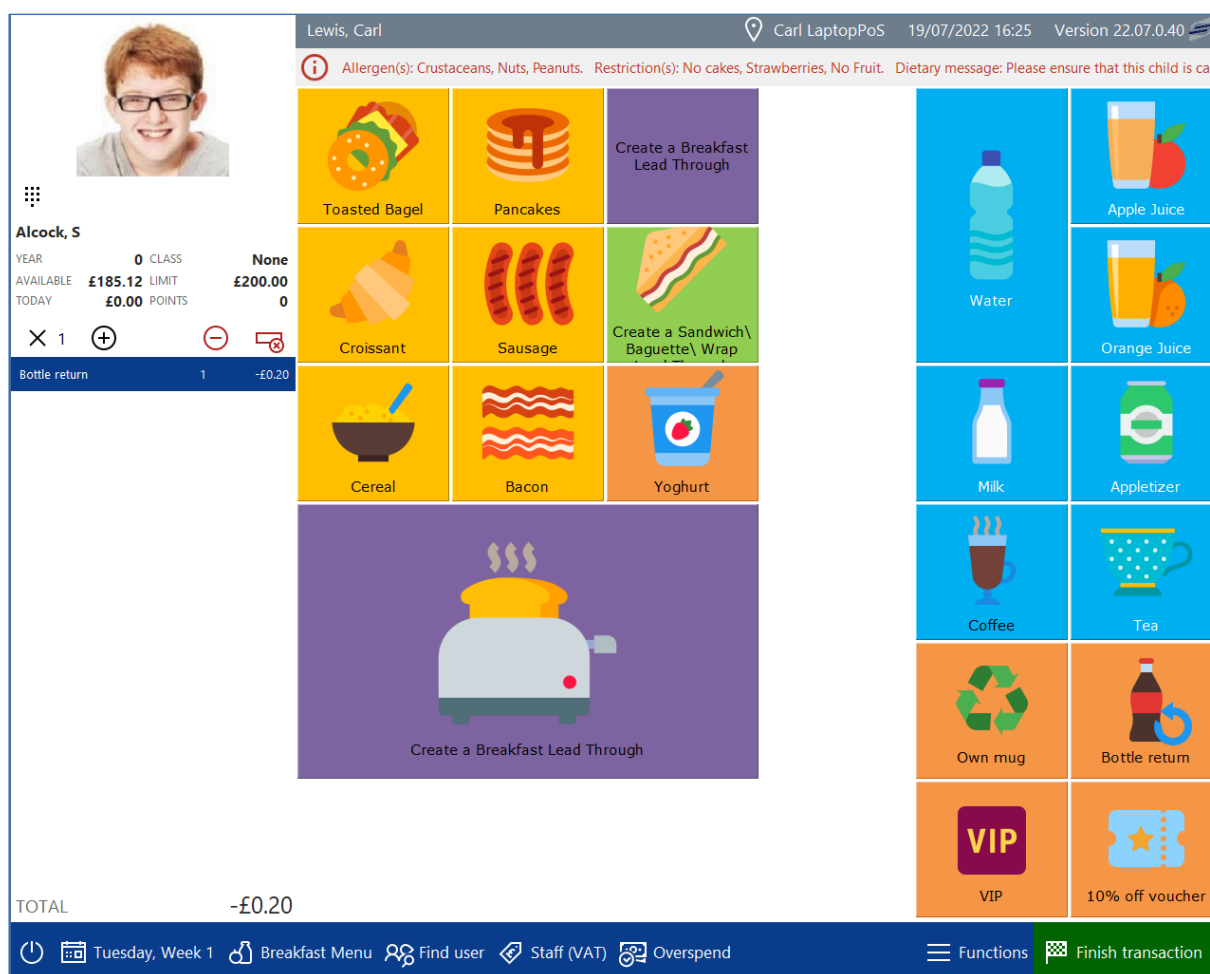
1. Simply press the discount button from the menu



If the discount is set to use two amounts, the operator will be asked to select which amount they wish to apply.



- Once added to the basket, the transaction will be discounted.



- Continue with the transaction as required.



Once all the items have been added to the basket, if the transaction total is a negative amount (e.g. the value of all redeem items is greater than the value of all other items in the transaction), when pressing finish, the value will be added to the users account. If no user account is open (cash transaction), the cash drawer will open so that the operator can distribute the cash to the user.

Last modified: 20 March 2023

## Finishing the sale

Once all of the required items have been entered, you need to complete the sale by simply pressing the green **Finish transaction** button in the bottom right-hand corner of the screen.



After pressing **Finish transaction**, you will be returned to the 'Waiting for a customer' screen and you are ready to start a new transaction.

### The customer's account is short by £x.xx...

If your system is configured to be used with cash transactions, and the user does not have enough money in their account to purchase all of the items selected, after pressing 'Finish transaction', you will be asked if "they wish to top up their account with cash?".

#### Yes

Pressing 'Yes' will open the 'Receive payment' prompt. For more information, refer to the section on [Cash and debit/credit card sales](#).

#### No

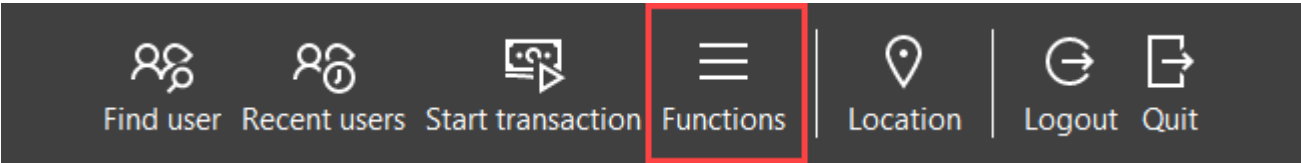
Pressing 'No' will return you to the sale where you can void any items that were causing them to go over their available balance.

Last modified: 20 March 2023

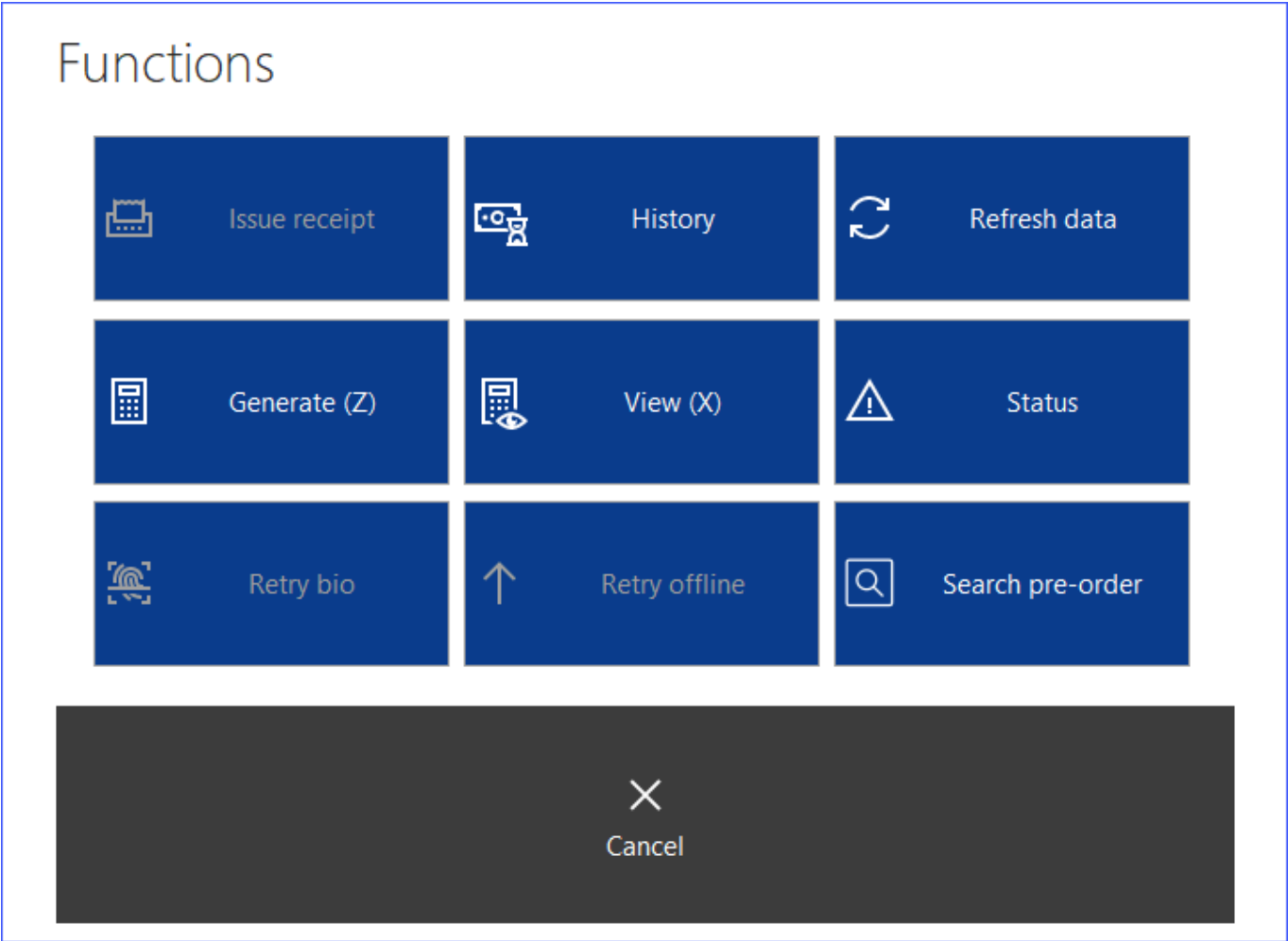
# Functions for the POS


## Point of Sale Functions

There are a number of functions that are available to use on the PoS out with carrying out transactions. These are accessed by pressing the **Functions** button in the waiting for a user screen.



This will open up a grid displaying the available functions.





Some functions may be greyed out, meaning that they cannot be used at this time. This is because functions are contextual, e.g. a transaction must have recently occurred for the **Issue receipt** function to be available to use.

Details on the usage of each function can be found below.

Function name	Function's usage
Issue receipt	Prints a receipt for the most recent transaction that has occurred.

<b>History</b>	Provides an overview of sales and refunds.
<b>Refresh data</b>	Refreshes the data available to the PoS, giving access to any changes that have been made to layouts or users.
<b>Generate (Z)</b>	Generates the totaliser report.
<b>View (X)</b>	Allows the user to view the totaliser report.
<b>Status</b>	Provides the user with a log of all status messages that have occurred.
<b>Retry Bio</b>	Attempts to connect to a biometric scanner.
<b>Retry offline</b>	Attempt to use the PoS offline.
<b>Search pre-order</b>	Allows the user to search for pre-orders.

*Last modified: 20 March 2023*

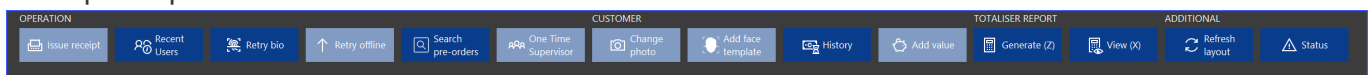
## Functions during a transactions (User)

### Functions available when performing a sale

Numerous additional functions become available when a transaction is in progress at the PoS. These are accessed by pressing the **Functions** button on the bottom right of the screen during a transaction.



This opens up a new toolbar with the available functions.



Some functions may be greyed out, meaning that they cannot be used at this time. This is because functions are contextual, e.g. a user account must be open for the **Change photo** function to be available to use.

Details on the usage of each function can be found below.

Function name	Function's usage
<b>Operation Functions</b>	
<b>Issue receipt</b>	Prints a receipt for the most recent transaction that has occurred.
<b>Recent users</b>	Displays recently opened user accounts.
<b>Retry Bio</b>	Attempts to connect to a biometric scanner.



<b>Retry offline</b>	Attempt to use the PoS offline.
<b>Search pre-orders</b>	Allows the user to search for pre-orders using a barcode or pre-order number.
<b>One-time supervisor</b>	Grants the open user account a supervisor allowance for the current transaction.
<b>Customer Functions</b>	
<b>Change photo</b>	Allows the operator to capture an image of a user using the webcam and set this image as the user's photo.
<b>Add face template</b>	Allows the operator to add a face template to a user, allowing for their account to be opened via facial recognition. Details on how to use this function can be found <a href="#">here</a> .
<b>History</b>	Provides an overview of sales and refunds.
<b>Add value</b>	Allows the operator to add money to a users account.
<b>Totaliser report</b>	
<b>Generate (Z)</b>	Generates the totaliser report.
<b>View (X)</b>	Allows the user to view the totaliser report.
<b>Additional functions</b>	
<b>Refresh layout</b>	Refreshes the menu layout on the PoS.
<b>Status</b>	Provides the user with a log of all status messages that have occurred.

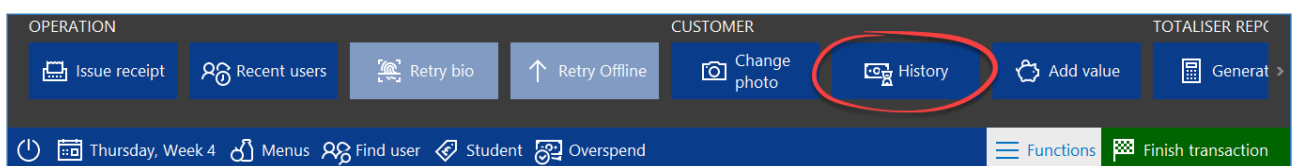
*Last modified: 20 March 2023*

## Refunding items



Items that have been purchased that day can be refunded via the Point of Sale. Once refunded, this money will be returned to the users account instantly.

1. Open a users account.
2. Press the **Functions** button and select **History** from the menu.



3. Staying on the 'Sales' tab, select the item(s) to be refunded and then press the **Refund selected** button.

Transactions for Addison, David


Sales Refunds

Transaction ID	Date	Is refund?	Location	Total
100	20/09/2018 15:39	<input type="checkbox"/>	Till 1	-£0.10
99	20/09/2018 15:39	<input type="checkbox"/>	Till 1	£1.80
	PLU		Qty	Amount
<input type="checkbox"/>	Water 500ml		1	£0.80
<input checked="" type="checkbox"/>	Pretzel		1	£1.00
98	20/09/2018 15:39	<input type="checkbox"/>	Till 1	£3.10

Issue receipt Refund selected Close

- Press **Yes** to confirm the refund.

Impact Fusion PoS

 Are you sure that you want to refund these items ?

Yes No

- Press **Close** to return to the menu.
- Enter any items to be sold or press **Finish transaction** to close the account.

## Limits and allowances


*Last modified: 20 March 2023*

If there are no problems with the transaction, the sale will be completed and the 'Waiting for a customer' prompt will be displayed.

## Spending Limits

Occasionally after pressing **Finish** you may get the following message:

Impact Fusion PoS

 The transaction would exceed the customer's spending limit

OK

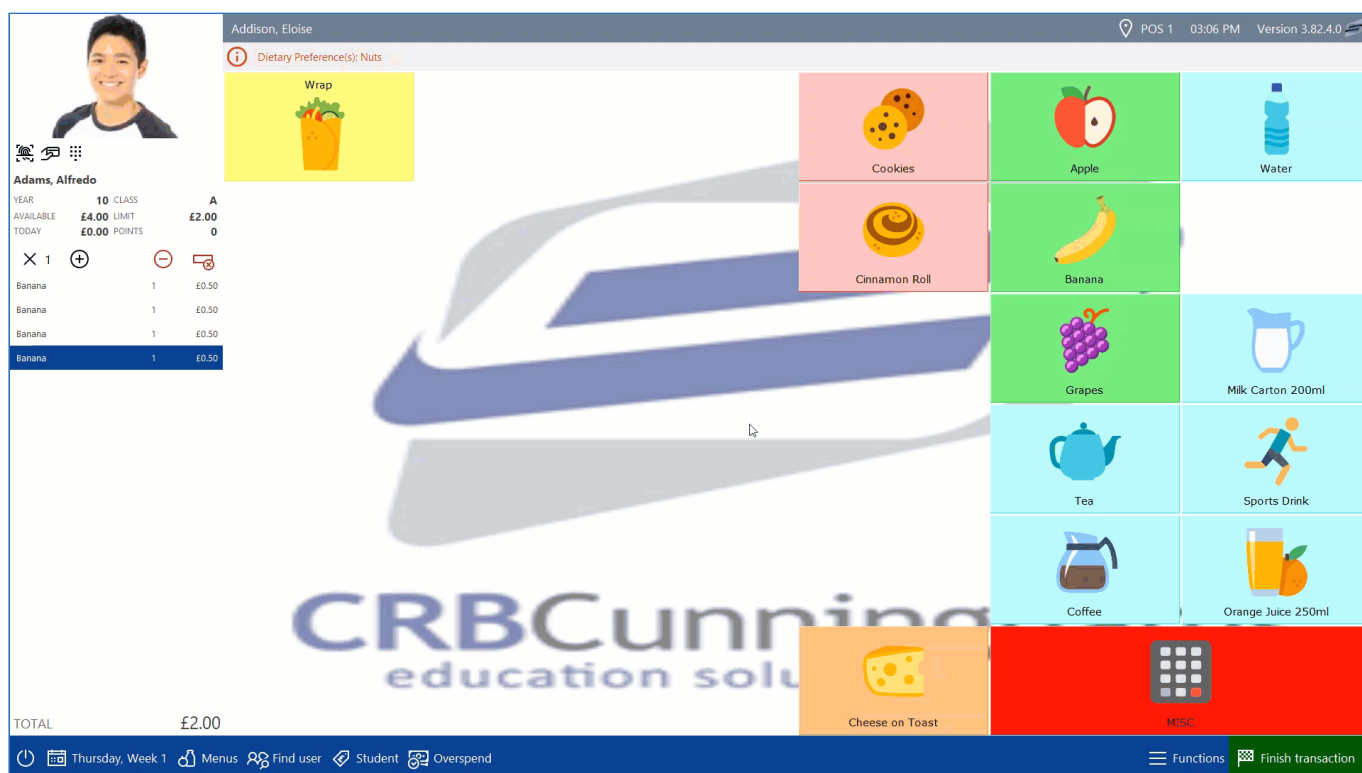
This is because this transaction will take the user over their daily spend limit or they do not have enough money on their account to purchase the selected items. This will either be the global limit that is set against the card type or the Daily/Break limits set on an individuals account in Fusion Back

Office.

To rectify this:

1. Press **OK**.
2. Void any items to take the customer under their limit (displayed top-left).
3. Press **Finish**.

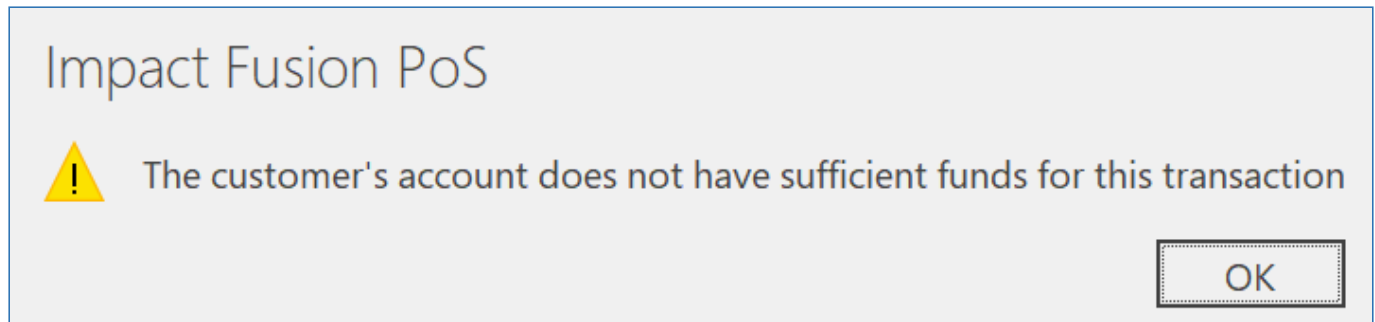
Below is an example showing what happens when a user's transaction tries to go over the daily limit set on their account. In this instance the user has a daily limit of **£2.00** and has already had 4 bananas put through the till equalling the daily limit. This means that the user will not be able to purchase any additional items even though they have credit available, as the daily limit can not be surpassed.



The message will inform the Till operator that “the transaction would exceed the customer’s spending limit” and will not add the item to the transaction list.

## Insufficient Funds

When a user depletes their available credit and tries to have an item they can no longer afford a message will appear to inform the till operator that “the customer’s account does not have sufficient funds for this transaction”. The item will not be added to the transaction list.



This will also be the case for those only with a FSM or Supervisor allowance available.

*Last modified: 20 March 2023*

## Allocating supervisor allowances

Fusion allows for staff to be allocated a supervisor allowance at the Point of Sale. This is particularly useful in schools that don't have a supervisor rota, as it alleviates the need for the staff to be allocated a supervisor allowance through the Back Office client.

There are two ways to allocate a supervisor allowance at the PoS; the "Classic" method, and the "Prompt" method.

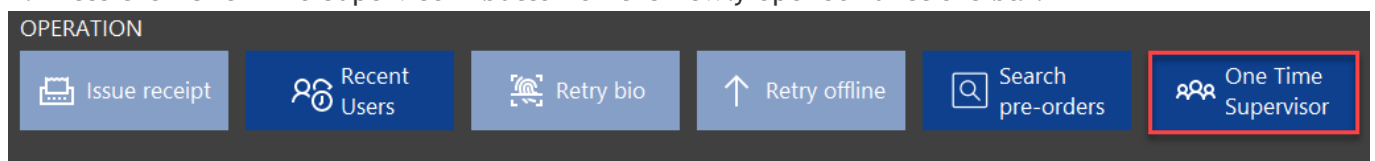
### "Classic" Method

The classic method requires the PoS operator to manually assign a supervisor allowance after the staff member notifies them of their status as a supervisor.

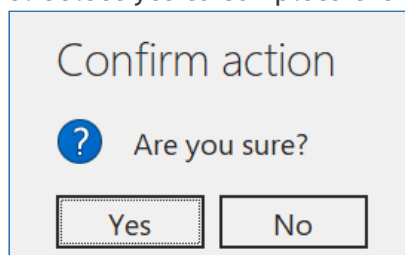
1. Open the staff member's account, then click the functions button located in the bottom right hand corner of the screen.



2. Press the "One Time Supervisor" button on the newly opened functions bar.



3. Select yes to complete the allocation of the supervisor allowance.

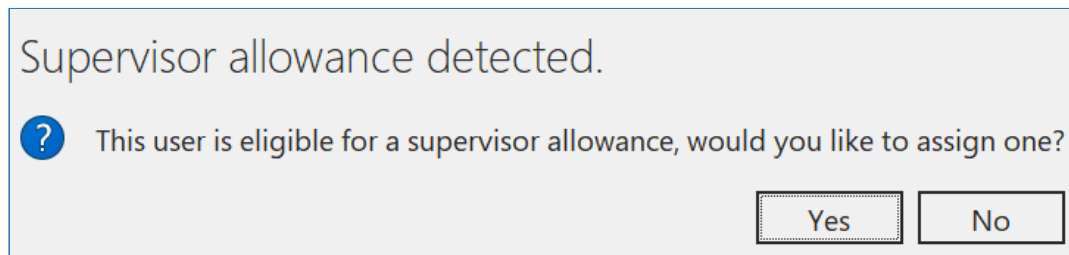


If the PoS operator lacks the permission to assign a supervisor allowance a user with this permission will be required to enter their login details to confirm the allocation.

## “Prompt” Method

The prompt method presents the PoS operator with the option to allocate a supervisor allowance when an eligible account is opened at the PoS. The prompt will only be displayed during periods in which a supervisor allowance can be used, e.g. a lunch service.

1. Simply press yes when presented with the supervisor allowance prompt and the allowance will be allocated.



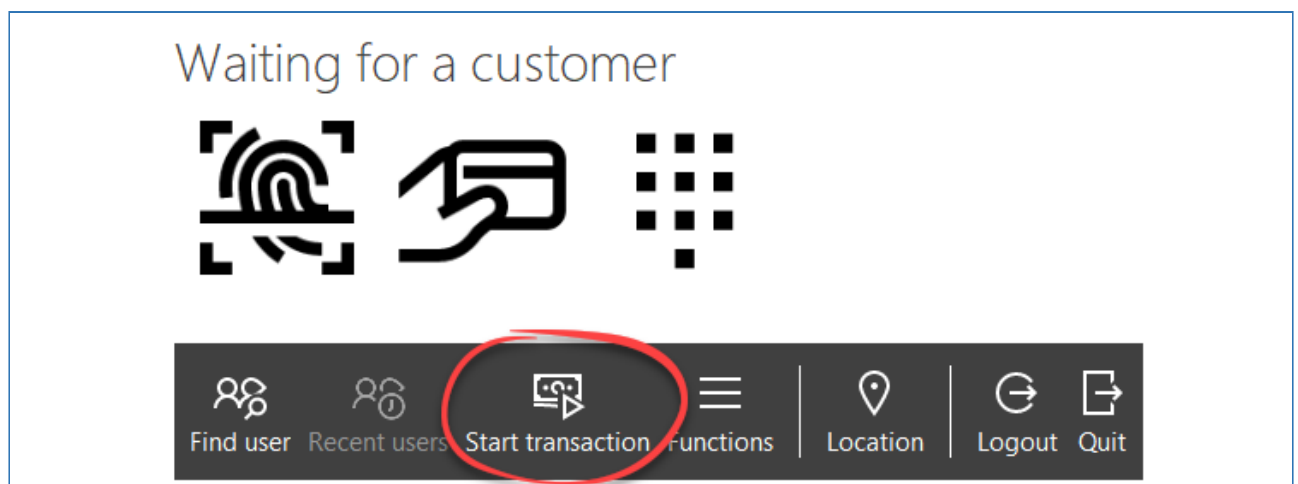
The prompt method must be enabled in the school settings in the Fusion Back Office client. This can be found under the Transactions tab on the school settings page.

*Last modified: 20 March 2023*

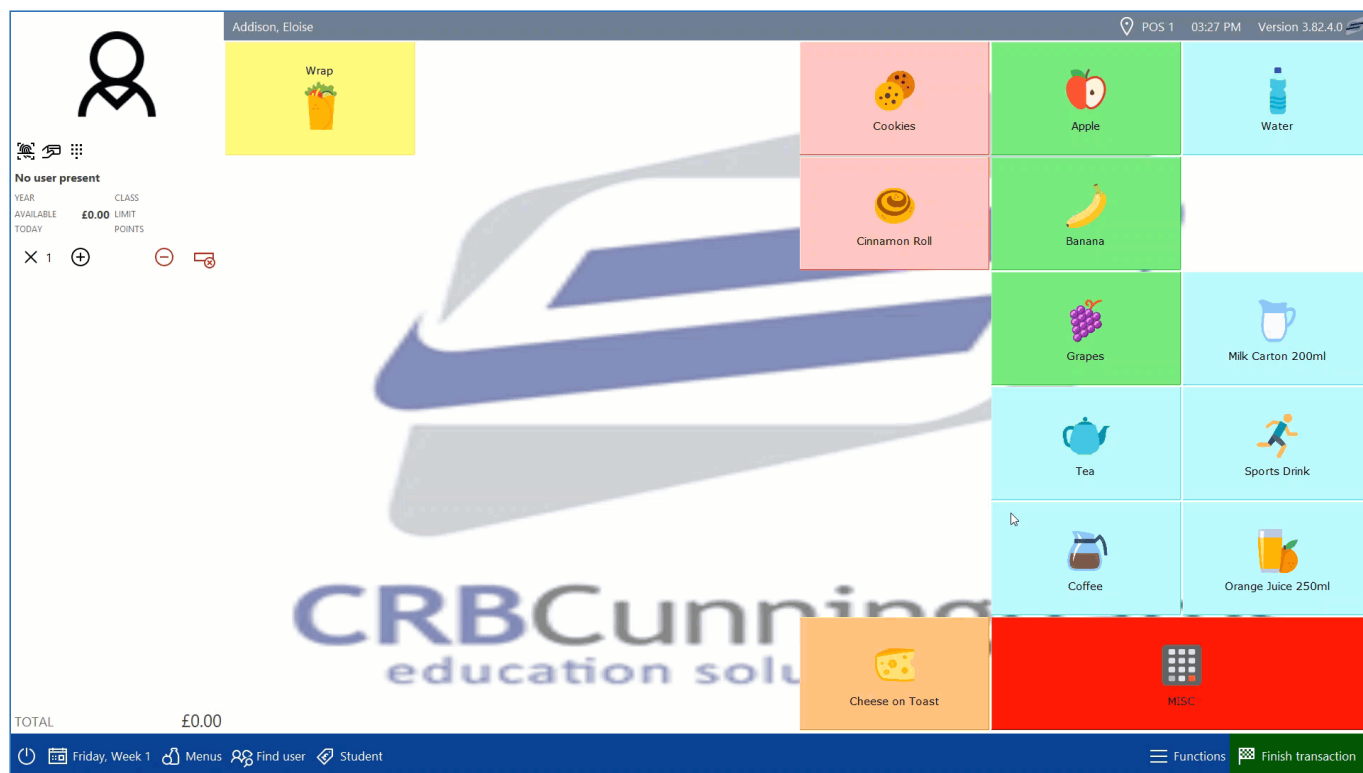
## Cash and Debit/Credit card sales

The process for customers wanting to pay by cash or debit/credit card is the same, until you get to the Recieve payment screen. From there, the operator can specify how the payment is to be made. To start the sale:

1. Press the **Start transaction** button on the POS ‘Waiting for a customer’ section.



2. Select the items from the layout to add them to the basket.
3. When all items have been added to the basket, press the **Finish transaction** button from the bottom right.



## Paying by cash

The **Amount tendered** section to the right allows you to enter the amount manually using the **Grey** number buttons and the **Tender options** are quick links to a set amount. The first one in **Red** will be the exact amount, the options in **Green** are note values and the options in **Blue** are coin values. Change Due will be displayed below the tender options.

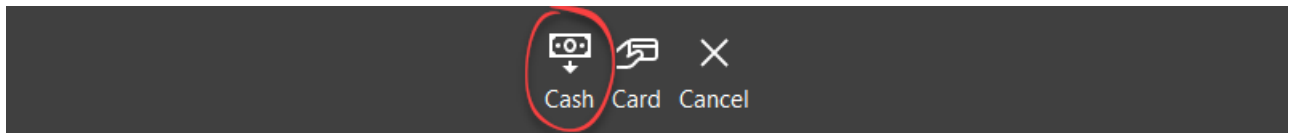
### Receive payment

Receipt			Amount tendered			Tender options		
Coffee	1	£1.00	£0.00			£1.50	£50.00	£20.00
Banana	1	£0.50	7	8	9	£10.00	£5.00	£2.00
			4	5	6	£1.00	£0.50	£0.20
			1	2	3	£0.10	£0.05	£0.02
			0	<	C	£0.01		
AMOUNT DUE £1.50						CHANGE DUE £0.00		

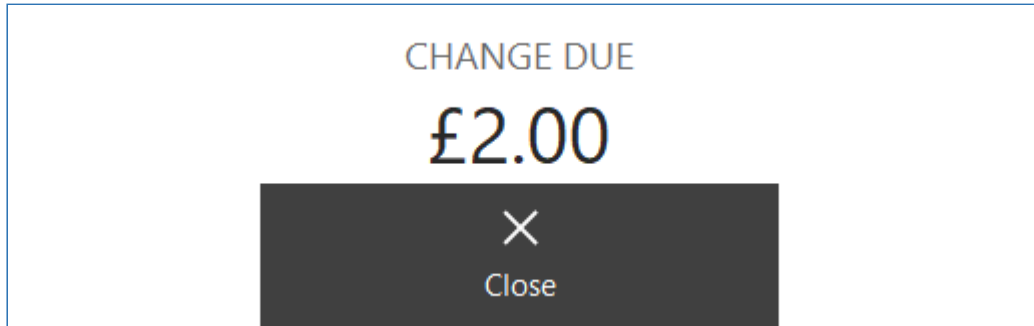
Cash
Card
Cancel

1. Enter the amount of cash that the user has handed over.

2. Then press the **Cash** button.



3. If any change is due, this will be displayed on the screen and the cash drawer will be opened. Press **Close** once done.



4. The sale is completed and you will be returned to the “Waiting for a customer” screen.

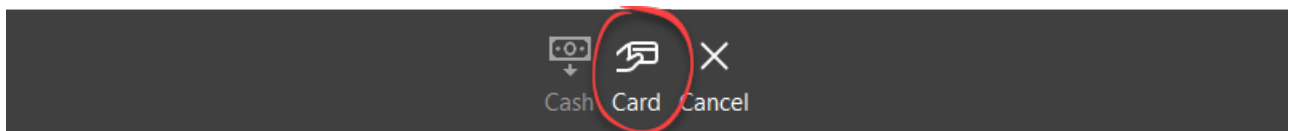
## Paying by Debit/credit card (or sales

The process of making a payment using a debit or credit card is slightly different depending on if the PDQ/PED terminal is integrated with Fusion. With an integrated PDQ, Fusion will send the transaction to the terminal and listen for a response. When the payment is authorised, the transaction will automatically be completed.



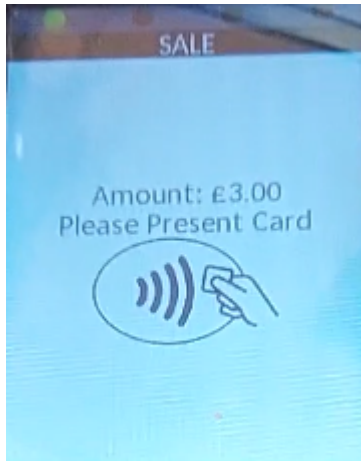
If you would like to learn more about how to add integrated PDQ terminals to one or more of your tills, please contact [info@crbcunninghams.co.uk](mailto:info@crbcunninghams.co.uk)

1. To pay by card, simply press the **Card** button.



## Integrated PDQ terminal

If the terminal is integrated with Fusion, Fusion will send the transaction to the Optomany service. The Optomany axept PoS Lite application will display the status of the transaction to the operator on the screen and the terminal will “wake up”, then display the transaction value and prompt the customer to make payment.



When the payment is authorised, the transaction will complete automatically and the Point of Sale will return to the 'Waiting for customer' screen.

If the payment was not authorised, the operator will be returned to the 'Receive payment' screen. If the user wants to try again, you can just press the **Card** button again.

Finally, if the customer wants to cancel the transaction, this can be done by pressing the red button with the cross on the terminal (bottom left) or by the operator pressing the red cancel button on the bottom left of the asept POS Lite dialog presented on the screen. To cancel the transaction completely, press the **Cancel** button on the PDQ payment screen (there may be a pause while Fusion awaits the response from Optomany that the transaction has been cancelled). When returned to the layout, void the items from the basket and press Finish transaction.

### Non-integrated PDQ terminal

After pressing **Card**, Fusion will present the transaction value and ask if the payment completed successfully. At this point, the operator will need to manually input the transaction value into the terminal and hand it to the customer. After the customer has attempted payment;

1. Press **Yes** or **No** to confirm the PDQ payment completed successfully or not.

Confirm payment

? Amount to enter: £0.50  
Did the PDQ payment complete successfully?

Yes No

2. This will finish the sale and return back to the 'Waiting for a customer' screen.

### PDQ Cashback

*Last modified: 20 March 2023*

The PDQ Cashback feature will enable you to perform cashback during a PDQ/Card transaction.





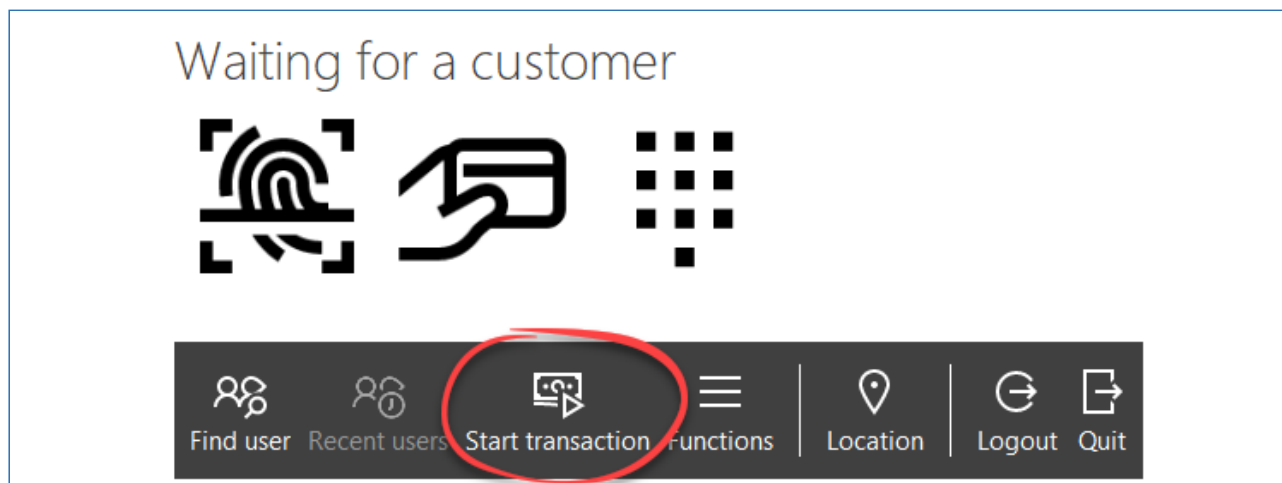
Speak to the CRBCunninghams Helpdesk to enable this feature if you would like to use this feature.



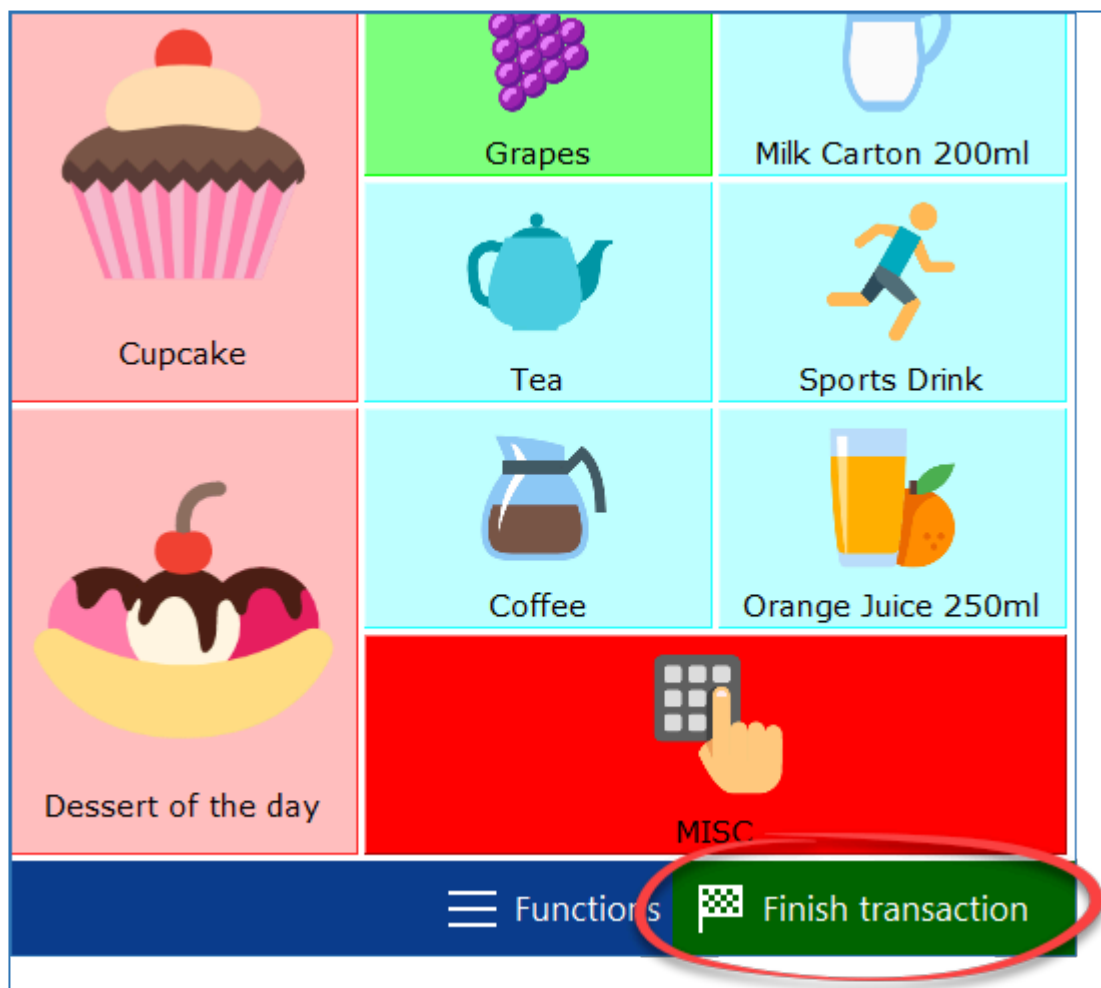
Cashback is not currently supported on integrated Optomany terminals.

## How to perform PDQ Cashback

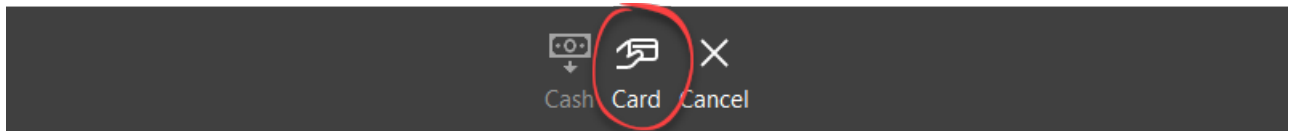
1. Press **Start transaction** from the 'Waiting for a customer' prompt.



2. Start selecting items and then press the **Finish transaction** button.



3. Enter the amount tendered or select a tender option then press the **Card** option.



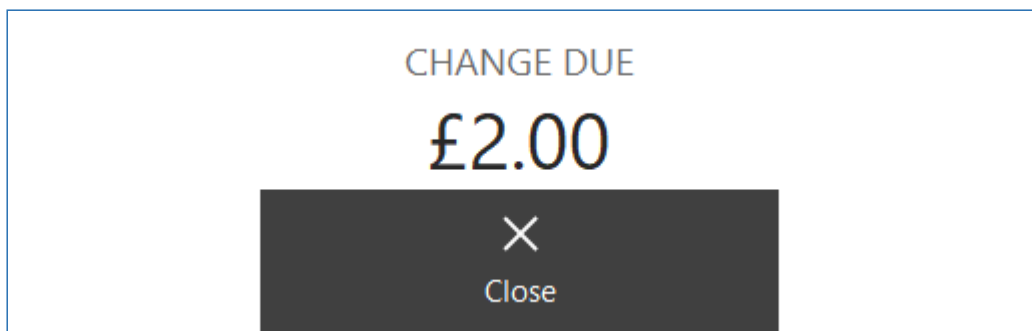
4. You will be displayed with an option to enter an amount for cashback. Enter an amount and press **OK**.

A screenshot of a 'Give cashback' screen. At the top, it says 'Give cashback' and 'Please enter cashback amount'. Below this is a display showing '£0.00'. Under the display is a numeric keypad with buttons for digits 0-9, a left arrow, and a 'C' button. At the bottom is a dark bar with a checkmark icon and the text 'OK', and an 'X' icon with the text 'Cancel'.

5. You will be displayed with a payment confirmation prompt, in the example shown below, the transaction amount due was £1.20 and the cashback amount of £2.00. Make sure the PDQ payment was complete and successful and press **Yes** to confirm.

A screenshot of a 'Confirm payment' screen. It has a light gray background. At the top, it says 'Confirm payment'. Below that is a blue circle with a white question mark. To the right of the question mark, it says 'Amount to enter: £3.20' and 'Did the PDQ payment complete successfully?'. At the bottom right are two buttons: 'Yes' and 'No'.

6. You will then have a prompt of how much **Change Due** is to be given. Press **Close** to end the transaction.



## Collecting Pre-orders from a PoS

*Last modified: 20 March 2023*



Fusion allows for users to pre-order meals in a variety of ways, including a self service Kiosk or via our mobile app. If your school is accepting pre-orders through Fusion and your Point of Sale is assigned to a collection point, orders can be displayed and marked as collected.



Only orders made for the current day can be viewed on the Point of Sale.

## Orders displayed automatically when the user account is opened

When users place an order, they will choose the day and period that they are ordering for. They will also choose where they will be collecting their order from (if there is only one collection point configured, this step is automatic for the user). When the user opens their account on the PoS, if the time matches their order time, and the Point of Sale is assigned to the collection point that the user chose, their order will be automatically displayed.

Pre-orders for Adams, Dexter

Preorder number 4  
Date / time Today 10:45  
Collected ☐

Description	Qty	Value
Bacon Sandwich	1	£1.30

Adams, Dexter  
YEAR 7 CLASS D

Total £1.30


Mark as collected Close

Press the 'Mark as collected' button when the order has been given to the user. Orders marked as

collected will no longer automatically be displayed if the user opens their account again, but they can be viewed by searching for it using the 'Search pre-order' button within functions (detailed below).

If a user has multiple available orders, you can choose which order(s) they are collecting by choosing it from the list on the right-hand side.

Pre-orders for Adams, Alfredo



**Adams, Alfredo**  
YEAR 10 CLASS A

Preorder number 2  
Date / time Today 13:00  
Collected ☐

Description	Qty	Value
Cheese Sandwich	1	£1.40
Fruit Salad	1	£0.10
Water 330ml	1	£0.70

Collected	Transaction Date	Preorder #
<input type="checkbox"/>	15 Aug 10:45	1
<input type="checkbox"/>	15 Aug 13:00	2

Total £2.20

Mark as collected Close



Each order will need to be marked collected individually.

## Searching for pre-orders

Pre-orders can be displayed on the Point of Sale without the user opening their account. This is done by accessing the **Functions** menu and pressing the **Search pre-order** button.

Functions

Issue receipt	History	Refresh layout
Generate	View	Status
Retry bio	Retry offline	Search pre-order

Cancel

## Searching by barcode

If your Point of Sale has a barcode scanner connected, and the user has a pre-order receipt with a barcode on it, simply scan the receipt and the order will be displayed.

## Searching by pre-order number

You can also search for the order by the pre-order number. Tap into the **Pre-order number** text box and an on-screen keypad will be displayed. Enter the number and press **OK**. The order will be displayed.



The pre-order number starts at #1 each day and increments with every order. This is so that the numbers do not get too large to be usable. When using this method, use caution as a user may be presenting a receipt that is not for the current day.

## Authentication errors Primary school Operation

*Last modified: 20 March 2023*

*Last modified: 20 March 2023*



Fusion allows for the Point of Sale to be ran in a simplified version that is more suitable for use in primary schools. PoS operators will be presented with the screen to search for users from start up, with this being particularly useful in primary schools as pupils will not be using login methods such as cards or biometrics.

## Enabling Primary Mode

1. Navigate to Locations in the Fusion Back Office client.
2. Select the PoS you wish to enable Primary Mode on and press the **Edit** button on the right hand side.
3. Click on the Behavioural tab.
4. Click the box to enable Primary Mode.

## Selecting a User in Primary Mode

Primary Mode will cause the user to be presented with the **Find User** screen. More information on how to use the Find User function can be found [here](#) under the heading **Finding a user manually**.

1. Select a Class from the left-hand side and this will now display the users within that class on the grid.

2. Select a user and perform a transaction. When you finish the transaction, it will take you back to the Primary operation mode and find another user.

*Last modified: 20 March 2023*

## Logging off and shutting down

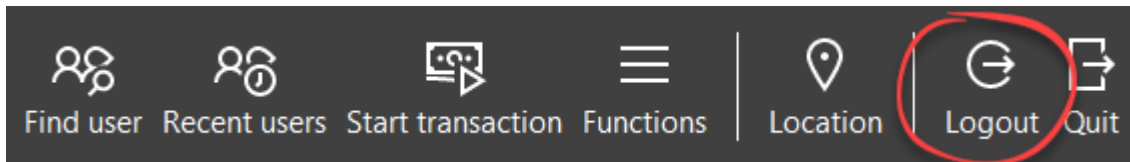


While the Impact Fusion Point of Sale is not in use, it is recommended that you log off. This will prevent any unauthorised people using the software but also allow another member of staff to log in using their credentials.

### Logging off

To log off the till;

1. From the 'Waiting for a customer' screen, press the **Logout** button.



2. Press **Yes** to confirm. You will be logged out of the software and the login window will be displayed.

### Shutting down

At the end of the day, you will probably want to power the till off. To do this;

1. From the 'Waiting for a customer' screen, press the **Quit** button.



2. Press **Yes** to confirm.
3. Press the **Shutdown** button from the bottom of the screen. The Point of Sale will close and the till will shut down.



When logging off or shutting down you may be asked to enter your username and password depending on your configuration settings.

## Offline mode

*Last modified: 20 March 2023*



Sometimes, the school network/server may have issues which prohibit the Point of Sale from communicating to the Fusion Data Server. To alleviate these issues, Fusion provides an Offline mode which allows you to record sales locally on the Point of Sale. When the issues are resolved, these transactions will be uploaded to the server so that sales have not been lost.



While in offline mode, the PoS does not know what the user's balance is or what they may have spent on other tills, so balance limits are not enforced. When the transaction is posted this will take the user overdrawn if they have spent more than they had available.



While in offline mode, all transactions are stored locally on the tills. If the data server is down



for multiple days, it is highly recommended to back up the tills to protect against data loss.

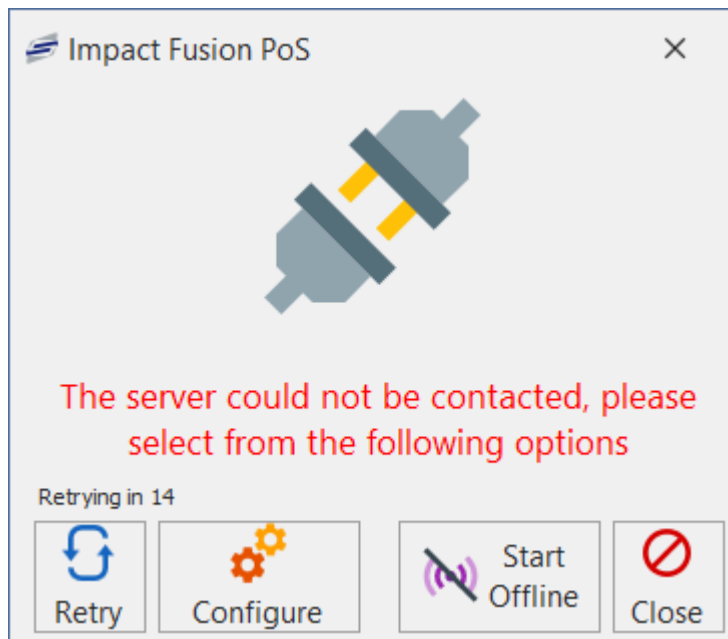
*Last modified: 13 April 2023*

## Entering offline mode

There are two methods of accessing offline mode

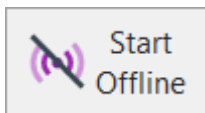
### No connection to Server

When the Point of Sale is launched, if there is no connection to the Fusion Data Server, you will see the no connection screen.



From here, you can choose to operate in offline mode by:

1. Click the **Start Offline** button.



2. The software will load up and you will be presented with the login screen, you'll notice the red **Offline** status at the bottom right-hand corner.





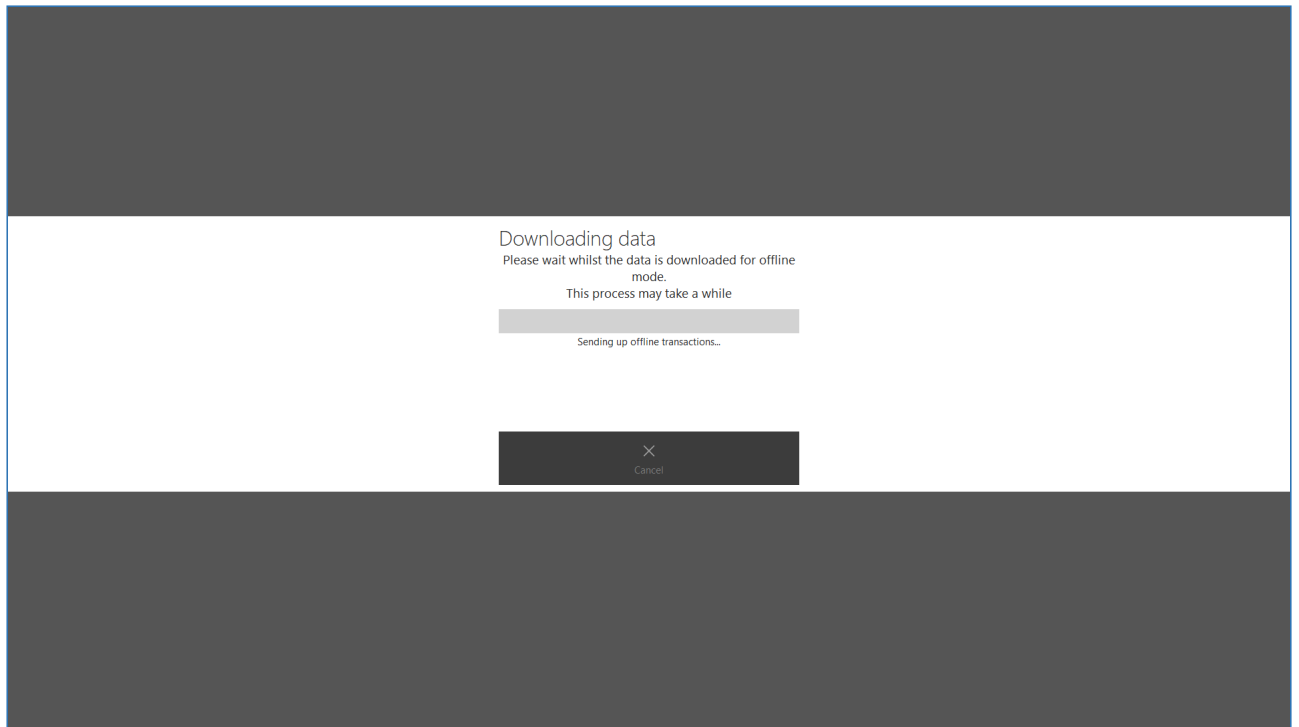
3. Login using your usual credentials.
4. You will now be able to perform transactions in offline mode.

*Last modified: 13 April 2023*

## Going back online & synchronising transactions

When you have confirmation that the issues have been resolved and the Data server is now available, you should now upload the transactions. You do this by:

1. Log out and close the PoS software.
2. Re-launch the Fusion PoS software.
3. Given that the connection has indeed been restored, the software will upload all data created while using offline mode to the Data Server.



4. Once the upload has been completed, the software will open as normal.

*Last modified: 13 April 2023*

# Smart board

Fusion Smart board is a PoS for Primary schools. This will allow Teachers and Pupils to pre order their lunch for the day. It can be accessed by a URL which can be bookmarked or a shortcut can be created on the desktop.



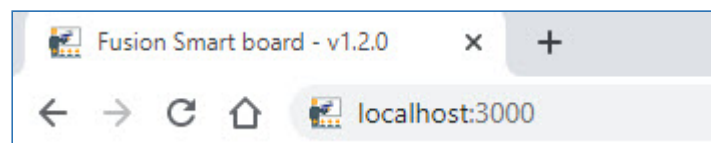
*Last modified: 20 March 2023*

## Starting the Smart board & logging In

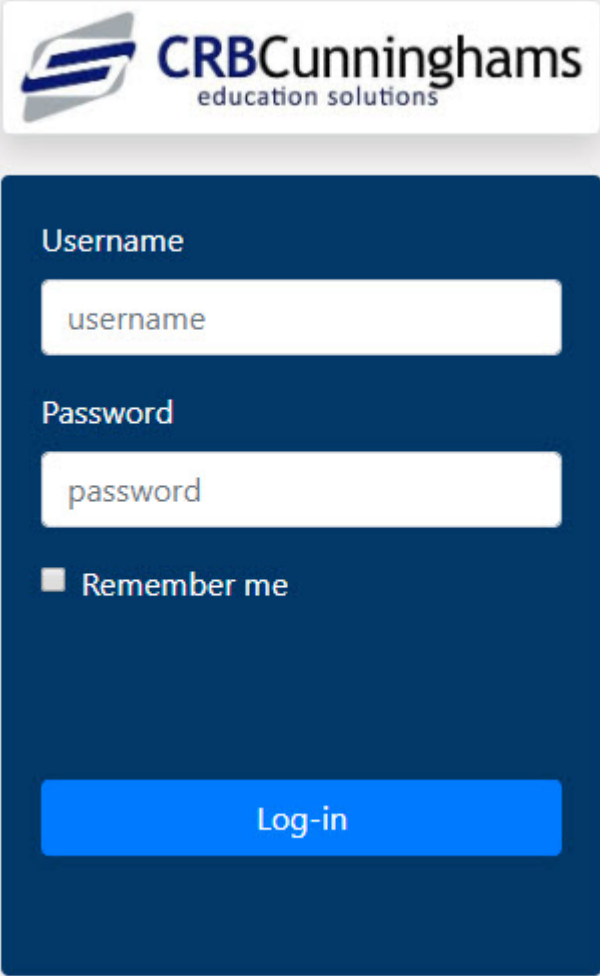


There are a few ways to start the Smart board software and all are URL based. You can enter the URL directly into the web browser, open via a saved bookmark within the web browser or from a shortcut created which will open the URL.


The URL below is an example of what the address should look like when starting the software. Localhost means the service is running locally and 3000 is the port used by the service.



When the software has been started it will display a log in page where you will be required to enter a username and password which can also be remembered to make logging in quicker.



The image shows a login interface for CRBCunninghams. At the top is the logo, which consists of a stylized 'C' icon followed by the text 'CRBCunninghams' and 'education solutions' underneath. Below the logo is a dark blue rectangular box containing the login fields. Inside this box, the label 'Username' is above a white text input field containing the placeholder text 'username'. Below that, the label 'Password' is above another white text input field containing the placeholder text 'password'. Under the password field is a checkbox with the label 'Remember me'. At the bottom of the dark blue box is a large blue button with the text 'Log-in' in white.

 The login method(s) that are available for you to use will depend on your system set up.



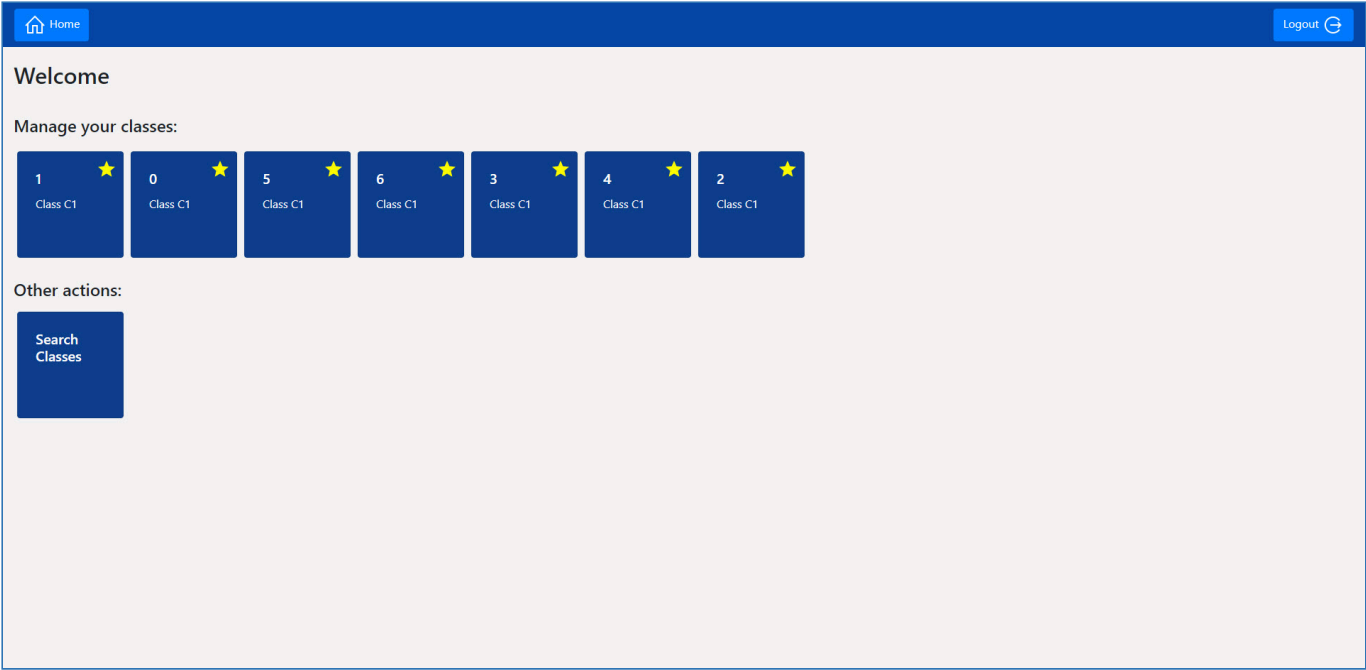
If the user has not ticked the Remember me option and the session has been inactive for 30 minutes, the user will be logged out of the session and will need to sign back in again. If the user clicked the Remember me option they will be signed in until the user signs out manually.

## Managing the Home Screen

*Last modified: 20 March 2023*





The home screen is a personalised place for the user that is logged in to search and add favourite classes. Your home screen will apply the same settings whether you log on to your workstation or another workstation located elsewhere that can start the smart board software.

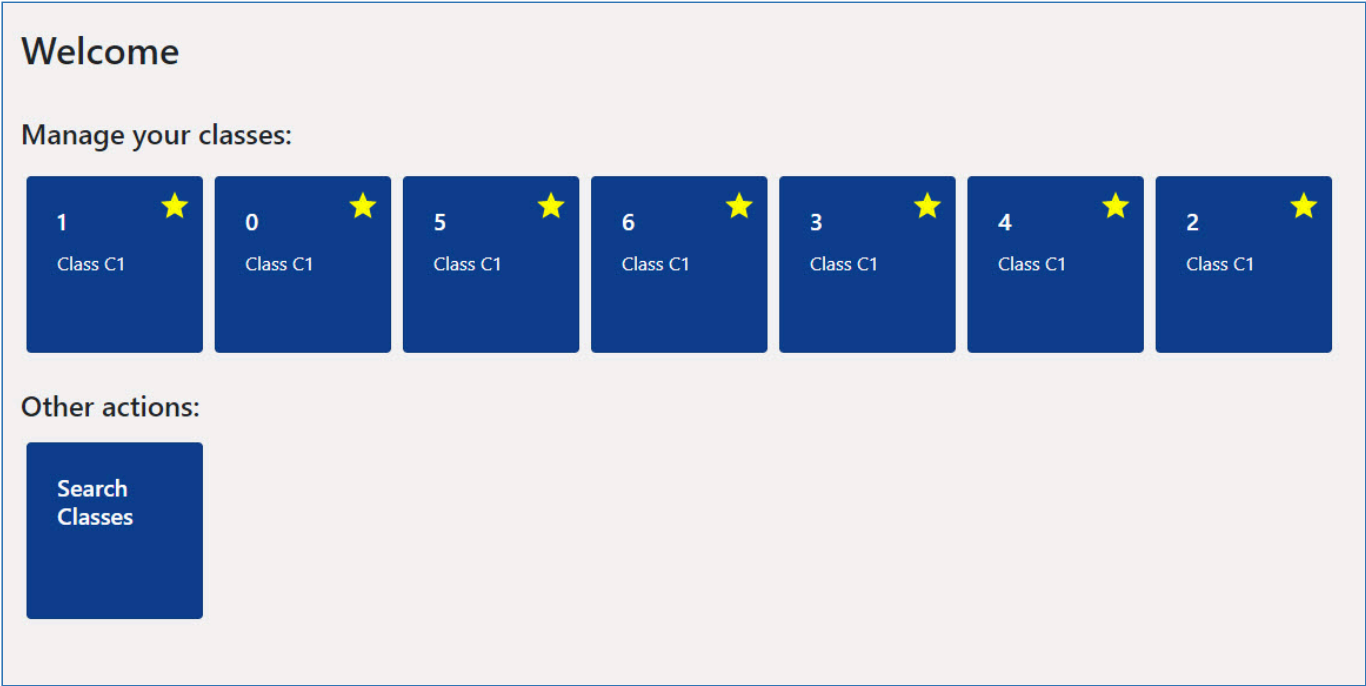


## Title Bar



-  The Home button will take you back to the Smart board Home screen when you are in another selected screen.
-  The Logout button will allow the user to log out of their smart board account and return to the log in screen.

## Home Screen



## Manage Your Classes

You will see any starred classes under the manage your classes section.

### Manage your classes:

The class tile will display the Year and Class. It will also display a Gold Star to indicate that the class has been selected as a favourite. Clicking on the tile will take you to the Class screen displaying the Users within that class.

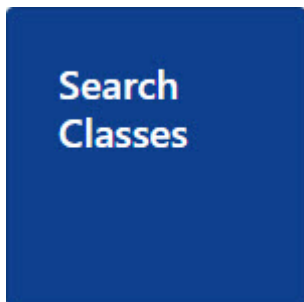


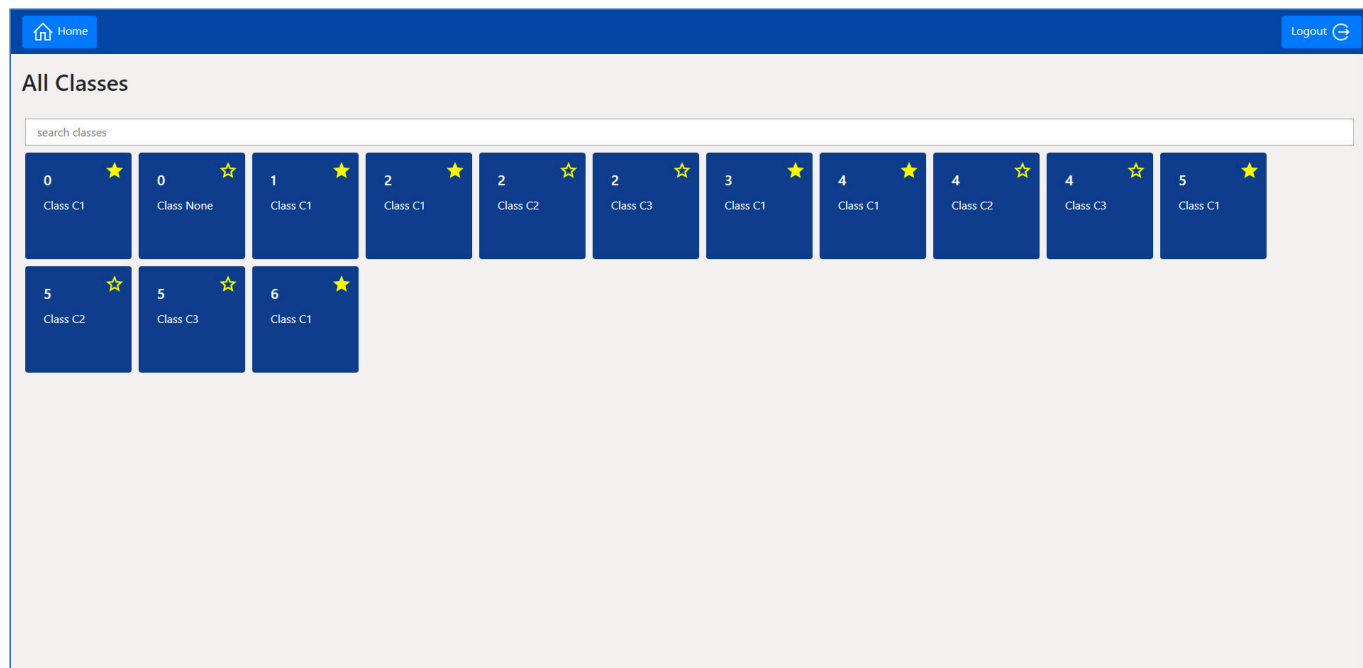
## Other Actions

You can search for classes within the Other Actions section. You will have the ability to also make classes favourites from the All Classes grid.

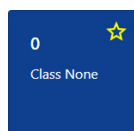
### Other actions:

Clicking the Search Classes tile you will enter the All Classes screen. You will see all available classes in the grid. Selecting a class will take you to the Users grid within that class.

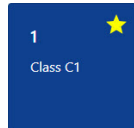




You can select the Gold Star to either add to your favourite classes list or if already a favourite, remove them from the list.



This class only has a Gold outline around the Star and will not show on the Favourite Classes grid on the Home screen.



The Gold Star on this class has been selected and will therefore show as a selection on the Favourite Classes grid on the Home screen.

## Search Classes

You can type a number for the year of the class you are searching for and it will filter the class grid based on the results.

*Last modified: 20 March 2023*

## Make an order

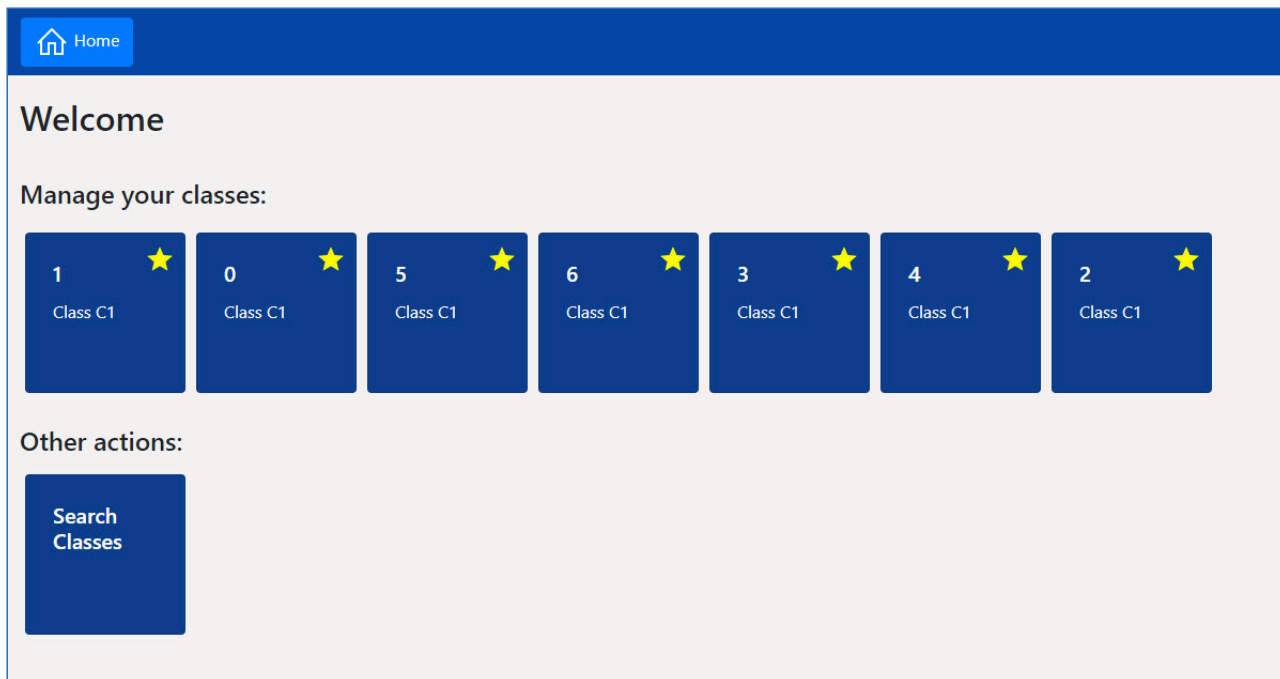
The next few pages discuss the process that the user will need to do to make an order using the Smart board.

*Last modified: 20 March 2023*

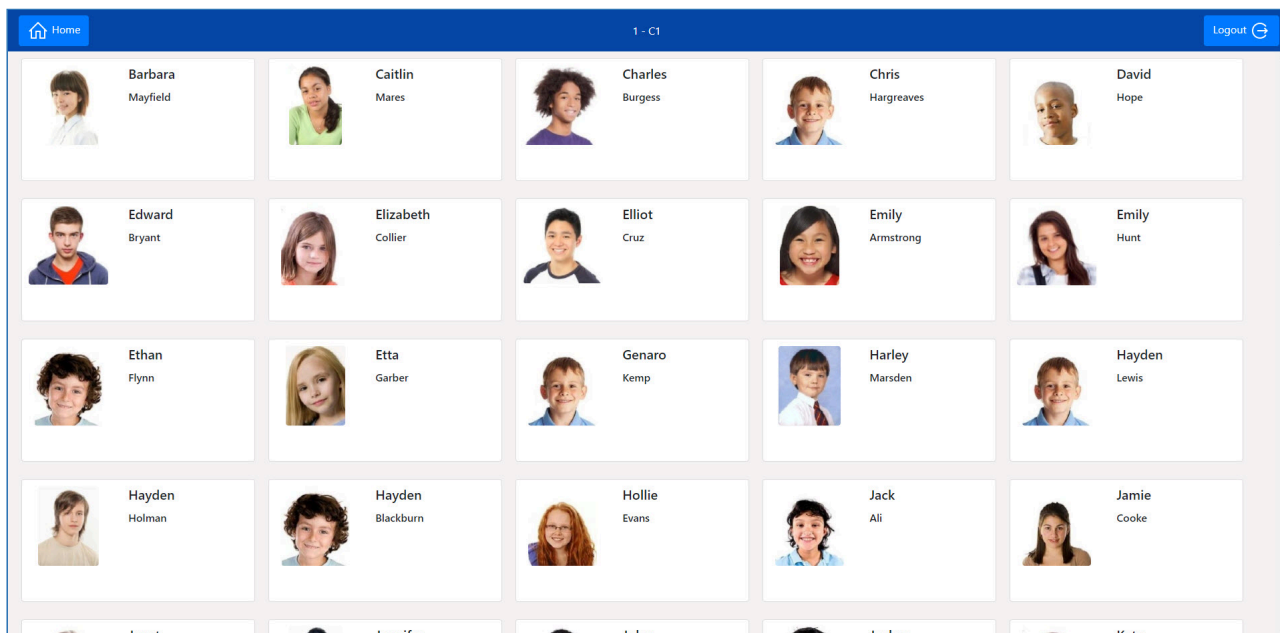
## Opening your account

Before you can place an order, you will need to open your account.

1. To start you will need to open the class that you belong to from the Smart board Home screen. The class will either be set as a favourite or will need to be searched for using the search classes tile.



2. When you have selected a class you will be shown a grid of users associated with that class.



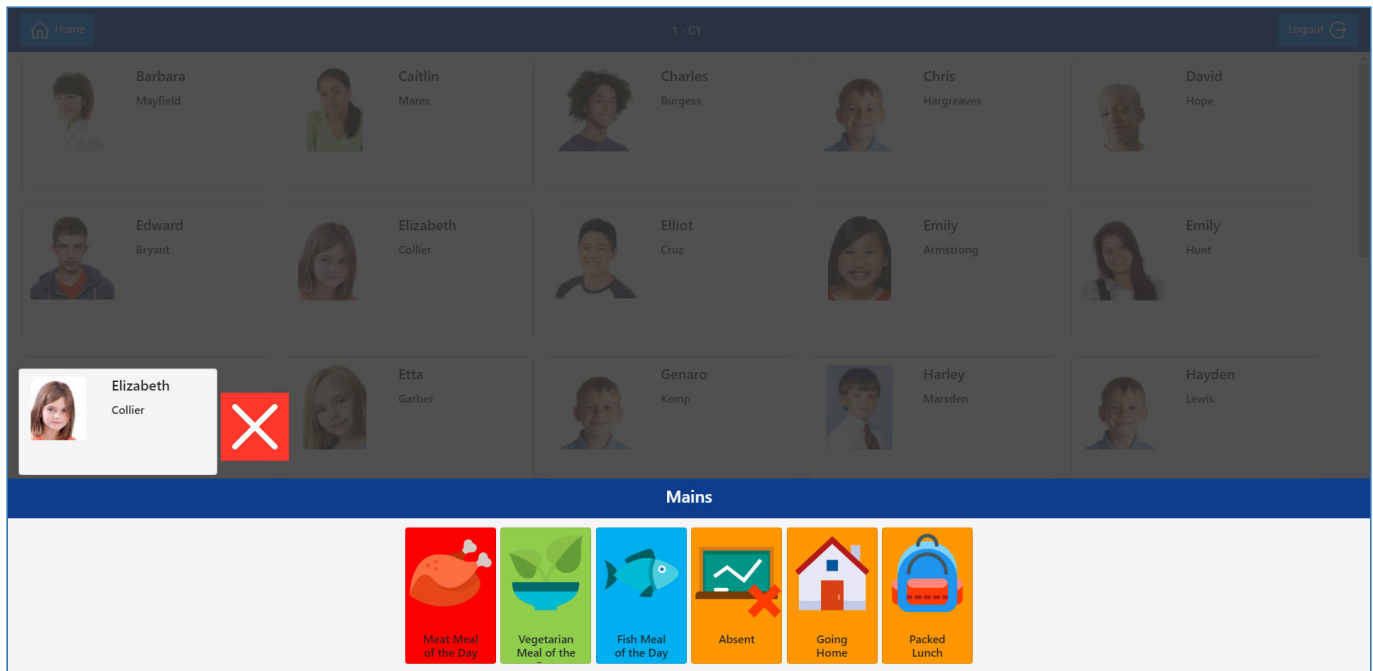
3. Select a User from the grid to start the transaction.

## Select your Items

*Last modified: 20 March 2023*

Once you have selected an account from the classes screen, you can start selecting the items that you wish to purchase. The order the menus are shown in is dependant on the order in which the menus were created in Fusion Smart board layouts, with the first menu created being shown at the bottom of the screen.

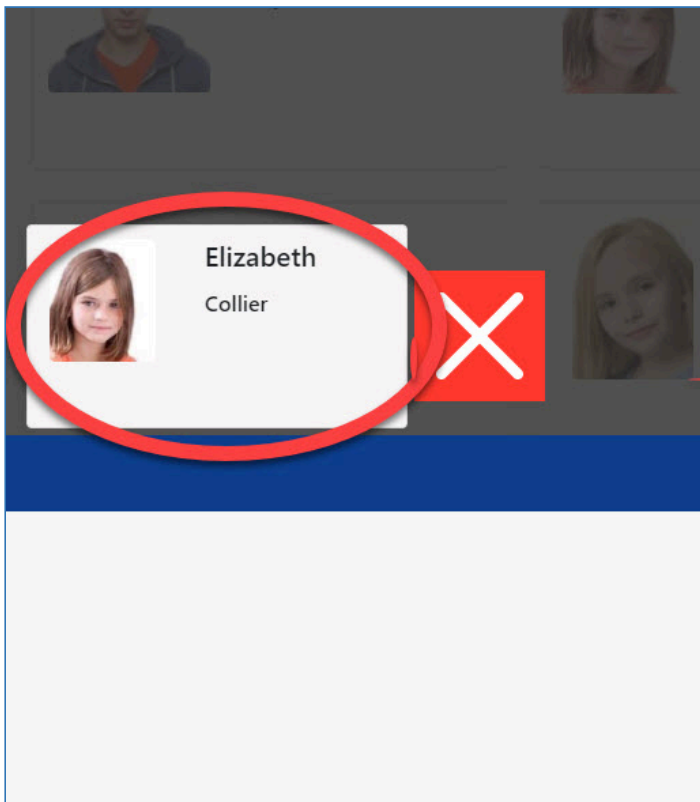




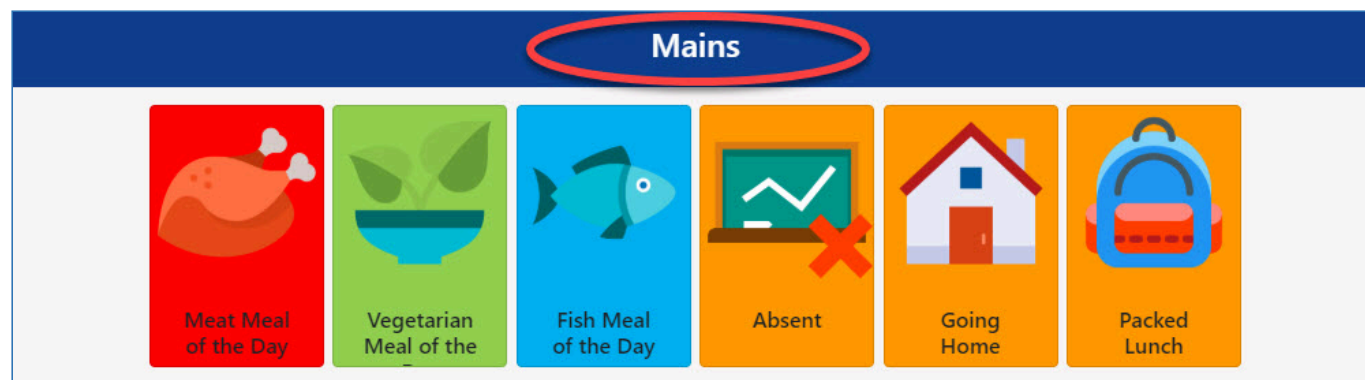
**i** Dependant on the menu configuration, menus may have rules that you need to meet to successfully place an order, such as a minimum/maximum selections from a menu. As a default the maximum item selection for Smart board items will be set to 1 and cannot be increased.

## User Grid

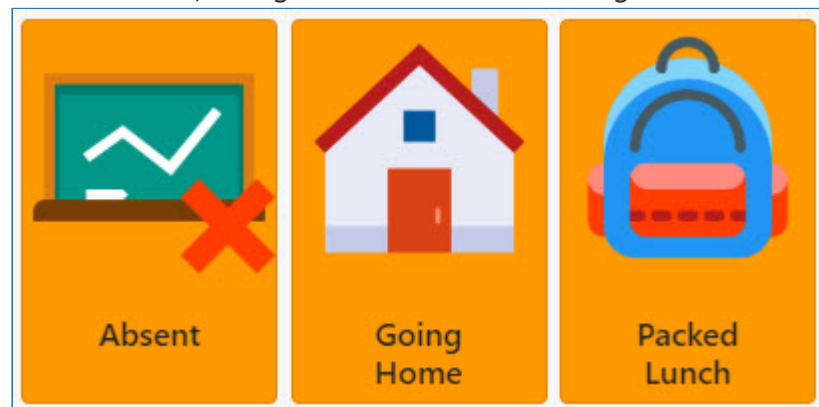
The Users name will be shown on the left of the screen and the user grid will dim to indicate that you are in a transaction.



The name of the menu will be displayed in the blue title bar above the items grid.

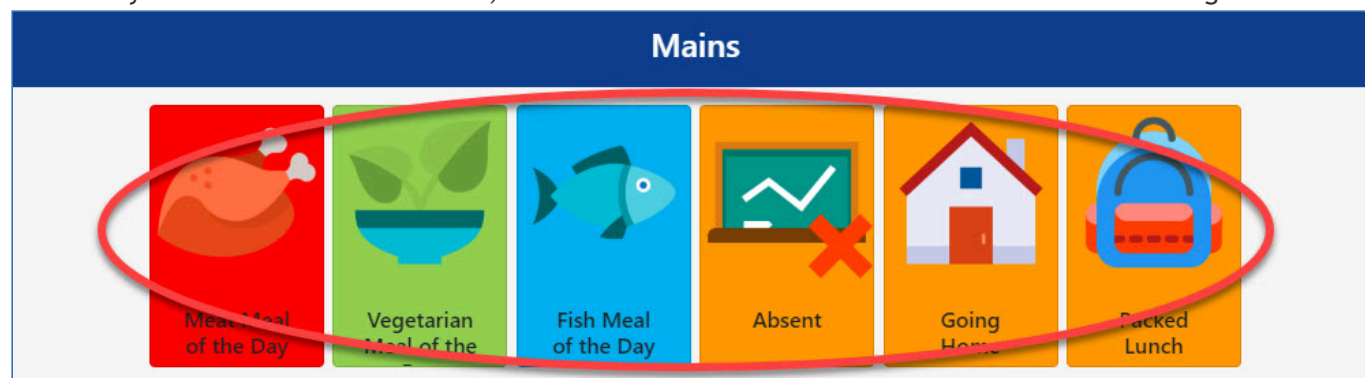


On the first menu there will also be 3 additional items available as a default to indicate whether the user is Absent, Going Home for lunch or having a Packed Lunch.



## Selecting your Items

To make a selection choose an item from the grid. Once the item has been selected, depending on how many menus have been created, it will move on to the next menu and item selection grid.



The Main menu has a minimum item requirement set to 1 on the period menu. The user will have to pick an item to continue and to finalise the transaction.

The next menu has been setup with a minimum requirement of 0 which will allow the user to either select an item or skip the selection entirely. There will also be an option to go back to the previous menu to change the selection if you wish.



When the last item has been selected the user's selected items will be displayed on their tile, and depending on the colour of the item, will also set the colour along with image at the bottom of the tile.



## Logging out of the Smart board

*Last modified: 20 March 2023*



To log out of the Smart board software you can click the Logout button on the Title bar at the top from any screen.

*Last modified: 20 March 2023*

# Pre-order kiosk



The Fusion pre-order kiosk is an unattended application which allows users to make orders for future meal periods. This allows kitchen staff to prepare the meals in advance and the user to collect them quickly and easily.


Impact Pre-order Kiosk  
Version 4.11.2.0

15:07  
13/12/2019

Welcome to the Pre-order kiosk. Order now to beat the queues! Welcome to


1

Place your order




2


Save time




3

Enjoy your food!



  
CRBCunninghams  
education solutions

**How to use the pre-order kiosk**  
  
1. Open your account. Your details will be displayed.  
2. Select your desired food.  
3. Press 'Finish Order'. A receipt will be printed.  
4. Take your receipt to your collection point at the collection time.

 **Begin**

## Make an order

*Last modified: 20 March 2023*

The next few pages discuss the process that the user will need to follow to make an order using the kiosk.

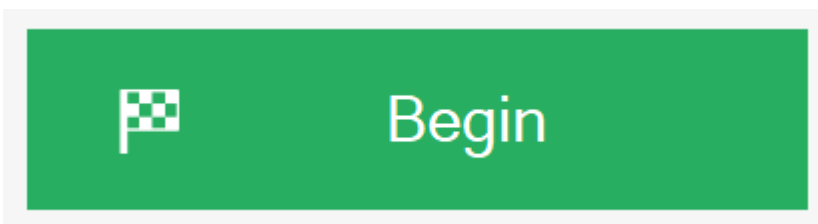
1. [Opening your account](#)
2. [Choose pre-order period](#)
3. [Select your items](#)
  - a. [Multi-part items](#)
4. [Confirming your order](#)

## Opening your account

*Last modified: 20 March 2023*

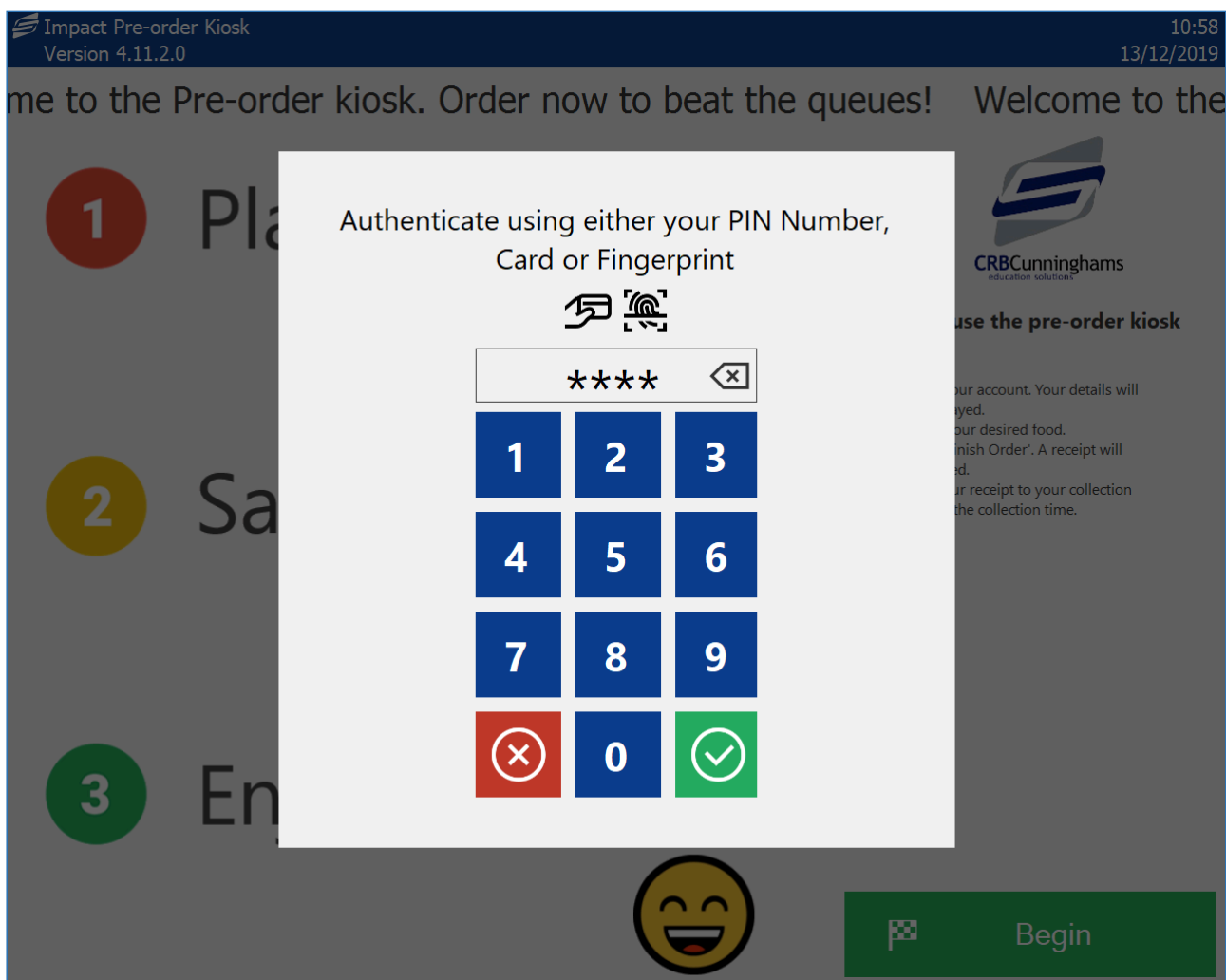
Before you can place an order, you first need to open your account.

1. To start the process, press the **Begin** button from the bottom-right corner.

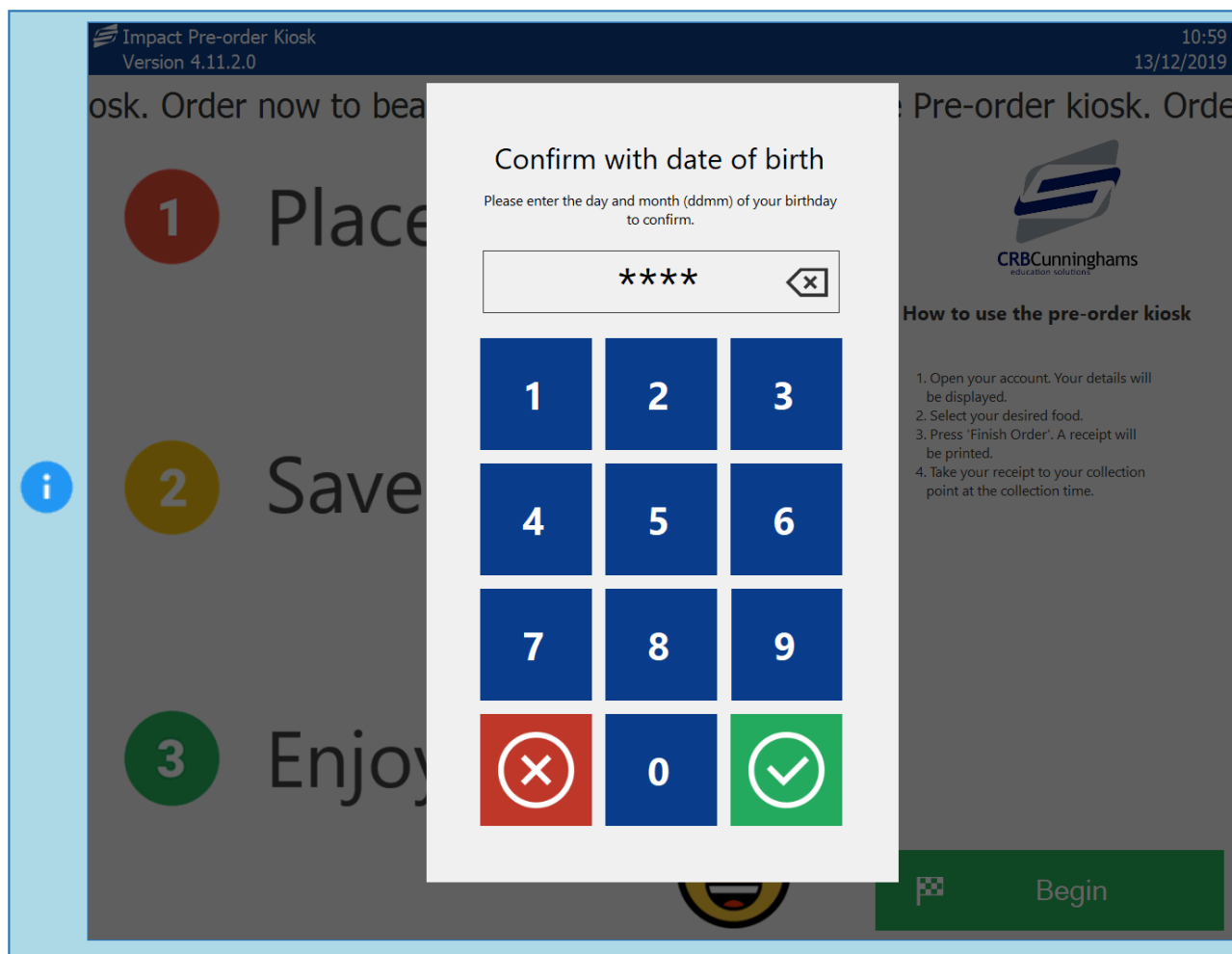


If you are using a card or fingerprint to find your account you can skip pressing the Begin button.

2. Present your card, place your finger onto the biometric reader, or enter your PIN onto the onscreen keypad.



If you use PIN or cards, the school may have enabled two-factor authentication. This requires you to enter your date of birth in a 4-digit, day and month format (e.g. 0512 = 5th December) to confirm that it is you and not someone else using your PIN or card.



## Choose pre-order period

When your account is opened, you will need to choose when you are ordering for.

*Last modified: 20 March 2023*

Impact Pre-order Kiosk  
Version 4.11.2.0

14:22  
13/12/2019

Allan, Lara (Y12C4)

Pre-order for :

**Morning break**  
Mon  
16/12/2019  
11:00

**Lunch**  
Mon  
16/12/2019  
13:00

Logout Pending Orders

1. Select the pre-order period that you wish to make your order for.




Even if only one period is available, we want the user to knowingly select the order period so that it reduces the opportunity for mistakes.

2. If the kiosk only has a single collection point configured, this will automatically be selected and the user taken to the order screen. If more than one collection point is available, the user will need to choose where they wish to collect their order from. Once selected, they will be taken to the order screen.

Impact Pre-order Kiosk  
Version 4.11.2.0

15:15  
13/12/2019



Allan, Lara (Y12C4)

Pre-order for :

Morning  
break  
Mon  
16/12/2019  
11:00


Lunch  
Mon  
16/12/2019  
13:00


Collection point :

Dining hall

Reception

Sixth form

 Logout


 Pending Orders

## Selecting your items


*Last modified: 20 March 2023*

Once the pre-order period (and collection point) has been selected, you can start selecting the items that you wish to purchase. Menus appear down the left hand side and the products within that menu to the right.






**Impact Pre-order Kiosk**  
 Version 4.11.2.0

14:25  
 13/12/2019



Allan, Lara (Y12C4)  
 Spent Today: £0.00  
 Limit: £5.00  
 Balance: £6.88


 Mon 16/12/2019 @ 11:00  

 Dining hall

**Sandwiches**  
 Min: 1 Max: 2


0/2 Please select at least 1 and no more than 2 items from this section


Snacks  
 Drinks


Bacon Sandwich £1.20	Sausage Sandwich £1.20	Cheese Sandwich £1.10	Ham Sandwich £1.15
Tuna Sandwich £1.10	Custom Sandwiches/ Baguette/ Wrap From £1.80		

No Items Yet


Total: £0.00


 Cancel Order



 Finish Order


 Dependant on the menu configuration, menus may have rules that you need to meet to successfully place an order, such as a minimum/maximum number of selections from a menu, minimum/maximum number of items, or a minimum/maximum total spend. Menus that have minimum/maximum rules will have a coloured circle next to them with the rules below the menu name. When the circle is red, the rule has not been met, when it is green, you have successfully met the criteria for that menu. You will also need to spend within your daily limit if applicable.



1. Select the menu from the list on the left.
2. Press the button for an item. This will add it to your basket.


**Impact Pre-order Kiosk**  
 Version 4.11.2.0

14:25  
 13/12/2019



**Allan, Lara (Y12C4)**  
 Spent Today: £0.00  
 Limit: £5.00  
 Balance: £5.68


**Mon 16/12/2019 @ 11:00**  

**Dining hall**

**Sandwiches**  
 Min: 1 Max: 2

1/2 Please select at least 1 and no more than 2 items from this section

Snacks

Drinks

Bacon Sandwich  
£1.20

Sausage Sandwich  
£1.20

Cheese Sandwich  
£1.10

Ham Sandwich  
£1.15

Tuna Sandwich  
£1.10

Custom Sandwiches/ Baguette/ Wrap  
From £1.80

Bacon Sandwich  
Remove  
£1.20

Total: £1.20


Cancel Order

Finish Order




Some items are 'multi-parts'. These items have additional stages to meet. See the next section for more information.


- Repeat until you have selected all your items.
- To remove an incorrectly added item, press **remove** from underneath the item in the basket area on the right-hand side of the screen.



**Impact Pre-order Kiosk**  
 Version 4.11.2.0

14:25  
 13/12/2019



**Allan, Lara (Y12C4)**  
 Spent Today: £0.00  
 Limit: £5.00  
 Balance: £4.48


**Mon 16/12/2019 @ 11:00**


**Dining hall**

**Sandwiches**  
 Min: 1 Max: 2

2/2 Please select at least 1 and no more than 2 items from this section

Snacks

Drinks

Bacon Sandwich  
£1.20

Sausage Sandwich  
£1.20

Cheese Sandwich  
£1.10

Ham Sandwich  
£1.15


Tuna Sandwich  
£1.10


Custom Sandwiches/ Baguette/ Wrap  
From £1.80

Bacon Sandwich  
Remove £1.20

Sausage Sandwich  
Remove £1.20

Total: £2.40



 Cancel Order


 Finish Order


*Last modified: 20 March 2023*

## Multi-part items



Multi-part items are used when you are required to choose additional options to make up that item. These are typically used for meal deals or custom items. The example below is for a custom sandwich where the user is required to choose what bread type they want, what filling, which salad and sauce options.


**Impact Pre-order Kiosk**  
 Version 4.11.2.0

14:33  
 13/12/2019



**Allan, Lara (Y12C4)**  
 Spent Today: £0.00  
 Limit: £5.00  
 Balance: £3.48


**Mon 16/12/2019 @ 11:00**  

**Dining hall**

Custom Sandwiches/ Baguette/ Wrap

**Custom Sandwiches/** £1.80

**Bread type**  
 Min: 1 Max: 1

**Filling**  
 Min: 1 Max: 1

**Salad**  
 Max: 4

**Sauce**  
 Max: 2

Please select 1 items from this section



Sandwich - White Bread  
 £0.00

Sandwich - Brown Bread  
 £0.00

Baguette - White Bread  
 £0.50

Baguette - Brown Bread  
 £0.50

Total: £1.80

 Cancel Item
  Finish Item

Multi-parts can be identified from the ordering screen as they will say 'From' before the price.



Depending on the configuration, additional options may be available at extra cost. Items that display £0.00 are included in the cost, but items not £0.00 priced will be added on-top of what the main item purchased is.

Just like the main order screen, the options available are split into different menus. We call these multi-part menus 'Stages'. These stages will usually have minimum and maximum requirements. For example, if a user is building a custom sandwich, they must choose a bread type and they can't choose more than one. Whereas for the salad options, you may not want to force a user to select any options but you may want to limit how many can be added.

1. Select the option from the menu stage. Just like from the main order screen, a green badge with the number of times it is in the basket will be displayed on the button. When you hit the maximum for that stage, you will be automatically moved to the next stage.  
If you meet the minimum requirements for a stage, but you don't wish to order the maximum allowed, you can navigate to the next stage by pressing the header button.

**Impact Pre-order Kiosk**  
Version 4.11.2.0

14:37  
13/12/2019

Allan, Lara (Y12C4)  
Spent Today: £0.00  
Limit: £5.00  
Balance: £3.48

Mon 16/12/2019 @ 11:00  
Dining hall

Custom Sandwiches/ Baguette/ Wrap

Bread type: 1/1 (Min: 1 Max: 1)  
Filling: 1/1 (Min: 1 Max: 1)  
Salad: 3/4 (Max: 4)  
Sauce: 0/2 (Max: 2)

Please select no more than 4 items from this section

Item	Count	Price
Cucumber	1	£0.00
Lettuce	1	£0.00
Red Onion	1	£0.00
Tomato	1	£0.00

Custom Sandwiches/ £1.80  
Sandwich - White Bread £0.00  
Chicken £0.00  
Cucumber £0.00  
Red Onion £0.00  
Tomato £0.00

Total: £1.80

Cancel Item Finish Item

- If you wish to make a change to a previous stage, you can navigate back to the stage to make another choice. If you have reached the maximum for that stage, all options will be greyed out. You will need to remove an item from the basket using the 'Remove' button before you can select another.
- Once finished, press the green **Finish item** button in the bottom-right corner and the item will be added to your basket.

*Last modified: 20 March 2023*

## Confirming your order

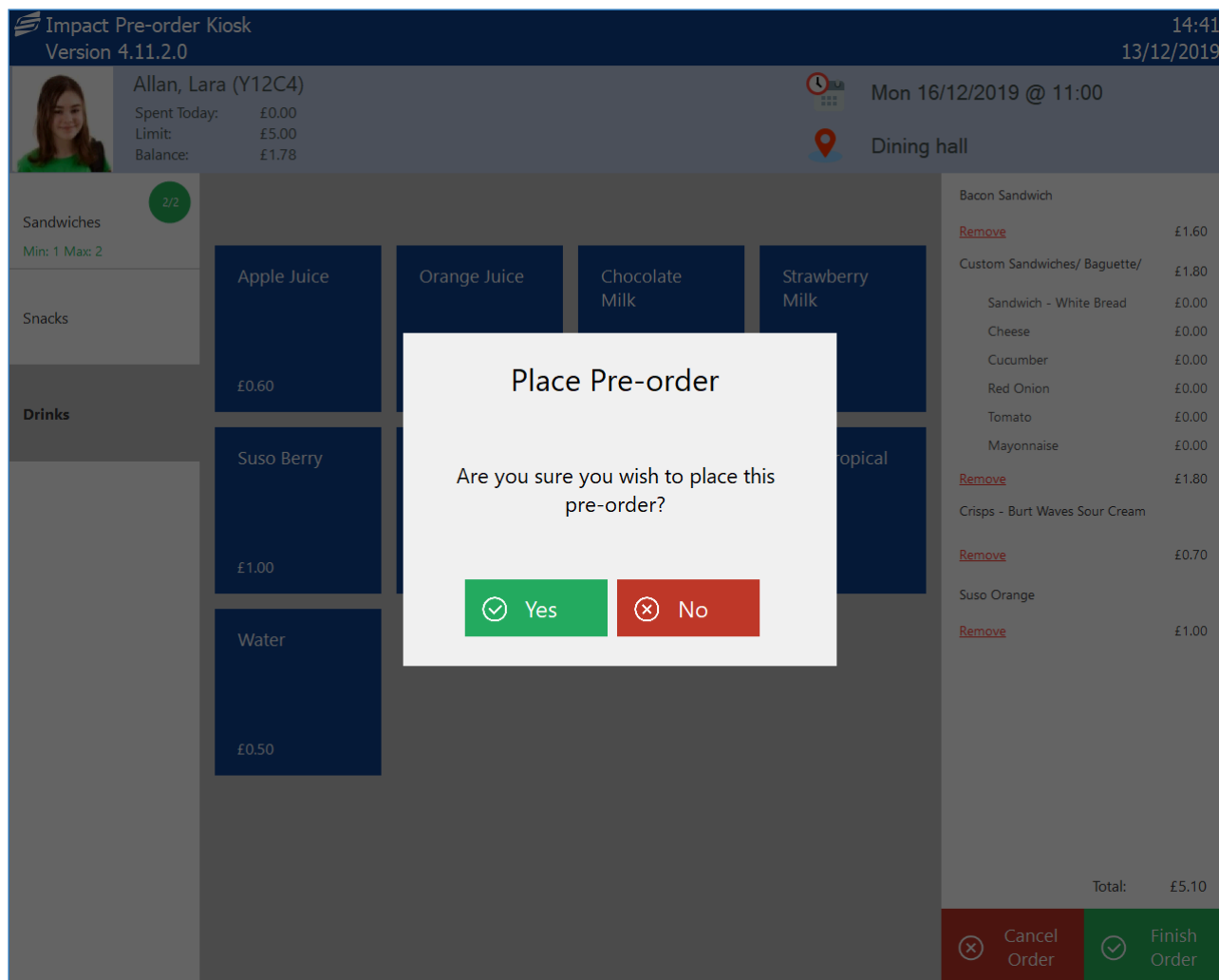
Once you have selected all of the items that you wish to purchase, you need to finish the transaction.

- Press the green **Finish Order** button in the bottom right of the screen.

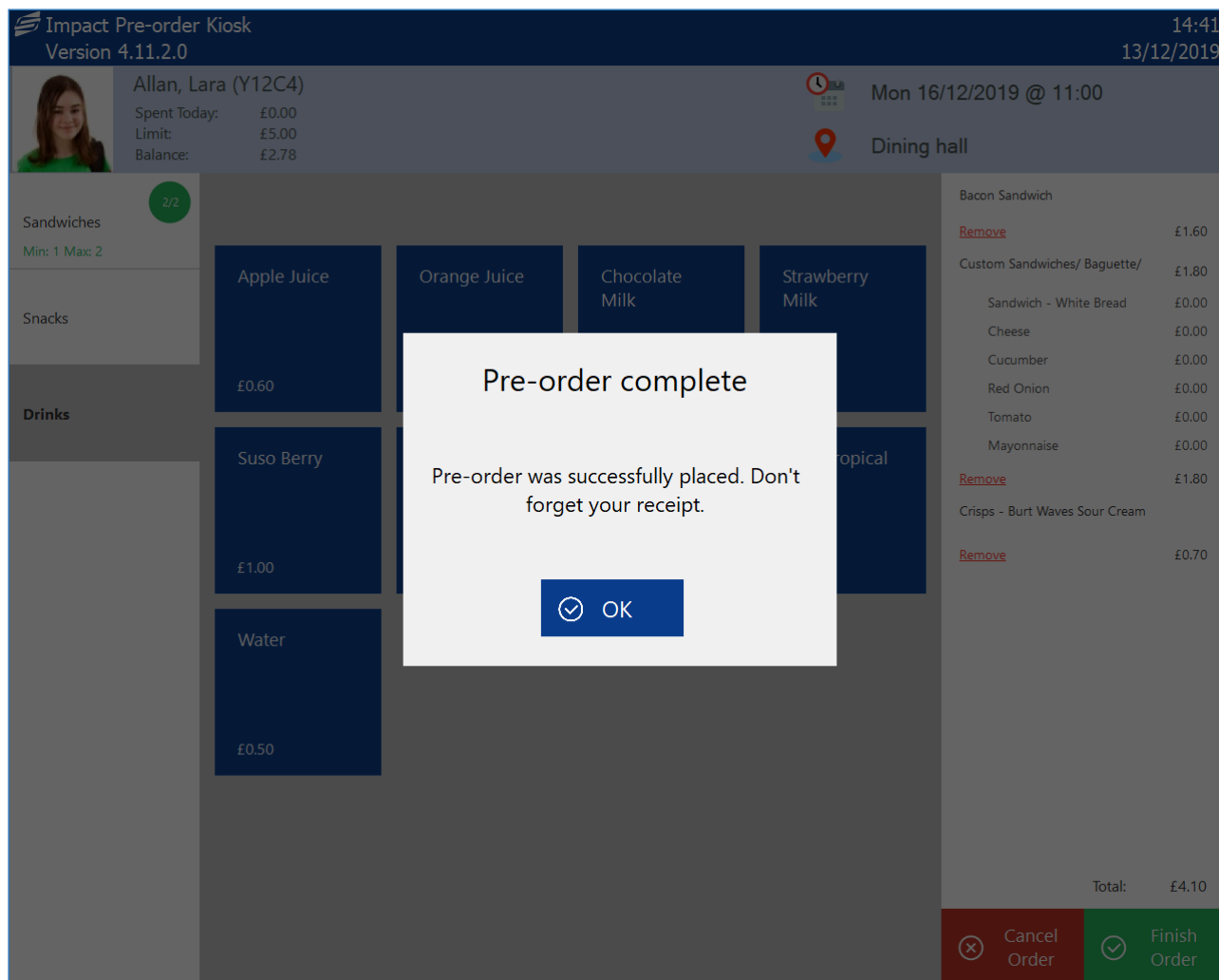
Total: £5.10

Cancel Order Finish Order

- You will be prompted to confirm your order. Press **Yes** to confirm. Pressing **No** will return you to the order screen to make additional changes.



3. Your order will be sent to the server for confirmation. If successful, a message will be displayed and a receipt will be printed. Press **OK** to finish.



The above prompt will disappear automatically after a few seconds if the user does not press OK.

## Managing the kiosk

*Last modified: 20 March 2023*

The pre-order kiosk application is designed to run unattended on a kiosk within the school. Day-to-day, there should be very little requirement for any management of it, but from time-to-time, you may need to perform some simple management tasks such as changing the time the kiosk is allowed to be used and to turn it off.

## Accessing the kiosk management

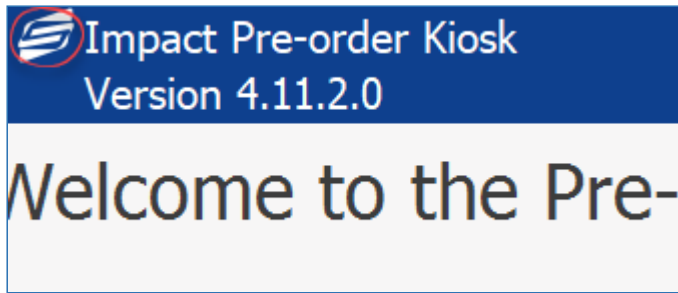
*Last modified: 20 March 2023*

As the kiosk is designed to run unattended within the school, CRBC have deliberately made accessing the management functions of the kiosk fairly difficult. To access the configuration of the kiosk:



Your login will need the 'Pre-order kiosk operator' permission to log in.

1. Press the CRB Cunninghams logo (top-left corner) 10 times in succession.



- This will take you to the login screen. Use your credentials to log in and press the green **Login** button.



When logged in, you will have access to the kiosk. The areas that you have access to are limited depending on your user permissions. For the purpose of this manual, it is assumed that you have access to all areas.



Impact Pre-order Kiosk
Administrator, Administrator
16/12/2019
12:54

Software version4.11.2.0  
Communications version3  
Computer name  
IP address





Location details

Location22  
Location nameKiosk  
Super group

Kiosk details

Fast printing enabled☒  
Printer nameCOM3  
Allow pre-order for next available date☒  
Minimum user credit£0.00  
Maximum incorrect PIN attempts5  
Maximum receipt reprints1  
Idle timeout30.0  
Home page textWelcome to the Pre-order kiosk. Order now to beat the queues!  
Opening times06:00 - 18:00  
Home page image

No image data


 Configure
 Home
 Status

The different areas are accessed using the buttons on the menu bar at the bottom of the screen. These options are:



This button takes you to the power options where you can close the kiosk, reboot it or shut it down entirely.



The Configure menu takes you to the configuration screens where you can manage the configuration on the kiosk (Requires the 'Edit locations' permission).



The Home option logs the user out and returns to the home screen.

*Last modified: 20 March 2023*

## Power options



Pressing the power button, will give you three options; Desktop, Reboot, and Shutdown. Each of these are discussed below.

Impact Pre-order Kiosk Administrator, Administrator 16/12/2019 13:02

Software version: 4.11.2.0

### SHUTDOWN

*impactfusion*

Enter the desktop password

7	8	9
4	5	6
1	2	3
0	<	C

Please select from one of the following exit options

Desktop	Reboot	Shutdown	Cancel
---------	--------	----------	--------

Configure Home Status



### Desktop

The desktop option will close the kiosk application and take you to the desktop, leaving the device running the kiosk on. This is useful when you wish to open a different application (for example, you are running the kiosk software on a Point of Sale and wish to switch to the Point of Sale application).

Depending on your kiosk's configuration, you may or may not be required to enter a desktop password. The desktop password is designed to stop unauthorised users accessing the desktop of the PC. If an onscreen keypad is displayed, you will need to enter the correct password before being able to press the 'Desktop' button.



If configured, the desktop password will have been given to the admins of the system. If you are an admin and require the password, please contact support.



## Reboot

Pressing Reboot will close the kiosk application and immediately reboot the device. When the device turns back on, the kiosk software will automatically start back up.



If the kiosk software is running on a Point of Sale device, the automatic startup of the application may be disabled, in which case you will need to start the application manually.



## Shutdown

Pressing the Shutdown button will close the kiosk application and immediately shut down the device.



When using the shut down option, you will require access to the power button. This button may require a key to be accessed.

## Configuration options

*Last modified: 20 March 2023*



The configuration options are only available to users that have the 'Edit locations' permission. From within these screens, the configuration of the kiosk can be altered.

## General

*Last modified: 20 March 2023*

This screen allows you to turn on/off authentication options.

**Connect to Impact Fusion server**

**Attached peripherals**  
Configure the attached peripherals for this location.

General | Pre-order kiosk | User details | Fast printing

**Authentication options**

Biometrics ☒ Login? ☒ User authentication?

PIN entry ☒ Login? ☒ User authentication? ☒ DOB confirm?

Cards ☒ Login? ☒ User authentication? ☐ DOB confirm?

Card reader ACS A... ▼

**Startup / Shutdown**

☐ Shutdown to desktop requires password?

**Hardware**

Keyboard reader Card & PIN ▼

☐ Show mouse cursor

< Back Next > Cancel

Section	Setting	Description
Authentication options	Biometrics - Login?	Allow users to use biometrics to log into the management screen (requires iDStore and a biometric scanner connected).
	Biometrics - User authentication?	Allow users to use biometrics to open their account and place an order (requires iDStore and a biometric scanner connected).
	PIN entry - Login?	Allow users to use a PIN to log into the management screen.
	PIN entry - User authentication?	Allow users to use a PIN to open their account and place an order.
	PIN entry - DOB confirm?	When enabled, users opening their with a PIN account will be asked to enter their date of birth in a ddmmy format (e.g 0512 = 5th December) as an additional security measure. This is to try and prevent users guessing other users PINs.
	Cards - Login?	Allow users to use a registered card to log into the management screen.

	Cards - User authentication?	Allow users to use a registered card to open their account and place an order (requires a connected card reader).
	Cards - DOB confirm?	When enabled, users opening their account with a card will be asked to enter their date of birth in a ddmm format (e.g 0512 = 5th December) as an additional security measure. This is to try and prevent users from using other users cards.
	Card reader	Select the card reader for the kiosk to use.
Startup / Shutdown	Shutdown to desktop requires password?	When enabled, a desktop password will be required to access the Desktop after pressing the 'Power' button.
Hardware	Keyboard reader	Not really used for kiosk. Keep as Card & PIN generally.
	Show mouse cursor	When enabled, a cursor will be displayed on the kiosk. This is usually left not enabled as the kiosk is typically used on a touchscreen.
Printing	Receipt printer	Only visible when 'Fast printing' is not enabled. Fast printing is used for receipt printers. If fast printing is not enabled, select which printer to use.

*Last modified: 20 March 2023*

## Pre-order kiosk

This section contains settings for the behaviour of the pre-order kiosk application.

**Connect to Impact Fusion server**

**Attached peripherals**  
Configure the attached peripherals for this location.

General Pre-order kiosk User details Fast printing

☒ Allow pre-order for next available date

Minimum user credit £0.00

Idle timeout 30 Maximum PIN attempts 5 Maximum receipt reprints 1

Home page text  
Welcome to the Pre-order kiosk. Order now to beat the queues!

Basic Collection points

Home page image  
No image data  
Edit  
Delete

Advertisement

Opening times

Start time	End time
06:00	18:00

Add  
Edit  
Delete

< Back Next > Cancel

Section	Setting	Description
	Allow pre-order for next available date	When enabled, users can order for the current day and a day ahead.
	Minimum user credit	Users wishing to use the kiosk must have at least this amount on their account.
	Idle timeout	The amount of time (in seconds) that the kiosk will keep an account open before automatically closing the account after inactivity.
	Maximum PIN attempts	The kiosk will temporarily lock after this many failed PIN attempts. This is designed to try and prevent users from guessing users' PIN numbers as the kiosk is typically in an unattended location.
	Maximum receipt reprints	The number of times a user can reprint a receipt for a placed order. For example, setting this to '1' means that they can reprint a receipt once (so in theory can have two copies as one gets printed at the time of order). Reprinted receipts

		have 'Duplicate copy' at the header.
	Home page text	This is the text that scrolls across the top of the home screen.
Basic	Home page image	This image will be used in the top-right of the kiosk screen instead of the CRB Cunninghams logo.
	Opening times	The kiosk can only be used to place orders within the following times. Multiple times can be created (e.g. 06:00 - 08:45, 11:00 - 11:20, 14:00 - 18:00).
Collection points	Collection points	Which collection points can users using this kiosk choose to collect their order from. Additional collection points are created within the Fusion Back Office application under 'System settings' > 'Collection points'.

*Last modified: 20 March 2023*

## User details

This section contains settings for what information is displayed for the open user account.

Connect to Impact Fusion server

Attached peripherals  
Configure the attached peripherals for this location.

General Pre-order kiosk **User details** Fast printing

☒ Show available credit

☒ Show daily limit

☒ Show spent today

< Back Next > Cancel

Section	Setting	Description
---------	---------	-------------

Show available credit	When enabled, displays how much credit a user has in their account for the selected pre-order period.
Show daily limit	When enabled, displays the users daily limit.
Show spent today	When enabled, displays how much the user has spent for the selected pre-order period.

*Last modified: 20 March 2023*

## Fast printing

This section contains settings for the receipt that is printed when a user places an order.

Connect to Impact Fusion server

Attached peripherals  
Configure the attached peripherals for this location.

General Pre-order kiosk User details **Fast printing**

☒ Enable fast printing

Port: COM3 Test  
Baud: 9600

Details

☒ School name ☒ Transaction  
☒ User name ☒ Date / Time

Pre-order settings

☒ Collection point  
☒ Menu names  
☒ Year/Class

Footer

☒ Line 1: Thank you for your order!  
☒ Line 2: Don't forget to collect it.  
☒ Barcode (Pre-order only)

Sales receipt preview Pre-order receipt preview Balance topup receipt preview

Pre-order receipt  
Preview School  
Pre-order :  
Transaction : 1  
Name : Preview User  
Year / Class : 1/1  
Date / Time : 16/12/2019 13:00:48  
Pre-order for : 16/12/2019 13:00:48  
Collection point : Preview Point

Product	Qty	Price
(Menu 1)		
Item 1	1	1.00
(Menu 2)		
Item 2	1	1.00
Total	2	2.00
Account		2.00

16/12/2019 13:00  
Thank you for your order!  
Don't forget to collect it.

< Back Next > Cancel

Section	Setting	Description
	Enable fast printing	When enabled, this turns on printing using a fast receipt printer (requires a compatible serial receipt printer).
	Port	Select the port which the receipt printer is connected to.
	Baud	Select the baud rate of the connected printer.
	Test	Allows you to test the Port and Baud settings. This should print off a receipt when pressed using the selected settings.




Details	School name	(Can't be disabled) Displays the name of the school on the receipt for where the order is placed.
	Transaction	(Can't be disabled) Displays the transaction number for the order being placed.
Pre-order settings	Collection point	When enabled, displays the collection point for the placed order.
	Menu names	When enabled, displays the name of the menu above the purchased product. For example, if a user purchased a bottle of water from the drinks menu, the receipt will list (Drinks) Water.
	Year/Class	When enabled, displays the users year and class on the receipt.
Footer	Line 1	Free text which allows you to enter some custom text to be printed on the bottom of the receipt (max 30 characters).
	Line 2	Free text which allows you to enter some custom text to be printed on the bottom of the receipt (max 30 characters).
	Barcode (pre-order only)	When enabled, displays a barcode at the bottom of the receipt.

*Last modified: 20 March 2023*

## Logging out (Home)



Pressing the Home button will quickly close the management screen, log you out and return the software to the home screen ready for users to place orders.


 Impact Pre-order Kiosk  
Version 4.11.2.0

15:07  
13/12/2019

Welcome to the Pre-order kiosk. Order now to beat the queues! Welcome


1

Place your order




2


Save time



3


Enjoy your food!



  
CRBCunninghams  
education solutions

**How to use the pre-order kiosk**

1. Open your account. Your details will be displayed.
2. Select your desired food.
3. Press 'Finish Order'. A receipt will be printed.
4. Take your receipt to your collection point at the collection time.

 **Begin**

## Troubleshooting the kiosk: “Kiosk Currently Closed”

*Last modified: 20 March 2023*

Occasionally the kiosk will display a screen that says that “The Kiosk is currently closed” (like the one below) that indicate that there may be an issue with the kiosk. These are usually pretty minor and require no user intervention before the kiosk becomes fully operational again.

## Kiosk Currently Closed

Opening Times: 06:00 - 15:00

- Opening times: 00:00 - 00:00
- There are no periods available for pre-order
- The printer needs user attention
- The school is closed today
- Too many failed PIN attempts

*Last modified: 20 March 2023*

### Opening times: 00:00 - 00:00

The kiosk is configured with opening times. Only during these times can the kiosk be used to place orders and outside these times the following screen will be displayed.

**Kiosk Currently Closed**

Opening Times: 06:00 - 15:00

## Solution

If the times displayed by the kiosk are correct, wait until the time when the kiosk is open. If the opening times need to be altered, see the section on [Configuration](#).

*Last modified: 20 March 2023*

## There are no periods available for pre-order

The kiosk can only be used when there are upcoming periods that are available for a user to order for. For example, if the kiosk is configured to only allow ordering for today, when all pre-order periods for today have already passed, this screen will be displayed.

## Kiosk Currently Closed

There are no periods available for pre-order.

### Solution

This could be one of two possible issues. Firstly, there are no more pre-order periods available for today and the kiosk is not configured to allow ordering for the next available day. Wait until the next day when the pre-order periods become available. If you wish to allow ordering for the next available day, you can alter the configuration to allow this.

The second possible issue is that the pre-order layout does not contain any available pre-order periods (i.e. a rotational menus and the weeks have ran out).



Information on how to alter your pre-order layout can be found [here](#).

*Last modified: 20 March 2023*

### The printer needs user attention

If there is an issue with the attached receipt printer, the below screen will be displayed.

## Kiosk Currently Closed

The printer (serial printer on COM3) needs user attention

### Solution

Ensure that the receipt printer is powered on and all cables are fully connected, the printer has paper and the paper roll is fitted correctly. Reboot the kiosk and try again. If the problem persists, contact support.

*Last modified: 20 March 2023*

### The school is closed today

The kiosk will only work on days where the school calendar has the school listed as Open.

## Kiosk Currently Closed

The school is closed today.

### Solution

If today is a legitimate closed day, the kiosk will be fine on the next open day. The kiosk uses the school dates entered in the school calendar. If the calendar is incorrectly configured, you will need to correct this within the Fusion Back Office application and 'System settings' > 'School calendar'.

*Last modified: 20 March 2023*

### Too many failed PIN attempts

The kiosk has a setting that will cause it to temporarily suspend itself when a PIN has been entered incorrectly multiple times. This is designed to prevent users from attempting to guess other users' PINS in an unattended environment.

## Kiosk Currently Closed

Too many failed PIN attempts.

### Solution

The kiosk will eventually come back after a short period of time (30 seconds). The number of failed PIN attempts can be upped if required in the configuration screen.

*Last modified: 20 March 2023*



# General

This section is to be used to group articles/pages that don't have a direct relationship to any other sections.

## Allergens

*Last modified: 20 March 2023*

The allergens functionality in Fusion has been enhanced to offer a more robust method of protecting users from purchasing items that contain allergens that they are allergic to. Previously schools were free to create and manage a list of 'Restrictions' which were used for this purpose.

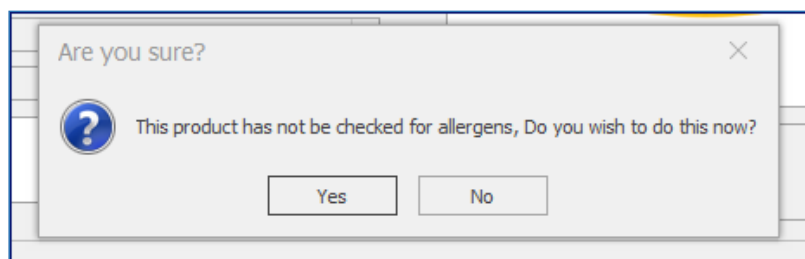
<https://www.food.gov.uk/business-guidance/allergen-guidance-for-food-businesses#allergens>

While the ability to create restrictions is still available and useful, we are now including a separate list of the 14 allergens recognised by the UK Food Standards Agency. These allergens are non-editable and allow us to more clearly manage a user's/product's allergen information and make it more clear to the operator why a user is unable to purchase an item.

Additionally, a dedicated list of standard allergens allows us to integrate with the recipe management system, Nutmeg, and in the future retrieve allergies of users from compatible MIS.

## Checked for allergens checkbox

When creating or editing a product, there is now a 'Checked for allergens' checkbox within the 'Allergens, Diets, & Restrictions'. This checkbox is used as a reminder to check the product for allergens. If you attempt to save changes without checking this checkbox, you will get a reminder and be asked if you want to do this now.



Pressing 'Yes' will open the 'Allergens' tab where you can set the allergen information for the product. Once complete, tick the 'Checked for allergens' checkbox to record that this product has been checked.

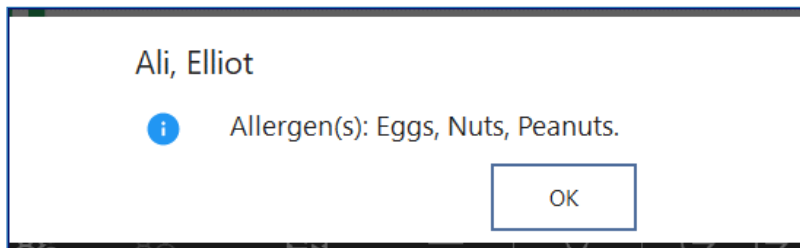
## Contains vs May contain

When setting the allergen information for a product, for each allergen, if the product is known to contain that allergen, you should set it to 'Contains'. If there is a potential that the product may contain the allergen, it can be set to 'May contains'. These function differently at the Point of Sale and are presented to pre-order users accurately.

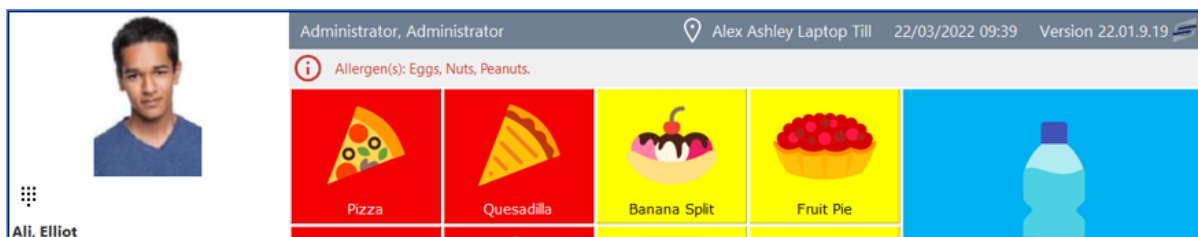
## Users with allergies

### Allergen messages

If a user has been set as having an allergy when their account is opened at the Point of Sale, an information message is presented to the operator. The operator needs to acknowledge this message before they are able to continue with the transaction.

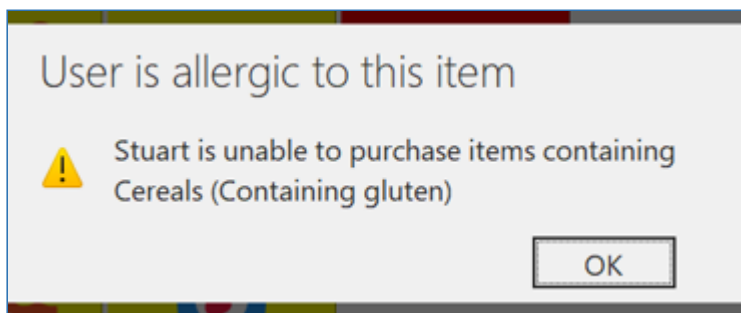


Once the message has been acknowledged, the message will appear as a banner at the top of the screen for the duration of that transaction as a reminder.

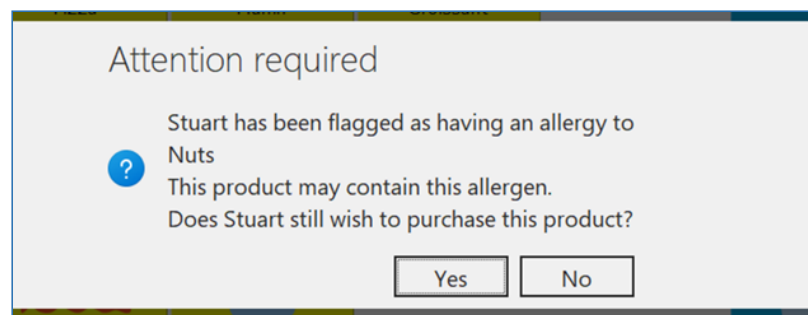


### Attempted purchase

When a user has been flagged as having an allergy when they attempt to purchase an item that is set as 'Contains' that allergen, the transaction will be prevented and the operator will be alerted as to why.

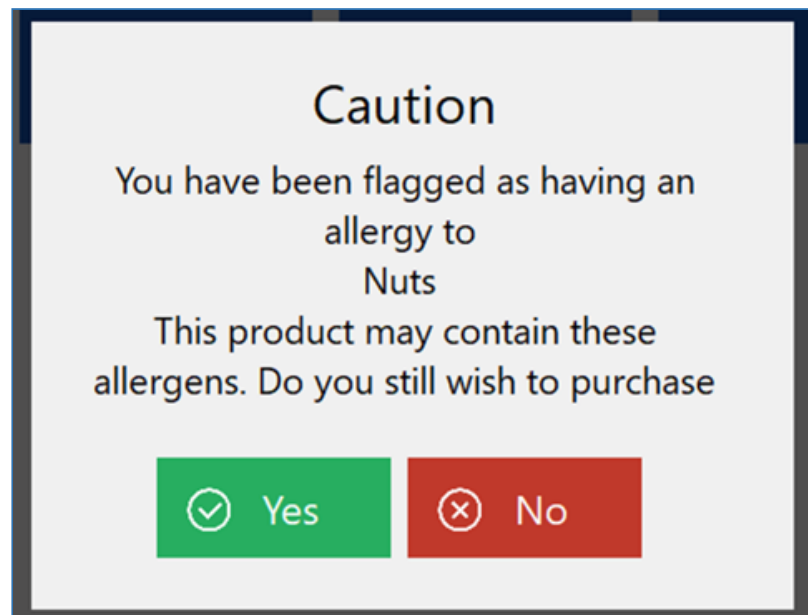
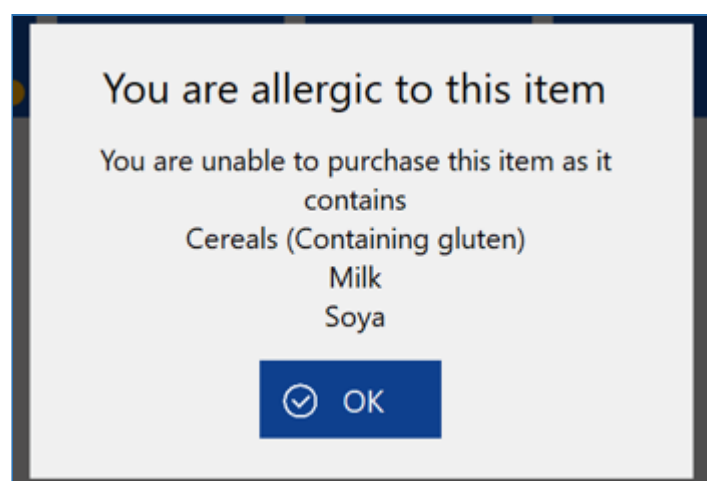


If the product is set to 'May contain' an allergen that the user is allergic to, an alert is presented to the operator asking them if the user is aware and if they still wish to purchase the item.



## Pre-order

Similar messaging will also appear on the pre-order kiosk, so that users are clear as to what allergens a product has, and if they can't purchase it they understand why.



The pre-order kiosk now also has a product information page so that users can view a products full information, including allergen details.



## Chocolate chip cookie

Cookies with Milk Chocolate Chunks. New, More Delicious Recipe.

Our Fox's cookies now taste even more delicious, our fabulous new recipe has more chocolate than ever.

At Fox's we understand that every biscuit needs to give you a little moment of pleasure.

✕

**Allergen information**

**Contains:** Cereals (Containing gluten), Milk, Soya

**May contain:** Nuts, Peanuts

**Dietary information**

**Suitable:** Halal, Kosher, Vegetarian

**Not suitable:** Vegan

**Nutritional information**

**Serving size:** 23g

Typical values	Per 100g	Per 23g serving
Energy	2,050.00kJ	471.50kJ
Energy	453.00kcal	104.19kcal
Fat	23.80g	5.47g
of which saturates	12.40g	2.85g
Carbohydrates	62.20g	14.31g
of which sugars	30.90g	7.11g
Fibre	1.90g	0.44g
Protein	5.70g	1.31g
Salt	0.49g	0.11g


**Five a day:** 1

**Per 100g:** Alcohol 10.00g, Beta-sitosterol 40.00mg, Brassicasterol 40.00mg, Campesterol 40.00mg, Copper 44.00mg

## Steak Pie

✕

**Allergen information**

 Allergen information for this product has not yet been confirmed. If you have allergy concerns, please speak to your school's kitchen before purchasing this item.

**Dietary information**

None specified

**Nutritional information**

None specified

## Restrictions

Restrictions will continue to function as before, so you can still prevent users from making purchases

of items for other reasons, such as if a parent does not want their child purchasing cakes or if a user has an allergy to an allergen that is not one of the 14 recognised ones.

## On upgrade

For existing Fusion clients, on an upgrade, we can convert the default restrictions to allergens. This will map any users and products to use the corresponding allergen and then delete the old restriction. For example, if a user was flagged with the 'Nuts' restriction, and/or any products also mapped to this restriction, they will now be set as having a 'Nut' allergy and the products will be set as contains nuts. The old 'Nuts' restriction is then deleted.

Any restrictions that were not created by Fusion can be converted to allergens using the 'Map restrictions' tool.

## New reports

Three new reports have been added to display allergen information.

### Product allergens

The product allergens report displays a matrix of all products in the system, and their allergen status.

# Product allergens

Provides a list of all products and their allergen information.

Report generated on 24/03/2022 at 17:24:10 using the below criteria

Group(s): All

Breakfast																
PLU Number	Product name	Checked	CEL	CER	CRU	EGG	FIS	LUP	MIL	MOL	MUS	NUT	PEA	SES	SOY	SUL
100256	Bacon	AA - 07/03/2022	—	—	—	—	—	—	—	—	—	—	—	—	—	
100263	Baked Beans		—	—	—	—	—	—	—	—	—	—	—	—	—	—
100261	Black Pudding	AA - 24/03/2022	—		—	—	—	—	—	—	—	—	—	—	—	
100269	Boiled Egg		—	—	—	—	—	—	—	—	—	—	—	—	—	—
100254	Create a Breakfast	AA - 24/03/2022														
100266	Fried Bread	AA - 24/03/2022	—		—	—	—	—	—	—	—	—	—	—	—	—
100258	Fried Egg	AA - 24/03/2022	—	—	—		—	—	—	—	—	—	—	—	—	—
100260	Fried Mushrooms	AA - 24/03/2022	—	—	—	—	—	—	—	—	—	—	—	—	—	—
100253	Full House Breakfast		—	—	—	—	—	—	—	—	—	—	—	—	—	—
100262	Grilled Tomato	AA - 24/03/2022	—	—	—	—	—	—	—	—	—	—	—	—	—	—
100257	Poached Egg	AA - 24/03/2022	—	—	—		—	—	—	—	—	—	—	—	—	—
100255	Sausage	AA - 24/03/2022	—	—	—	—	—	—	—	—	—	—	—	—	—	—

### User allergens (by allergen)

Grouped by allergen, this report provides a list of users that have had allergies applied to their user account

<b>User allergens (by allergen)</b>		
Grouped by allergen, this report provides a list of users that have had allergies applied to their accounts.		
Report generated on 24/03/2022 at 17:30:22 using the below criteria		
School(s): CRBCunninghams Secondary School		
User type(s): All		Status: Current only
<b>Celery</b>		<b>Number of users: 1</b>
<b>Person ID</b>	<b>Name (Year/Class)</b>	<b>User type</b>
717D4DDF-348F-454A-8768-61FDA5CC3550	Ali, Amy (11/C4)	Student
<b>Cereals (Containing gluten)</b>		<b>Number of users: 0</b>
No users with this allergen		
<b>Crustaceans</b>		<b>Number of users: 1</b>
<b>Person ID</b>	<b>Name (Year/Class)</b>	<b>User type</b>
EF60A9F2-FDA2-4085-BC6C-A39FB7367BBF	Alcock, Stuart (0/None)	Staff
<b>Eggs</b>		<b>Number of users: 2</b>
<b>Person ID</b>	<b>Name (Year/Class)</b>	<b>User type</b>
5C2BE011-8E66-4C14-978A-8F68C849924B	Ali, Elliot (10/C6)	Student
51B5A1EC-FA30-44FF-9288-27E9D956B344	Ali, Terry (8/C6)	Student
<b>Fish</b>		<b>Number of users: 3</b>
<b>Person ID</b>	<b>Name (Year/Class)</b>	<b>User type</b>
237FB94A-A288-44C9-AB77-C3D6C78E675F	Allan, Jennie (0/None)	Staff
SALES-01	Banks, Paul (0/STAFF)	Student
SALES20	Hunter, Gareth (0/None)	Student
<b>Lupin</b>		<b>Number of users: 0</b>
No users with this allergen		
<b>Milk</b>		<b>Number of users: 11</b>

## User allergens (by user)

Provides a list of users that have had allergies applied to their accounts.

User allergens (by user)		
Provides a list of users that have had allergies applied to their accounts.		
Report generated on 24/03/2022 at 17:32:11 using the below criteria		
School(s): CRBCunninghams Secondary School		
User type(s): All		Status: Current only
Staff		Number of users: 3
Person ID	Name (Year/Class)	Allergen(s)
EF60A9F2-FDA2-4085-BC6C-A39FB7367B8F	Alcock, Stuart (0/None)	Crustaceans, Nuts, Peanuts
237FB94A-A2B8-44C9-AB77-C3D6C78E675F	Allan, Jennie (0/None)	Fish
TEST01	Ashley, Alex (0/None)	Milk
Student		Number of users: 16
Person ID	Name (Year/Class)	Allergen(s)
717D4DDF-348F-454A-8768-61FDA5CC3550	Ali, Amy (11/C4)	Celery, Nuts
5C2BE011-8E66-4C14-978A-8F68C849924B	Ali, Elliot (10/C6)	Eggs, Nuts, Peanuts
51B5A1EC-FA30-44FF-9288-27E9D956B344	Ali, Terry (8/C6)	Eggs
011B46D7-5B91-459B-8BE3-191E3CF8B39B	Allan, Edward (12/C6)	Milk
4AF9D73B-6638-48F7-8465-6B9CE0C745FF	Allan, Lisa (12/C4)	Milk
38B3384A-144E-42F3-840B-2F7F2021DE1E	Allen, Katherine (9/C10)	Milk
E96EA17E-547B-44B6-A9C6-6E3ED3BD59C2	Armstrong, Jonathan (11/C10)	Nuts
SALES-01	Banks, Paul (0/STAFF)	Fish, Milk, Nuts
3837E7C3-FDAD-47AD-8B8E-5BE7A6CEFA9F	Black, Gary (11/C13)	Milk
853A2645-6B8B-430A-985B-AAC021197A06	Bryant, Riley (8/C6)	Milk

## Read more:

- [User: Allergens, dietary & restrictions](#)
- [Product: Allergens, diets & restrictions](#)

*Last modified: 20 March 2023*