



CRBCunninghams

education solutions



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Fusion

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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.

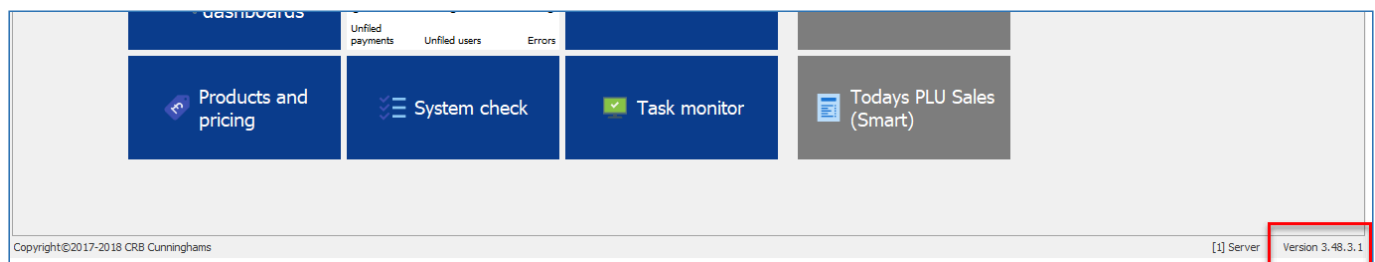
If you are already viewing this user guide in a .PDF, the online version can be found here:

<http://crbcunninghams.co.uk/manuals/fusion/440>.

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/>.

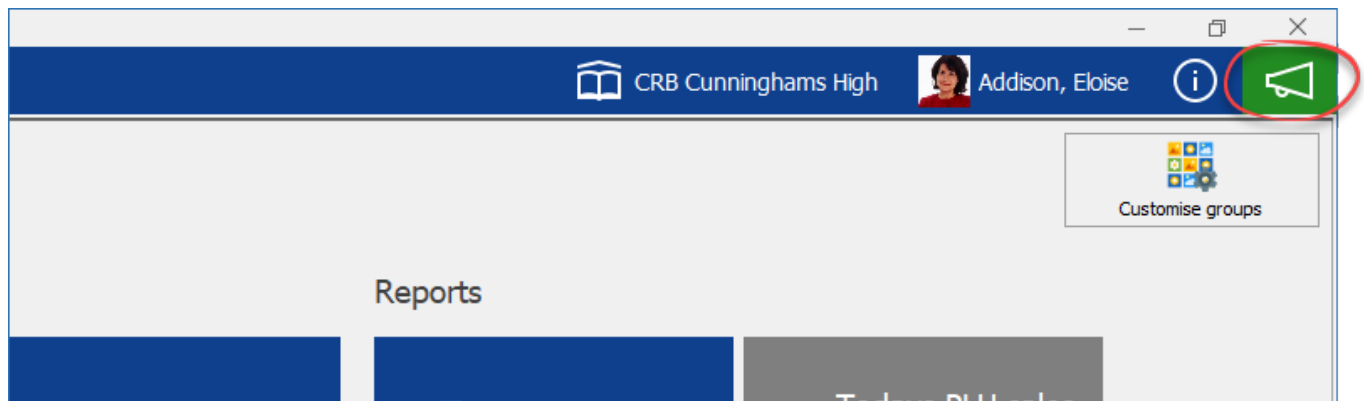
If you have any feedback, suggestions or feature requests, please contact us using this form

<http://crbcunninghams.co.uk/support/feedback/>.

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 Fusion feedback form. Once you have completed the form, press **Submit**. This will send your feedback directly to the Fusion product owner and will be discussed with the development team.



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

What's new?

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

Headline features

Allowance carry-over

This version of Fusion allows for any unspent allowances (such as Free School Meals and Supervisor allowances) to be configured to not be automatically be removed at the end of each day. Instead, a set of rules can be configured allowing eligible users to carry-over this unspent allowance to be used on a future day. Any allowance carried over will stay with the users account until spent or removed manually.

Override system date and time on the Point of Sale while offline

For schools that need to use offline mode to process sales, you can now specify the date and time that you wish to use for these transactions. Previously, all sales would be recorded using the date and time that is set on the till but occasionally you may need to process sales for a previous day.

Archive old layouts

After a few years of using Fusion, your layouts screen may become full of previous layouts that are no longer useful to you. We have now added the ability to archive these old layouts so that the layouts screen is easier to work with.

Improved Pre-order transactions screen

The pre-order transactions screen has had a few minor improvements to make it easier to work with, such as additional quick filters so it is easier to find the information that you are looking for.

Other general improvements

- Daily Summary report now also displays 'Head count' along with 'Transaction count'.
- Added ability to enter a description against products which will be used by Fusion Online.
(Requires latest Fusion Online Establishment service)
- A new 'Purse Balance' report which allows the user to show every users current balance for the selected purse.
- Users screen in back office now shows how many users have been selected.
- A new permission has been added for the management of User Types and allocation rules.

Bug fixes

General

- Fixed an issue with Parent Pay where clearing old forensic logs was timing out
- Fixed an issue with forensic logging when using sQuid
- Fixed an issue where ParentPay and sQuid were converting values meaning that meal deals would show as the higher value.
- Fixed an issue where a user update would overwrite ParentPay external balance.
- Users screen now shows the correct number of users in the grid after a filter is applied.
- Fixed an issue with PoS occasionally prompting "The data could not be retrieved from the server" while performing a lookup due to a database timeout.
- Fixed an issue where users that did not have the "Edit products" permission was incorrectly prevented from performing a cash up.

- Now allows pre-order cancellation time to be set earlier than the cut-off time.
- Fixed an issue where pre-orders made via Fusion Online were not able to be processed if containing multi-part items.
- Fixed an issue where you could not save a custom data source that used the Date field (not DateTime).
- Fixed issues with the 'Revaluation list' and 'Coin usage' reports showing data from other schools in the database.
- School calendar not configured prompt will no longer be displayed if the user does not have permission to configure that schools calendar.
- Fixed an issue where refunds were not showing on the correct days on the 'Sales summary', 'PLU Sales', and 'PLU Sales (Smart)' reports. They now show on the day the refund was performed like other reports, not the day the original sale occurred.

Pre-order transactions are now correctly considered on the 'Allowance Usage (Summary)' report.

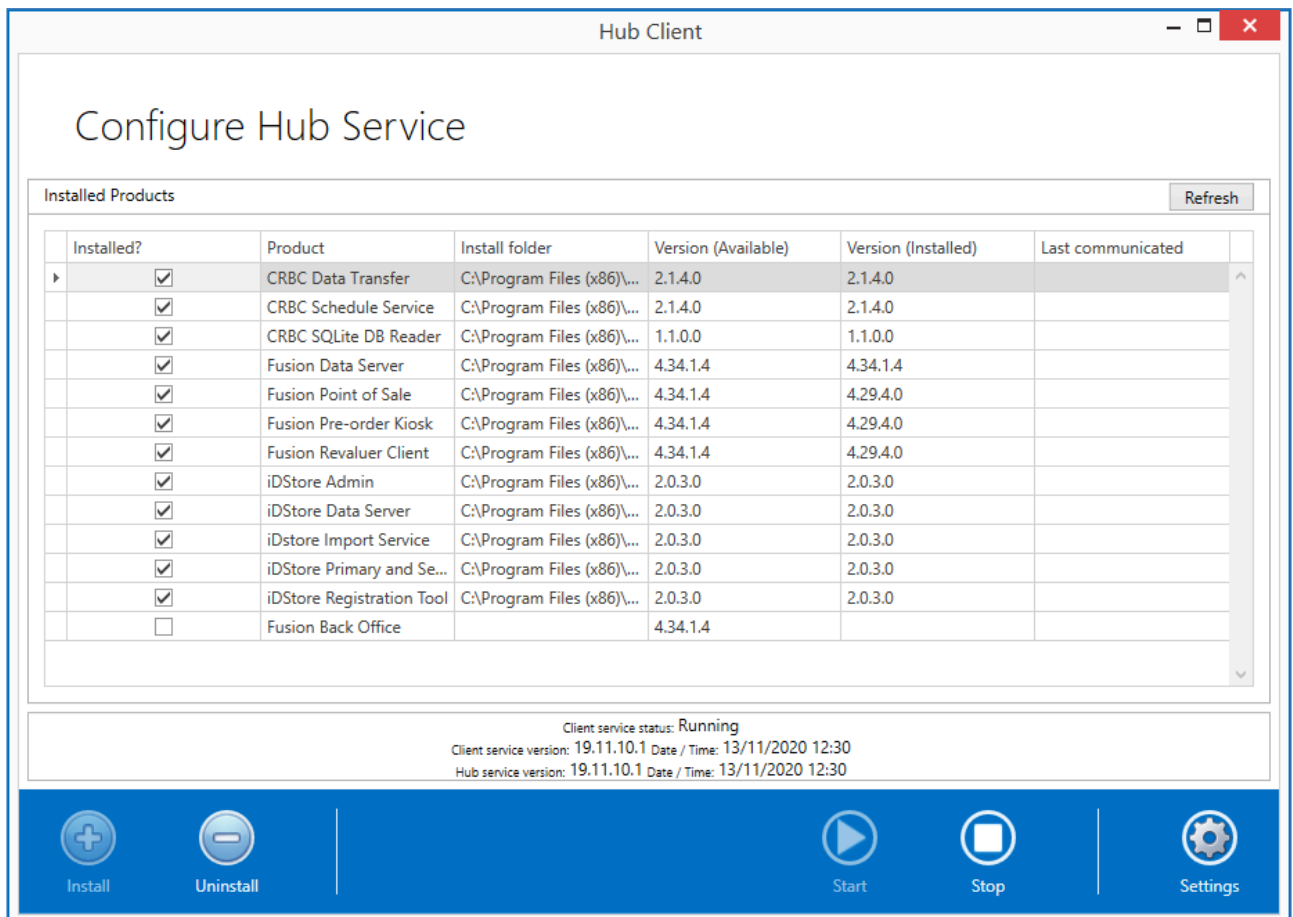
Installing Fusion Back Office client

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 an additional PC, or you may have replaced a PC that previously had the Back Office software on it.

i 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.



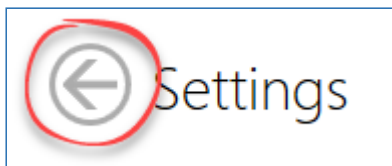
Configuring the CRBC Hub Client

i 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.
4. 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"/>

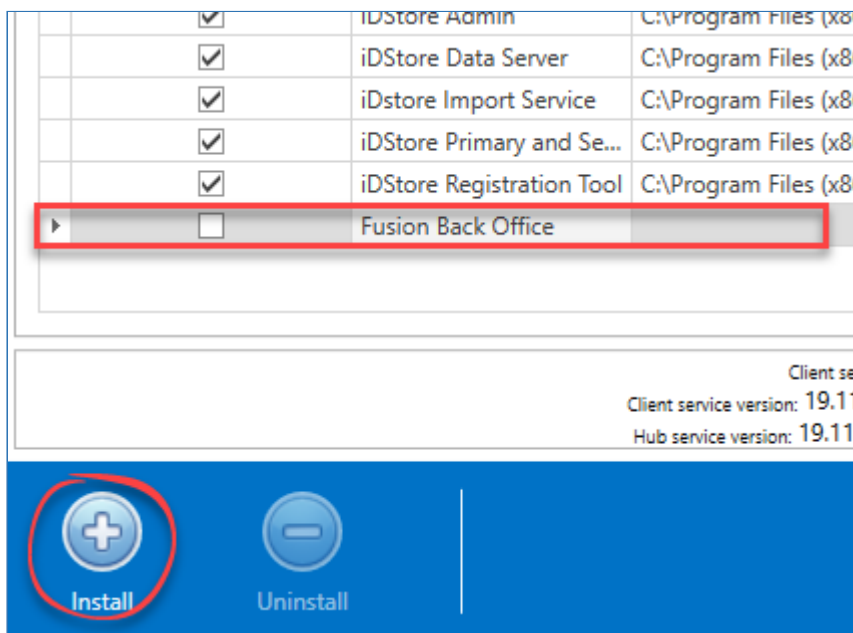
5. Click the **Back Arrow** button located at the top left of the program to return to the Hub Dashboard.



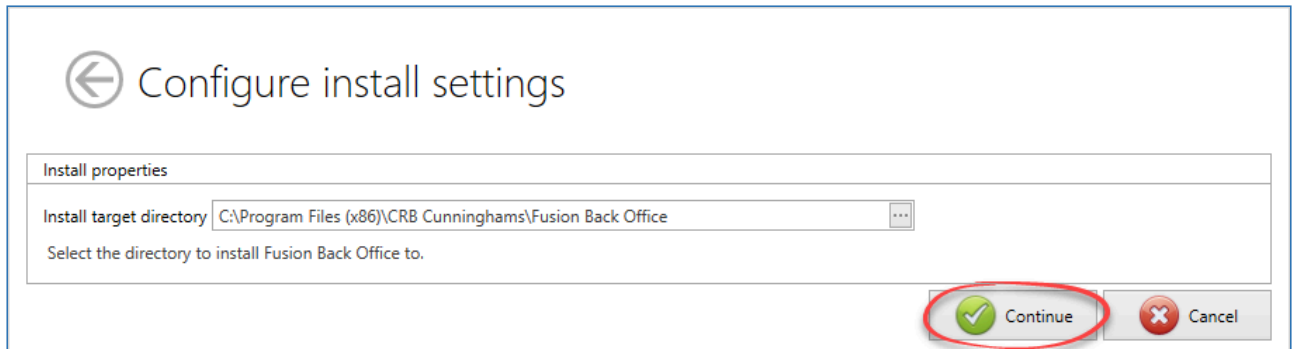
6. Click the **Start** button located at the bottom of the program to start the Hub Client server.

Installing Fusion Back Office

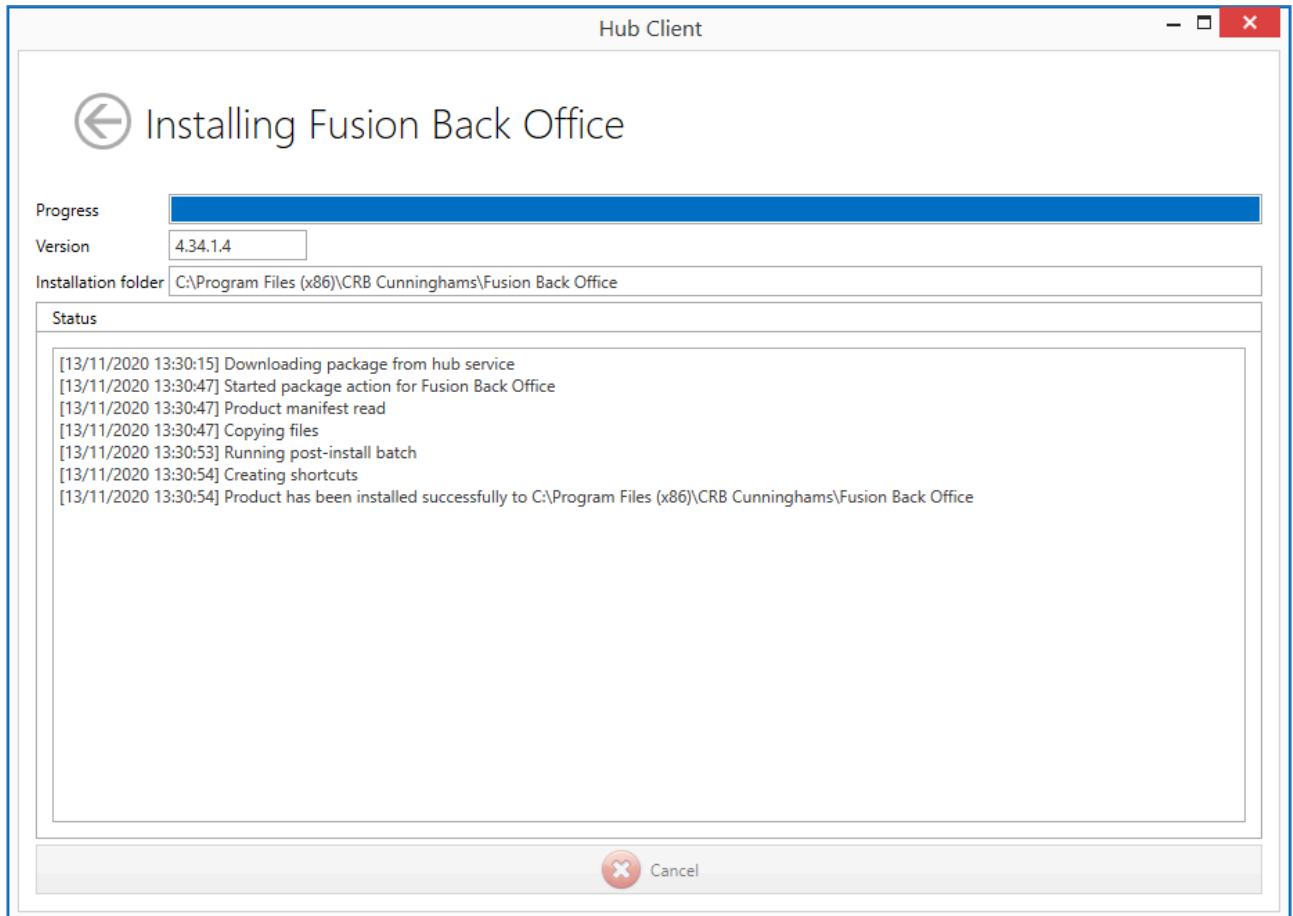
1. Select **Fusion Back Office** from the Hub List.
2. Click the **Install** button located at the bottom left of the program.



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



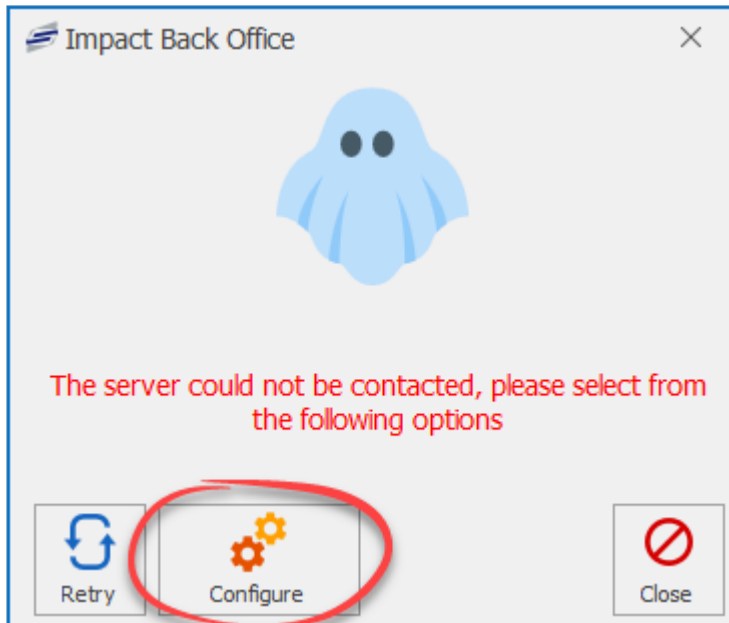
5. This will start installing the application. In the **Status** section you will see that the Product has been installed successfully.



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.

Back Office

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**



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

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.



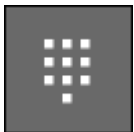
Biometrics (Fingerprint)

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

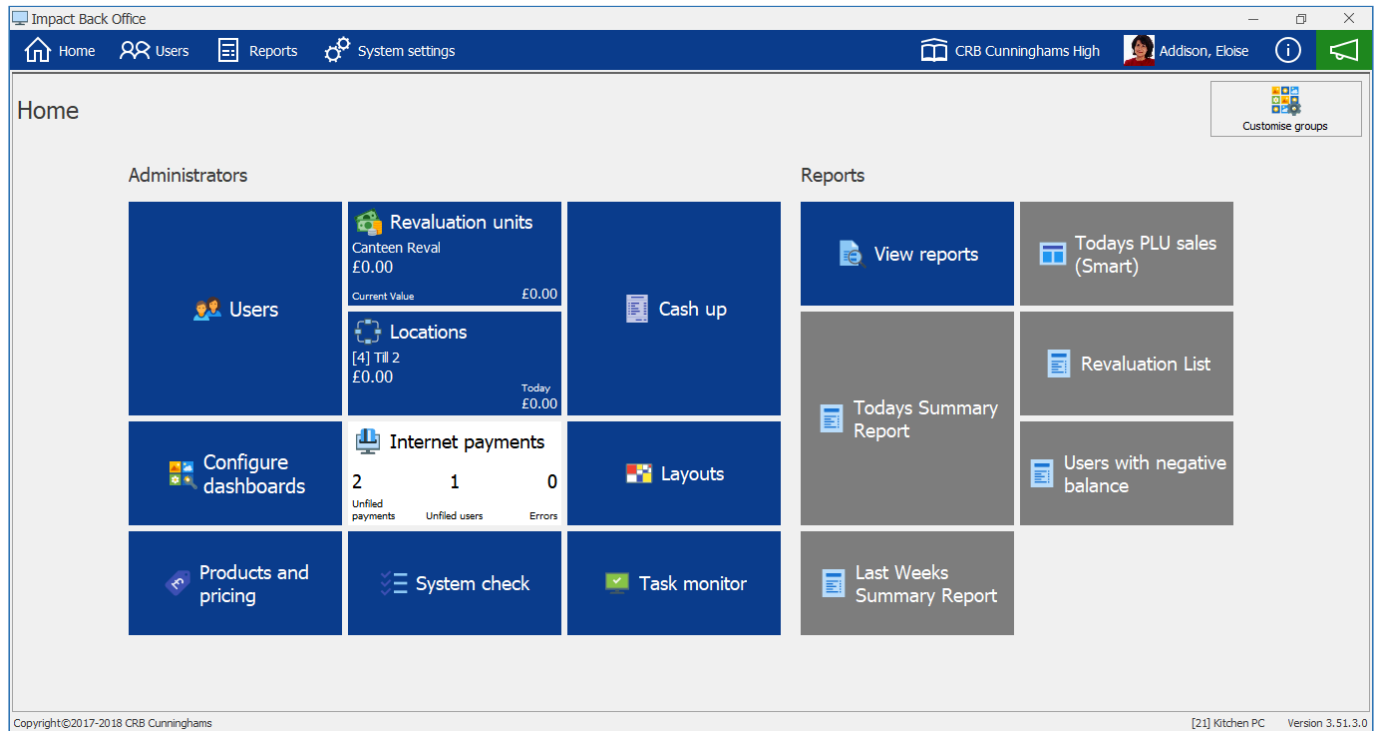
The last method is to use a PIN. Enter your PIN using either the keyboard or mouse and press the green **Login** button to confirm.

i 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.

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

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.



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.



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.



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

Administrators

Users	Revaluation units Canteen Reval £0.00 Current Value £0.00	Cash up	View reports	Last Weeks Summary Report
	Locations [5] Sandwich bar £0.00 Today £0.00			
Configure dashboards	Internet payments 0 0 0 Unfiled payments Unfiled users Errors	Layouts	Daily Summary Report	Users list (Negative balance)
	Products and pricing			
System check	Task monitor	Todays PLU Sales (Smart)		

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.

Customising your dashboard

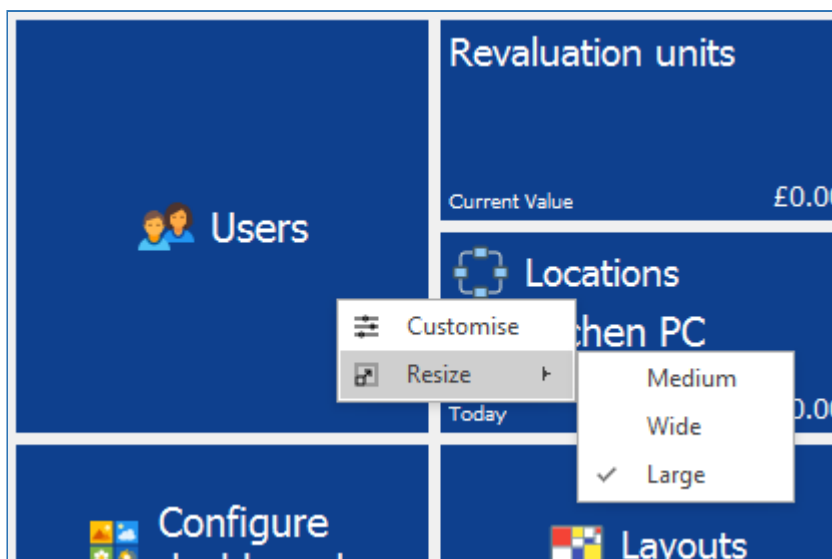
As mentioned in the previous section, the dashboard is unique to each user. This means that you can customise it to how you like. For example, if you want a certain tile to be more prominent, make it bigger and change its colour. Any changes that you make will only affect your dashboard so nobody else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

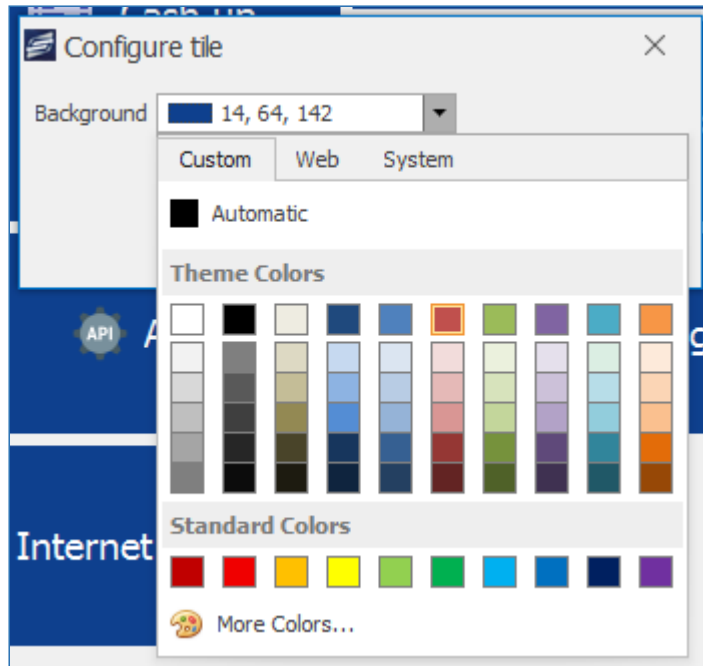
Resizing a tile

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

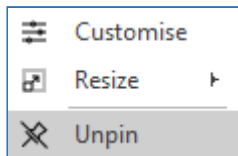
1. Right-click on the desired tile.
2. Select **Customise**.
3. Change the colour of the tiles background by using the colour selector.



4. Press **OK** to confirm.

Removing a tile

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



Adding new tiles

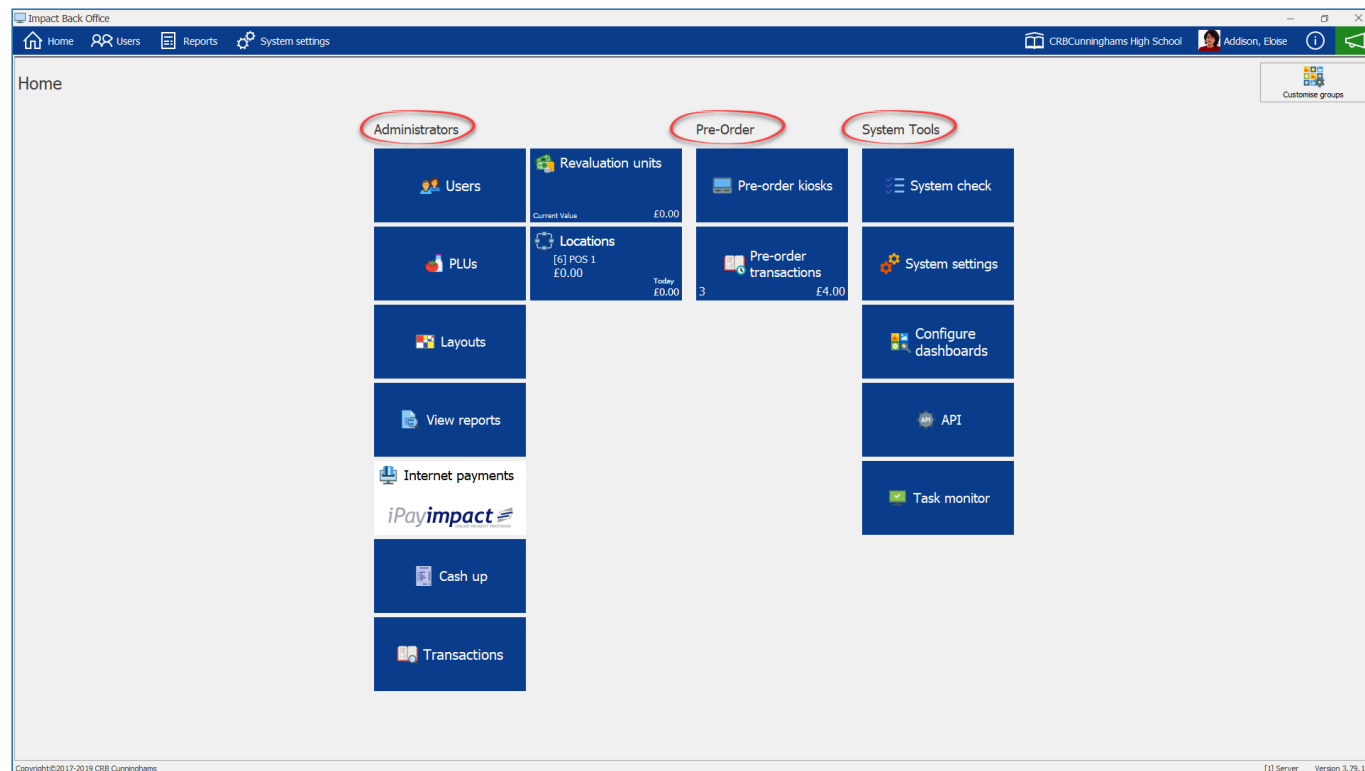
New tiles can be added in two different ways. The first method is by Using the **PIN** button that appears when viewing a particular screen. For example, pressing the PIN button on the Users Screen will PIN a new Users tile to the dashboard.



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

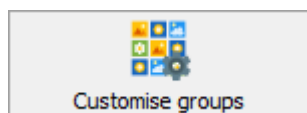
Customise Groups

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.

Configuring 'Home'

Name	Tiles
Administrators	9
Pre-Order	2
System Tools	5

Move up

Move down

Reset to defaults

OK

Users



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.

Find user

Name: Status: Allowance:

User type:

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				
Student	165	Adams	Allison	Allison	06/06/2005	8, A	29/04/2019				
Student	426	Adams	Becky	Becky	06/06/2004	9, E	29/04/2019				
Student	610	Adams	Clara	Clara	06/06/2002	11, A	29/04/2019				
Student	291	Adams	Damien	Damien	06/06/2005	8, E	29/04/2019				
Student	116	Adams	Dexter	Dexter	06/06/2006	7, D	29/04/2019				
Student	1037	Adams	Edward	Edward	06/06/2000	13, E	29/04/2019				
Student	453	Adams	Felicia	Felicia	06/06/2003	10, A	29/04/2019				
Student	469	Adams	Freddie	Freddie	06/06/2003	10, A	29/04/2019				
Student	176	Adams	Gary	Gary	06/06/2005	8, A	29/04/2019				
Staff	721	Adams	Gary	Gary	06/06/1982	0, None	29/04/2019				
Student	803	Adams	Harold	Harold	06/06/2001	12, B	29/04/2019				
Student	187	Adams	Jacqueline	Jacqueline	06/06/2005	8, B	29/04/2019				
Student	48	Adams	Joshua	Joshua	06/06/2006	7, B	29/04/2019				
Student	220	Adams	Kayla	Kayla	06/06/2005	8, C	29/04/2019				
Student	292	Adams	Marvin	Marvin	06/06/2005	8, E	29/04/2019				
Student	638	Addison	Abbie	Abbie	06/06/2002	11, B	29/04/2019				
Student	735	Addison	Adele	Adele	06/06/2002	11, E	29/04/2019				
Student	253	Addison	Alicia	Alicia	06/06/2005	8, D	29/04/2019				
Student	528	Addison	Alton	Alton	06/06/2003	10, C	29/04/2019				

1064 records found, last updated 09/05/2019 09:10:21

Adams, Alfredo

Edit user Add value

Activity Edit card Print PIN GDPR report

User ID: 1043
Year / Class: 10-A FSM
DOB: 06/06/2003
Message:

Purse	Balance
Catering	£10.00
Supervisor	£0.00
FSM	£2.50
UFSM	£0.00

Total points: 0

Copyright © 2017-2019 CRB Cunningham [1] Server Version 3.79.1.0

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.

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.

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	<input type="text"/>	Status	Current only	Allowance	All
		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 three 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.
- **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.

Impact Back Office

Home Users Reports System settings CRBCunninghams High School Addison, Eloise

Find user

Name: alfredo Status: Current only Allowance: All

User type: All

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"/>

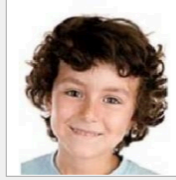
15 records found, last updated 09/05/2019 09:16:26

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Haye, Alfredo

Edit user Add value

Activity Edit card Print PIN GDPR report



User ID: 233
Year / Class: 8-D FSM
DOB: 06/06/2005
Message:

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

Total points: 0

[1] Server Version 3.79.1.0

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"/>

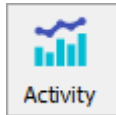
Viewing user activity



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 look
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

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

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[1] Server Version 3.79.1.0

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

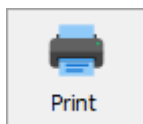
4. The users activity will be grouped by transaction. If a user has purchased multiple items in a single transaction, you can press the  button to expand the transaction.

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.

User Activity Report
CRB Cunningham High School

Knott, Ben
Date range: 05/02/2018 - 22/02/2018
Year / Class: 8-8D Card Number: 1721409950

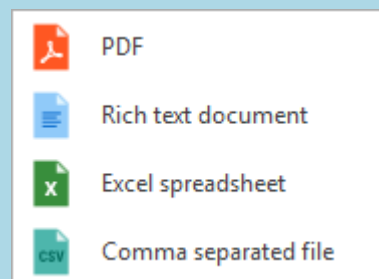
Date / Time	Type	Purse	Paid	Free	Payment Type	Location Name	Location ID
21/02/2018 12:15	PC Revaluer	Cashless	£8.00	£0.00	Cash	Till 1	3
21/02/2018 12:43	Sale - Till	Cashless	-£4.10	£0.00		Till 1	3
22/02/2018 09:43	Sale - Till	Cashless	-£1.60	£0.00		Till 1	3
Purse	Opening Balance	Total Income	Total Spend	Closing Balance			
Cashless	£0.00	£8.00	£5.70	£2.30			

Page 1 of 1
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3. 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.



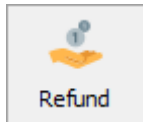
Issuing refunds



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

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



3. Confirm the refund by pressing **Yes**.
4. 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.

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

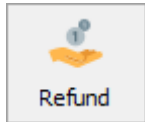
21/02/2018 12:43:01		10 Sale - Till	Cashless	-£4.10	£0.00	£0.00	3 Till 1	Addison, Eloise		
Details list										
PLU No.	PLU	Group	Quantity	Price level	Paid	Free	VAT	Disc.	Points	Refunded
34	Main Meal - Meat option	Hot Meals	1	1	-£2.50	£0.00	£0.00	£0...	0	<input checked="" type="checkbox"/>
38	Hot Dessert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

1. Expand the transaction by pressing the  button.
2. 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
<div><div>Details list</div><div>Purses</div></div>											
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

3. Press the **Refund** button.



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

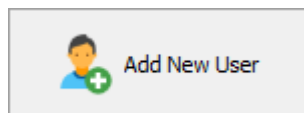
Adding/editing users



Users can easily be added or edited in Impact Fusion.

Adding a new user

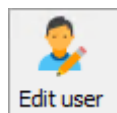
To add a new user, simply press the **Add New User** button located in the top-right corner of the users screen.



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.



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 users details. Any fields with a red-ish background are mandatory.

Field	Required	Description
Surname	Yes	The last name of the user
Forename(s)	Yes	The users forename(s)
Family		Users can be grouped into families. This feature is not yet fully implemented.
Known as		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	Yes	The users gender.
DOB		The users date of birth.
Ethnicity		The users ethnicity.
E-mail address		The users (or their parents/guardians) email address.

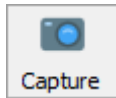
Setting a user photo

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

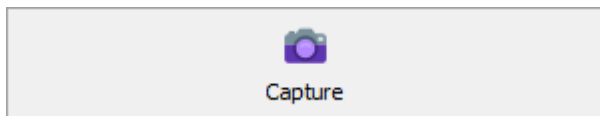
Capturing a photo using an attached webcam

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.



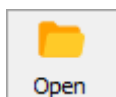
4. The captured image will be displayed on the right. Drag the square to crop the area for the photo.
5. If you are happy with the image, press **Save** to complete or press **Capture** to take another. Pressing **Cancel** will close the window without saving any changes.

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="Joeeph"/>
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"/>		



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.

Basic details



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

Field	Required	Description
Account 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 User types 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 Select to complete. For more information, see the Years & Classes 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.
User ID		The users unique ID, often the schools admission number.
MIS ID		The users MIS ID (if applicable). Non-editable.
Payment ID		Used by some online payment providers to link accounts between the two systems.
Biometric ID		Displays the users Biometric ID if linked to an identity management platform such as iDStore. Non-editable.
Card number(s)		Displays any card numbers allocated to the user. Cards are assigned using the Edit Card feature. More information can be found here
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.
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.
Hide Meal Choice		This option allows the student (aged 14 or over) to stop sending their meal choice descriptions to the activity and replaces the text with just a 'Meal' description.

Restrictions



The Restrictions tab allows you to apply restrictions on which items the user can purchase. For example, if a user has the 'Milk' restriction selected, they will be unable to purchase any items that have been marked as containing Milk.

For more information, see the [Restrictions](#) section.

Restriction	
Avoid Nuts	<input type="checkbox"/>
Celery	<input type="checkbox"/>
Crustaceans	<input type="checkbox"/>
Eggs	<input checked="" type="checkbox"/>
Fish	<input type="checkbox"/>
Gluten	<input type="checkbox"/>
Lupin	<input type="checkbox"/>
Milk	<input checked="" type="checkbox"/>
Molluscs	<input type="checkbox"/>
Mustard	<input type="checkbox"/>
Nuts	<input type="checkbox"/>
Peanuts	<input type="checkbox"/>
Seasame	<input type="checkbox"/>
Soybeans	<input type="checkbox"/>

Adding/removing restrictions user restrictions

To set or remove a restriction placed on a user, simply tick or un-tick the tickboxes against the restrictions. When the changes are saved, the user will no longer be able to purchase products that are also marked with that restriction.


Medical, Dietary & Notes







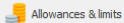




Lastly, there are three more tabs which can be used to store additional information about the user.

Dietary

Surname	Douglas	Forename(s)	Alfredo
Family		Known as	Alfredo
Gender	Male	DOB	06/06/2001
Ethnicity	Please select		
E-mail address	mail@crbcunninghams.co.uk		












Severe Nut Allergy

Obscure meal choice ☒


Any Dietary information inputted into the dietary field will show up on the till when the account is opened firstly as a popup.

*Douglas, Alfredo

 Dietary Preference(s): Severe Nut Allergy



Secondly it will appear at the top of the opened transaction.


 Dietary Preference(s): Severe Nut Allergy



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

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.

Allowances & limits



The Allowances & Limits tab allows you to configure a users 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 underneath tickboxes available.
Supervisor	Monday etc.	If the Supervisor tickbox is selected, on which days is the user entitled to a supervisor allowance.

Add value to a user account



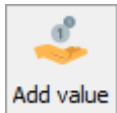
Although the majority of users may top-up their accounts using a Revaluation machine (aka Revaluer, or Reval for short) or online, many users still require that money is added to their accounts manually, for example any users who still bring cheques into school. This money can be added onto the user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



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)	<input type="checkbox"/> New daily limit £2.00		
Account name			
Sort code		Account number	

Save

Cancel



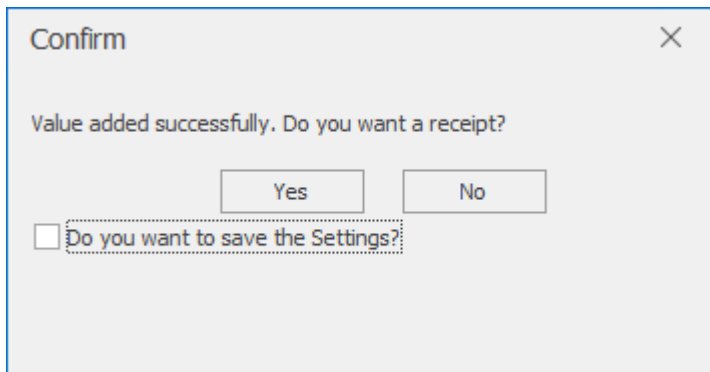
Highlighted fields are required for the value to be added. Other fields are for internal reference.



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)	<input checked="" type="checkbox"/> New daily limit	£5.00
--------------------------	-----------------------------------------------------	-------

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?

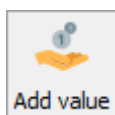
Yes No

☐ Do you want to save the Settings?

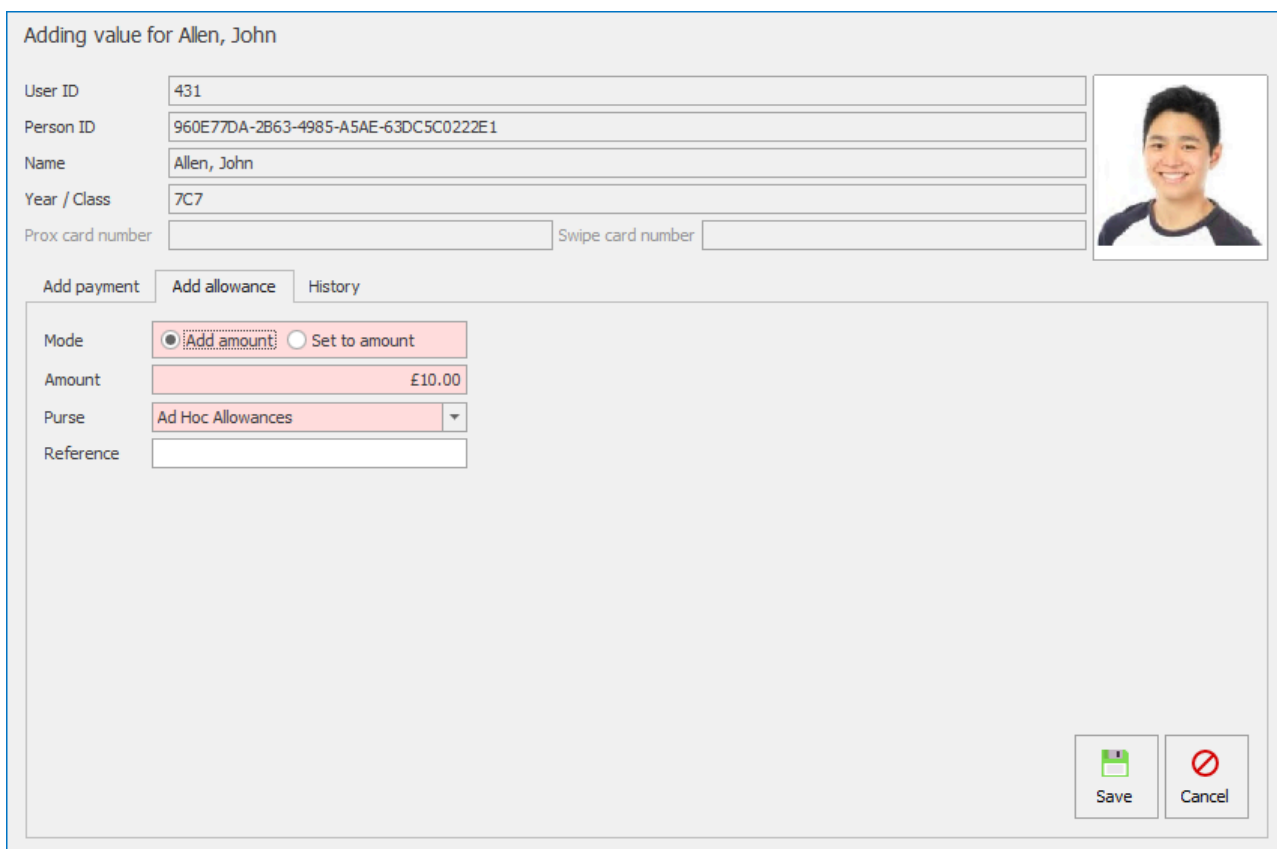
 You can have the software remember your preference by selecting 'Do you want to save the settings?' prior to pressing a button so that you will not be asked again.

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

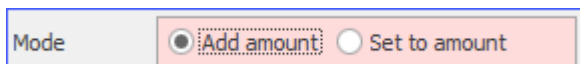
Amount: £10.00

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.

Issuing and editing cards

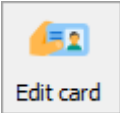


If your users use cards to identify themselves on the system, you will first need to register cards against your users and update their cards when they inevitably lose or damage them.



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 **Edit card** button.



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'.

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

Confirm

×

Card issued successfully. Do you want a receipt?

Yes

No

☐ Do you want to save the Settings?

Viewing card history

A users 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**.

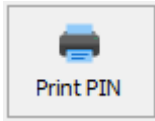
Printing PIN



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 **Print PIN** button on the selected account.



2. This will print a PIN letter

GDPR Report



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 **GDPR Report** button.




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


GDPR report


Name

Year / Class

DOB


Report


Download


Close

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




Impact Back Office
Home
Users
Reports
System settings
CRBCunninghams High School
Addison, Eloise

GDPR report
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
Person ID: 468
Source: APG.1
Messages:
Start Date: 29/04/2019
Leaving Date:

Points

Total points: 0

Current Balances

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

GDPR report

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.

Reports



Fusion contains a full set of reports that make management and analysis of the system easy. The list of reports can be accessed 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 CRBCunninghams High School Addison, Eloise

Back Reports

Find report ☐ Custom only ☐ Favorites ☐ Show receipt reports

Report name	Category	Report type	Created	Modified
★ All schools income by month	Income	Standard	29/04/2019	29/04/2019
★ All schools sales by group	Sales	Standard	29/04/2019	29/04/2019
★ Allowance Usage (Detailed)	Allowances	Standard	29/04/2019	29/04/2019
★ Allowance Usage (Summary)	Allowances	Standard	29/04/2019	29/04/2019
★ Balance by range (Template)	Letters	Snap	29/04/2019	29/04/2019
★ Coin Usage	Lists	Standard	29/04/2019	29/04/2019
★ Daily summary report	Sales	Standard	29/04/2019	29/04/2019
★ Dashboard	Dashboard	Smart	29/04/2019	29/04/2019
★ GDPR report	GDPR	Standard	29/04/2019	29/04/2019
★ Income summary	Sales	Smart	29/04/2019	29/04/2019
★ Low balances (Template)	Letters	Snap	29/04/2019	29/04/2019
★ PLU Sales	Sales	Standard	29/04/2019	29/04/2019
★ PLU Sales (Smart)	Sales	Smart	29/04/2019	29/04/2019
★ Pre-order Colours Distribution Report	Pre-order	Standard	29/04/2019	29/04/2019
★ Pre-order Conflicts	Pre-order	Standard	29/04/2019	29/04/2019
★ Pre-order Distribution Report	Pre-order	Standard	29/04/2019	29/04/2019
★ Pre-order Preparation Report	Pre-order	Standard	29/04/2019	29/04/2019
★ Revaluation list	Lists	Standard	29/04/2019	29/04/2019
★ Revaluation list - order by class	Lists	Standard	29/04/2019	29/04/2019
★ Revaluation Summary	Receipts	Standard	29/04/2019	29/04/2019

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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.

Find report Enter name of the report to search for ☐ Custom only ☐ Favorites ☐ Show receipt reports

Report name	Category	Report type	Created	Modified
★ Coin Usage	Lists	Standard	29/04/2019	29/04/2019
★ Daily summary report	Sales	Standard	29/04/2019	29/04/2019
★ Revaluation list	Lists	Standard	29/04/2019	29/04/2019
★ All schools income by month	Income	Standard	29/04/2019	29/04/2019
★ All schools sales by group	Sales	Standard	29/04/2019	29/04/2019
★ Allowance Usage (Detailed)	Allowances	Standard	29/04/2019	29/04/2019

Standard report

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

Example: Daily Summary Report

Daily Summary Report
01/01/2018 - 25/09/2018 CRB Cunninghams High

Transaction & Balance Reconciliation

Cashless Balance At Start	£361.46	Less EPOS Cashless Sales	£23.49
Allowance Balance At Start	£0.00	Less Vending Sales	£0.00
Balances	£0.00	Less New Card Sales	£0.00
Opening Balance Trans	£0.00	Less Unused Free Meals	£32,467.10
Manual Revaluations	£0.00	Less Unused Supervisor Meals	£1,222.40
Add Internet Payments	£0.00	Less Unused UFSM	£0.00
Add Invoice Transfers	£0.00	Less Unused Breakfast	£0.00
Add Cash Revaluations	£37.58	Theoretical Cashless Balance	£378.45
Add Card Revaluations	£0.00	Actual Cashless Balance	£378.45
Adjustments	£0.00	Allowance Balance At End	£0.00
Add Free Meal Allowances	£32,470.00		
Add Supervisor Allowances	£1,222.40	EPOS Card Sales	£0.00
Add UFSM Allowance	£0.00	EPOS Cash Sales	£0.50
Add Breakfast Allowances	£0.00	EPOS Cashback	£0.00
		Available for Banking	£38.08

Detail Breakdown

User Type	Allowance Sales			Cash Sales					
	Details	Count	Total (£)	Details	Breakfast	M.Break	Lunch	A.Lunch	Total
Student	FSM	2	£2.90	Trans	2	7	9	18	
	UFSM		£0.00	Sales (£)	£0.00	£2.30	£7.41	£10.40	£20.11
	Super.		£0.00	VAT (£)	£0.00	£0.21	£1.13	£0.84	£2.18

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

Low balances (Template), CRB Cunninghams High

September 25, 2018

To the Parent / Guardian

User ID	Surname	First name	Year group	Balance
136	Addison	Dorian	77E	-£0.40

Your Son/Daughter's account for **Cashless** 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.

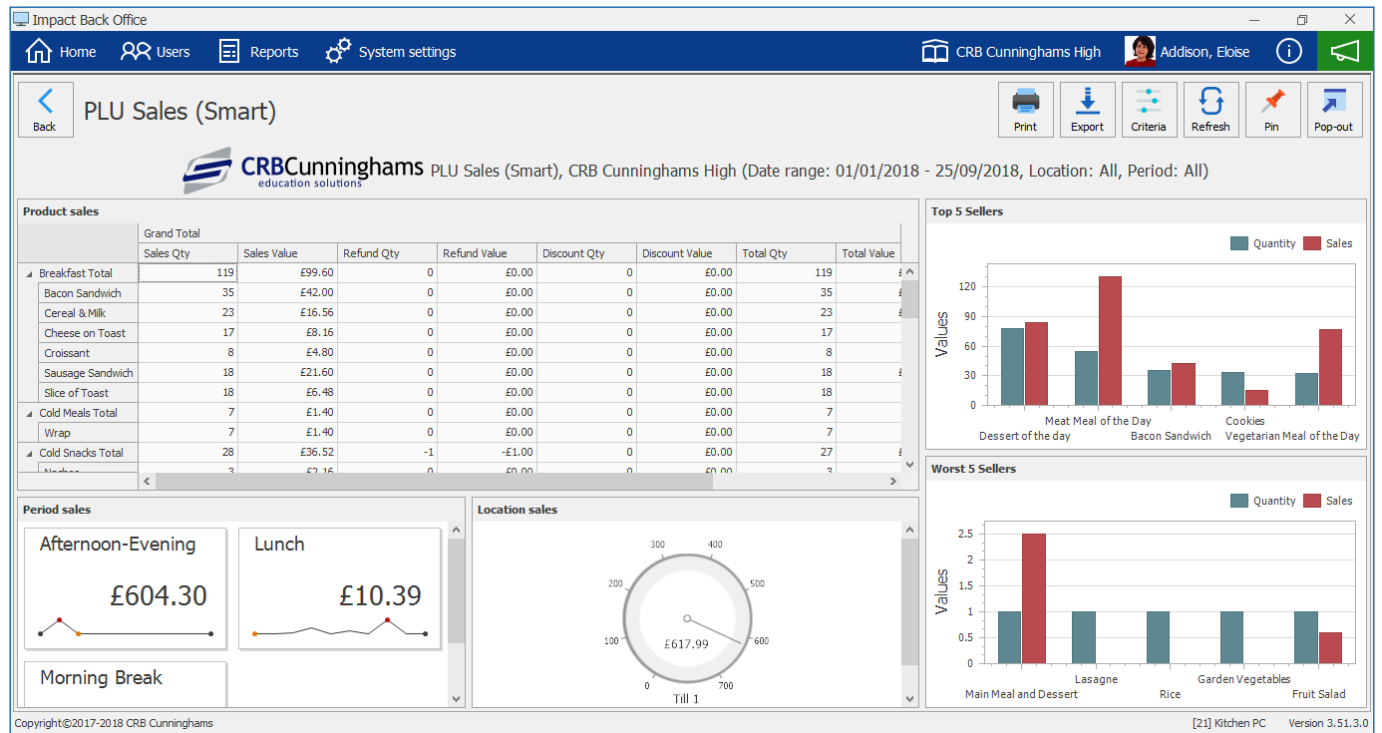
All cheques should be placed in the cheque deposit box with your child's name and year group printed on the back.
All cheque payments should be made payable to **School name here**.

Please check the above details are correct.

Smart report

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

Example: PLU Sales



Available reports

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

Name	Category	Type	Description
All schools income by month	Income	Standard	Provides a breakdown by month for all schools' income.
All schools sales by group	Sales	Standard	Provides a detailed breakdown of the sales of each PLU and their respective groups for each school.
Allowance usage (Detailed)	Allowances	Standard	Provides a detailed breakdown of all free allowance usage.
Allowance usage (Summary)	Allowances	Standard	Provides a summary of all free allowance usage.
Balance by range	Letters	Snap	Allows for sending letters to parents/users where their balance is between a defined range.
Coin usage	Lists	Standard	Provides a breakdown of all physical cash taken through the system for a particular date or date range.
Daily summary report	Sales	Standard	A summary report of all system transactions for a particular date or date range.
Dashboard	Dashboard	Smart	Provides a number of graphs and tables detailing the daily activity within the system. Income, Sales, Daily Income Summary, Student FSM Uptake, Student Sales by Location and Staff Sales by Location are all displayed in this report.
GDPR Report	GDPR	Standard	Reports all information that the system holds on a specified user.
Income summary	Sales	Smart	A summarisation of the income received through the system including where the income was generated and the type of income.
Low balances	Letters	Snap	Allows for sending letters to parents/users where their balance is below a defined amount.
Opening/ Closing balance by date range	Lists	Standard	Displays users' initial and final balances for a chosen date range.
PLU sales	Sales	Standard	Provides a breakdown of all product sales.
PLU sales (Smart)	Sales	Smart	Provides an interactive breakdown of all product sales including the best and worst selling products.
Pre-order Colours Distribution	Pre-order	Standard	Provides a report for pre-orders and itemises each PLU within the order.
Pre-order Conflicts	Pre-order	Standard	Provides a report of any pre-orders that are conflicting.
Pre-order Distribution	Pre-order	Standard	Provides a report for pre-orders and itemises each PLU within the order.
Pre-order	Pre-order	Standard	Provides detail on which items need to be prepared to meet the

Preparation			orders that have been placed.
Revaluation list	Lists	Standard	Provides a report of all users who have added money onto their account.
Revaluation list – Order by Class	Lists	Standard	Provides a report of all users who have added money onto their account, ordered by year / class.
Revaluation Summary	Receipts	Standard	Duplicate of Coin Usage report, will be removed in future release.
Revaluation summary by cash up	Lists	Standard	Provides a breakdown of all physical cash taken through the system by cash up procedures.
Sales summary	Sales	Standard	Provides a summary of all transactions through the system.
Sales summary (Multi-School)	Central Management	Standard	Provides a summary of all transactions through the system for Central Management using Multi-Schools.
Sales summary by class	Sales	Standard	Provides a summary of all transactions through the system broken down by class.
Sales summary by type	Sales	Standard	Provides a summary of all transactions through the system broken down by transaction type.
Transactions summary by date	Sales	Smart	Provides a breakdown of system transactions over time.
User history	Lists	Standard	Lists the topup and purchase history of a specific user for the selected time period.
Users list	Lists	Standard	A simple list of users in the system.
Users list with purse summary	Lists	Smart	A list of users in the system with a summarisation of purses and user types.
User permissions	Lists	Standard	Displays all the security roles and which permissions and users are assigned to them.

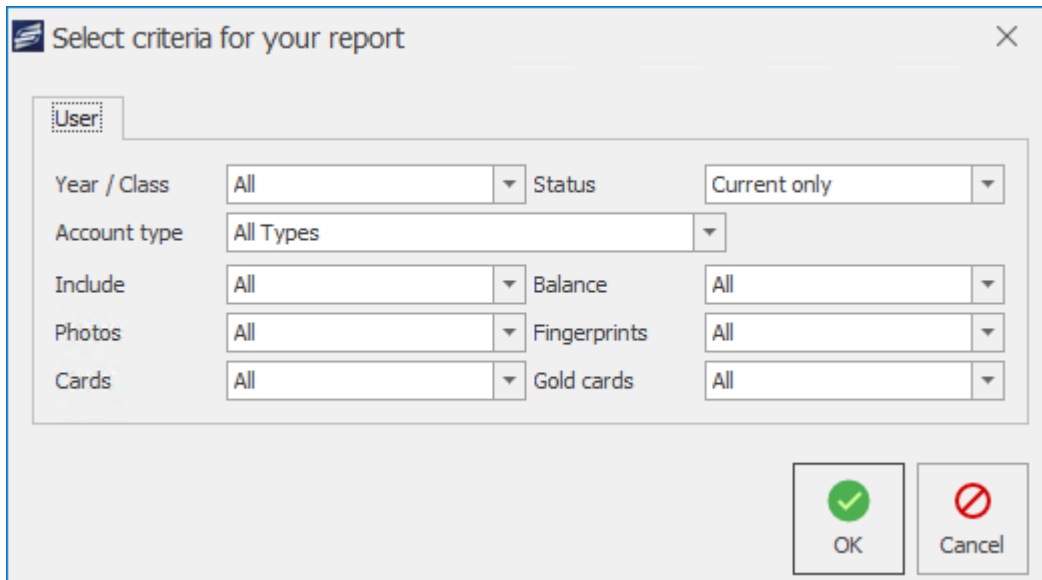
Viewing reports


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**.

A dialog box titled 'Select criteria for your report' with a close button (X) in the top right. It has a tab labeled 'User'. Inside, there are several dropdown menus: 'Year / Class' (All), 'Status' (Current only), 'Account type' (All Types), 'Include' (All), 'Balance' (All), 'Photos' (All), 'Fingerprints' (All), 'Cards' (All), and 'Gold cards' (All). At the bottom right, there are two buttons: 'OK' with a green checkmark and 'Cancel' with a red X.

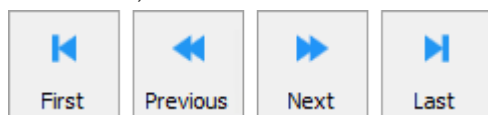
 Each report will have different reporting criteria.

 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.

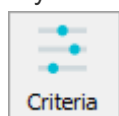
Navigating the report

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

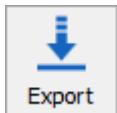
To print the generated report, simply press the **Print** button and follow your printers prompts.



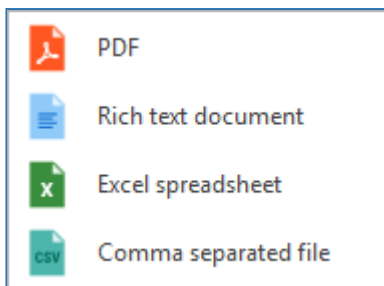
Exporting the report

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.

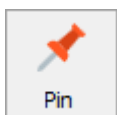


3. Select a location and enter a filename for the exported report.
4. Press **Save**. The report will be saved to the chosen location.
5. Press **Yes** to open the file now or press **No** to return to the report in Fusion.

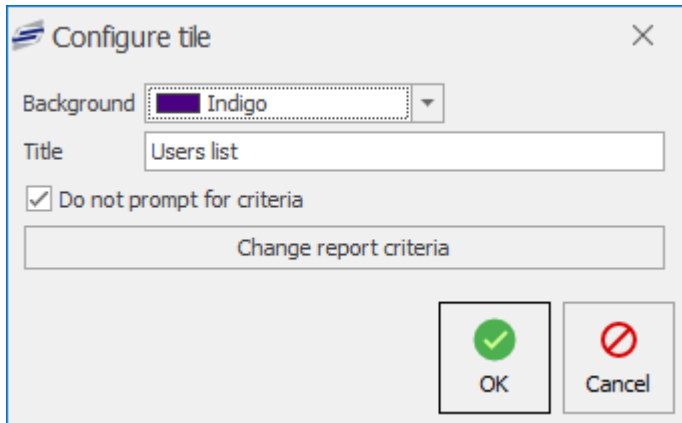
Pinning a report

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.



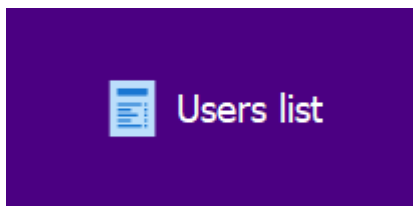
2. Configure the pinned tile as required:

A screenshot of a 'Configure tile' dialog box. It has a title bar with a close button (X). Inside, there's a 'Background' dropdown menu showing 'Indigo' with a color swatch. Below it is a 'Title' text box containing 'Users list'. A checked checkbox labeled 'Do not prompt for criteria' is present. Below the checkbox is a button labeled 'Change report criteria'. At the bottom right are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red prohibition icon.

- 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.



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 Cunningham 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.

Impact Back Office

Home Users Reports System settings

CRBCunninghams High School Addison, Eloise

Settings

Back

System setup

- Locations
- Security roles
- Dashboards
- Logins

School settings

- Platform Settings
- School calendar
- User types
- Years / Classes
- Meal time periods

Client settings

- Payment types
- Purses
- Schools
- Restrictions
- Collection points

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Dashboards

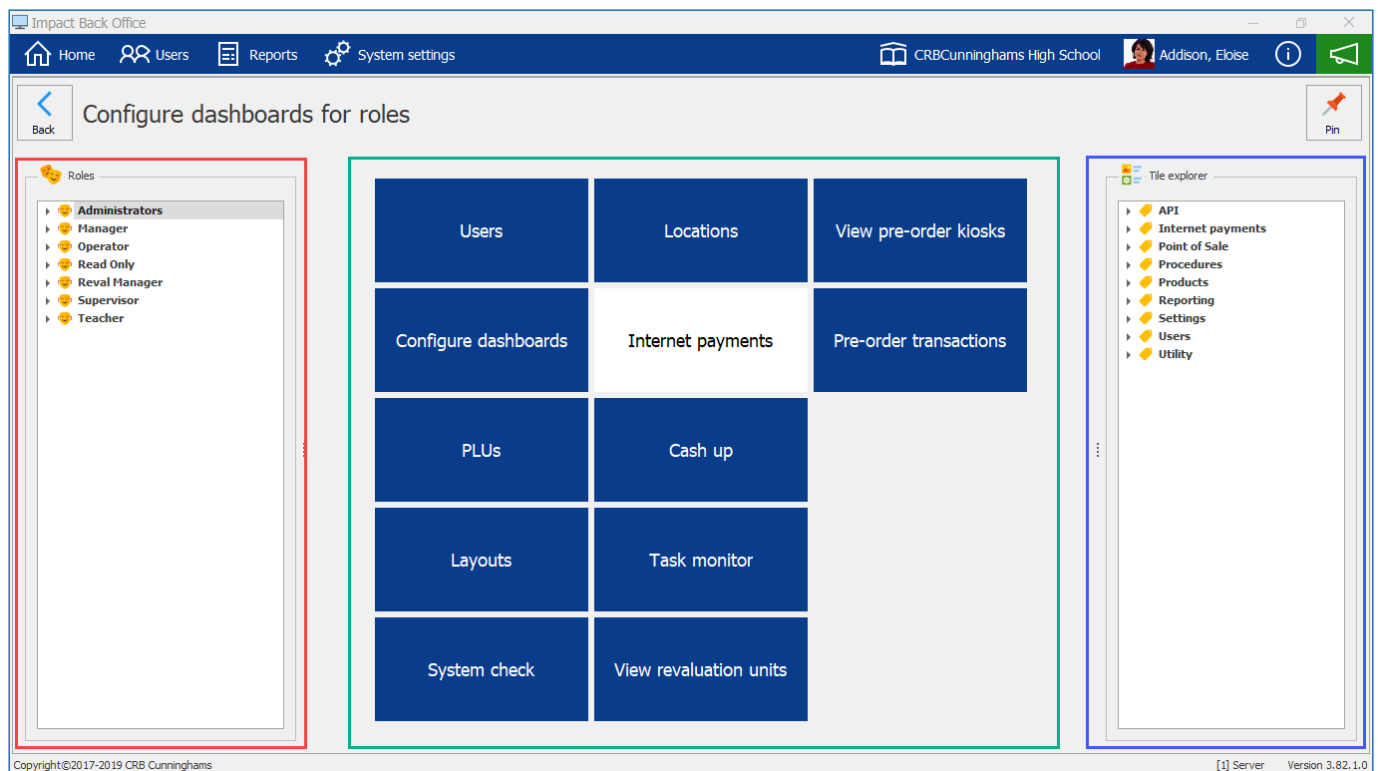


The dashboard is a place where you can easily and quickly access areas of the cashless system. The dashboard can be customised to your liking. Tiles can be pinned and unpinned, moved around the dashboard, you can change the colour and resize the tiles.

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.

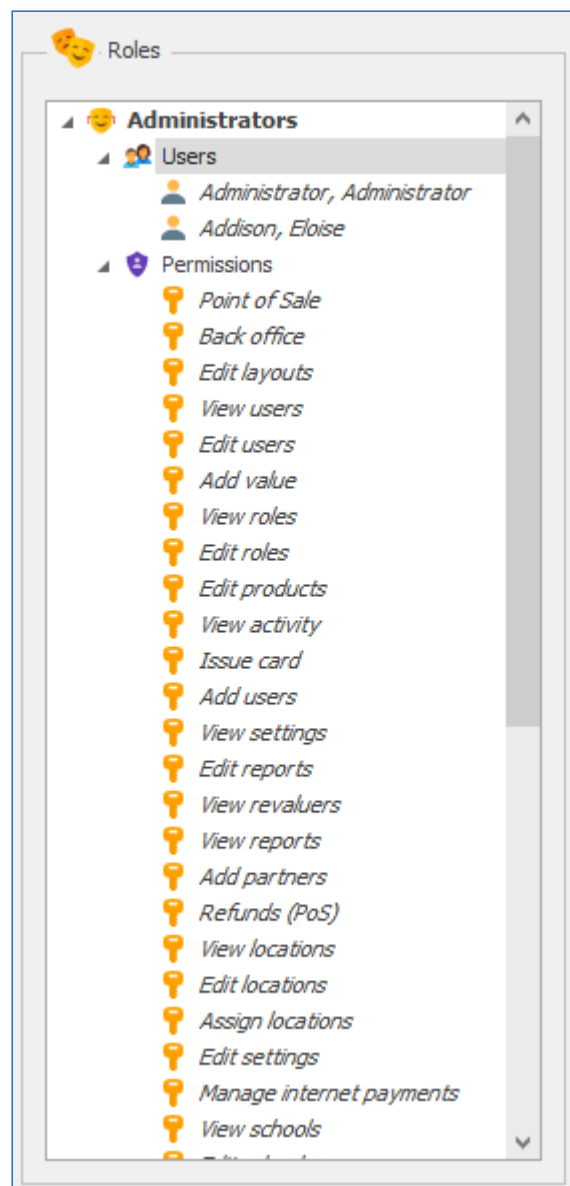


You can customise a dashboard according to which role you are logging in with. For instance, a read only role may only have access to tiles like reports and a manager role will have access to deeper area of the system.



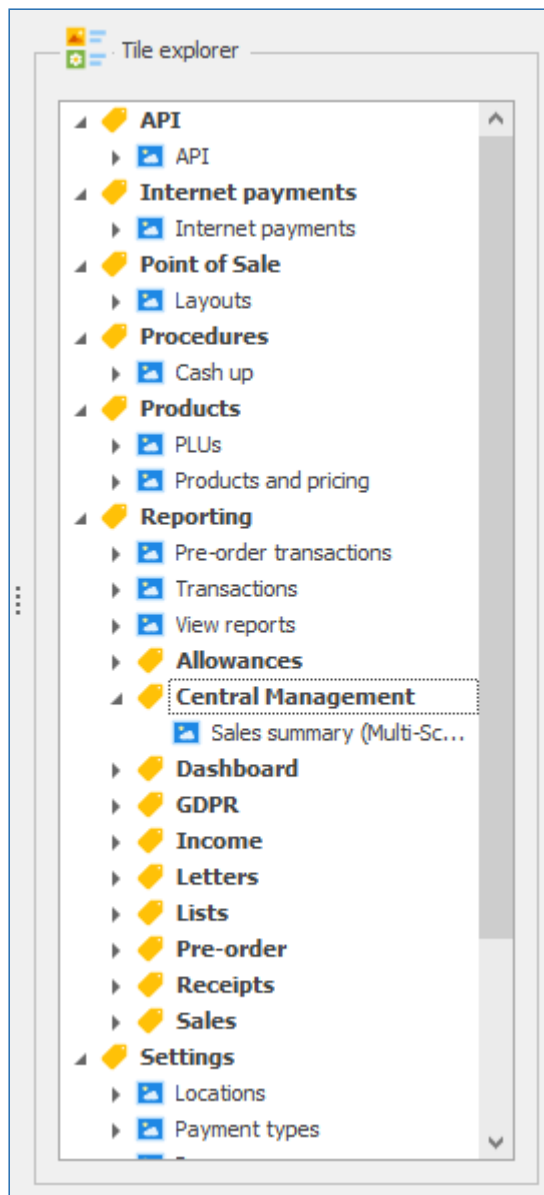
Roles

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.

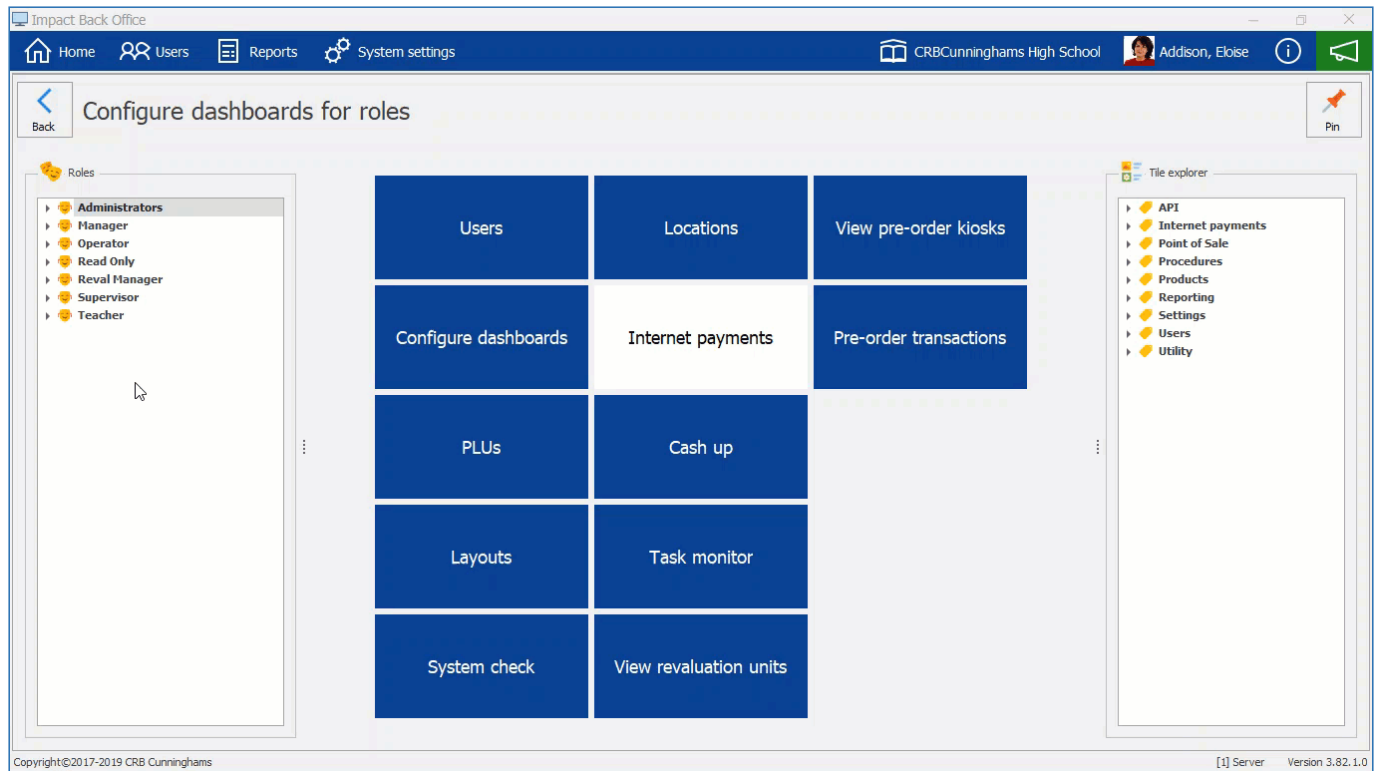


Tile Explorer

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.

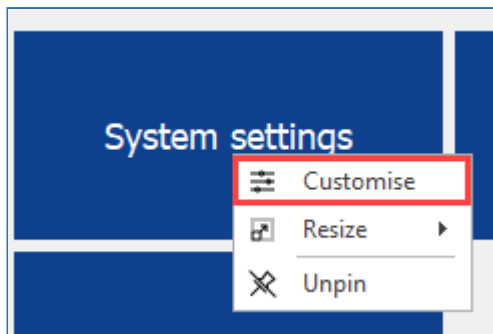


Below is a quick video tutorial on how to add a tile to a dashboard.

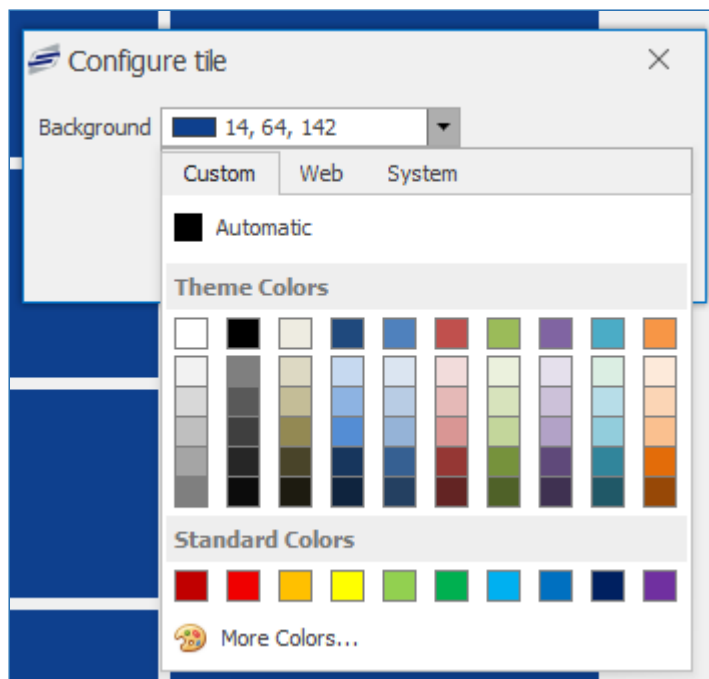


Changing the Colour of a tile

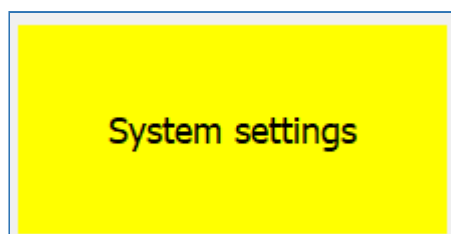
1. Right click on the tile you wish to change the colour for and press **Customise**.



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

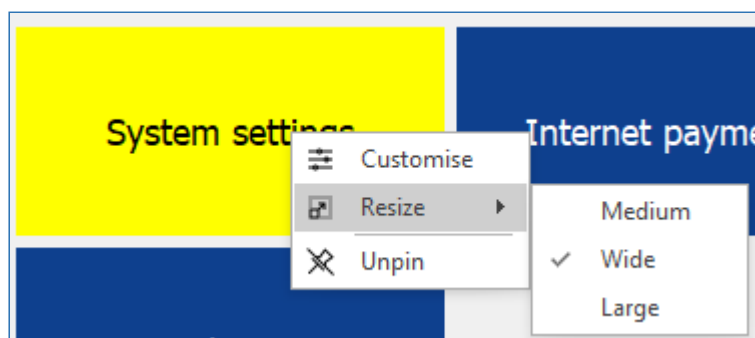


- Once a colour has been selected press **OK**. This will change the background colour of the tile.

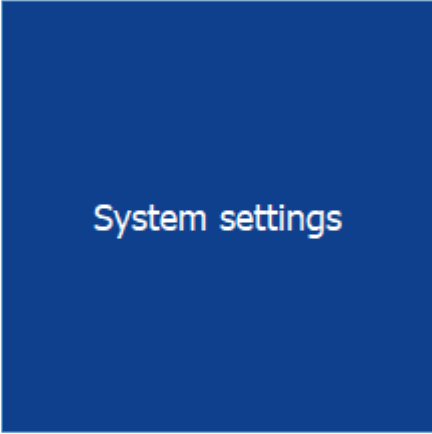


Changing the Size of a tile

- 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

Locations

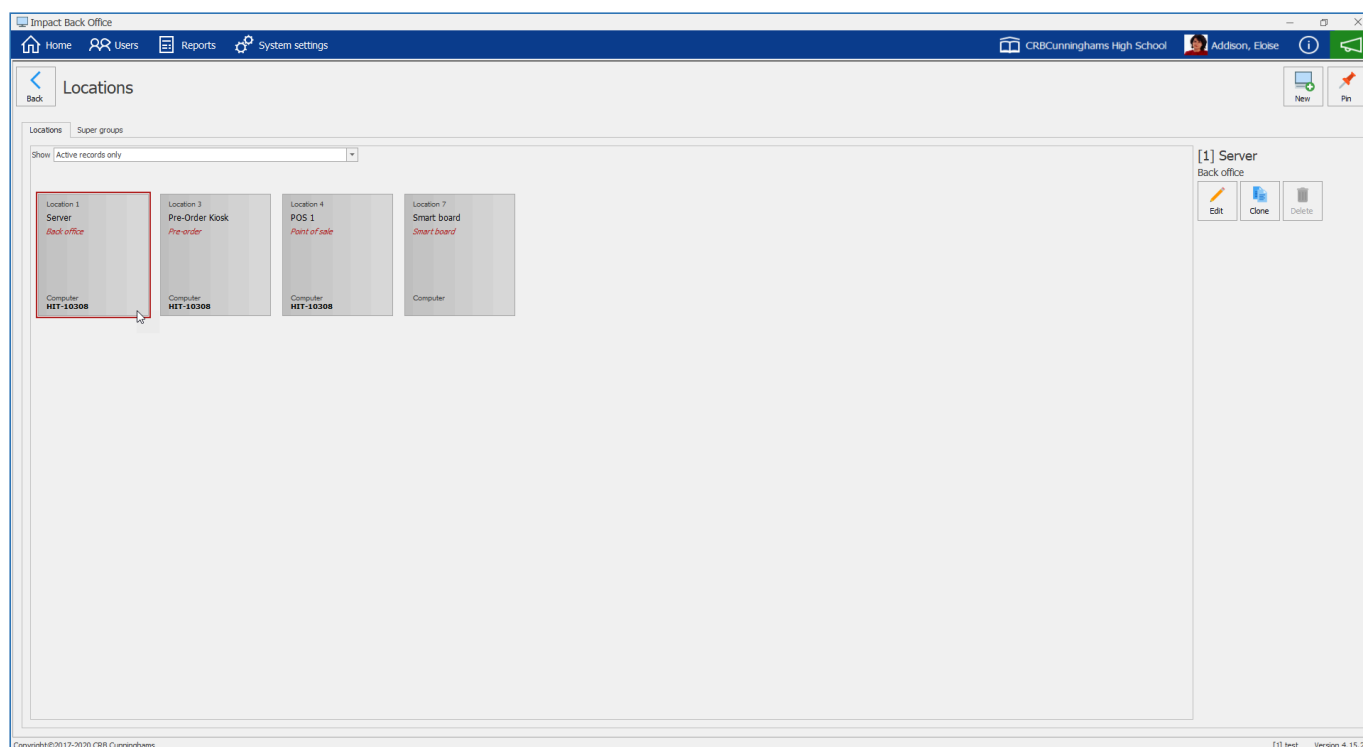


Locations allows you to view existing workstations connected to the Fusion and also allows you to add new locations. The locations that can be added and accessed through this screen include Revals, Point of Sales, Back Office, Pre-order kiosks, and Smart boards.

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.



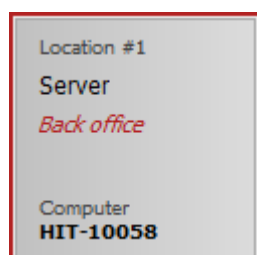
Only CRBCunninghams staff are advised to **Add** new **Locations**. This will be for when a new piece of hardware is installed or an existing piece of hardware is returning.



Locations

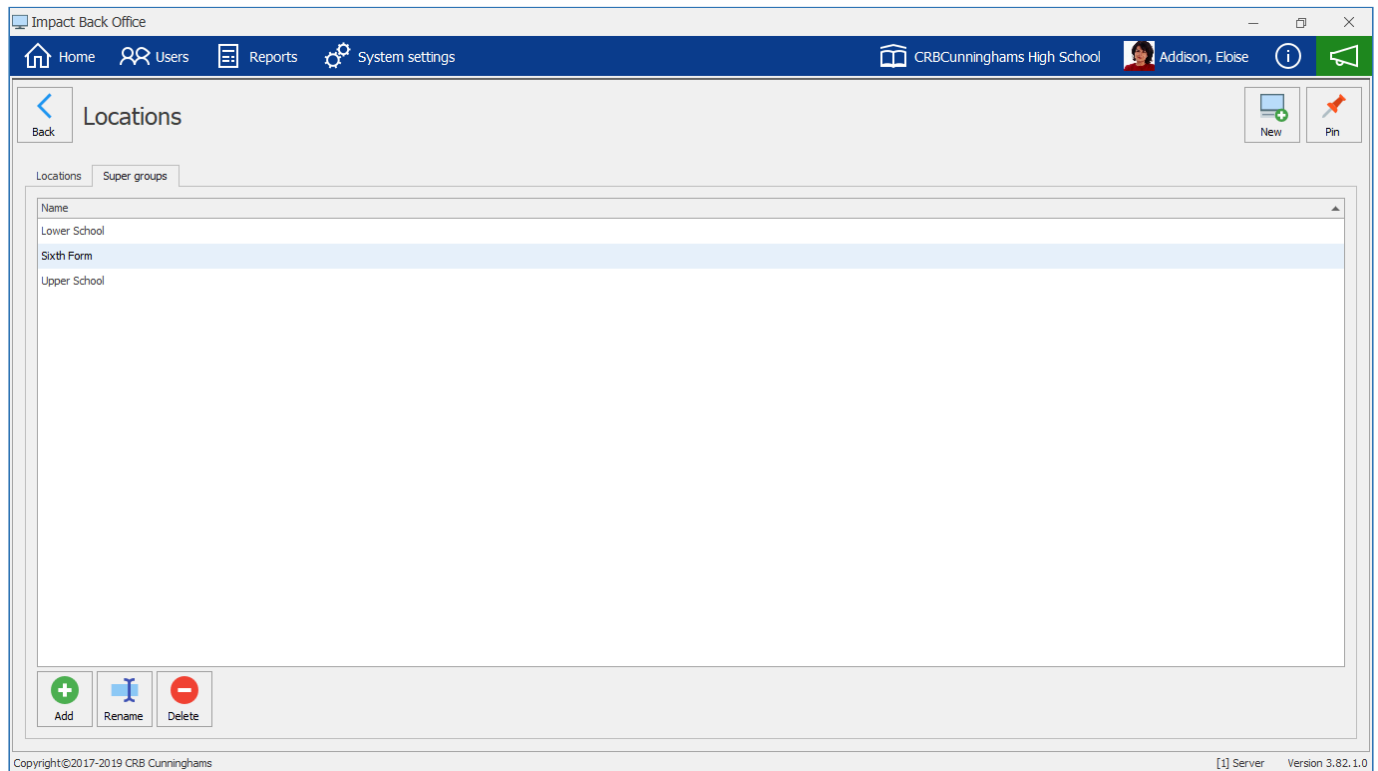
You can select and view information regarding a location.

On the left hand side it will show a tile of the location detailing the **Location Number**, **Location Name**, **Type** of location and the **Computer Name** associated with that location.

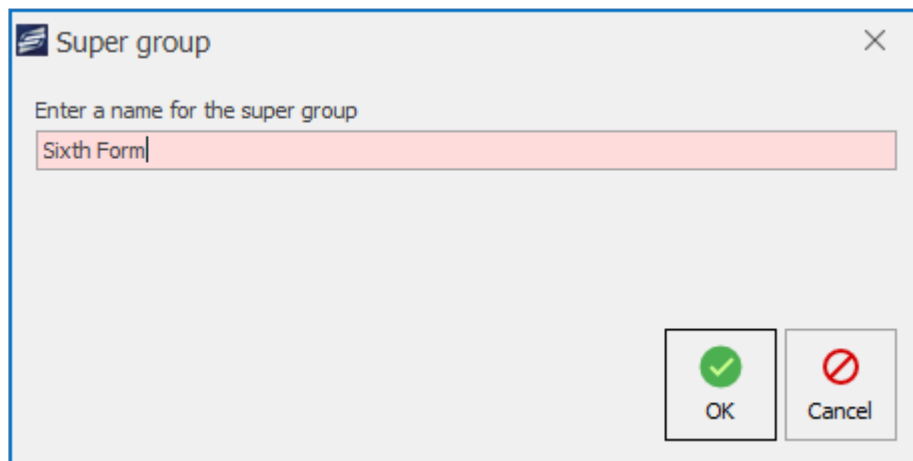


Super groups

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

HTT-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

Logins?

User authentication?

PIN entry

Logins?

User authentication?

Cards

Logins?

User authentication?

Startup / Shutdown

Auto login?

Shutdown requires user verification?

Shutdown to desktop requires password?

Printing

Receipt printer

Microsoft Print to PDF

Always print cash transactions?

Always print user transactions?

Operational

Day / week can be changed?

Cash history size

Prevent overspend on cash?

Allow cash transactions?

Multi column year display

Collection point

Not set

Hardware

Keyboard reader

None

Show mouse cursor

Error Log Location

C:\ProgramData\CRB Cunningham\Impact\Logging

Save

Save & Close

Cancel

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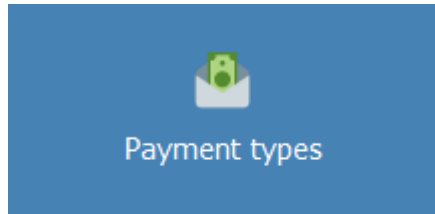
[1] Server Version 4.15.2.0

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.

Impact Back Office

Home Users Reports System settings CRBCunninghams High School Addison, Eloise

Payment types

Back New

Available 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: Balance transfer

Represents: TRANSFER

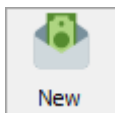
Allow manual payments: ☒

Save Delete Cancel

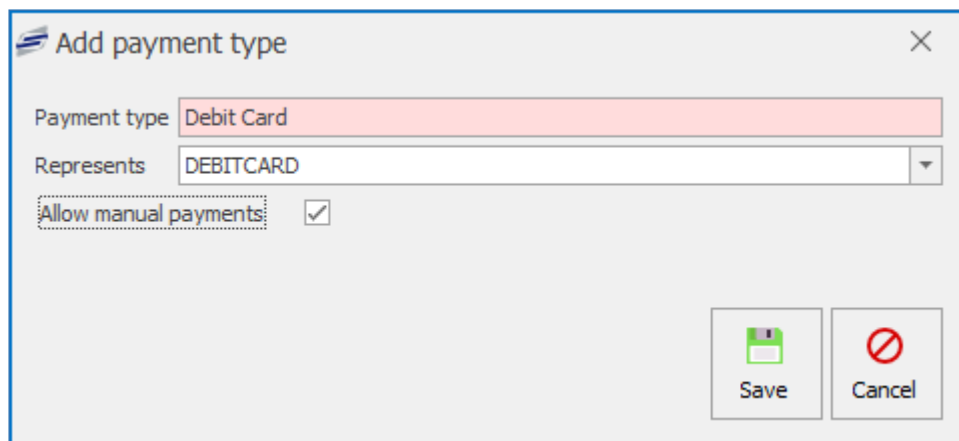
Copyright © 2017-2019 CRB Cunningham [1] Server Version 3.82.1.0

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:

Represents:

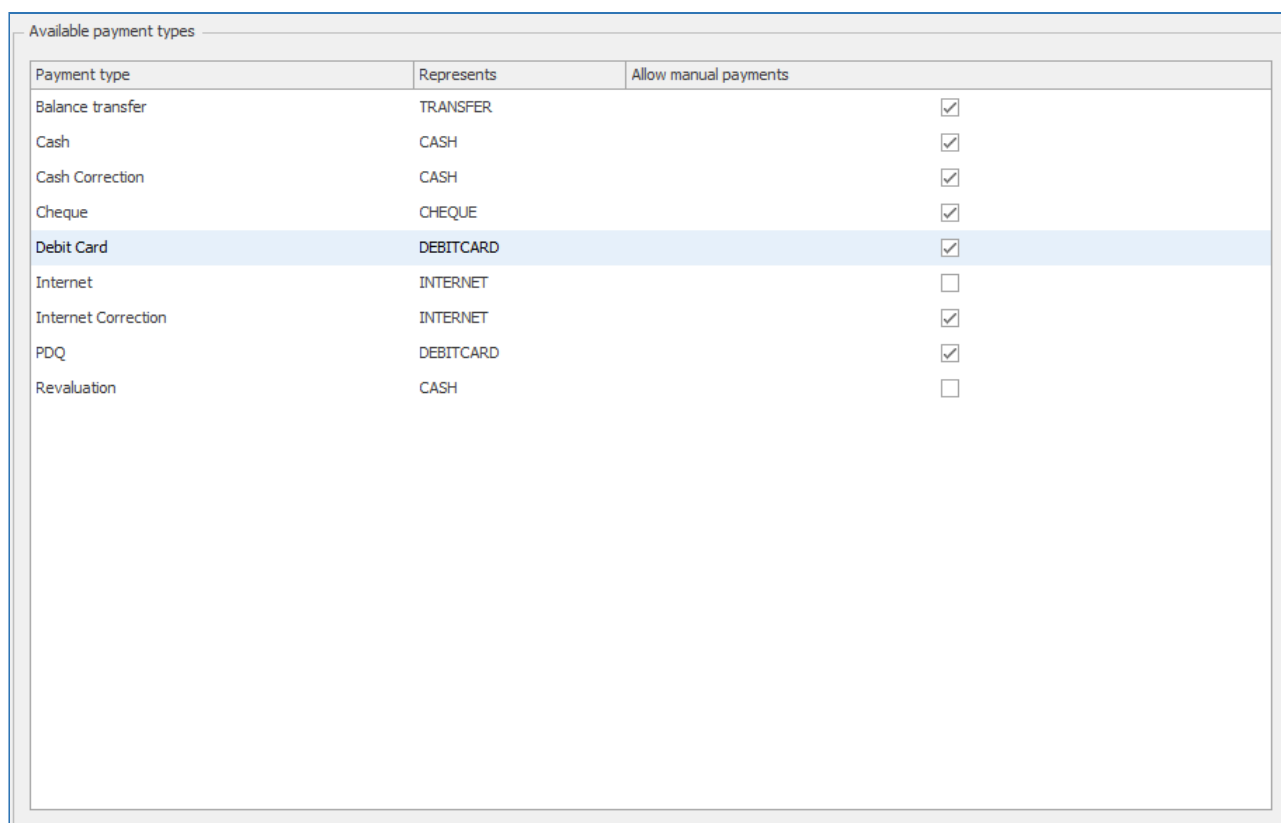
Allow manual payments: ☒

 Save  Cancel

4. Press **Save**.

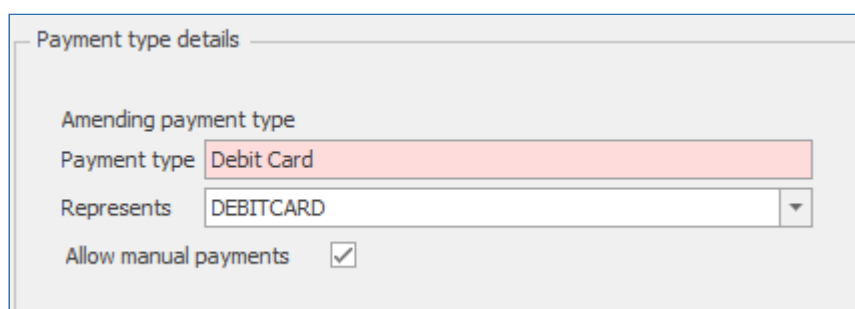
Editing a Payment type

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.



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

Purses

Back

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: 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

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.

[illegible]

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**.

Name

Pupil Premium

Can add value to purse? ☒

Type

FSM Daily

Enable carry over for this purse ☐

Carry over rules

Apply to users with labels

☐ Border
☐ Sixth Form

Add label

Add label

Apply to users in years

☐ 0 ☐ 9 ☐ 12
☐ 7 ☐ 10
☐ 8 ☐ 11

Apply to user types

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

ⓘ Minimum spend

£0.00

ⓘ Maximum value

£0.00

ⓘ Maximum carry forward

£0.00

Save

Cancel

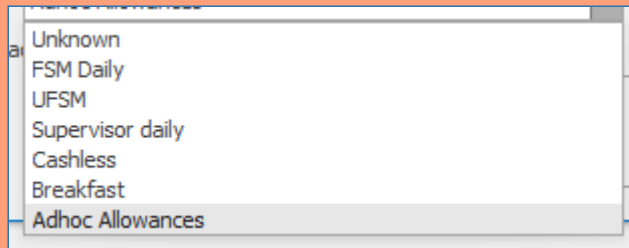
3. Select whether to **Enable carry over for this purse** if applicable.

i Information on the configuration of allowance carry-over can be found [here](#)

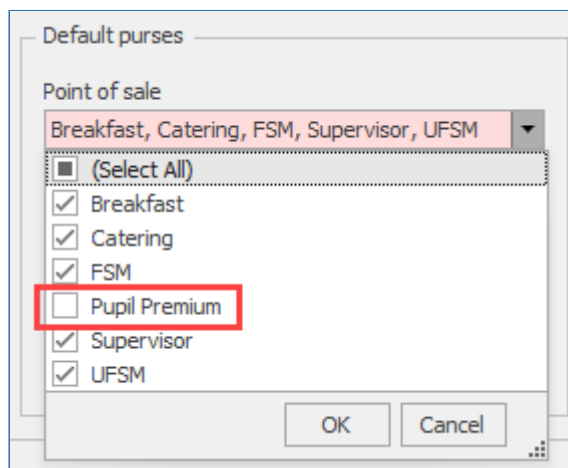
4. Press **Save**.



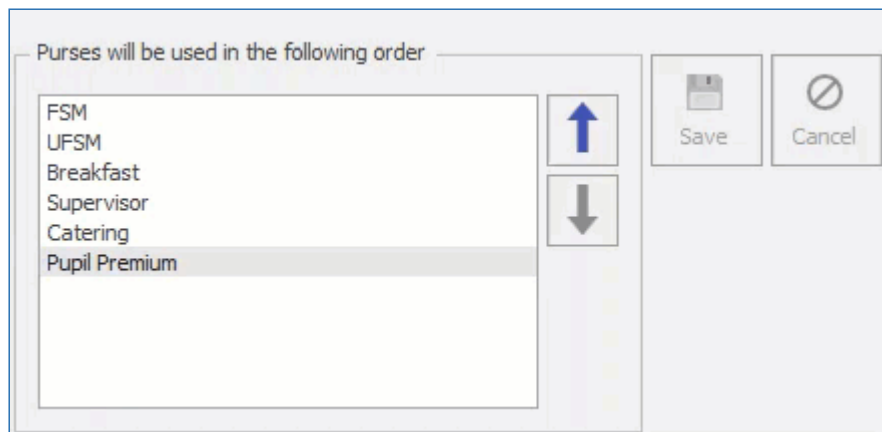
It is important to note that you cannot select a **Type** that has already been selected for a previous purse. This does not apply to the **Cashless** and **Adhoc Allowances** purse types.



- 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.

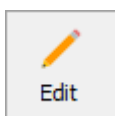


- You can also move the purse **Up** or **Down** on the order of use list. Press **Save** to confirm changes. **Cancel** will undo changes.



Editing a Purse

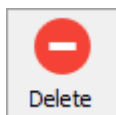
- Select a purse from the list.
- Press the **Edit** button.



- 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

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 the unused allowance in accordance with the rules that have been configured. When carry-over is enabled for a purse, this will then show in the user's screen amongst the 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

Name
Can add value to purse? ☒

Type

Enable carry over for this purse ☒

Carry over rules

Apply to users with labels

☒ Border
☐ Sixth Form

Add label

Apply to users in years

☐ 0 ☐ 9 ☐ 12
☐ 7 ☐ 10
☐ 8 ☐ 11

Apply to user types

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

i Minimum spend

i Maximum value

i Maximum carry forward



If no rules are selected then everyone who receives this allowance will have carry-over enabled. If you wish to restrict the users that have carry-over enabled you can do this by selecting the relevant checkboxes.

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

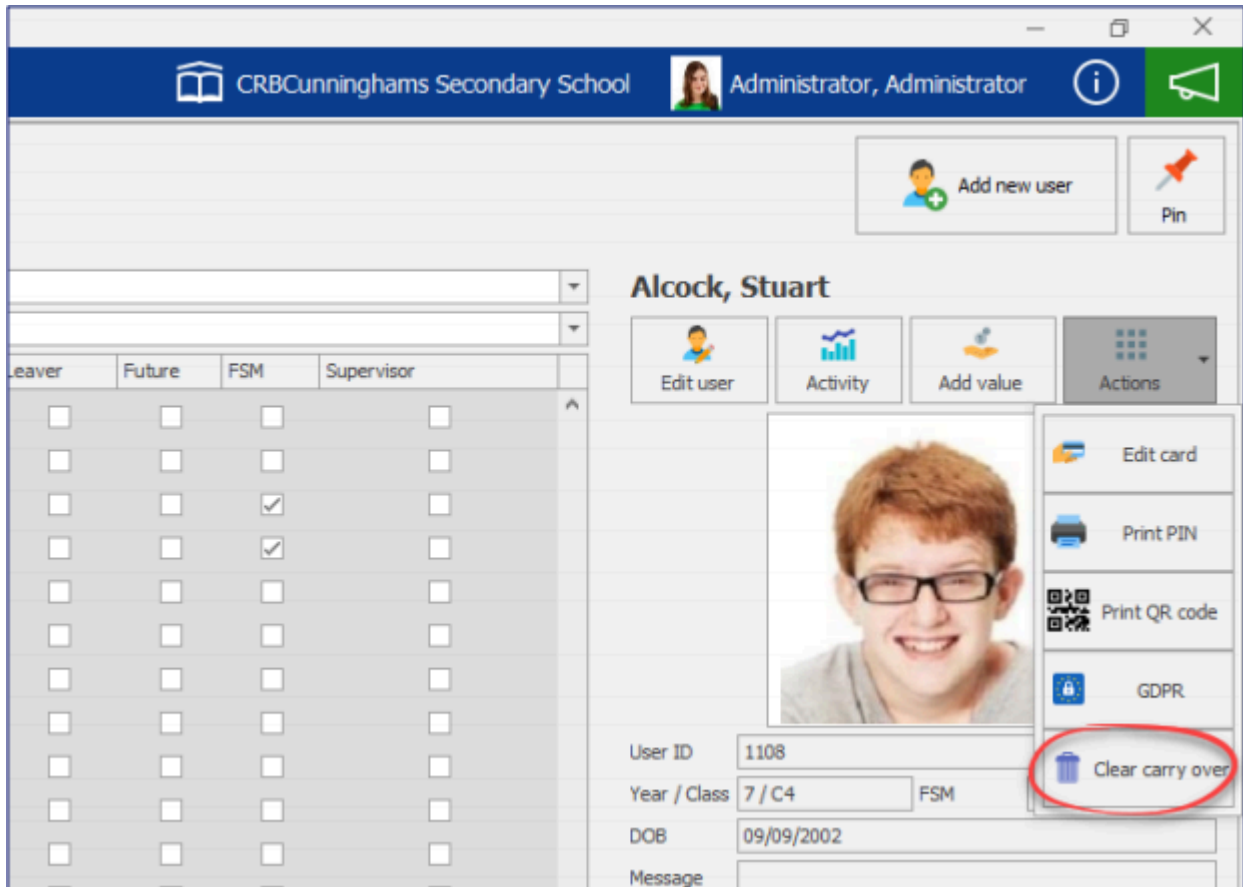
Removing Carry-over Allowance

You may wish to clear users carry-over allowance each week, or between school years. This is currently a manual process.

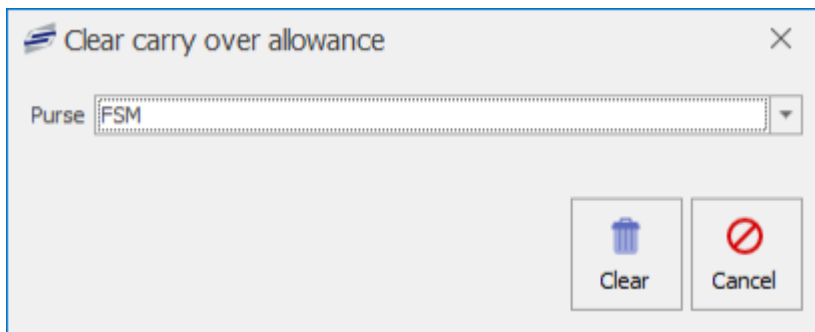
1. From the Users screen, select the user(s) that you want to remove the carry-over for. Don't worry about only having to select only those that have a balance in their carry-over purse, because if

they do not have a balance, they will just be skipped.

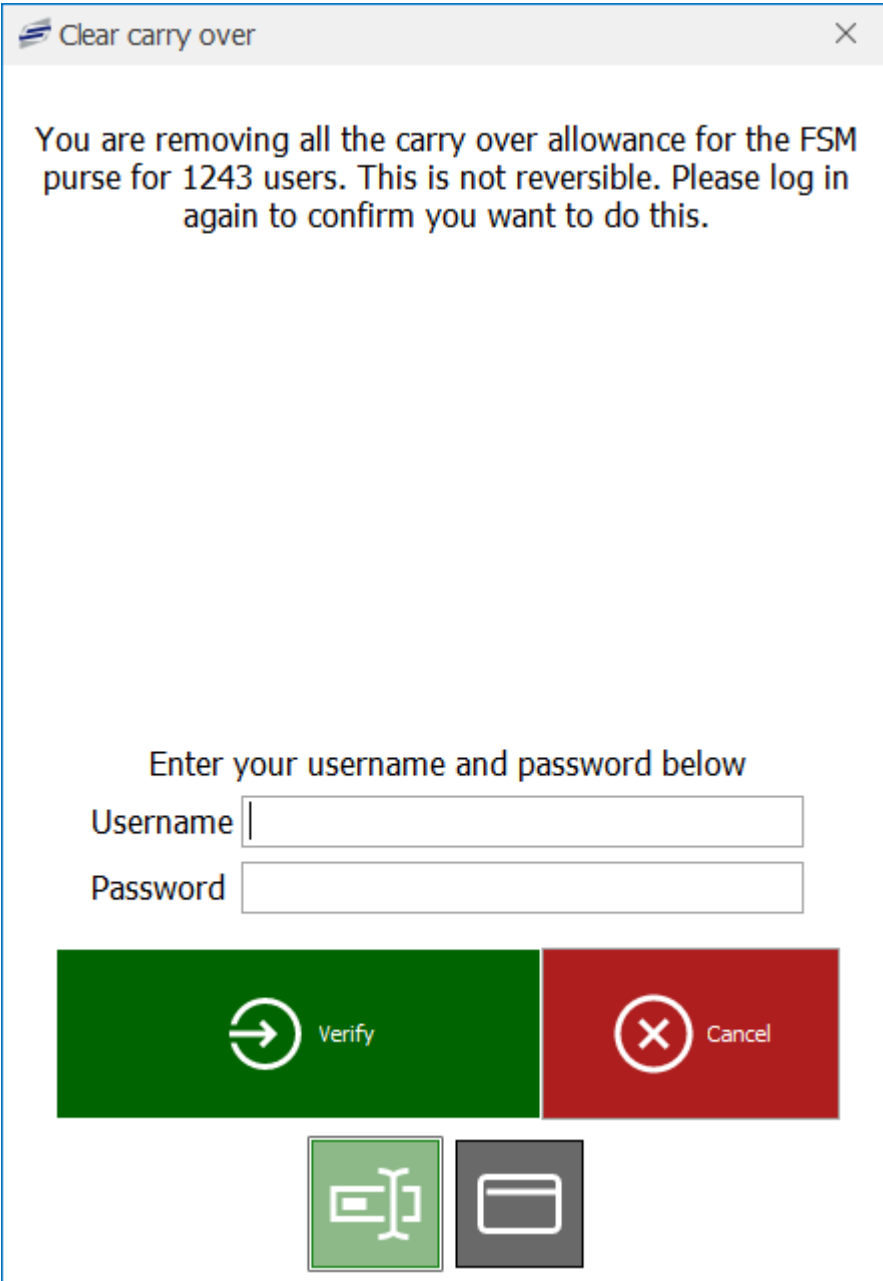
2. Go to **Actions** and select **Clear carry over**.



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



4. You will be asked to enter your username and password. To continue with the process, enter your details 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

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



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

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.

Security role name	Modified
Administrators	20/06/2018 12:36
Manager	18/07/2017 14:15
Supervisor	02/06/2017 11:28
Operator	17/07/2017 10:18
Read Only	02/06/2017 11:28
Reval Manager	02/06/2017 11:28

Supervisor

Rename Delete

Permissions

- ☐ Access all schools
- ☐ Add partners
- ☒ Add users
- ☒ Add value
- ☐ Allow export of data in response
- ☐ Allow one time supervisor allowar
- ☐ Allow overspend (PoS)
- ☐ Allow user notifications
- ☐ Assign locations
- ☒ Back office
- ☐ Configure internet payments
- ☒ Edit layouts
- ☐ Edit locations
- ☐ Edit logins
- ☒ Edit products
- ☒ Edit reports
- ☐ Edit roles
- ☐ Edit schools
- ☐ Edit settings
- ☒ Edit users
- ☒ Issue card
- ☐ Manage internet payments
- ☒ Point of Sale
- ☐ Point of Sale Voice

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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.

Setting role permissions

To set the roles permissions, select the role from the list and select or deselect the required permissions using the list on the right-hand side of the screen. The available permissions are detailed in the table below.

Permission	Description
Access all schools	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	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.
Allow export of data in response to GDPR	Can manage GDPR button on user accounts. Can view, print, download and export.
Allow one time supervisor allowance (PoS)	Can allow a supervisor allowance during a transaction on the PoS.
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.
Configure internet payments	Can add a new Internet Payment provider and make changes to the configuration of the Internet Payment provider.
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.
Edit roles	Can create and edit security roles to assign them to Fusion logins.
Edit schools	Can make changes to school settings.
Edit settings	Can access the system settings screen in the Impact Back Office application.
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 Declaration	Can perform a cash declaration in the Cash up tile. Will have insufficient permission otherwise. Cash Variance needs to be enabled in the school configuration.
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 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.
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 schools screen within the system settings.
View settings	Can view the schools settings.
View transactions	Can view user transactions.
View users	Can view the users screen in Impact Back Office.

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

CRB Cunninghams High Addison, Eloise

Manage logins

Back

Username	User ID	Name	User type	Biometrics?	Card?	PIN?	PIN expires	Active directory?	Modified	Modified by
Eloise.Addison	178	Addison, Eloise	Staff	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	20/06/2018 11:39	Administrator, Administra...
Impact	1	Administrator, ...	Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	02/06/2017 11:28	,
Damon.Allen	1053	Allen, Damon	Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Paul.Banks	1061	Banks, Paul	Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Simon.Calland	1067	Calland, Simon	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Damen.Carter	1064	Carter, Damien	Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Dan.Carter	1056	Carter, Daniel	Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Nicky.Carter	1724	Carter, Nicky	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Gill.Eaborn	1065	Eaborn, Gill	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Russell.Hawes	1054	Hawes, Russell	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
John.Leonard	1723	Leonard, John	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	25/07/2017 10:32	Administrator, Administra...
Carl.Lewis	1063	Lewis, Carl	Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Emily.Meades	1060	Meades, Emily	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Trish.Moore	1722	Moore, Trish	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	25/07/2017 10:32	Administrator, Administra...
RevalManager	2	Reval Manage...	Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	02/06/2017 11:28	,
Jamie.Roberts	1062	Roberts, Jamie	Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...
Paul.Tennant	1721	Tennant, Paul	Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	25/07/2017 10:32	Administrator, Administra...
Danielle.Tucker	1058	Tucker, Danielle	Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	08/12/2017 08:29	Administrator, Administra...

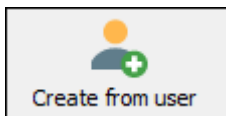
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Creating a new login



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.



2. 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"/>
Staff	721	Adams	Gary	Gary	06/06/1982	0, None	01/02/2018		<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

3. 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

Back

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: 20/06/2018 11:39 Modified By: Administrator, Administrator

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

4. 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.

School calendar



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. The school calendar is also critical for using a PreOrder as the system needs to know which are valid service days.



A school calendar must be configured for the Fusion system to function.

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

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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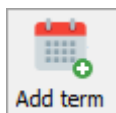
Term dates key

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

- 1 **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.
- 4 **Service:** The school is closed but the catering system is still open for use.
- 5 **Holiday:** The school is closed for the holidays on this day.
- 6 **Election:** The school is closed for an election 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.

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

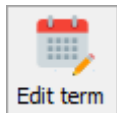
Save Cancel

3. Press **Save** to complete.

 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**.



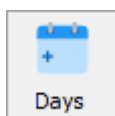
Setting school holidays

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.

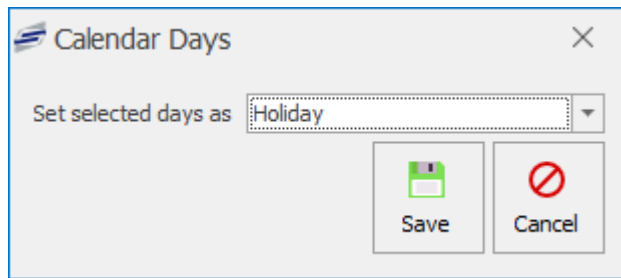
1. Using the calendar, select the date(s)

 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 (e.g. 'Holiday') and press **Save**.



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.

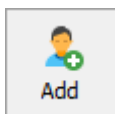
Description	Represents
Student	STUDENT
Staff	STAFF
Catering	STAFF
Hospitality	STAFF
Admin	ADMIN

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		


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.

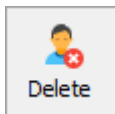


Deleting a user type

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.



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.

i 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.

i 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.

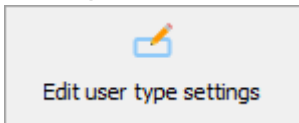
Creating new user type settings

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**.

i 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



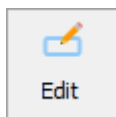
2. Configure the allocation rule:

- **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.

3. Press **Save**.

Editing an allocation rule

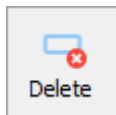
1. Select the required allocation rule from the list and press **Edit**.



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**.

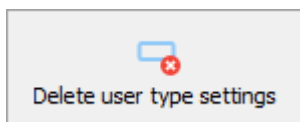


2. Press **Yes** to confirm.

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



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

Impact Back Office

Home Users Reports System settings CRB Cunninghams High Addison, Eloise

Edit year classes

Back Add year class

School: CRB Cunninghams High

Year	Year name	Class	Teacher name	UFSM
0 0		None		<input type="checkbox"/>
7 7		7A	Gary Adams	<input type="checkbox"/>
7 7		7B	Louise Bartlett	<input type="checkbox"/>
7 7		7C	Brian Charles	<input type="checkbox"/>
7 7		7D	Harry Dumbledore	<input type="checkbox"/>
7 7		7E	Ron E	<input type="checkbox"/>
8 8		8A	Hugh Armstrong	<input type="checkbox"/>
8 8		8B	Kate Bee	<input type="checkbox"/>
8 8		8C	Fiona Carter	<input type="checkbox"/>
8 8		8D	Pete Dearing	<input type="checkbox"/>
8 8		8E	Darren Ealing	<input type="checkbox"/>
9 9		9A	Timothy Applemore	<input type="checkbox"/>
9 9		9B	Nicky Brampton	<input type="checkbox"/>
9 9		9C	Charlie Charles	<input type="checkbox"/>
9 9		9D	Debbie Downer	<input type="checkbox"/>
9 9		9E	Wall E	<input type="checkbox"/>
10 10		10A	Ken Acres	<input type="checkbox"/>
10 10		10B	Diedre Barlow	<input type="checkbox"/>
10 10		10C	Keith Chegwin	<input type="checkbox"/>
10 10		10D	Donny Doom	<input type="checkbox"/>

Edit Delete

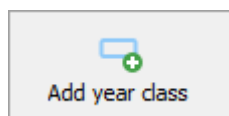
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If your system is linked to iDStore, your years and classes will be created automatically and there is no management required by you.

Add a new class

1. Press the **Add year class** button.



2. Configure the new class as required:

Adding year class

Year

Year name

Class

Teacher name

UFSM year ☐

Save Cancel

- **Year:** The numerical value of the year
- **Year name:** The name of the year. This can be alphabetical as many primary schools will

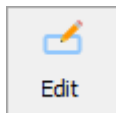
have names for their years.

- **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



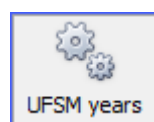
Classes cannot be deleted if users are still registered to it.

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

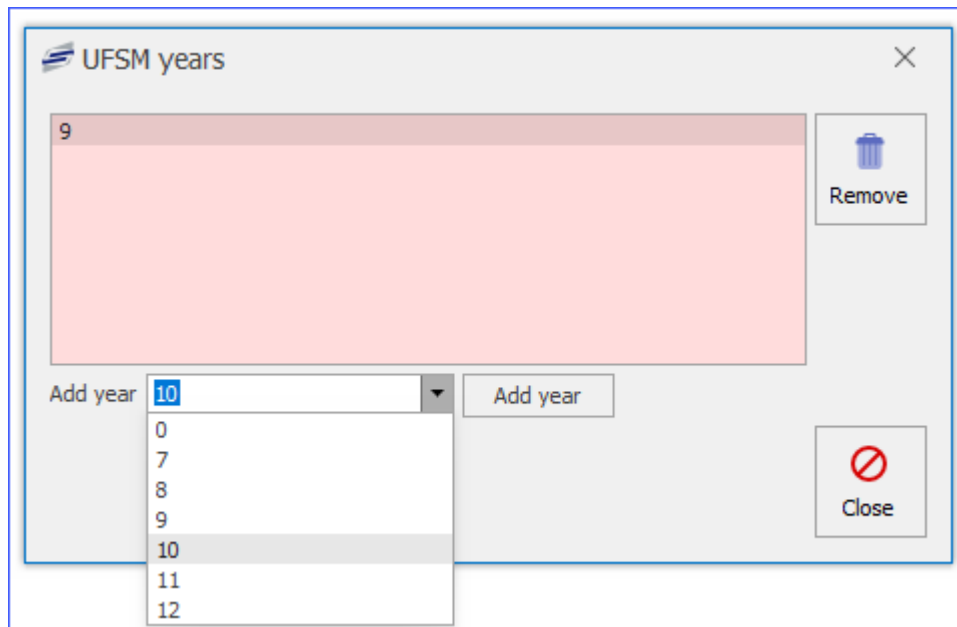


3. Press **Yes** to confirm.

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.

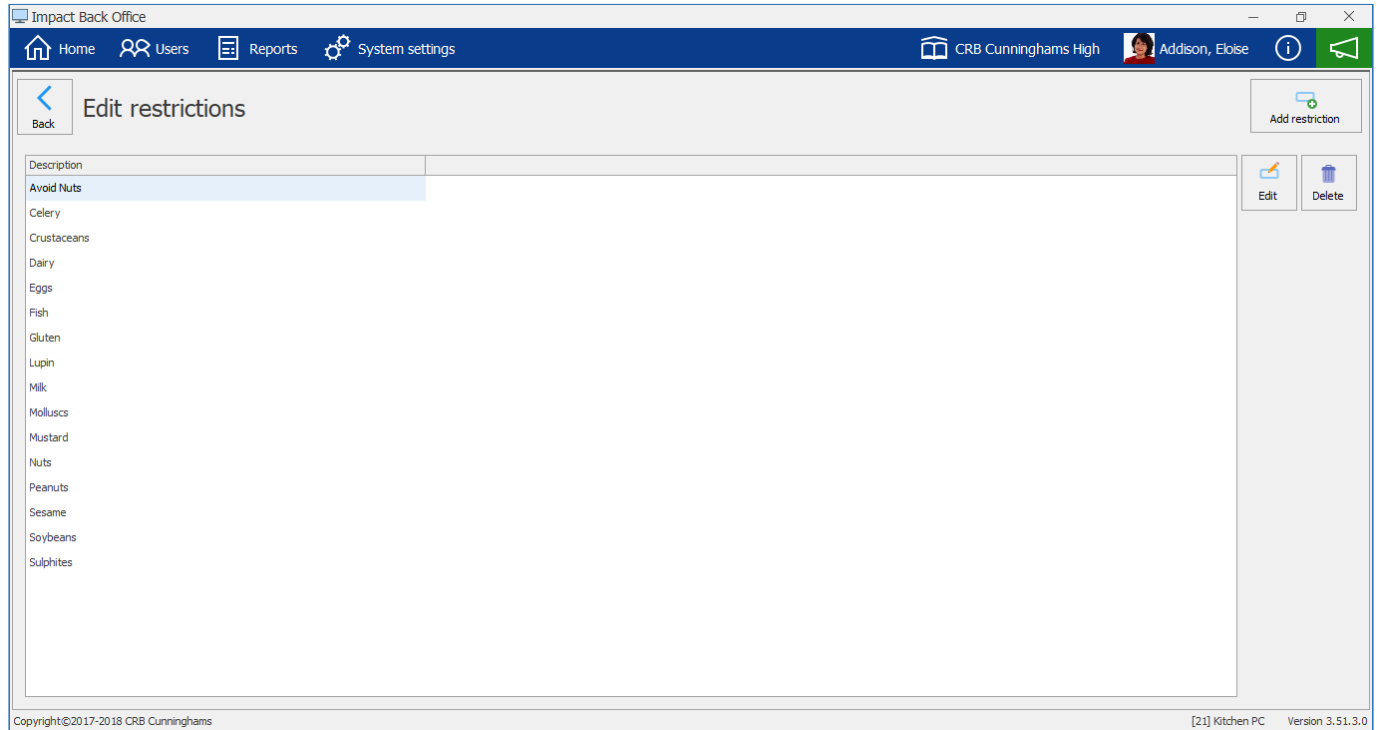


3. Press **Close** to complete the process.

Restrictions



Restrictions can be used to stop users from purchasing items that they are not allowed to have. For example, a user that has been assigned to the 'Avoid nuts' restriction, will not be able to purchase any products that have also been assigned to this restriction. Impact Fusion contains the current 14 allergens as required by EU FIC regulations, but more can be created as required.



Restrictions can also be used to stop the purchase of items on other grounds. In the past, we have had parents not wishing to have their child eat cakes. We will use this scenario as an example. If a product is marked against this restriction, when a user that is also marked as having this restriction attempts to purchase this item at the Point of Sale, the following error will be displayed and the item will not be added to the transaction.

Restriction Match

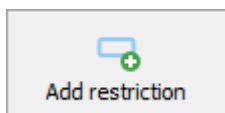


The PLU has been marked with the following restriction(s) that the current user has also been marked with:
No cakes

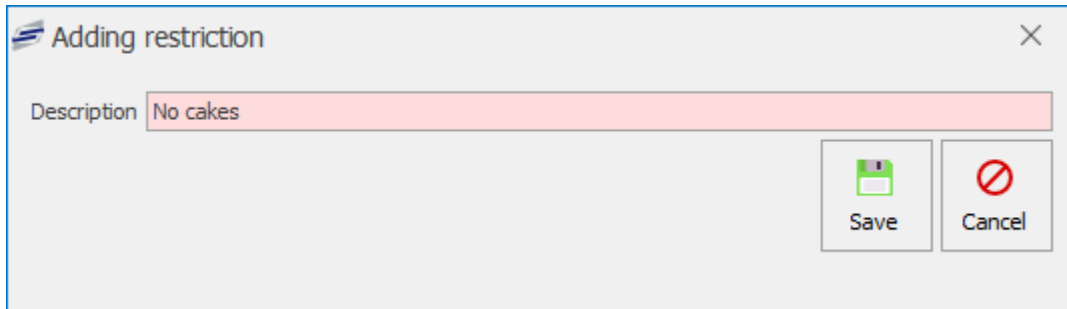
OK

Creating a new restriction

1. Press the **Add restriction** button



2. Enter a name/description for the restriction



3. 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 User restrictions 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 'Restrictions' tab and put a tick against your restriction.
5. Press **Save & close**.

Adding a product to a restriction

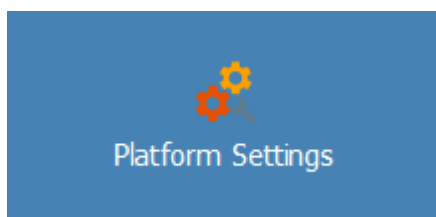
 For more information, see the PLU restrictions section of this manual.

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**.

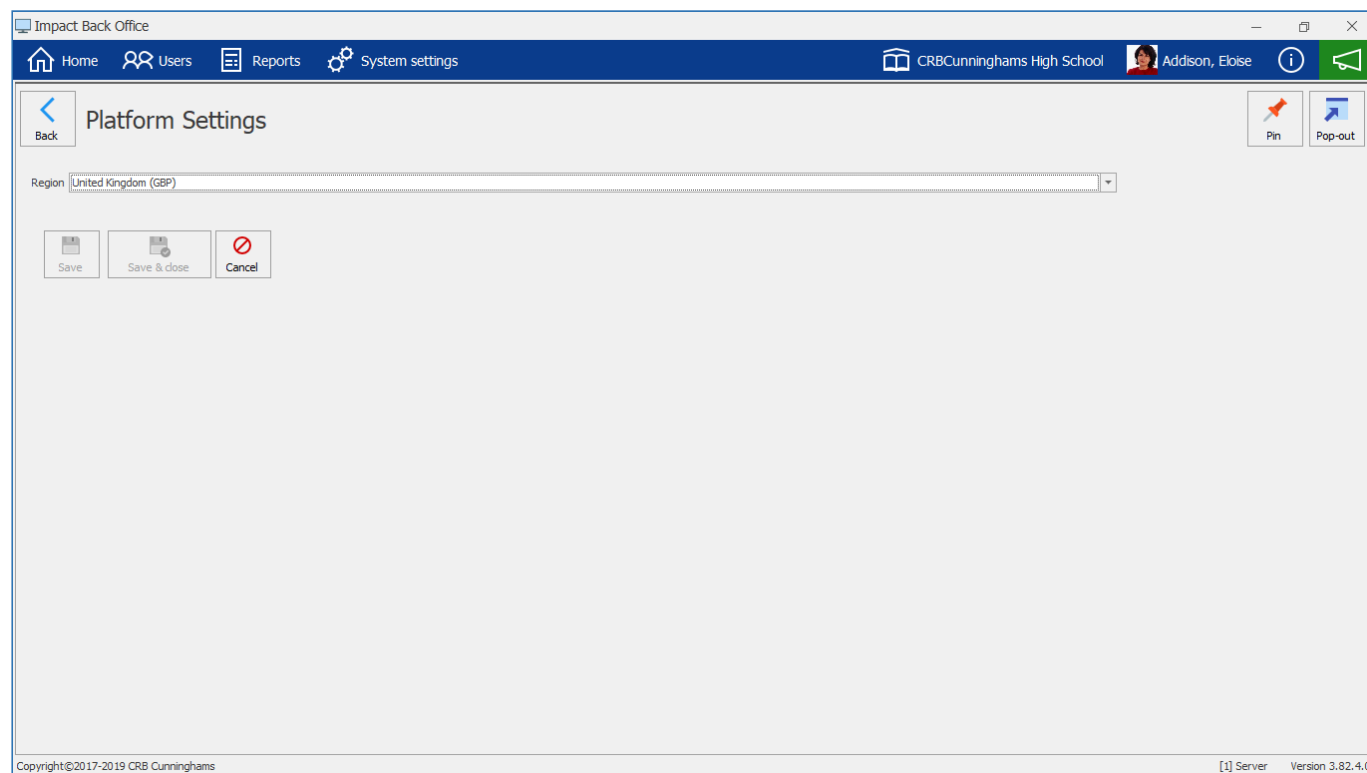
Platform Settings



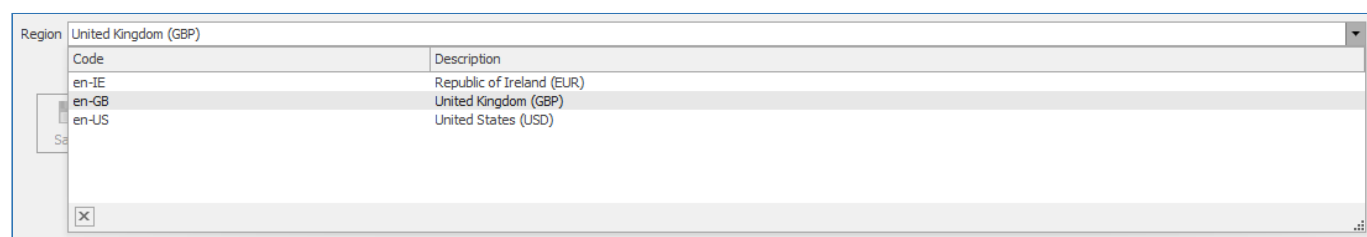
The platform settings is simply currency settings for the cashless system. The 3 available options are **United Kingdom (GBP)**, **Republic of Ireland (EUR)** and **United States (USD)**.



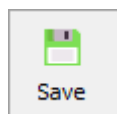
Platform settings is accessed in the system settings tile.



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.

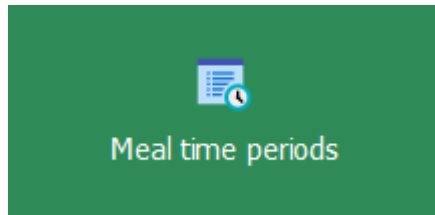


Meal time periods



Meal time periods are the times are the start and end times of all the services in which the system will be in use. Great for recording 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

Back Edit meal periods Add meal period Pop-out

School: CRBCunninghams High School

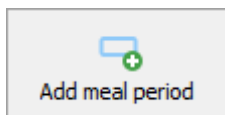
Name	Start time	End time	Represents	Active
Breakfast	06:00	09:15	Breakfast	<input checked="" type="checkbox"/>
Morning Break	09:15	11:30	MorningBreak	<input checked="" type="checkbox"/>
Lunch	11:30	14:30	Lunch	<input checked="" type="checkbox"/>
Afternoon-Evening	14:30	23:59	Afternoon	<input checked=""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

Edit Delete

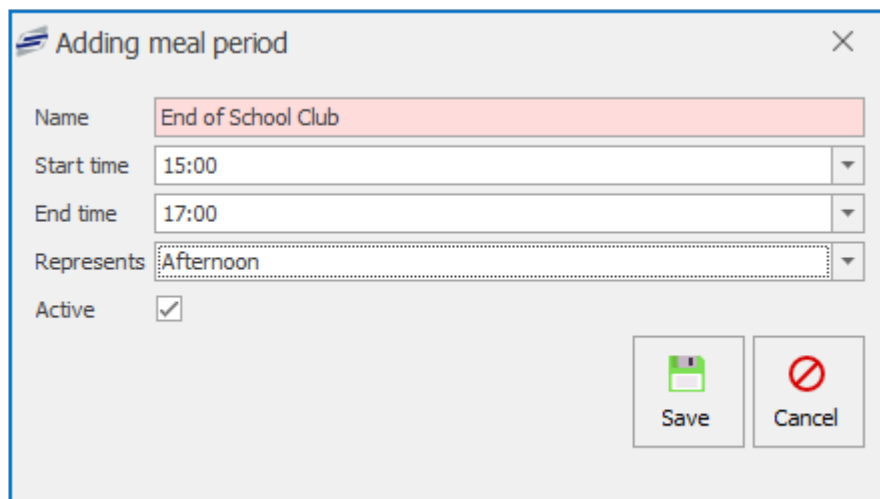
Copyright © 2017-2019 CRB Cunningham [1] Server Version 3.82.4.0

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**



The screenshot shows a dialog box titled "Adding meal period" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Name:** A text input field containing "End of School Club".
- Start time:** A time selection dropdown menu showing "15:00".
- End time:** A time selection dropdown menu showing "17:00".
- Represents:** A dropdown menu showing "Afternoon".
- Active:** A checkbox that is currently checked.
- Buttons:** Two buttons at the bottom right: "Save" (with a floppy disk icon) and "Cancel" (with a red prohibition sign icon).

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.



Internet payments

PLUs



The PLUs screen is where all of the management of your products and pricing is performed. It is accessed by pressing either the 'PLUs' or 'Products and pricing' tiles.



i For those users that were originally using an older version of Fusion (v3.53.1 and below), this screen is a combination of the old PLU and Price lists screen. They have been combined to make management of products easier.

Impact Back Office

Home Users Reports System settings CRB Cunningham High Addison, Eloise

PLUs

Back

Name: Winter 2018 Start date: 20/09/2018 [Change price list](#)

PLUs

Find: ☒ Active only [Bulk price change](#)

PLU number	Name	Group	Secondary Schools		Cost price	
			Student	Staff	Community	
1	Apple	Fresh Fruit	£0.70	£0.30	£0.30	£0.00
2	Grapes	Fresh Fruit	£0.40	£0.36	£0.30	£0.00
3	Slice of Toast	Breakfast	£0.30	£0.36	£0.00	£0.00
4	Cereal & Milk	Breakfast	£0.60	£0.72	£0.00	£0.00
5	Cheese on Toast	Breakfast	£0.40	£0.48	£0.00	£0.00
6	Croissant	Breakfast	£0.50	£0.60	£0.00	£0.00
7	Bacon Sandwich	Breakfast	£1.11	£1.20	£0.00	£0.00
8	Sausage Sandwich	Breakfast	£1.00	£1.20	£0.00	£0.00
9	Banana	Fresh Fruit	£0.40	£0.36	£0.00	£0.00
10	Cinnamon Roll	Desserts	£0.60	£0.72	£0.00	£0.00
11	Water 330ml	Drinks	£0.60	£0.72	£0.00	£0.00
12	Water 500ml	Drinks	£0.80	£0.96	£0.00	£0.00
13	Orange Juice 250ml	Drinks	£0.50	£0.60	£0.00	£0.00
15	Sports Drink	Drinks	£1.10	£1.32	£0.00	£0.00

Save Save & close Cancel

PLU details

Apple

Edit PLU Delete PLU

Active: ☒

PLU number: 1

Group: Fresh Fruit

VAT code: Zero (0.00%)

Background colour: ☒

Text colour: ☒

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i FUN FACT: Incase you are wondering (many do), PLU stands for Price Look-Up.

Adding/editing PLUs

Adding a new PLU

When you start selling a new product to your users, you will first need to add it to the system. This is achieved by using the process below:

1. Press the **Add PLU** button.



2. Configure the PLU as required.

i The details required for a PLU are covered in the next few sections of this manual. They can be found by clicking on the following links [Basic Details](#), [Prices](#), [Nutritional Details](#) and [Restrictions](#).

3. Once configured, press **Save** or **Save & close**.

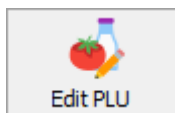
Editing an existing PLU

1. Find and select the PLU from the list.

i The PLU screen contains a find filter which makes selecting the required product easier.

PLUs						
Find		banana	<input checked="" type="checkbox"/> Active only	Bulk price change		
			Secondary Schools			Cost price
PLU number	Name	Group	Student	Staff	Community	
9	Banana	Fresh Fruit	£0.40	£0.36	£0.00	£0.00
19	Banana Milkshake	Drinks	£0.60	£0.72	£0.00	£0.00

2. Press the **Edit PLU** button.



3. Make the required changes.

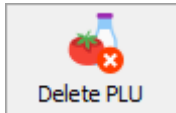
i The details required for a PLU are covered in the next few sections of this manual.

4. Press **Save** or **Save & close** to save your changes.

Deleting a PLU

! Products that are being used by a layout cannot be deleted. You must first remove the product from any layouts. For more information, see the [Layouts](#) section.

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



3. Press **Yes** to confirm.

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:

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.
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 PLU groups .
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. If you leave this as 'No VAT code', the VAT code that is set to the Price Band will be used. For example, typically the Student Price band will have the 0% VAT rate and staff the 20% VAT rate.
Scan code	No	If your system is using barcode scanners, you will need to enter the barcode number of the product here.
Points	No	How many points does a user earn if they purchase this item.
Available from free allowance	No	Can users use their free allowance to purchase this item?
Zero price able	No	Can this item be set to zero price?
Price override	No	If an item is set to 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

		products normal price will be used.
Background colour	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.
Text colour	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.
Image	No	This image will be used on the Point of Sale and/or smartboard. Due to licensing restrictions, no images are included with Impact Fusion. Images must be sourced/taken by the customer.

Prices

A single item can have multiple prices depending on what price band the user is in. Prices may also change over time. Using this screen we can simply input the price for the item in the grid.

Impact Back Office

Home Users Reports System settings CRB Cunninghams High Addison, Eloise

Back Adding new PLU Pop-out

Basic details Prices Nutritional details Restrictions

Price list	Start date	Secondary Schools			Primary Schools			Cost price
		Student	Staff	Community	Student	Staff	Community	
Winter 2018	20/09/2018	£0.50	£0.60	£0.65	£0.30	£0.60	£0.66	£0.10

Edit price bands Edit price lists

Save Save & close Cancel

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

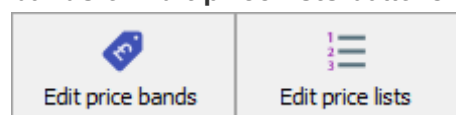
Each item can also have a 'Cost price' associated with it. This can be used for simple 'Profit v Loss' reporting.

Price groups, price bands, and price lists

The number of price groups, price bands, and price groups will vary on each site. In the screenshot above, this system has two price groups, each with three bands ('Student', 'Staff', and 'Community') and has a single price list. The 'Winter 2018' price list has a start date from the 20th September 2018 and will be used until a new price list is created with a more recent start date.

Any Secondary school users set to use the 'Student' price band purchasing this item will be charged 50p whereas primary school users set to the 'Student' price band will be charged 30p. This flexibility allows councils, MATs, or catering providers to have a single point of product management for all of their systems but also scales down for individual schools.

If you wanted to make changes to the price bands or price groups, you can click either the **Edit price bands** or **Edit price lists** buttons.



Upon pressing either button, you will be asked to save any changes that you have made and then taken to the relevant screen.



For more information, see the Price bands and Price lists sections of this manual.

Nutritional details

The full nutritional details of a product can be stored against each PLU. This allows for nutritional reporting through the Fusion system.

The screenshot shows the 'Impact Back Office' interface. At the top is a navigation bar with links for Home, Users, Reports, and System settings. Below this is a header for 'Adding new PLU' with a 'Back' button. The 'Nutritional details' tab is selected, showing a table for nutritional information per 100g portion. The table lists various nutrients and their values. At the bottom of the form, there is a field for 'Actual portion size (g)' set to 150, and three buttons: 'Save', 'Save & close', and 'Cancel'. The footer indicates copyright for 2017-2018 CRB Cunningham.

Impact Back Office

Home Users Reports System settings

Back Adding new PLU

Basic details Prices **Nutritional details** Restrictions

All per 100g portion

Nutrient	Value
Energy (kCal)	78.00
Fat (g)	0.20
Saturates (g)	0.00
Carbohydrates (g)	12.50
NMESugars (g)	4.70
FibreNSP (g)	3.70
Protein (g)	4.70
Iron (mg)	0.00
Calcium (mg)	0.00
VitaminA (µg)	0.00
Folate (µg)	0.00
VitaminC (mg)	0.00
Sodium (mg)	0.60

Actual portion size (g)

Save Save & close Cancel

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To enter the information, simply type into the grid the values per 100g of the product. At the bottom we can set (in grams) how large an actual portion/serving of this product is.

Restrictions




As discussed earlier in the [User restrictions](#) and the [Restrictions](#) sections, a restriction will stop a user from purchasing a product if both the user and the product are both marked with the same restriction.

The screenshot shows the 'Impact Back Office' application window. The title bar reads 'Impact Back Office'. The top navigation bar includes links for Home, Users, Reports, and System settings. The user profile 'Addison, Eloise' is visible in the top right. The main content area is titled 'Adding new PLU' and has a 'Back' button. Below the title, there are tabs for 'Basic details', 'Prices', 'Nutritional details', and 'Restrictions'. The 'Restrictions' tab is active, displaying a checklist of food categories. The checklist items are: Avoid Nuts, Celery, Crustaceans, Dairy, Eggs, Fish, Gluten (checked), Lupin, Milk (checked), Molluscs, Mustard, Nuts (checked), Peanuts, Sesame, Soybeans, and Sulphites. At the bottom of the window, there are three buttons: 'Save', 'Save & close', and 'Cancel'. The footer of the window shows 'Copyright©2017-2018 CRB Cunningham' on the left and '[21] Kitchen PC Version 3.51.3.0' on the right.

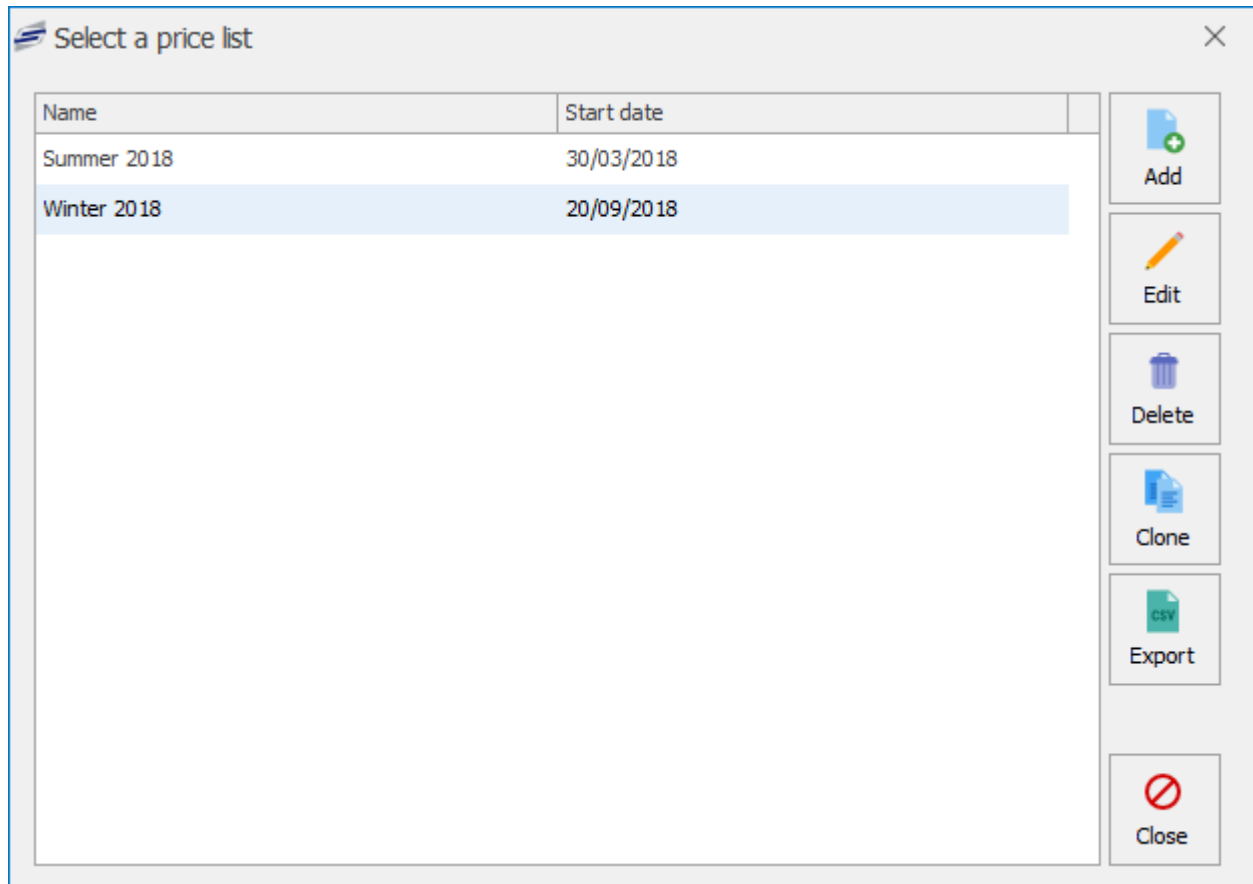
Restriction	Selected
Avoid Nuts	<input type="checkbox"/>
Celery	<input type="checkbox"/>
Crustaceans	<input type="checkbox"/>
Dairy	<input type="checkbox"/>
Eggs	<input type="checkbox"/>
Fish	<input type="checkbox"/>
Gluten	<input checked="" type="checkbox"/>
Lupin	<input type="checkbox"/>
Milk	<input checked="" type="checkbox"/>
Molluscs	<input type="checkbox"/>
Mustard	<input type="checkbox"/>
Nuts	<input checked="" type="checkbox"/>
Peanuts	<input type="checkbox"/>
Sesame	<input type="checkbox"/>
Soybeans	<input type="checkbox"/>
Sulphites	<input type="checkbox"/>

To mark a product against a restriction, simply select the applicable restriction(s) using the checklist.

Price lists

- 1  A price list is simply a list of all of your PLUs with the prices that are charged when users buy
- 2  them. As prices change over time, the price lists feature in Fusion allows you to create
- 3  multiple price tariffs that become active on a specified date. For example, if your prices are going up next term, you can create a new price list using the new term date as the start date.

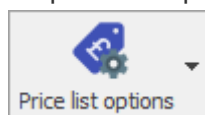
This means that come the new day of term, the system will automatically use the new price list.



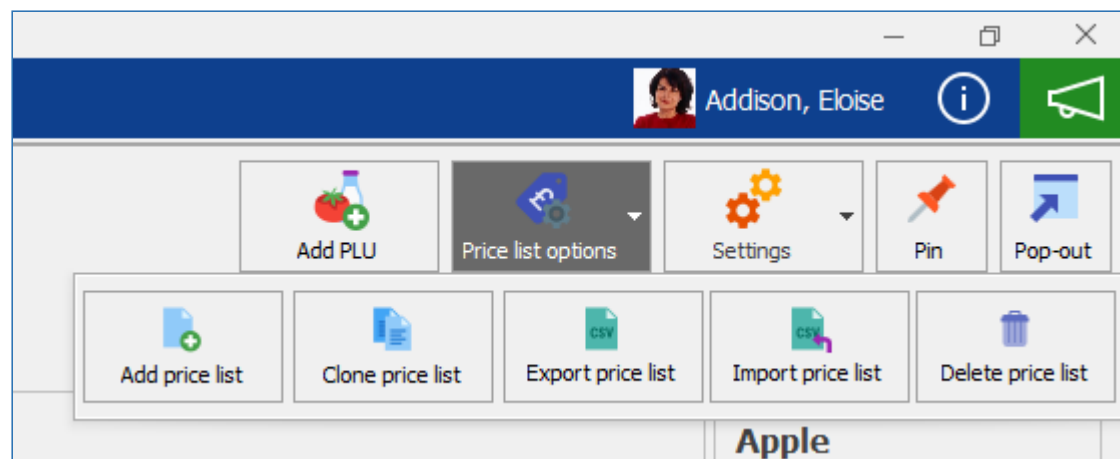
The Fusion system requires that there be an active price list at all times.

There are two methods of creating a new price list. The 'Add' method creates a brand new price list from scratch, all prices are set to zero to begin with. The 'Clone' method allows you to copy a previous price list, using the previous prices as a starting point.

All price list options are placed in the 'Price list options' button.

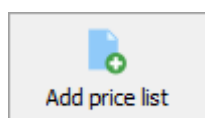


By pressing the Price list options button you will be presented with multiple options regarding price lists.



Adding a new Price list

1. To create a brand new price list, click the **Add** button.



2. Enter a name and a start date for the new price list.

A screenshot of the 'Add price list' dialog box. The dialog has a title bar with a blue icon and the text 'Add price list', and a close button (X) in the top right corner. Inside the dialog, there are two input fields: 'Name' with the text 'Summer 2019' and 'Start date' with the date '13/05/2019' and a dropdown arrow. At the bottom right of the dialog are two buttons: 'Save' (with a green floppy disk icon) and 'Cancel' (with a red circle and slash icon).

3. Press **Save**.
4. Set the prices on the new price list.

Impact Back Office

Home Users Reports System settings Addison, Eloise

Back PLUS

Name Summer 2019 Start date 13/05/2019 change price list

PLUs

Find ☒ Active only Bulk price change

PLU number	Name	Group	Price Group 1			Cost price
			Non-VAT	VAT	Community	
1	Apple	Fresh Fruit	£0.00	£0.00	£0.00	£0.00
2	Grapes	Fresh Fruit	£0.00	£0.00	£0.00	£0.00
3	Slice of Toast	Breakfast	£0.00	£0.00	£0.00	£0.00
4	Cereal & Milk	Breakfast	£0.00	£0.00	£0.00	£0.00
5	Cheese on Toast	Breakfast	£0.00	£0.00	£0.00	£0.00
6	Croissant	Breakfast	£0.00	£0.00	£0.00	£0.00
7	Bacon Sandwich	Breakfast	£0.00	£0.00	£0.00	£0.00
8	Sausage Sandwich	Breakfast	£0.00	£0.00	£0.00	£0.00
9	Banana	Fresh Fruit	£0.00	£0.00	£0.00	£0.00
10	Cinnamon Roll	Desserts	£0.00	£0.00	£0.00	£0.00
11	Water 330ml	Drinks	£0.00	£0.00	£0.00	£0.00
12	Water 500ml	Drinks	£0.00	£0.00	£0.00	£0.00
13	Orange Juice 250ml	Drinks	£0.00	£0.00	£0.00	£0.00
15	Sports Drink	Drinks	£0.00	£0.00	£0.00	£0.00
16	Tea	Drinks	£0.00	£0.00	£0.00	£0.00
17	Coffee	Drinks	£0.00	£0.00	£0.00	£0.00

PLU details

Apple

Edit PLU Delete PLU

Active ☒

PLU number 1

Group Fresh Fruit

VAT code Zero (0.00%)

Background colour ☐ ☐

Text colour ☐ ☐

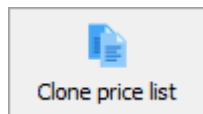
Save Save & close Cancel

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5. Press **Save** or **Save & close**.

Cloning a previous Price list

1. Select the previous price list that you want to use as a starting point and press **Clone**.



2. Enter a name and a start date for the new price list and press **Save**.

Cloning Summer 2018 price list

Name Winter 2018 Start date 20/09/2018

Save Close

3. Set the prices on the new price list.

The screenshot shows the 'Impact Back Office' application window. The top navigation bar includes 'Home', 'Users', 'Reports', and 'System settings'. The user 'Addison, Eloise' is logged in. The main section is titled 'PLUS' and contains a 'Name' field with 'Summer 2019' and a 'Start date' field with '13/05/2019'. A 'Change price list' button is visible. Below this is a table of items with columns for 'PLU number', 'Name', 'Group', 'Non-VAT', 'VAT', 'Community', and 'Cost price'. The table lists 17 items, including 'Apple', 'Grapes', 'Slice of Toast', 'Cereal & Milk', 'Cheese on Toast', 'Croissant', 'Bacon Sandwich', 'Sausage Sandwich', 'Banana', 'Cinnamon Roll', 'Water 330ml', 'Water 500ml', 'Orange Juice 250ml', 'Sports Drink', 'Tea', and 'Coffee'. On the right side, there is a 'PLU details' panel for 'Apple' with fields for 'Active', 'PLU number', 'Group', 'VAT code', 'Background colour', and 'Text colour'. At the bottom, there are 'Save', 'Save & close', and 'Cancel' buttons.

PLU number	Name	Group	Non-VAT	VAT	Community	Cost price
1	Apple	Fresh Fruit	£0.00	£0.00	£0.00	£0.00
2	Grapes	Fresh Fruit	£0.00	£0.00	£0.00	£0.00
3	Slice of Toast	Breakfast	£0.00	£0.00	£0.00	£0.00
4	Cereal & Milk	Breakfast	£0.00	£0.00	£0.00	£0.00
5	Cheese on Toast	Breakfast	£0.00	£0.00	£0.00	£0.00
6	Croissant	Breakfast	£0.00	£0.00	£0.00	£0.00
7	Bacon Sandwich	Breakfast	£0.00	£0.00	£0.00	£0.00
8	Sausage Sandwich	Breakfast	£0.00	£0.00	£0.00	£0.00
9	Banana	Fresh Fruit	£0.00	£0.00	£0.00	£0.00
10	Cinnamon Roll	Desserts	£0.00	£0.00	£0.00	£0.00
11	Water 330ml	Drinks	£0.00	£0.00	£0.00	£0.00
12	Water 500ml	Drinks	£0.00	£0.00	£0.00	£0.00
13	Orange Juice 250ml	Drinks	£0.00	£0.00	£0.00	£0.00
15	Sports Drink	Drinks	£0.00	£0.00	£0.00	£0.00
16	Tea	Drinks	£0.00	£0.00	£0.00	£0.00
17	Coffee	Drinks	£0.00	£0.00	£0.00	£0.00

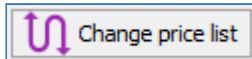
4. Press **Save** or **Save & close**.

Editing a Price list

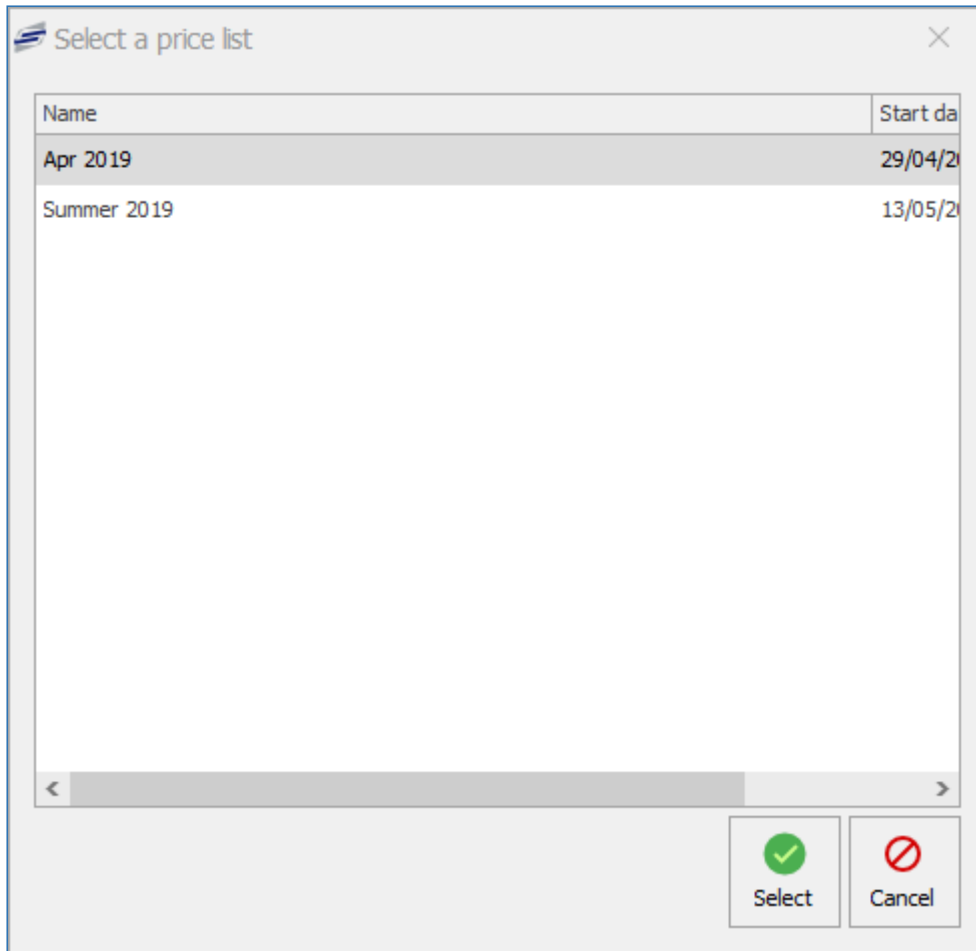


If this is the current price list and you change the start date to a date in the future. The system will revert to using the previous price list.

1. Press the **Change price list** button.




2. **Select** the price list from the list displayed.

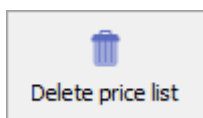


3. Set the prices as required.
4. Press **Save** or **Save & close**.

Deleting a Price list

 You are unable to delete a past or the currently active price list. This is because the system relies on this for audit purposes such as a users previous purchases.

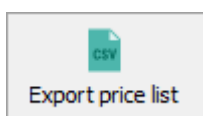
1. Select the price list and press the **Delete** button.



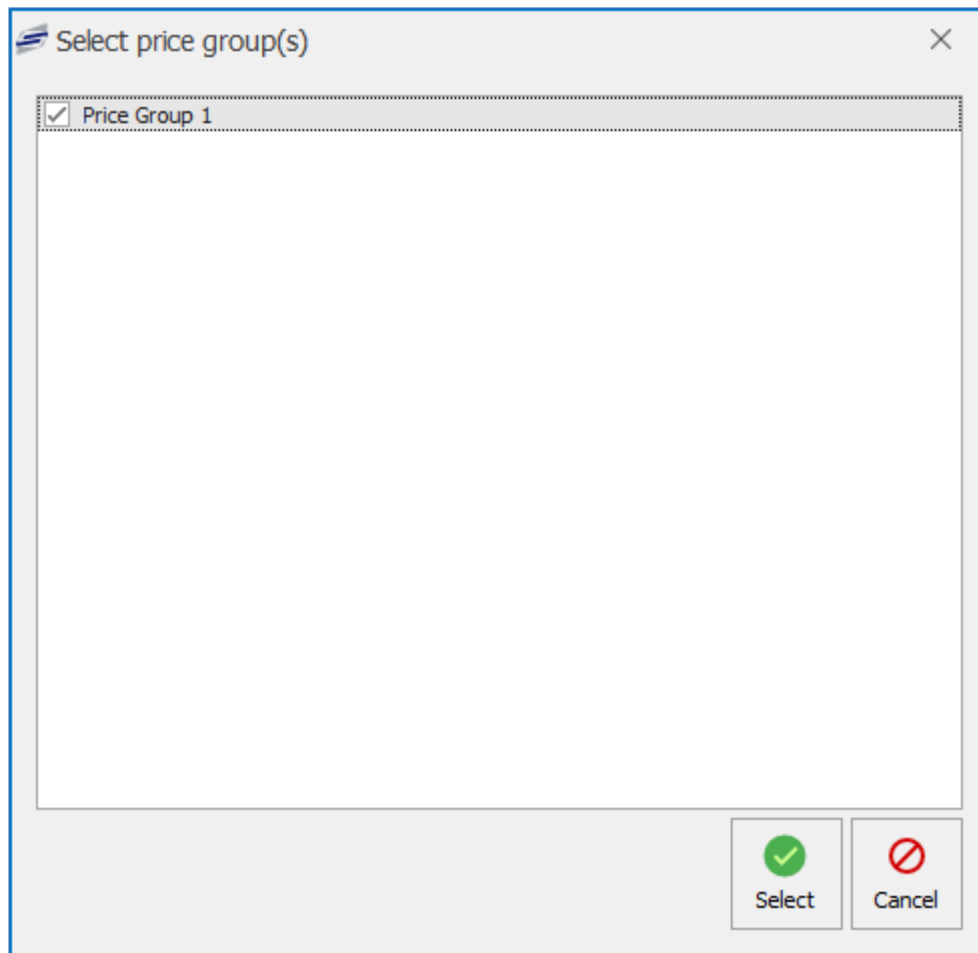
2. Press **Yes** to confirm.

Exporting a Price list

1. Press the **Export price list** button.



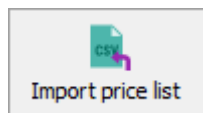
2. **Select** a Price group from the list displayed.



3. Browse to a folder to export the file.

Importing a Price list

1. Press the **Import price list** button.



2. Browse and select the Import csv file to open.

Impact Back Office

Home Users Reports System settings

CRBCunninghams High School Addison, Eloise

Import products and prices

Back Pop-out

Import file D:\Price Group 1_prices_20190513_142102.csv

PLU Number	PLU	Group	Group Name	Zero Price	VAT Code	VAT Name	VAT Rate	Cost Price	Non-VAT	VAT	Community
1	Apple	1	Fresh Fruit	False	1	Zero	0.00%	£0.00	£0.00	£0.00	£0.00
7	Bacon Sandwich	2	Breakfast	False	2	Standard	20.00%	£0.10	£0.00	£0.00	£0.00
30	Baguette - Brown	3	Cold Meals	True	2	Standard	20.00%	£0.10	£0.00	£0.00	£0.00
34	Baguette - White	3	Cold Meals	True	0		0.00%	£0.10	£0.00	£0.00	£0.00
64	Baked Beans	2	Breakfast	False	0		0.00%	£0.10	£0.00	£0.00	£0.00
59	Baked Potato	4	Hot Meals	True	0		0.00%	£0.00	£0.00	£0.00	£0.00
9	Banana	1	Fresh Fruit	False	0		0.00%	£0.10	£0.00	£0.00	£0.00
19	Banana Milkshake	5	Drinks	False	2	Standard	20.00%	£0.10	£0.00	£0.00	£0.00
76	BBQ	6	Sandwich - Sala...	True	0		0.00%	£0.10	£0.00	£0.00	£0.00
79	Brown	6	Sandwich - Sala...	True	0		0.00%	£0.10	£0.00	£0.00	£0.00
4	Cereal & Milk	2	Breakfast	False	1	Zero	0.00%	£0.00	£0.00	£0.00	£0.00
47	Cheese	7	Sandwich - Fillings	True	0		0.00%	£0.10	£0.00	£0.00	£0.00
5	Cheese on Toast	2	Breakfast	False	2	Standard	20.00%	£0.10	£0.00	£0.00	£0.00
74	Cheese Sandwich	8	Sandwiches	False	0		0.00%	£0.10	£0.00	£0.00	£0.00
46	Chicken	7	Sandwich - Fillings	True	0		0.00%	£0.10	£0.00	£0.00	£0.00
72	Chicken Sandwich	8	Sandwiches	False	0		0.00%	£0.10	£0.00	£0.00	£0.00
24	Chips	4	Hot Meals	False	2	Standard	20.00%	£0.10	£1.00	£1.20	£0.00
65	Chocolate Cake	9	Desserts	True	0		0.00%	£0.10	£0.00	£0.00	£0.00
20	Chocolate Milks...	5	Drinks	False	2	Standard	20.00%	£0.10	£0.00	£0.00	£0.00
10	Cinnamon Roll	9	Desserts	False	0		0.00%	£0.10	£0.00	£0.00	£0.00
17	Coffee	5	Drinks	False	2	Standard	20.00%	£0.00	£0.00	£0.00	£0.00

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[1] Server Version 3.79.1.0

Validation

- PLU number
- PLU name
- Group number
- Group name
- Unique scan codes

Price bands matched

Non-VAT
VAT
Community

Unknown columns

Pricing

New price list
Winter 2019
Takes effect
02/12/2019

Import

- Check that the checks and validations are correct and enter a new price list name and select a date it will take effect.

Validation

- PLU number
- PLU name
- Group number
- Group name
- Unique scan codes

Price bands matched

- Non-VAT
- VAT
- Community

Unknown columns

Pricing

New price list

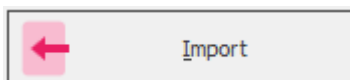
Winter 2019

Takes effect

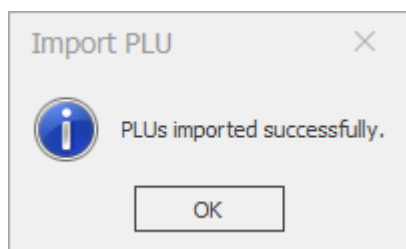
02/12/2019

Import

4. Press the **Import** button.



5. Confirmation of the import should appear.



Changing prices

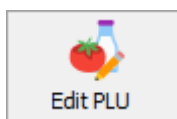


As we discussed in the [previous section](#), Fusion stores prices for each product on the system in Price lists. When the price of an item is to be changed, we will update the price list with the new price. Price lists give us the flexibility of making the change now, or for a future date. There are a couple of methods that we have available to change prices of products.

i If the Point of Sale software is open, you will need to press the **Refresh layout** button from within the functions menu to have the prices update on the PoS immediately. They will be updated automatically the next time you turn the PoS on.

Editing a PLU

1. From within the Products screen, find and select the PLU from the list of products.
2. Press the **Edit PLU** button.



3. Navigate to the **Prices** tab.
4. Change the prices accordingly.

Price list	Start date	Secondary Schools			Primary Schools			Cost price
		Non-VAT	VAT	Community	Non-VAT	VAT	Community	
Summer 2019	13/08/2019	£2.10	£2.45	£0.00	£2.00	£2.40	£0.00	
Winter 2019	07/10/2019	£2.20	£2.65	£0.00	£2.00	£2.40	£0.00	

Buttons at the bottom: Edit price bands, Edit price lists, Save, Save & close, Cancel.

i Remember, setting the price on a future price list will only come into effect when the start date for that price list is reached.

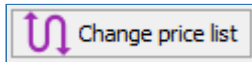
5. Press **Save & close** to finalise the changes.

Repeat the above for each product that has a new price.

Changing prices from the price list

Changing prices one by one

1. Select the price list to be edited using the **Change price list** button.



The current price list is selected by default.

2. Using the product grid, find and select the product to change.
3. Click into the price to be changed and enter a new price

4. Repeat the process for each product.
5. Once complete, press **Save** or **Save & close**

Changing multiple products at once using Bulk price change

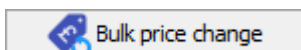
1. Select the PLU or PLUs. The selected PLUs will be highlighted in a light blue colour.

PLU number	Name	Group	Non-VAT	VAT	Community	
100001	Flapjack	Home Baking & Sundries	£0.75	£0.90	£0.90	£0.00
100002	Plain Muffin	Home Baking & Sundries	£0.75	£0.90	£0.90	£0.00
100003	Muffin	Home Baking & Sundries	£0.75	£0.90	£0.90	£0.00
100004	Plain Cookie	Home Baking & Sundries	£0.75	£0.90	£0.90	£0.00
100005	Chocolate Cookie	Home Baking & Sundries	£0.75	£0.90	£0.90	£0.00



You can select multiple PLUs by holding down the **CTRL** button on the keyboard and selecting the PLUs you want to change the price of.

2. Press the **Bulk price change** button.



3. From the **Update price band** dropdown, select a price band to update.

4. Select from the **Move prices** dropdown, **Up**, **Down** or **Set to value**.
5. Enter the value or percentage that you wish to change your PLUs by.
6. Press the green **Apply** button to save your changes.

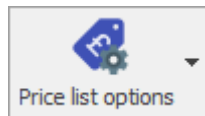
Up	This function will move the price of the selected PLU up dependant on what value has been set in the Add section
Down	This function will move the price of the selected PLU down dependant on what value has been set in the Subtract section
Set to value	This function will set the price exactly to what the value is in the Set to section (Cannot select a percentage if setting a specific value)

Promotions & deals

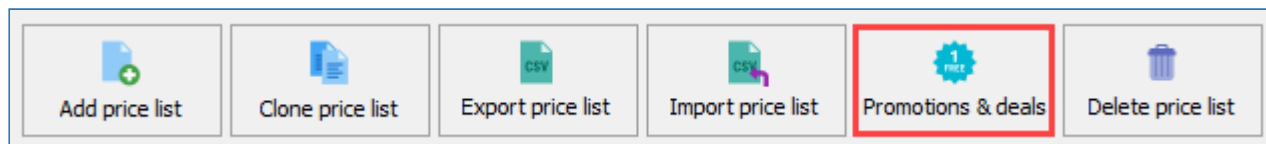


Promotions are a great way to incorporate meal deals and increase awareness of specific items. This could also help see an increase in profits. Meals Deals are common in schools.

Promotions and deals are located within the **Price list options** button.



Press the **Promotions & deals** button.



You can manage promotions and deals for the current price list. The current price list's name can be seen above the promotions & deals table, for example Summer 2019 as seen below.

Impact Back Office

Home Users Reports System settings Addison, Eloise

Back Promotions & deals Pop-out

Summer 2019

Name	Type	Start	End	From	To	M	T	W	Th	F	Sa	Su	FSM
Breakfast Meal Deal	SetPrice	04/06/2019	07/06/2020	08:00:00	17:00:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Move up Move down Add Edit Remove

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Grid

Name	Type	Start	End	From	To	M	T	W	Th	F	Sa	Su	FSM
Breakfast Meal Deal	SetPrice	04/06/2019	07/06/2020	08:00:00	17:00:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Column Name	Description
Name	Description of the Promotion or deal
Type	What type of promotion or deal has been selected
Start	When the Promotion or deal becomes active
End	The expiry date for the promotion or deal

From & To	What times period of the day is the promotion or deal available
Days of the weeks	Which days of the week is the promotion or deal available
FSM	N/A

Side bar



Move up




Move down



Add



Edit



Remove

- **Move up** will move the selected promotion or deal up the list.
- **Move down** will move the selected promotion or deal down the list.
- **Add** will allow you to add a new promotion or deal.
- **Edit** will allow you to edit and customize an existing promotion or deal.
- **Remove** will permanently remove and delete a promotion or deal.

Adding new Promotions & deals

-

- Promotion

Promotion name

Allowed on cash only sales
☒

Allowed times

☐ All Days
☐ Mon
☐ Tue
☐ Wed
☐ Thu
☐ Fri
☐ Sat
☐ Sun

Start time
00:00

Finish time
23:59

Promotion date range

☐ Limit promotion dates

Start date

Finish date

User types

☒ All user types

☐ Student
☐ Staff
☐ Catering
☐ Hospitality
☐ Admin

Prices

Description	Price
-------------	-------

Add
Edit
Delete

Triggers

Promo Group Name	Quantity
------------------	----------

Add
Edit
Delete

Save
Cancel

- | | |
|----------------------------|-------------------------------------|
| Promotion name | Sandwich Meal Deal |
| Allowed on cash only sales | <input checked="" type="checkbox"/> |

- Page 119 of 320

Allowed times

☐ All Days
 ☒ Mon
 ☒ Tue
 ☒ Wed
 ☒ Thu
 ☒ Fri
 ☐ Sat
 ☐ Sun

Start time

Finish time

5. To set a date range for the promotion to be available tick the box to **Limit promotion dates** and select a **Start & End date**.

Promotion date range

☒ Limit promotion dates

Start date

Finish date

6. If the Promotion is tied to specific user types or all user types you can select which from the **User types** section.

User types

☒ All user types

☐ Student
☐ Staff
☐ Catering
☐ Hospitality
☐ Admin

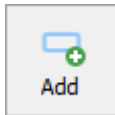
Add Prices

In the **Prices** section you will setup what the promotion will sell at to specific price bands. Staff might pay a higher price than Students.

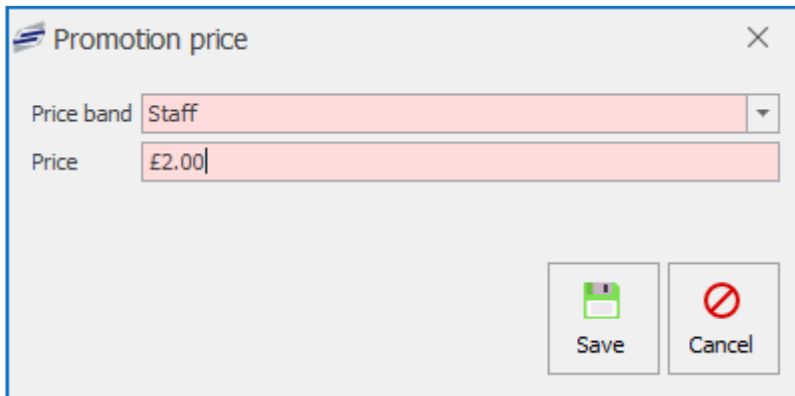
Prices

Description	Price
Student	£1.50

1. Press the **Add** button.



2. Select a **Price band** from the drop-down box and enter a **Price** the the promotion.

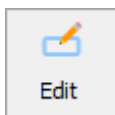


The dialog box is titled 'Promotion price' with a close button (X) in the top right corner. It contains two input fields: 'Price band' with a dropdown menu showing 'Staff' and 'Price' with a text box containing '£2.00'. At the bottom right, there are two buttons: 'Save' (with a green floppy disk icon) and 'Cancel' (with a red circle and slash icon).

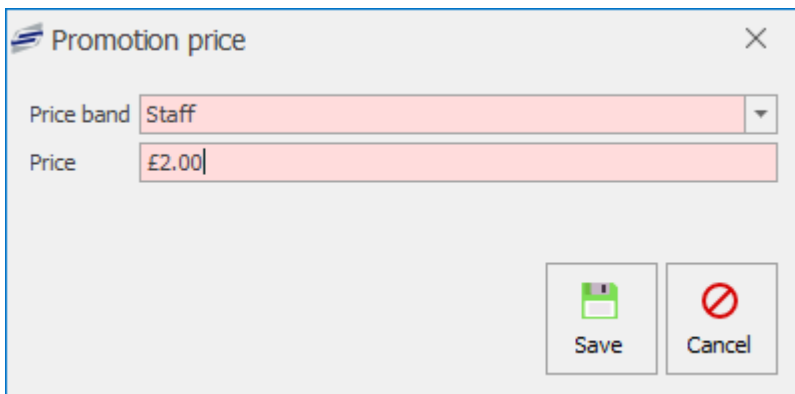
3. Press the **Save** button.

Edit Prices

1. Select a Price and press the **Edit** button.



2. Amend the **Price band** and **Price** accordingly.

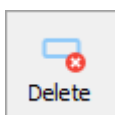


The dialog box is titled 'Promotion price' with a close button (X) in the top right corner. It contains two input fields: 'Price band' with a dropdown menu showing 'Staff' and 'Price' with a text box containing '£2.00'. At the bottom right, there are two buttons: 'Save' (with a green floppy disk icon) and 'Cancel' (with a red circle and slash icon).

3. Press the **Save** button.

Delete Prices

1. Select a Price and press the **Delete** button.



2. This will remove the price for that price band.




Triggers

Triggers are groups of PLUs that will set off a chain of events when other Triggered promo groups of

PLUs are selected within the same transaction. The system knows if the same groups are part of a promotion and will then deduct the amount from the final sale.

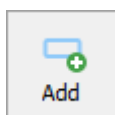
Triggers

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** amount, this is the amount of selections for the PLU to active the trigger.




Promotion trigger group



Group name:

Trigger quantity:

Trigger items

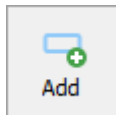
Type	Name
------	------

 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

Select Cancel

3. You can continue to add more PLU's 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

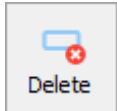
1. Select a Trigger from the list and press the **Edit** button.



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

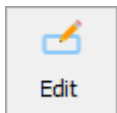
1. Select a Trigger from the list and press the **Delete** button.



2. This will remove the Promo group from the Triggers section.
3. Press **Save**.

Editing Promotions & deals

1. Select a Promotion from the list and press the **Edit** button.



2. Amend promotion config accordingly.

Promotion

Promotion name

Breakfast Meal Deal

Allowed on cash only sales

☒

Allowed times

☒ All Days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Start time

08:00

Finish time

17:00

Promotion date range

☒ Limit promotion dates

Start date

04/06/2019

Finish date

07/06/2020

User types

☒ All user types

☐ Student

☐ Staff

☐ Catering

☐ Hospitality

☐ Admin

Prices

Description	Price
Student	£2.00
Staff	£2.20

Add

Edit

Delete

Triggers

Promo Group Name	Quantity
Breakfast Mains	1
Breakfast Fruit	1
Drinks	1

Add

Edit

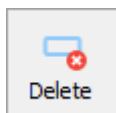
Delete

Save

Cancel


Delete Promotions & deals

1. Select a Promotion from the list and press the **Delete** button.



2. Press **Yes** or **No** to confirm deletion.
3. This will delete the promotion from the list.

The meal deal will active as soon as the trigger completes. Below is an example showing how it works.



Adams, Alfredo

YEAR 10 CLASS A

AVAILABLE £8.00 LIMIT £10.00

TODAY £0.00 POINTS 0

X 1 + -

Bacon Sandwich

Sausage Sandwich

Cheese on Toast

Slice of Toast

Cereal Milk

Croissant

Pizza

Pretzel

Cookies

Cinnamon Roll

Cupcake

Nachos

Banana

Grapes

Tea

Coffee

Water

Milk Carton 200ml

Sports Drink

Orange Juice 250ml

MISC

TOTAL £0.00

Wednesday, Week 4

Morning Break

Find user

Student

Overspend

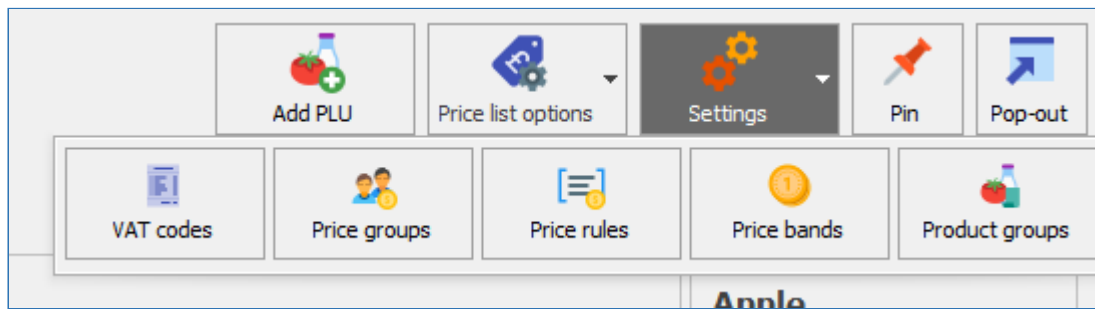
Functions

Finish transaction

Settings



The PLU Settings button is where you can manage existing and new VAT codes, Price groups, Price rules, Price bands and Product groups.



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.

VAT codes



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.

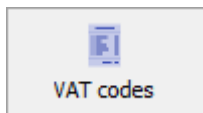


The VAT code associated with the transaction does not alter the price that the user pays, this is controlled by the Price bands and the Price rules. The VAT code simply tells the system how much of the transaction was VAT for the purposes of reporting.

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.

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

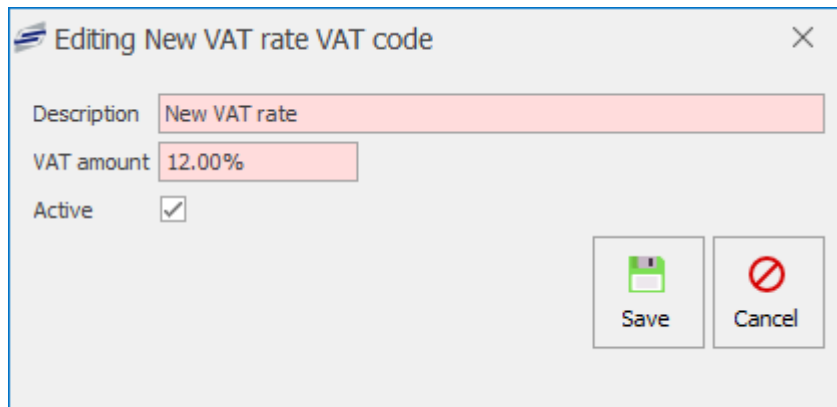
Although rare, the VAT rate may change over time, so Fusion needs to be able to allow for the new rate

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.

A dialog box titled "Editing New VAT rate VAT code" with a close button (X) in the top right corner. The dialog has a light gray background. It contains three input fields: "Description" with the text "New VAT rate", "VAT amount" with the text "12.00%", and "Active" with a checked checkbox. At the bottom right, there are two buttons: "Save" with a green floppy disk icon and "Cancel" with a red circle and slash icon.

3. Press **Save**.

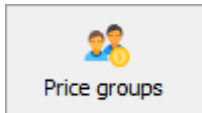
Price groups



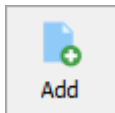
Price groups allow you to manage what price you are selling your products and to which price band. For example, a bottle of water for a Student could cost 50p and to a member of Staff that price would also include VAT and cost 60p. You can also create multiple Price groups. For example, the school might 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.

Adding new price group

Name **Price Group 1**

School

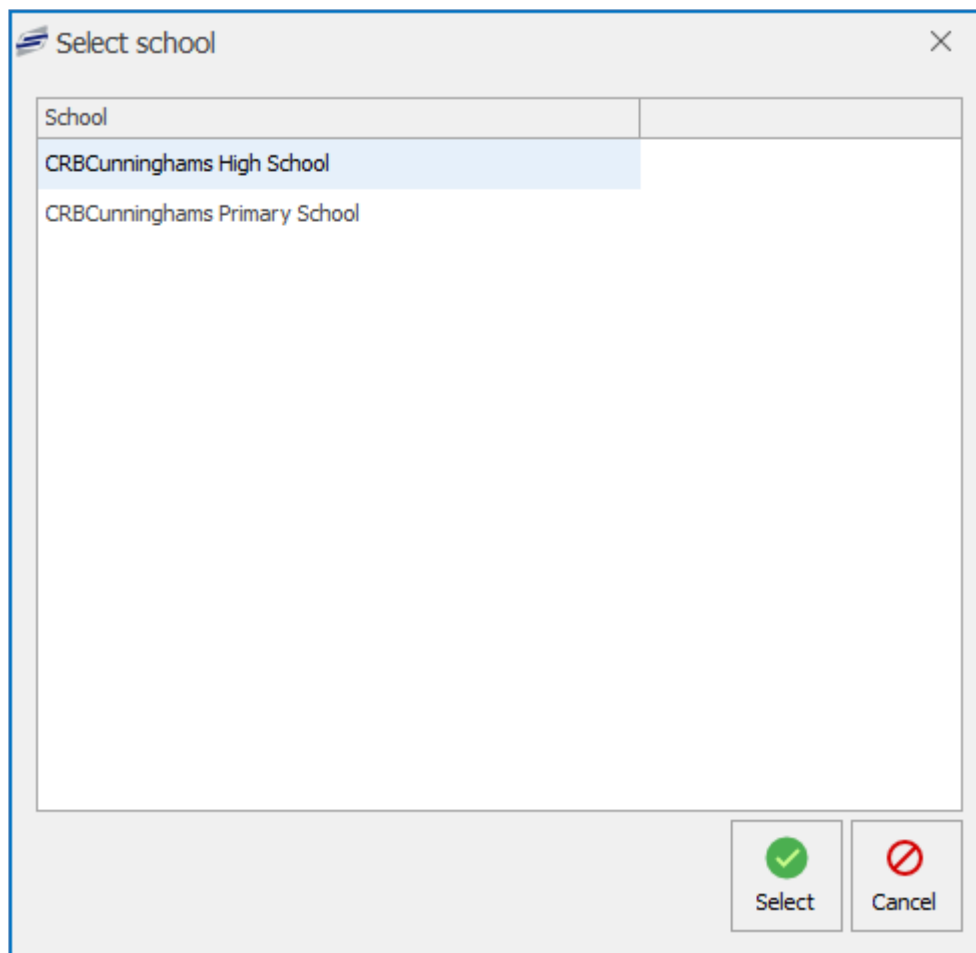
Add

Delete


OK Cancel

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.

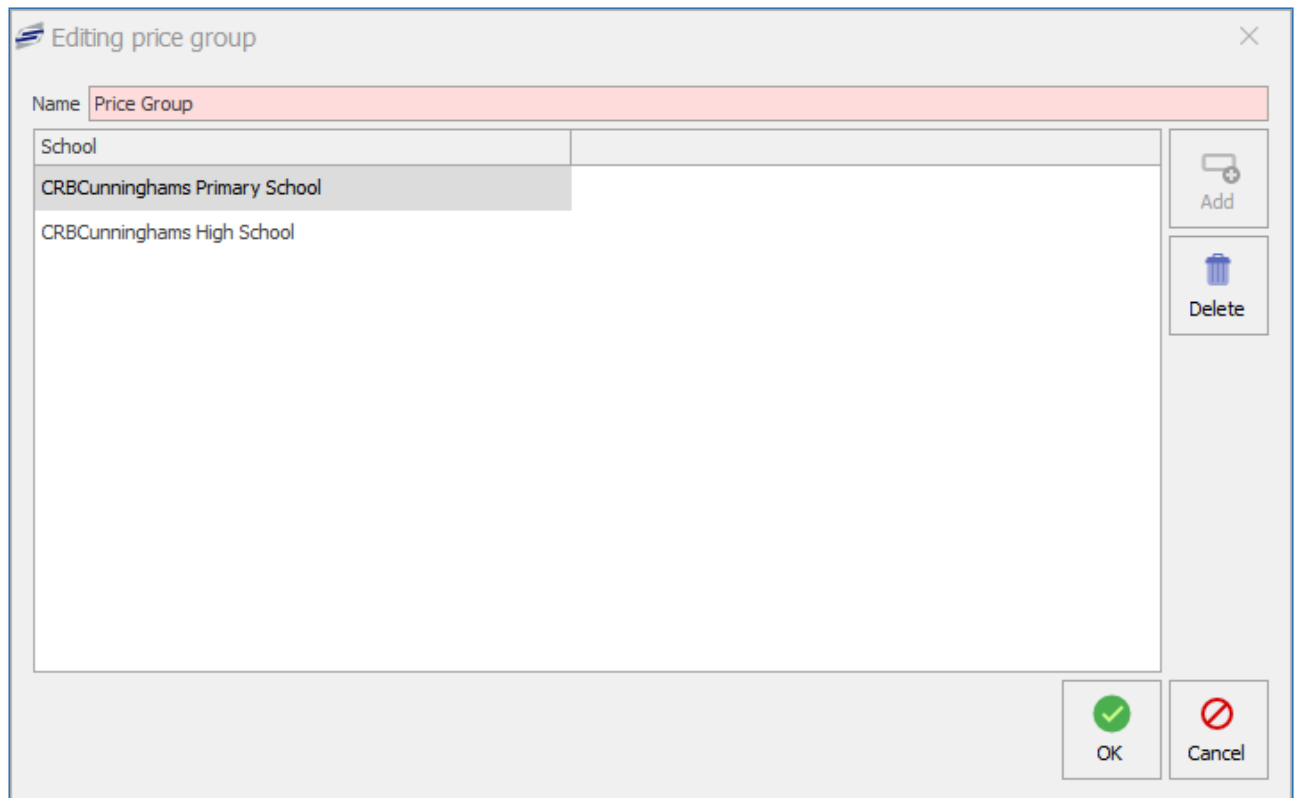
Editing a Price group

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

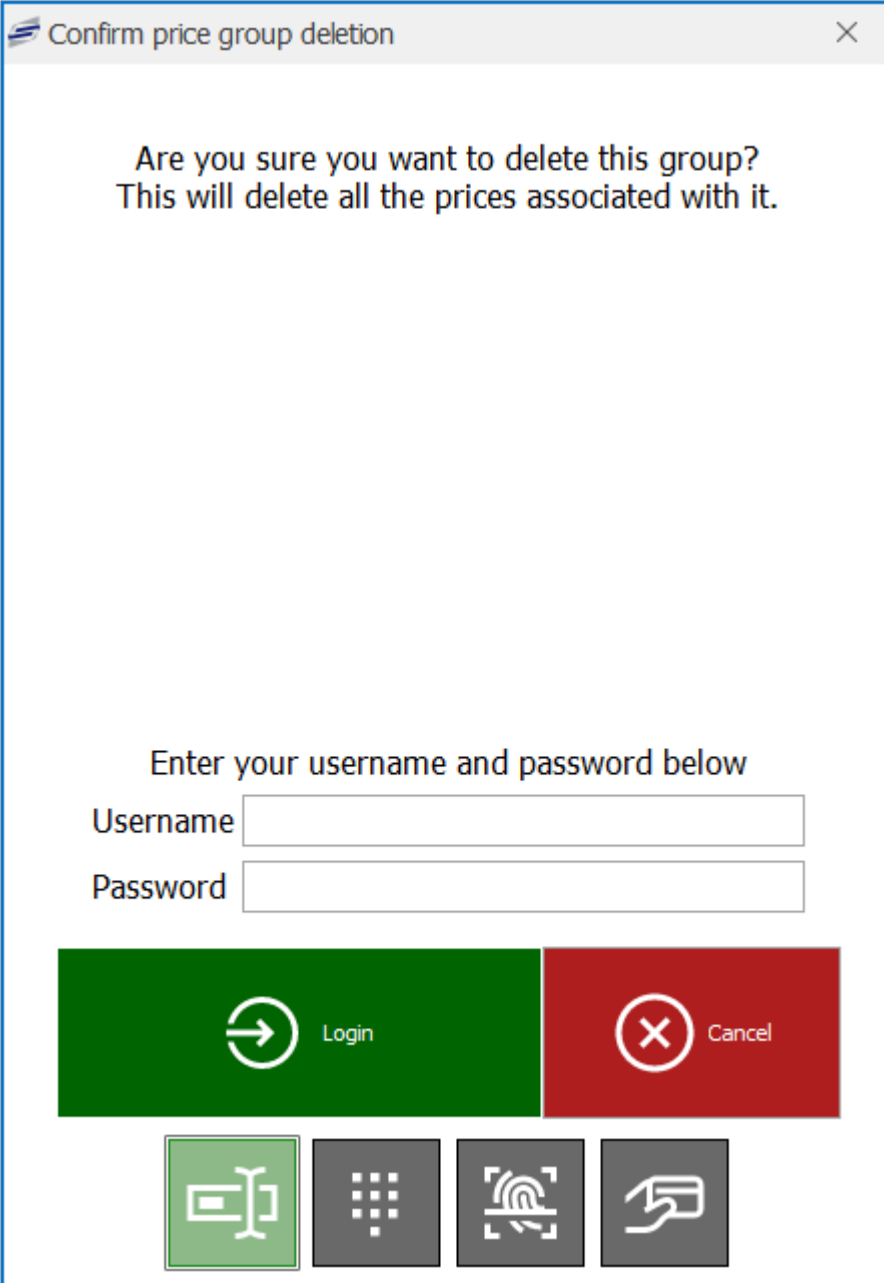
3. Press **OK** to confirm any changes.

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



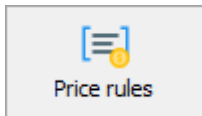
Price rules tie User types or meal statuses to Price Bands. The default price band is usually the Student (0% VAT). The first rule created would typically be for Staff user types to be associated to the Staff (20% VAT) price band.

Adding New Price Rules

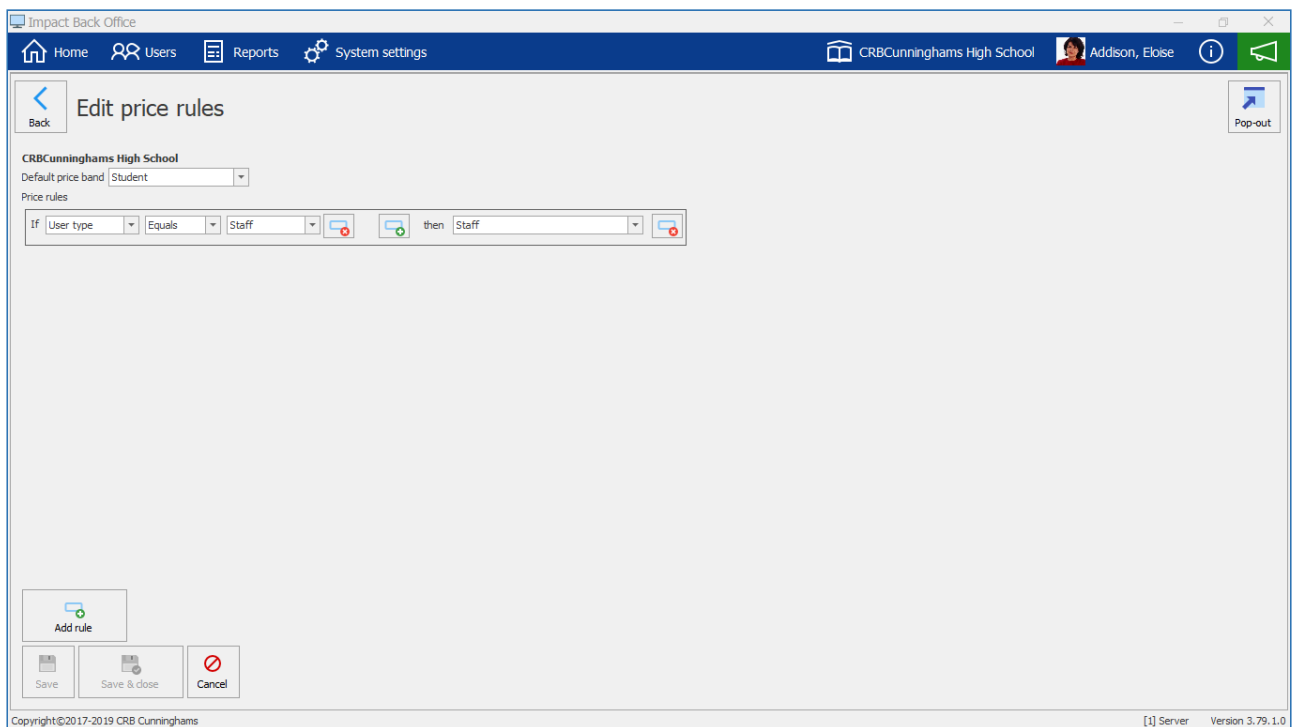


The default price band is usually set to Student (0% VAT). It will be in very rare circumstances that this will be different.

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.

Price rules

If   then 




5. Select either **User type** or **Meal choice**

Price rules

If   then 




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 

Student
Staff
Catering
Hospitality
Admin

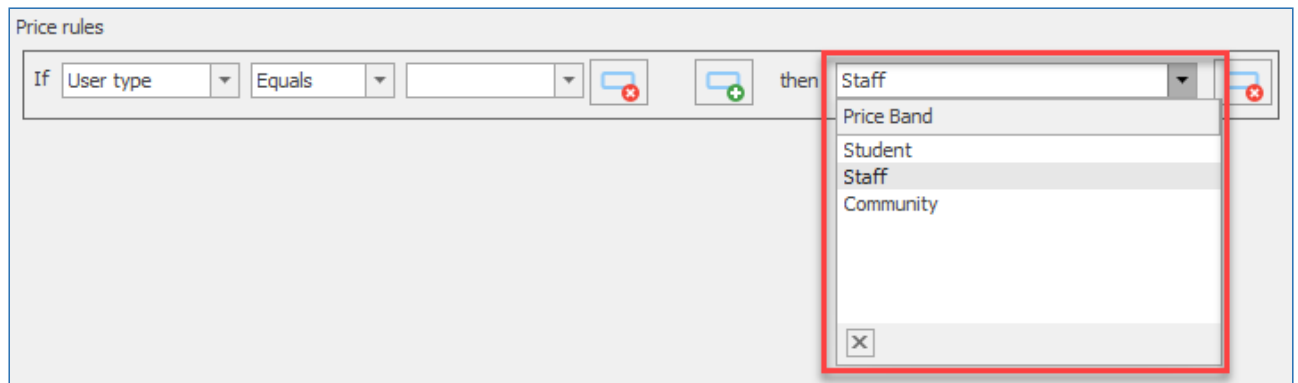
Price rules

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

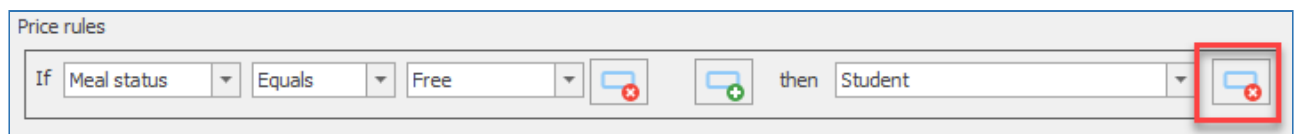
Price Band
Student
Staff
Community

X

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.

Price bands

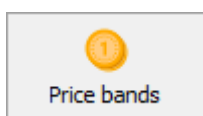


Price bands represent what user types will be using VAT codes. The default setup would usually consist of Students using a Zero VAT code, Staff and Community using a Standard (20%) VAT code.

Name	VAT code	Active
Student	Zero	<input checked="" type="checkbox"/>
Staff	Standard	<input checked="" type="checkbox"/>
Community	Standard	<input checked="" type="checkbox"/>

Adding a Price band

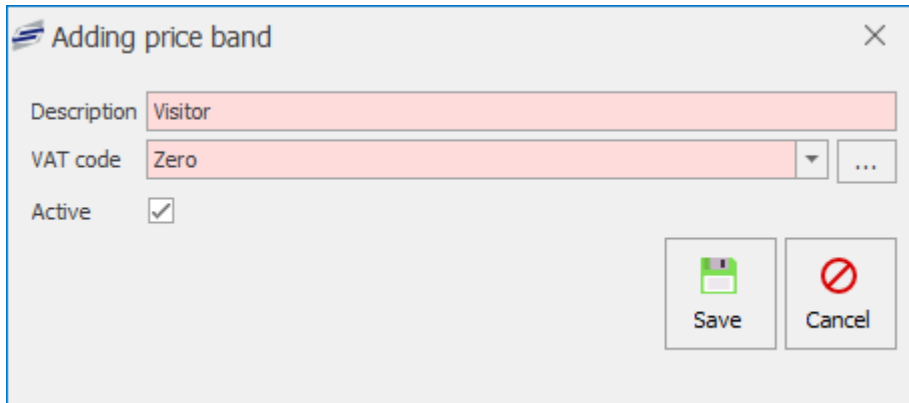
1. Press the **Settings** and select **Price bands**.





2. Press the **Add** button.



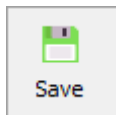
3. Enter a description for the new price band and select a VAT code. You will also need to select the Active checkbox for the price band to become live.



A dialog box titled "Adding price band" with a close button (X) in the top right corner. It contains three input fields: "Description" with the text "Visitor", "VAT code" with a dropdown menu showing "Zero" and a three-dot menu button to its right, and "Active" with a checked checkbox. At the bottom right are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with a red circle and slash icon).

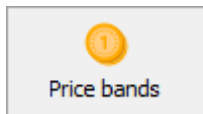
 You can also create a new VAT code by pressing the  button. Click on the link for more information regarding VAT codes.

4. Press **Save** button.

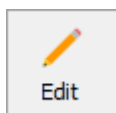


Editing a Price band

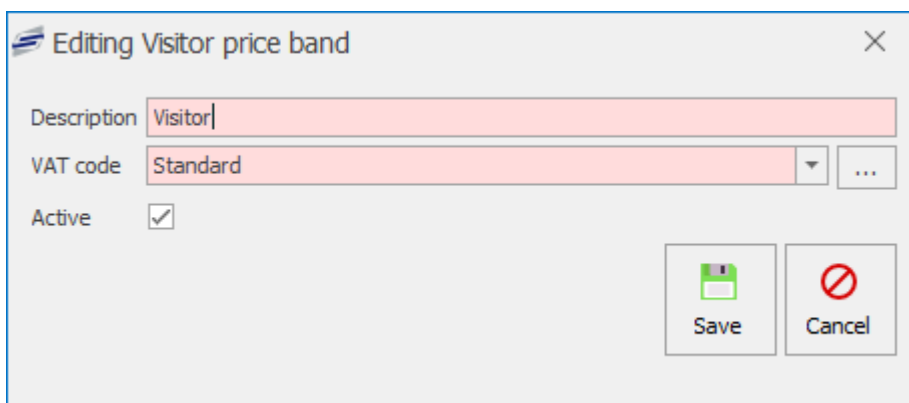
1. Press the **Settings** and select **Price bands**.



2. Select a price band and Press the **Edit** button.

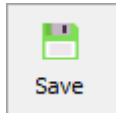



3. You can rename the description, select an alternative VAT code or activate/inactivate the price band.



A dialog box titled "Editing Visitor price band" with a close button (X) in the top right corner. It contains three input fields: "Description" with the text "Visitor", "VAT code" with a dropdown menu showing "Standard" and a three-dot menu button to its right, and "Active" with a checked checkbox. At the bottom right are two buttons: "Save" (with a floppy disk icon) and "Cancel" (with a red circle and slash icon).

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.

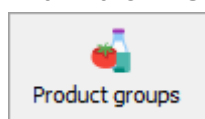
Product groups



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.

Accessing PLU groups

Within the PLU's tile select the **Settings** button and select the **Product groups** button.

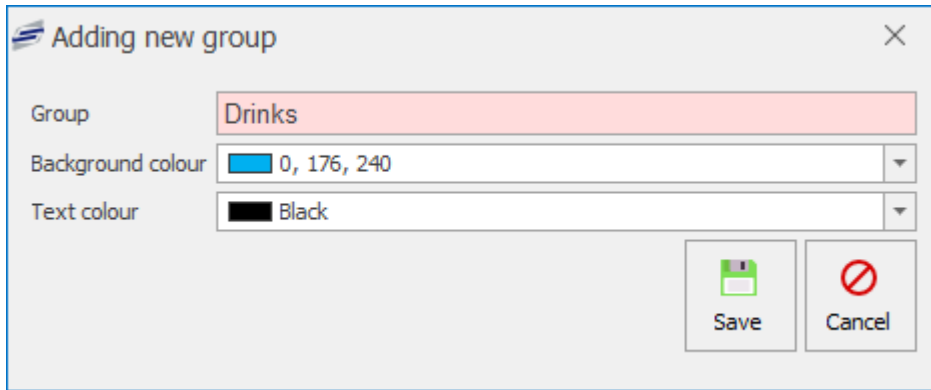



Creating a new group

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.



 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.

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.

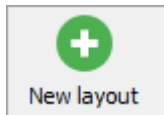
Layout ID	Name	Start date	No. weeks	Assigned to schools
Location type: Point of sale				
3	Summer 2018	01/05/2018	0	CRBCunninghams High School
Location type: Pre-order				
5	Pre Order	07/05/2019	0	CRBCunninghams High School
Location type: Smart board				
2	Smart Board	29/04/2019	0	CRBCunninghams Primary School

Creating a new layout

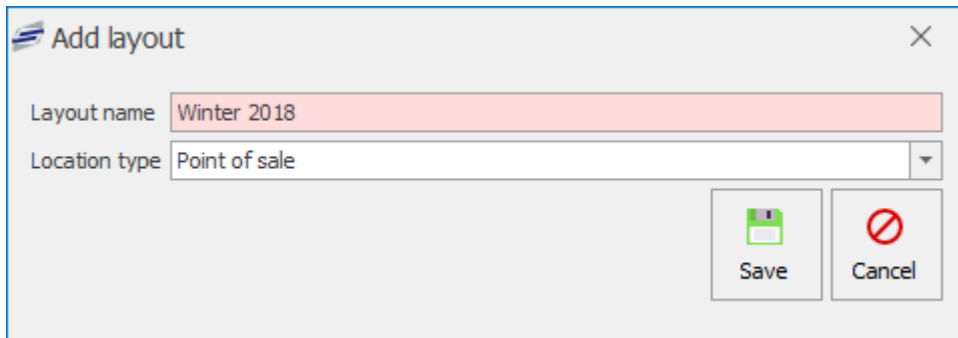
Layouts can be created either from scratch or from copying an existing layout;

Creating a brand new layout from scratch

1. Press the **New layout** button.



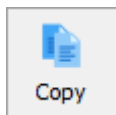
2. Enter a name and choose the type of layout that you wish to create.

A dialog box titled "Add layout" with a close button (X) in the top right corner. It contains two input fields: "Layout name" with the text "Winter 2018" and "Location type" with a dropdown menu showing "Point of sale". At the bottom right, there are two buttons: "Save" with a green floppy disk icon and "Cancel" with a red circle and slash icon.

3. Press **Save**.
4. 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

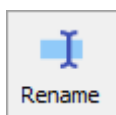
1. Select the required layout and press **Edit** button.



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.



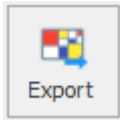
2. Enter a new description for the layout and press **Save**.

Deleting a layout

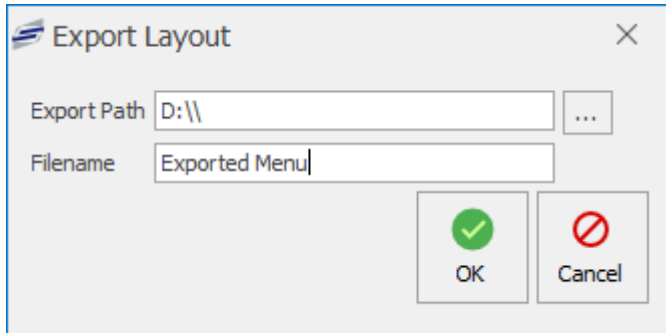
1. Select the layout to be deleted and press the **Delete** button.
2. Enter your username and password to confirm.
3. The layout will be deleted.

Export a layout

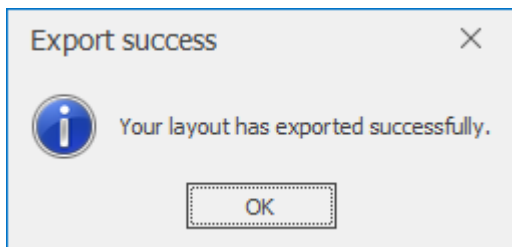
1. Select the layout you wish to export and press the **Export** button.




2. Browse to a directory you would like to send the export and give the file a name.



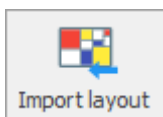
3. Press **OK** and the layout will export successfully.



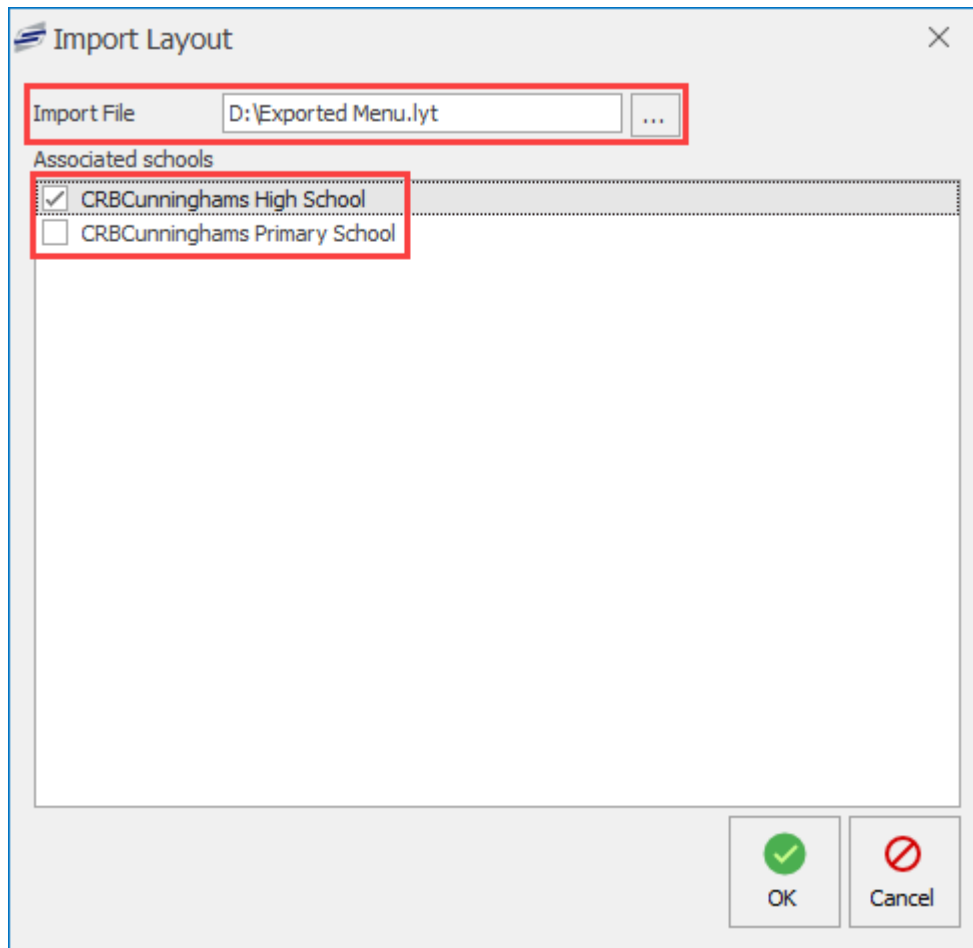
Importing a layout

 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.

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 CRB Cunninghams High Addison, Eloise

Layouts

Layout ID	Name	Start date	No. weeks	Assigned to schools
Location type: Point of sale				
1007	Summer 2018	01/05/2018	0	CRB Cunninghams High, CRB Cunninghams Primary
1	Summer 2017	01/05/2018	0	CRB Cunninghams High, CRB Cunninghams Primary
Location type: Pre order kiosk				
1005	PreOrder	07/02/2018	0	CRB Cunninghams High
Location type: Smart board				
3	Smart boards	02/01/2017	0	CRB Cunninghams Primary

Summer 2018 Current layout

Point of sale

Edit Rename Copy Delete

Associated schools

Name

CRB Cunninghams High

CRB Cunninghams Primary

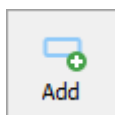
Add Remove

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

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. Press the **Add** button.



2. Select the required school and press the **Select** button.

Select school

School

CRB Cunninghams High School

Select Cancel

- The school will now be added to the layout.

Layout ID	Name	Start date	No. weeks	Assigned to schools
Location type: Point of sale				
3	Autumn / Winter 2018	01/09/2018	0	
1	Spring / Summer 2018	01/02/2018	0	CRB Cunninghams High School

Removing a School

- Select a School from the list.

Associated schools

Name
CRBCunninghams High School
CRBCunninghams Primary School

- Press the **Remove** button.



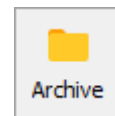
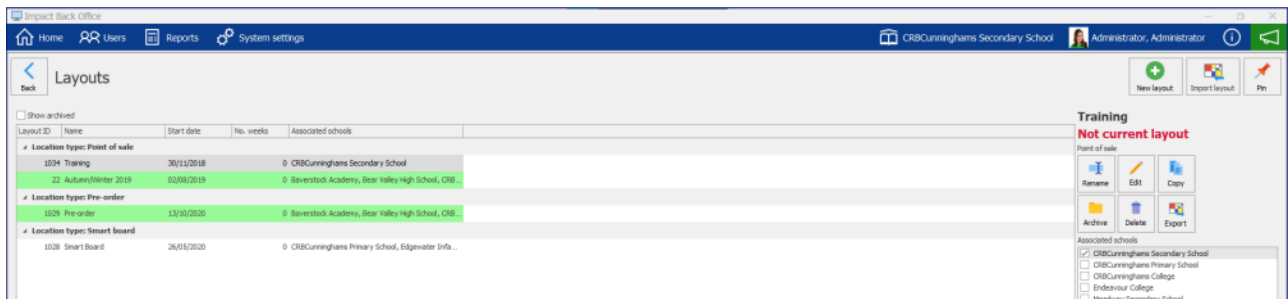
- Press the **Yes** or **No** to confirm the action.

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

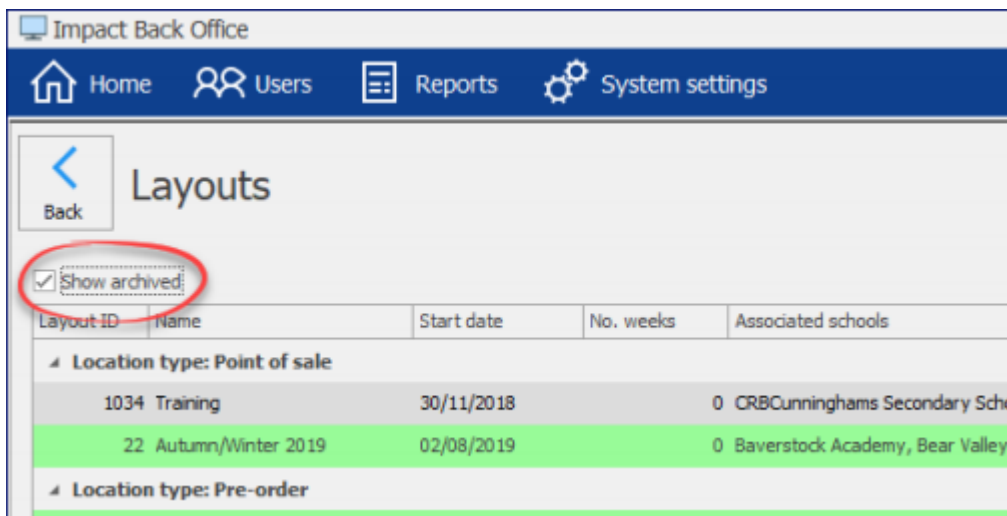
1. Select the layout you wish to archive from the layouts screen. This cannot be an active layout for any schools and must have a start date that is in the past.



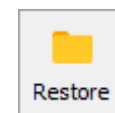
2. Press the **Archive** button on the right hand side of the screen.
3. The layout will be archived.

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.

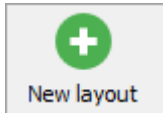
Point of Sale layouts



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.

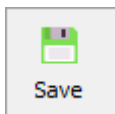
Creating a new POS layout

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.

3. Press the **Save** button.

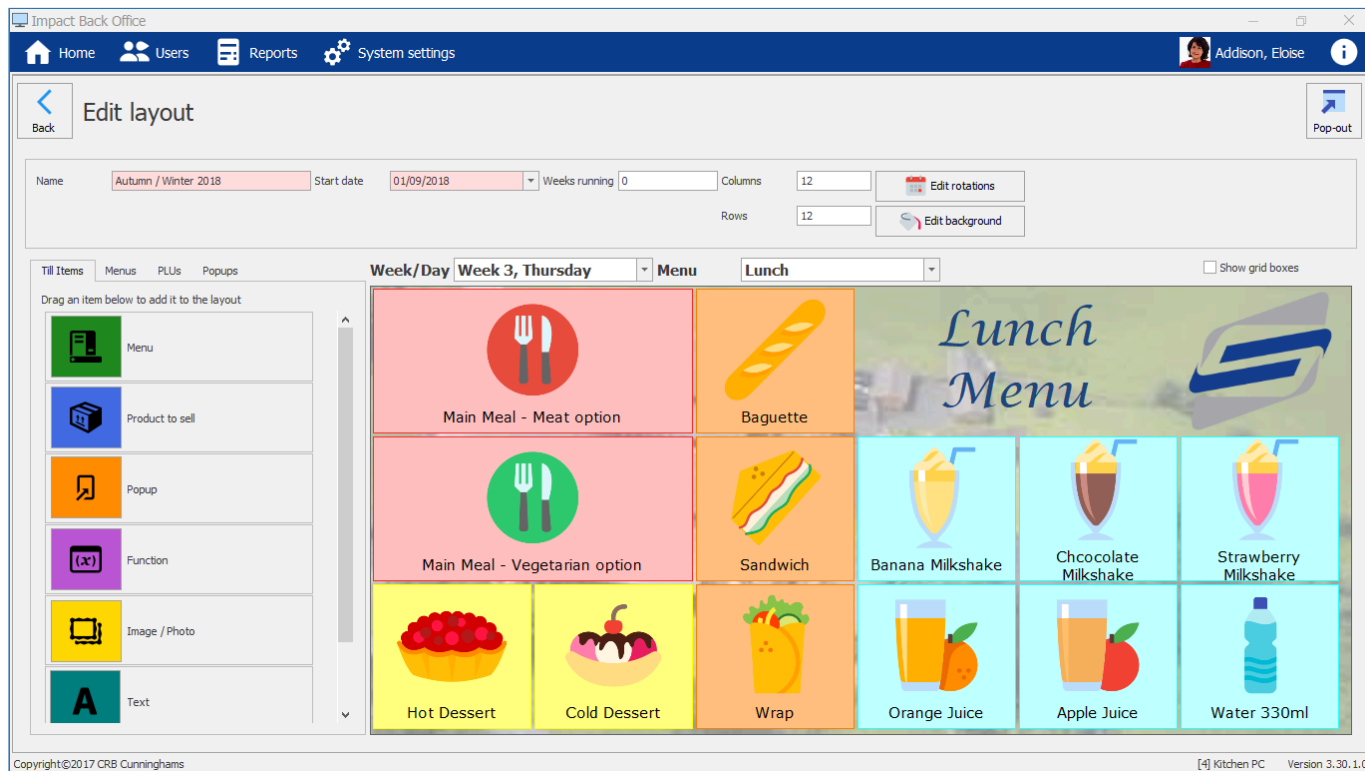


4. This will take you to the edit layout overview.

Editing a PoS layout



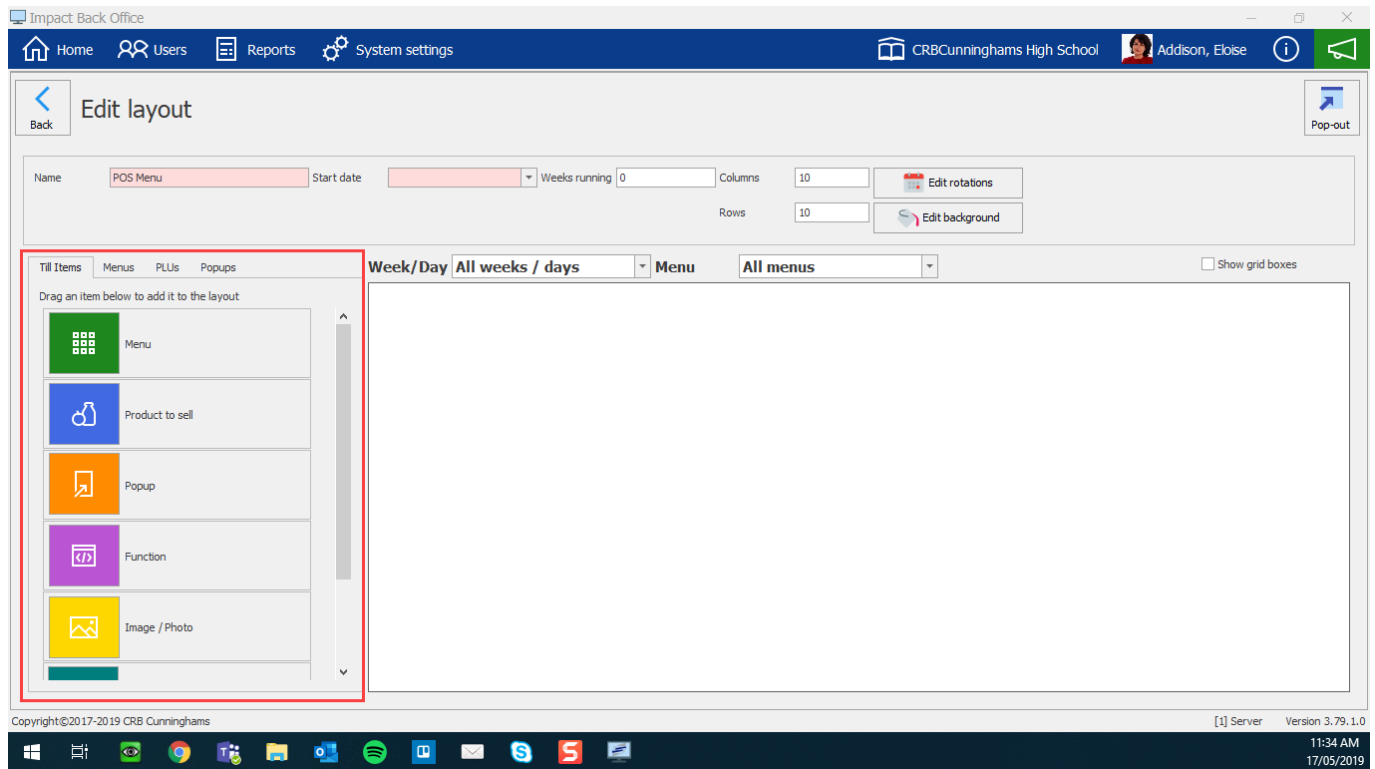
The layout designer allows for the creation of customised layouts. The layouts can be as simple or as complicated as you require.



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.

Layout properties



At the top of the layout designer, the properties of the layout are accessed. Alter these values as required.

- **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](#)

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

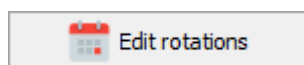
Week start	Week number
03/09/2018	1
10/09/2018	2
17/09/2018	3
24/09/2018	4
01/10/2018	1
08/10/2018	2
15/10/2018	3
22/10/2018	4
29/10/2018	1
05/11/2018	2
12/11/2018	3
19/11/2018	4
26/11/2018	1

Save **Cancel**

To configure the layout rotations;

Generate cycle

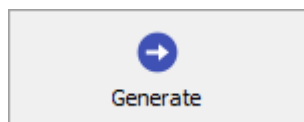
1. Press the **Edit rotations** button.



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

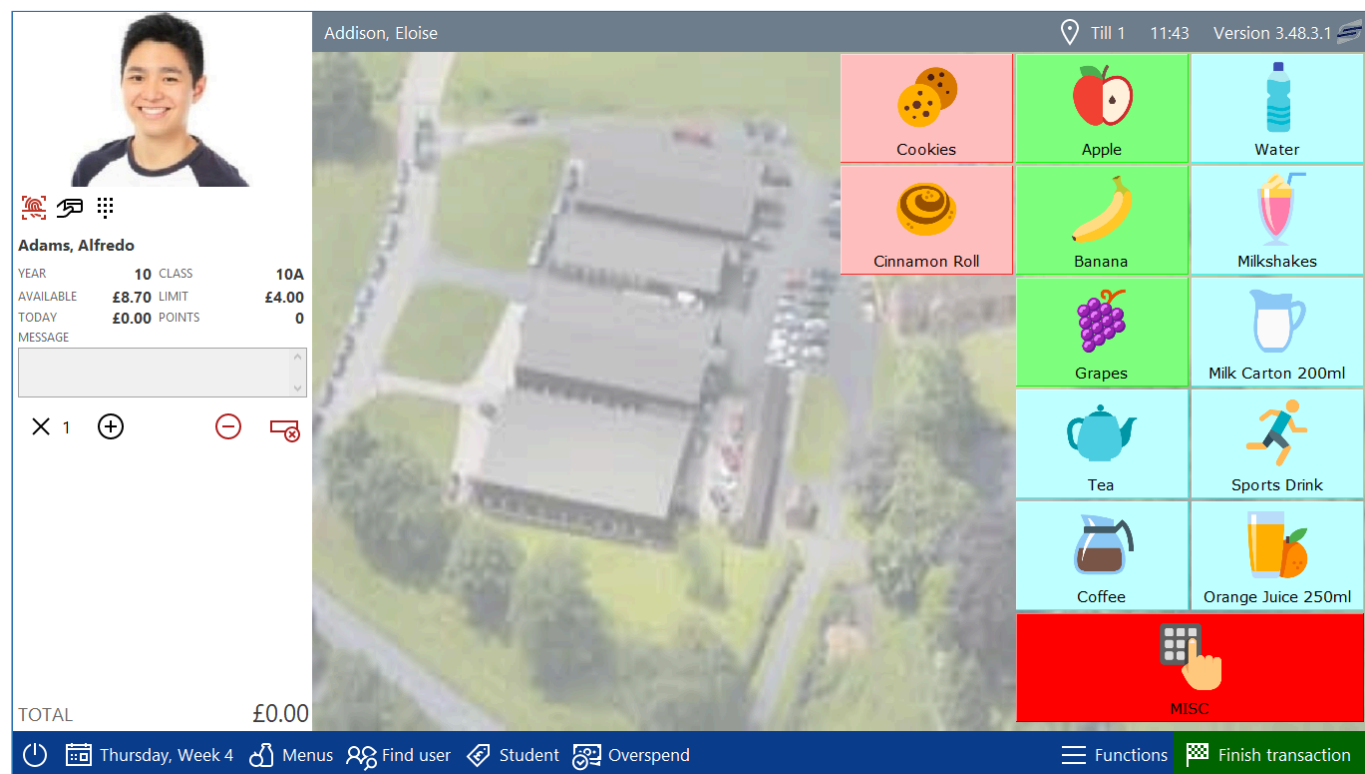
A red arrow points from the 'Week 2' button to the row for 17/09/2018 in the table.

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

Layout background

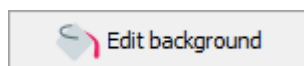


Fusion uses a white background on the Point of Sale by default. This can be changed if desired so that it is unique to your school.

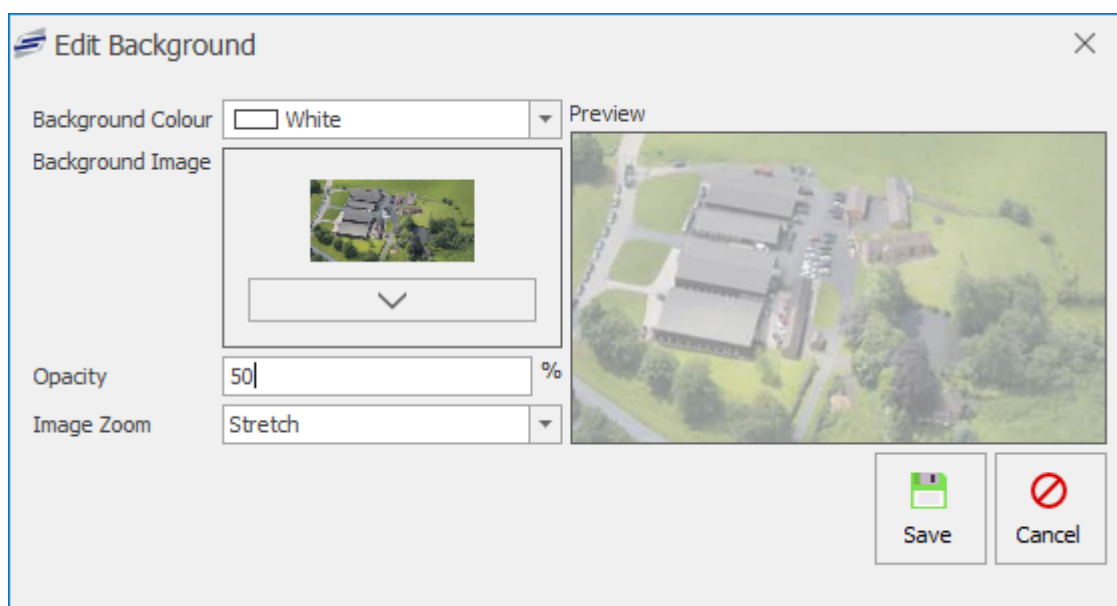


The background of the layout can be changed by;

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.

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

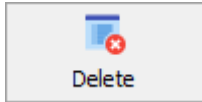
1. Select the menu to be edited and press the **Edit** button.



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.

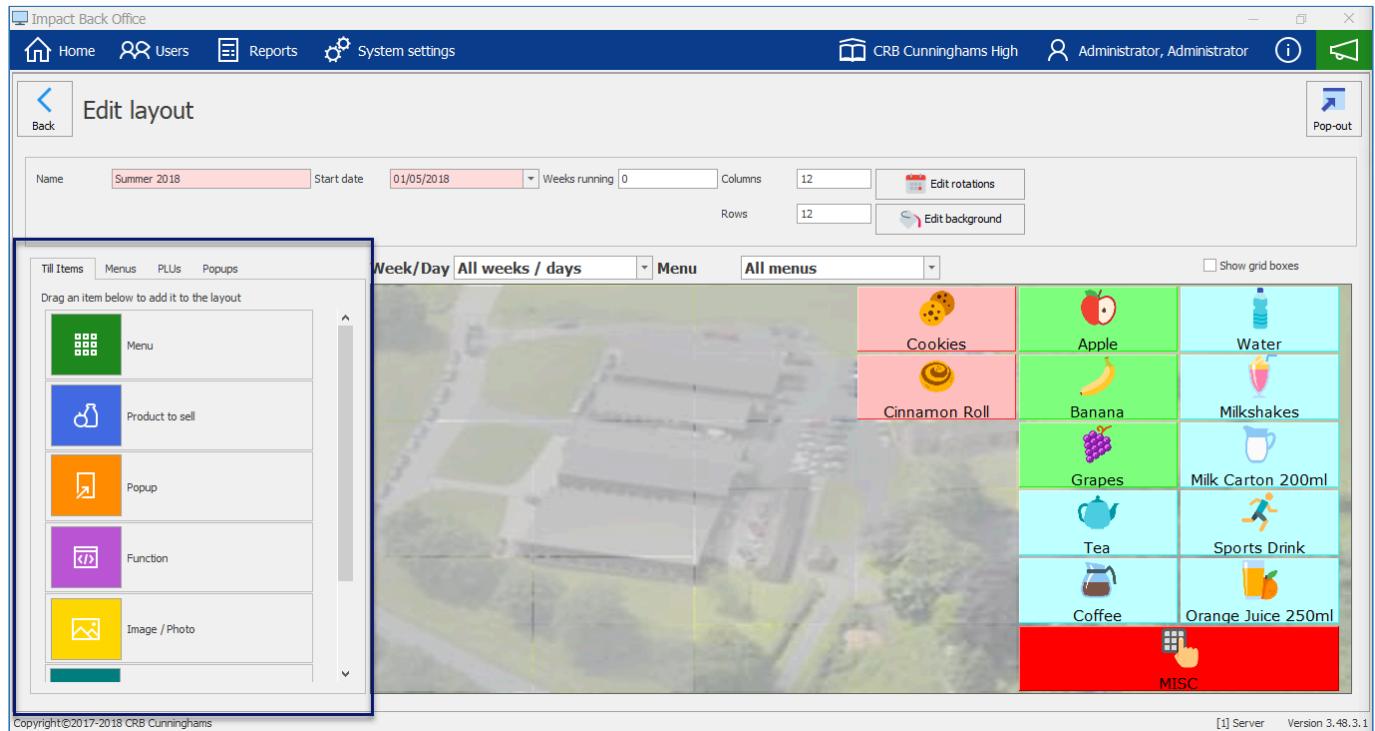


2. Press **Yes** to confirm and press **OK** to complete the process.

Adding items to menus

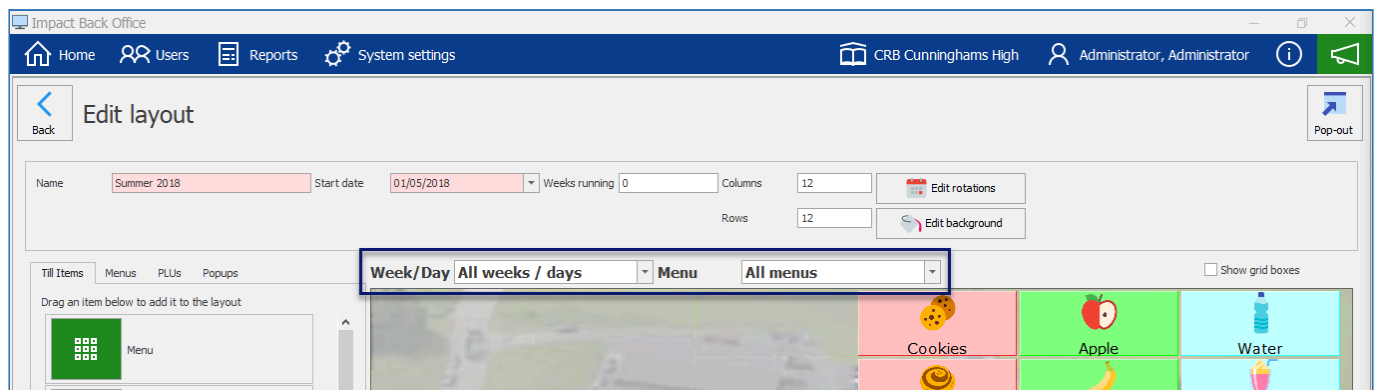


Multiple types of objects can be added onto a menu. This obviously includes buttons that are used to sell products, but also buttons for other menus and even text and images.



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

The screenshot shows the 'Edit layout' interface. At the top, there is a 'Back' button and a 'Pop-out' button. Below them, the 'Edit layout' title is displayed. The main area contains a form with the following fields: Name (POS Menu), Start date (dropdown), Weeks running (0), Columns (6), Rows (6), Edit rotations (button), and Edit background (button). Below the form, there are two dropdown menus: 'Week/Day' (All weeks / days) and 'Menu' (All menus). To the right of these dropdowns, there is a checkbox labeled 'Show grid boxes' which is checked. Below the dropdowns, there is a 6x6 grid of boxes. The grid is outlined with a red border, and the individual cells are outlined with blue borders. To the left of the grid, there is a sidebar with the following items: Menu (green icon), Product to sell (blue icon), Popup (orange icon), Function (purple icon), and Image / Photo (yellow icon). The sidebar also has a 'Drag an item below to add it to the layout' instruction.

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](#)

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.

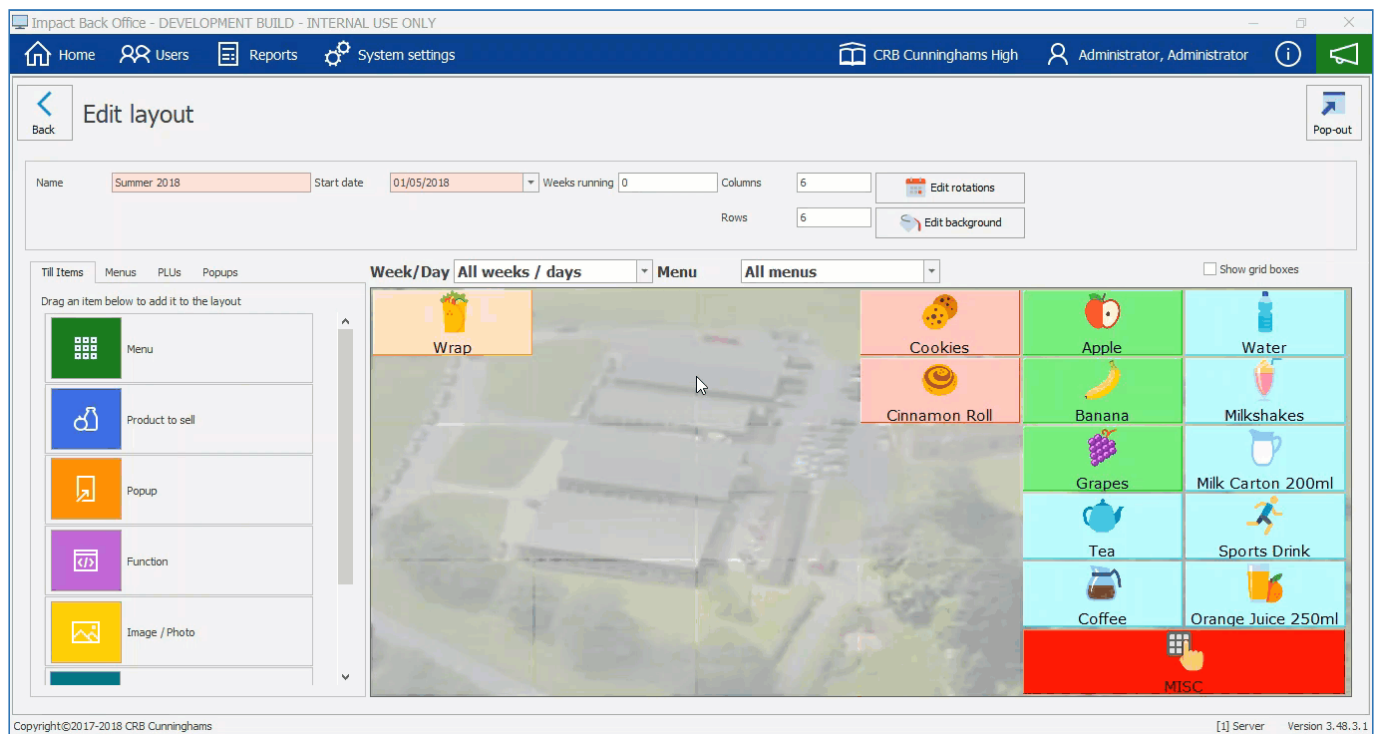
For those schools that require constant switching between menus (separate drinks, hot food, cold food menus etc.), it may be useful to add buttons that help switching between menus quicker and easier.



It is suggested that any menu buttons are added to the 'All weeks / days', 'All menus' menu so that they appear on every menu.

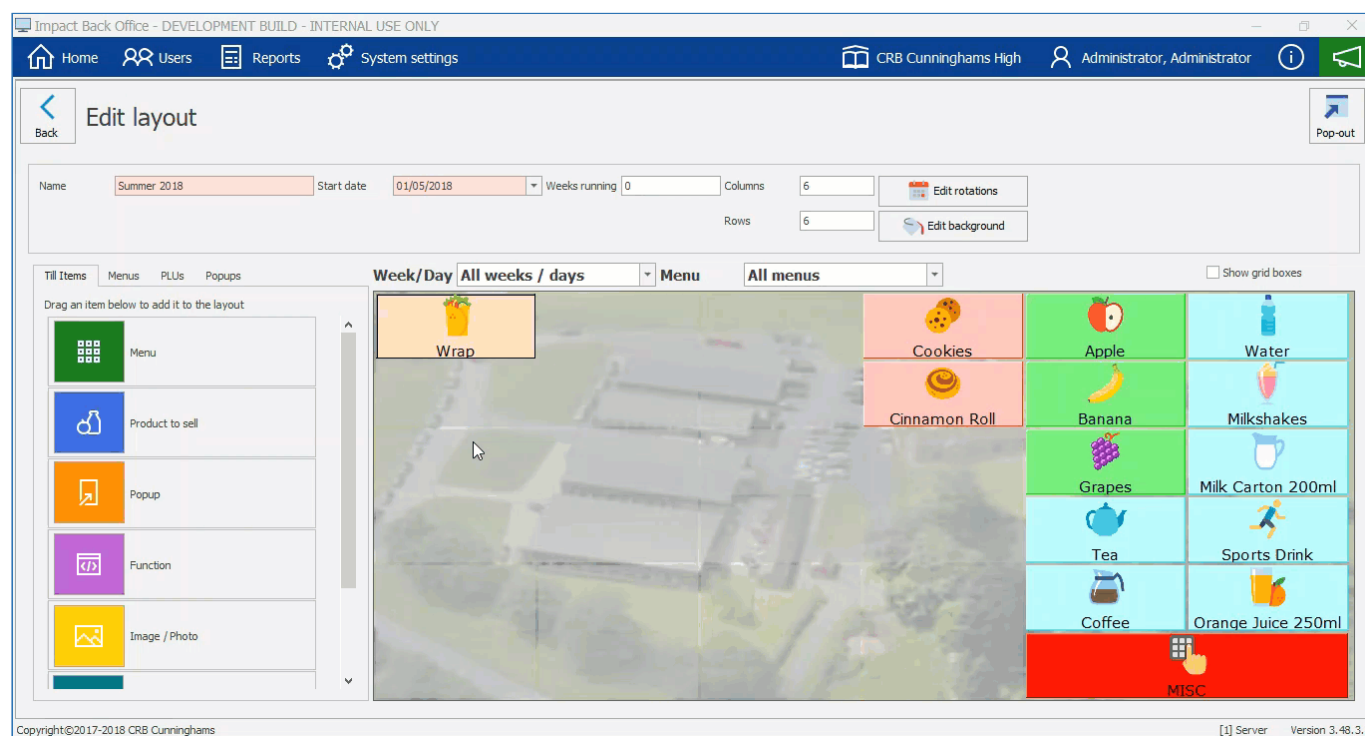
There are two methods of adding products to the layout and the one that you use most will be down to personal preference.

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.

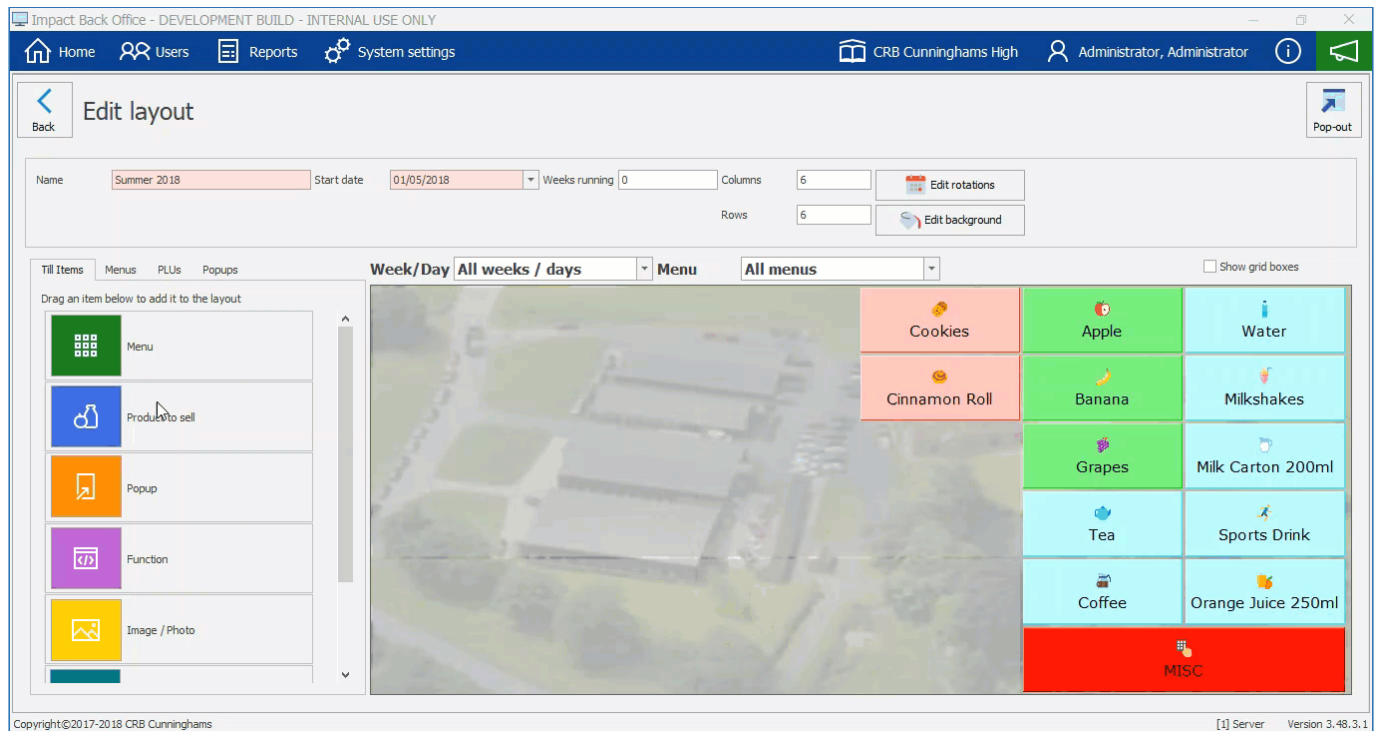
Adding *PLU* buttons to a menu



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.

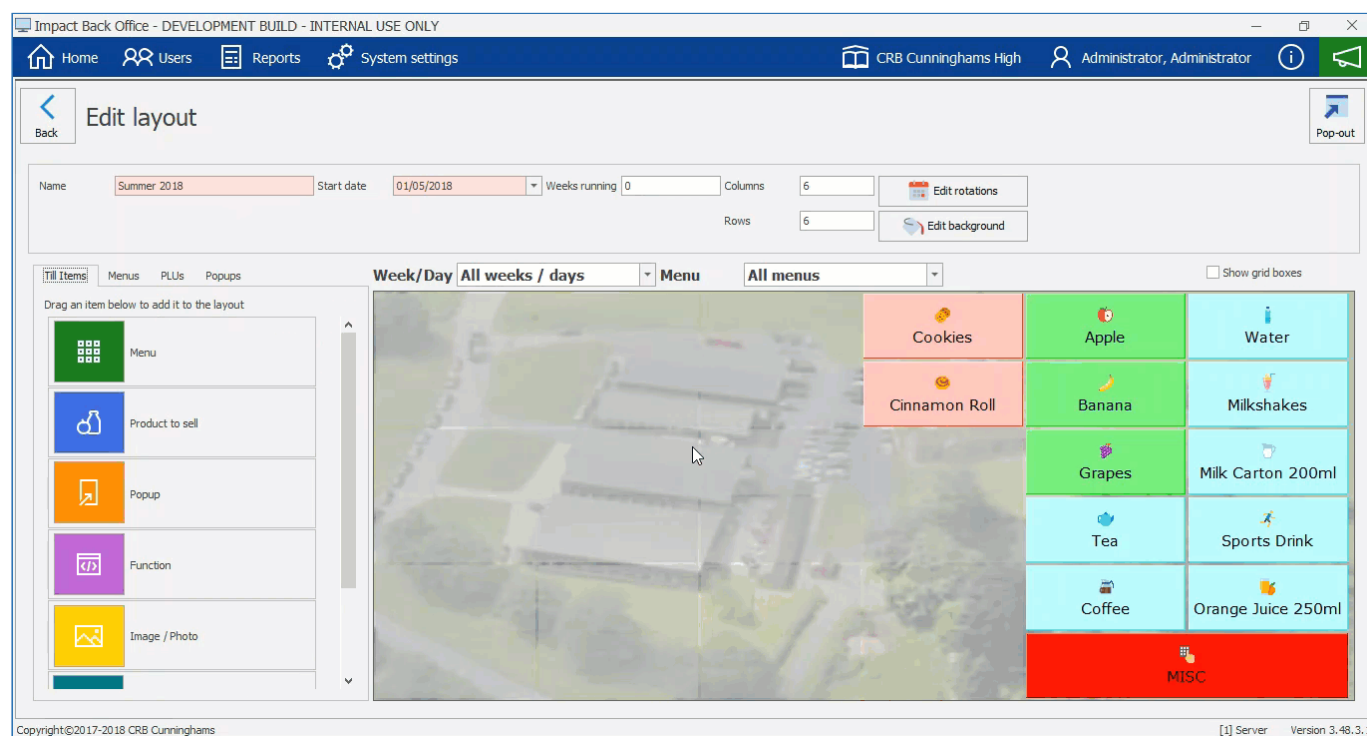
There are two methods of adding products to the layout and the one that you use most will be down to personal preference.

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.

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.

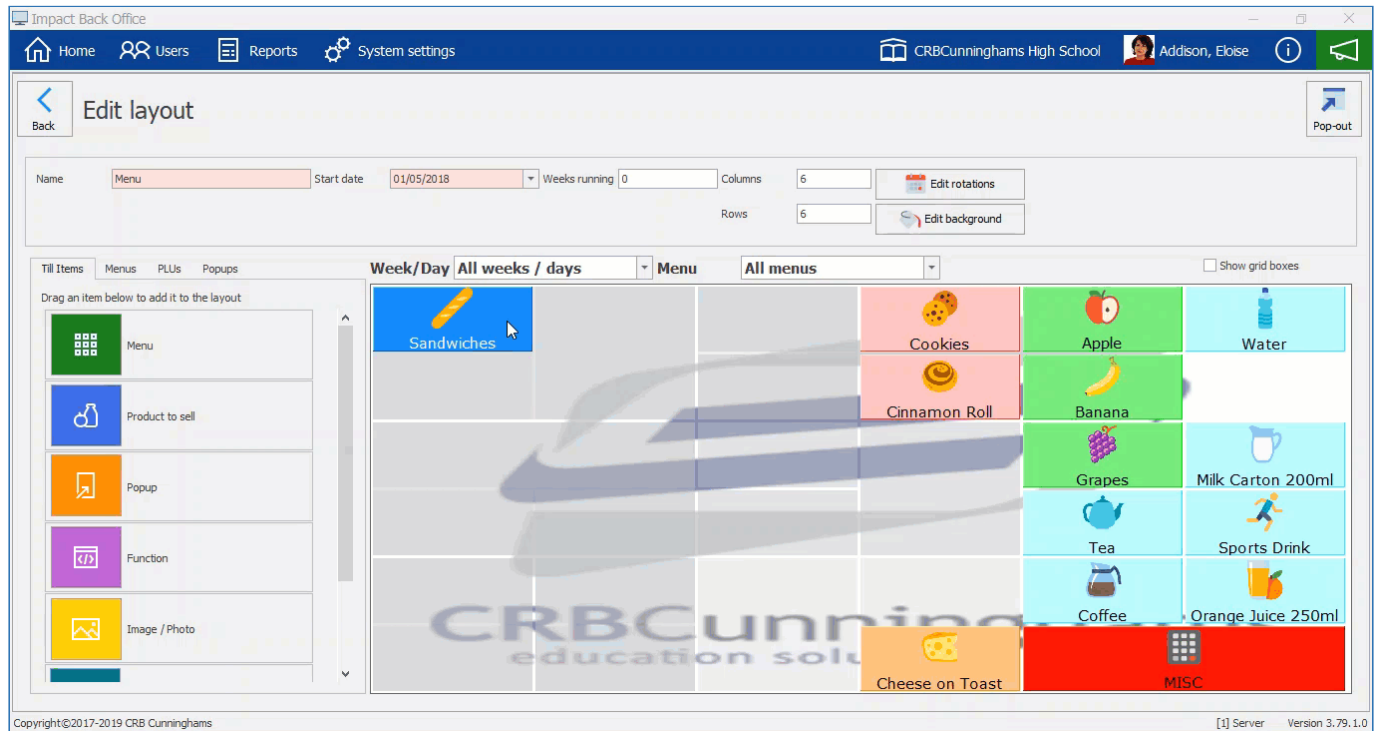
There is only one method of adding a popup to the layout. There are two methods that can be used to amend the controls and settings of the popup tile.

Add Popup to layout

The screenshot displays the 'Impact Back Office' 'Edit layout' screen. At the top, there's a navigation bar with 'Home', 'Users', 'Reports', and 'System settings'. The main area is titled 'Edit layout' and contains a form with fields for 'Name' (Menu), 'Start date' (01/05/2018), 'Weeks running' (0), 'Columns' (6), and 'Rows' (6). There are also buttons for 'Edit rotations' and 'Edit background'. Below the form, there's a 'Till items' tab with a list of items to drag: Menu, Product to sell, Popup, Function, and Image / Photo. The 'Popup' item is highlighted. The main grid shows various food and drink items like Cookies, Apple, Water, Cinnamon Roll, Banana, Milkshakes, Grapes, Milk Carton 200ml, Tea, Sports Drink, Coffee, Orange Juice 250ml, Cheese on Toast, and MISC. The interface also includes a 'Week/Day' dropdown set to 'All weeks / days' and a 'Menu' dropdown set to 'All menus'. A 'Show grid boxes' checkbox is also present.

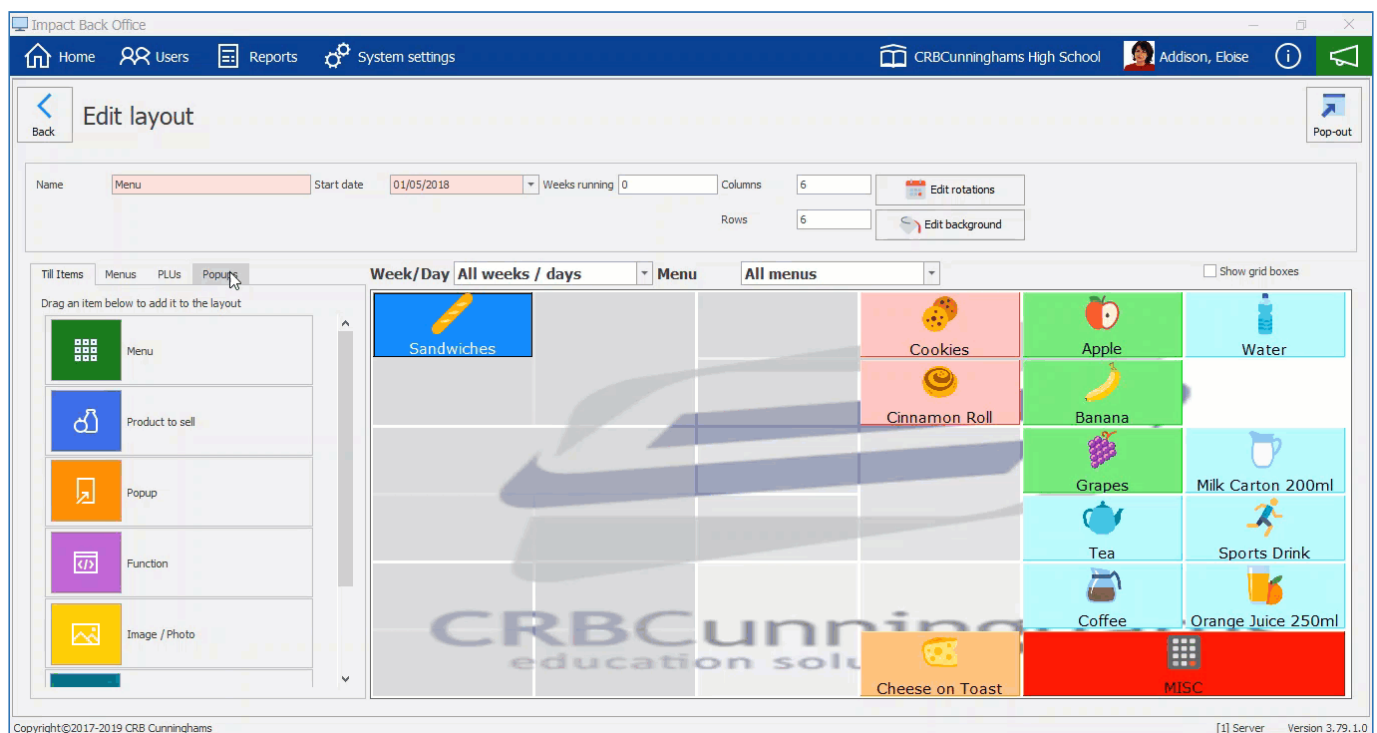
1. From the 'Till items' tab, click and drag the **Popup** tile onto the layout, release the mouse when the button is where you would like it to be.
2. Type a description for the Popup title.
3. Adjust the width or height of the tile.
4. (Optional) Amend font, colour and image if necessary.
5. Press **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**.

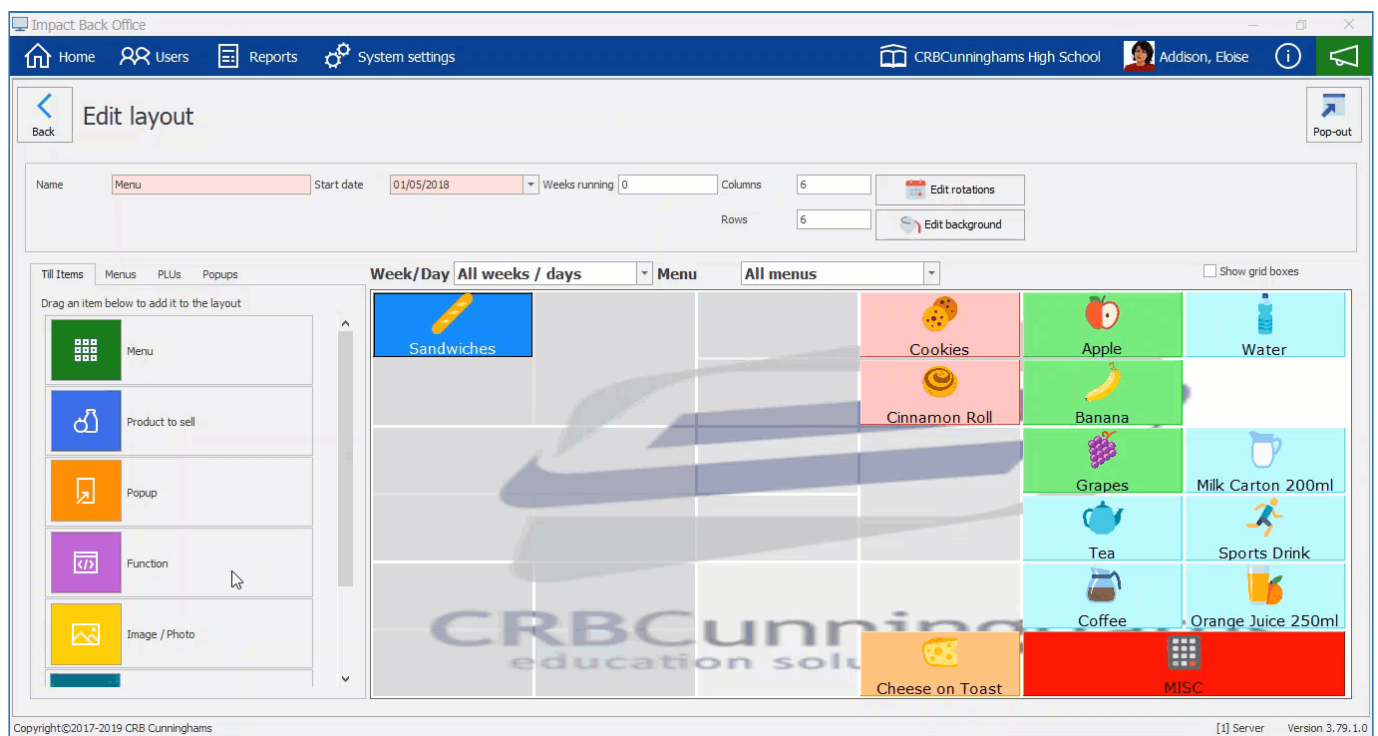
Adding Function, Image/Photo and Text to the layout

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.

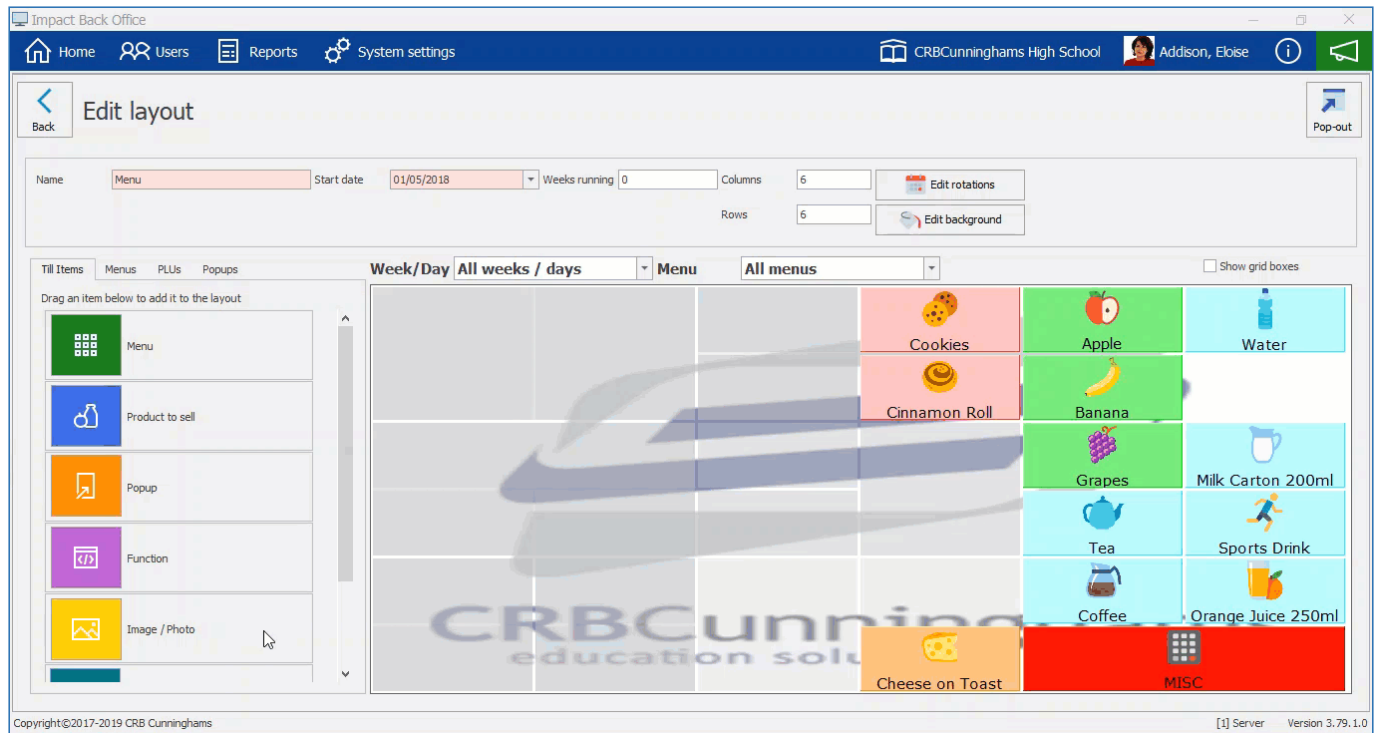


1. From the 'Till items' tab, click and drag the **Function** tile onto the layout, release the mouse when the button is where you would like it to be.
2. Select a function. Either **Update photo** or **View totaliser report**.
3. Press **Save**.

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.

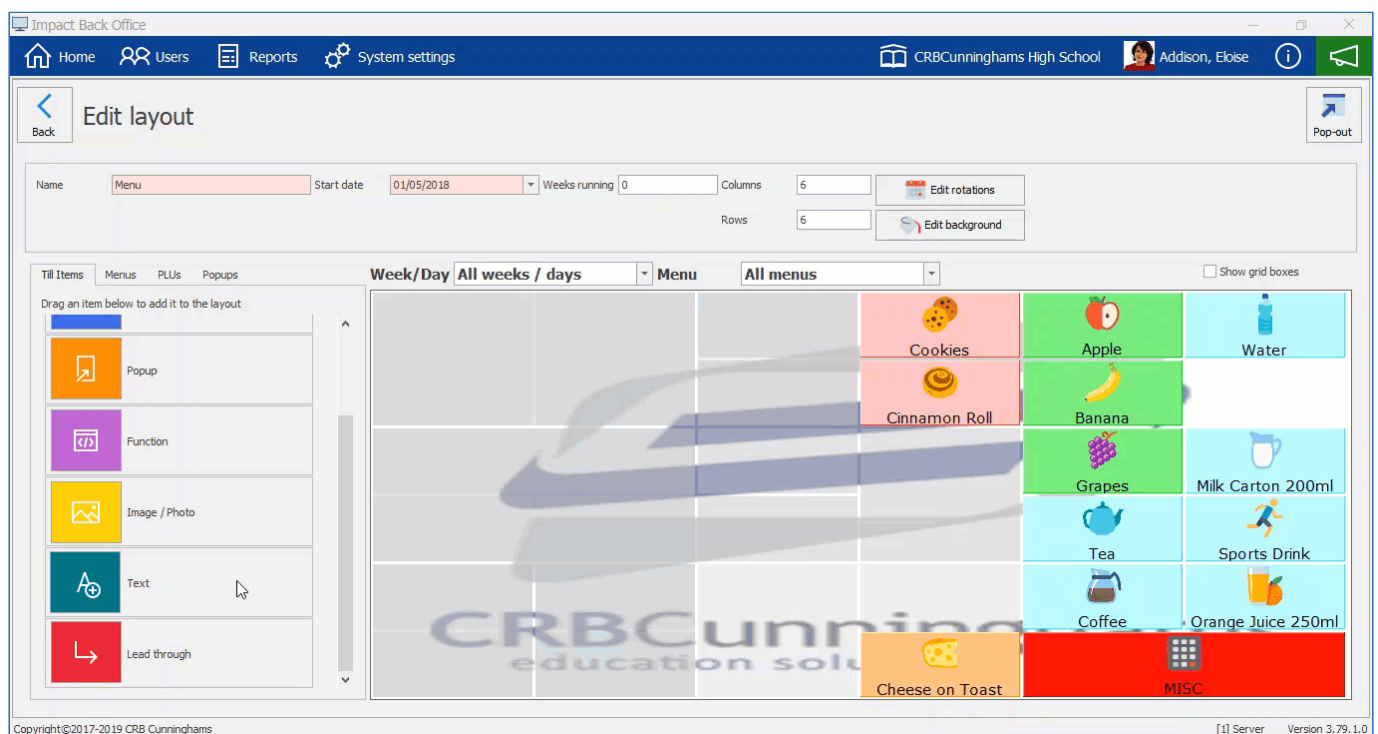


1. From the 'Till items' tab, click and drag the **Image / Photo** tile onto the layout, release the mouse when the button is where you would like it to be.
2. Press **Select Image** and select an image.
3. Press **Save**.

Adding Text to the layout



You can add text to a tile on the layout. Maybe a themed day description or school announcement.



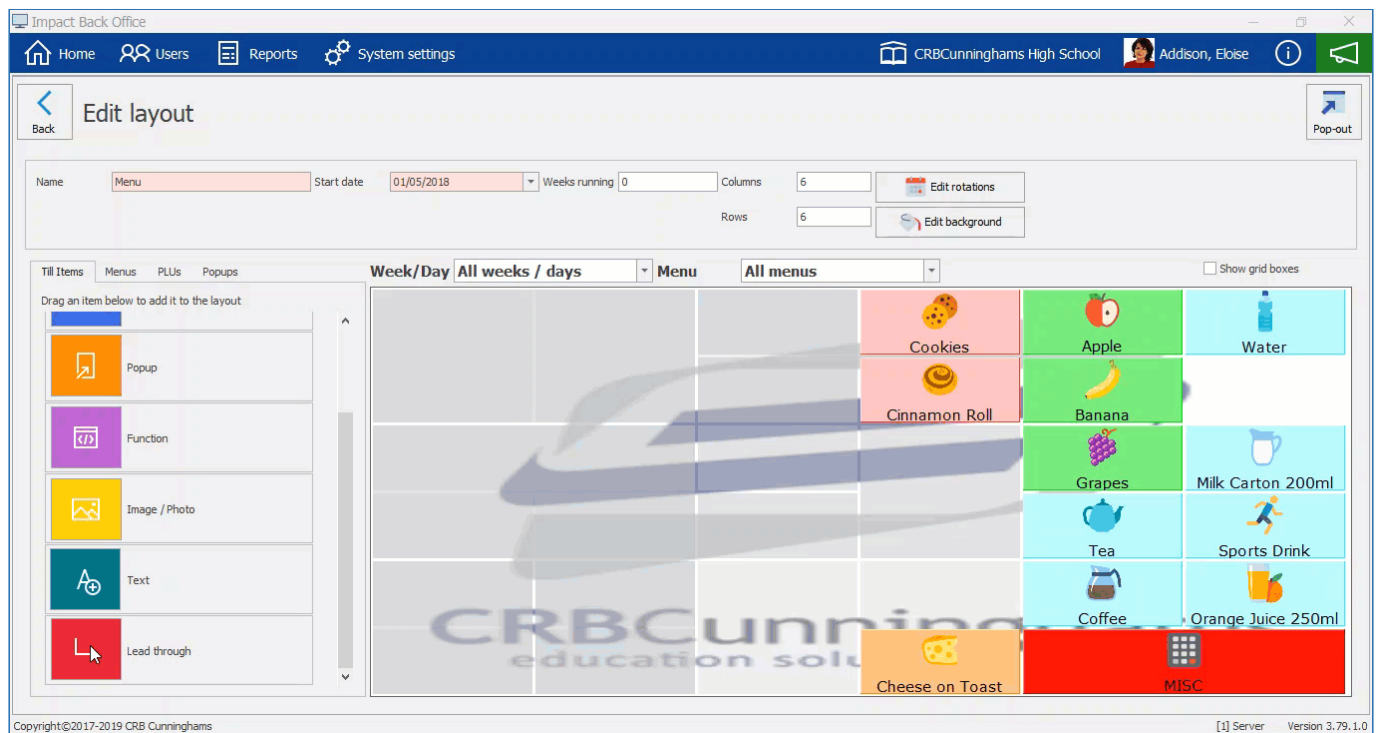
1. From the 'Till items' tab, click and drag the **Text** tile onto the layout, release the mouse when the button is where you would like it to be.
2. Enter the text you wish to display on the tile.
3. Press **Save**.


Adding Lead through to the layout



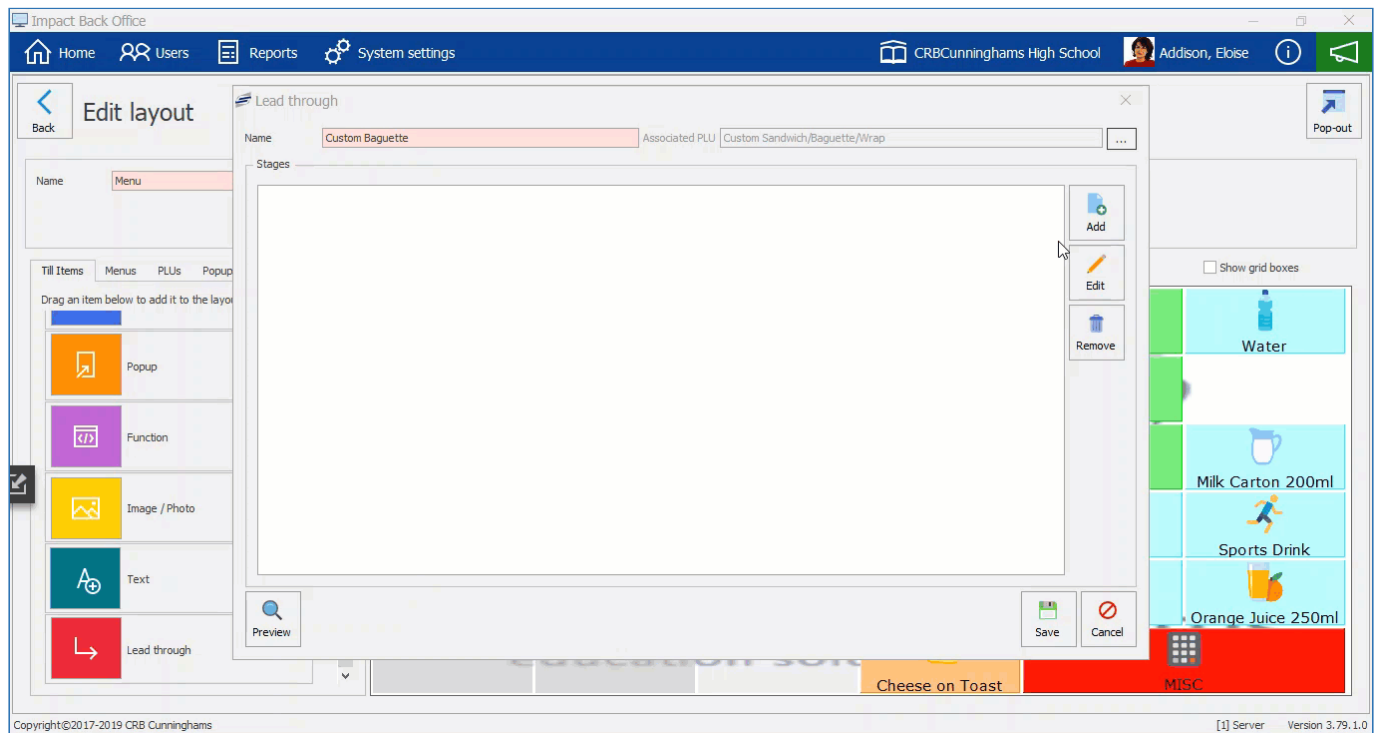
The lead through button is used to create a menu tile that allows for the selection of multiple products in stages. The stages can have a variety of requirement settings, ranging from wholly optional stages to those with strict restrictions on the minimum or maximum number of products that can be selected.

Adding a Lead through to the layout



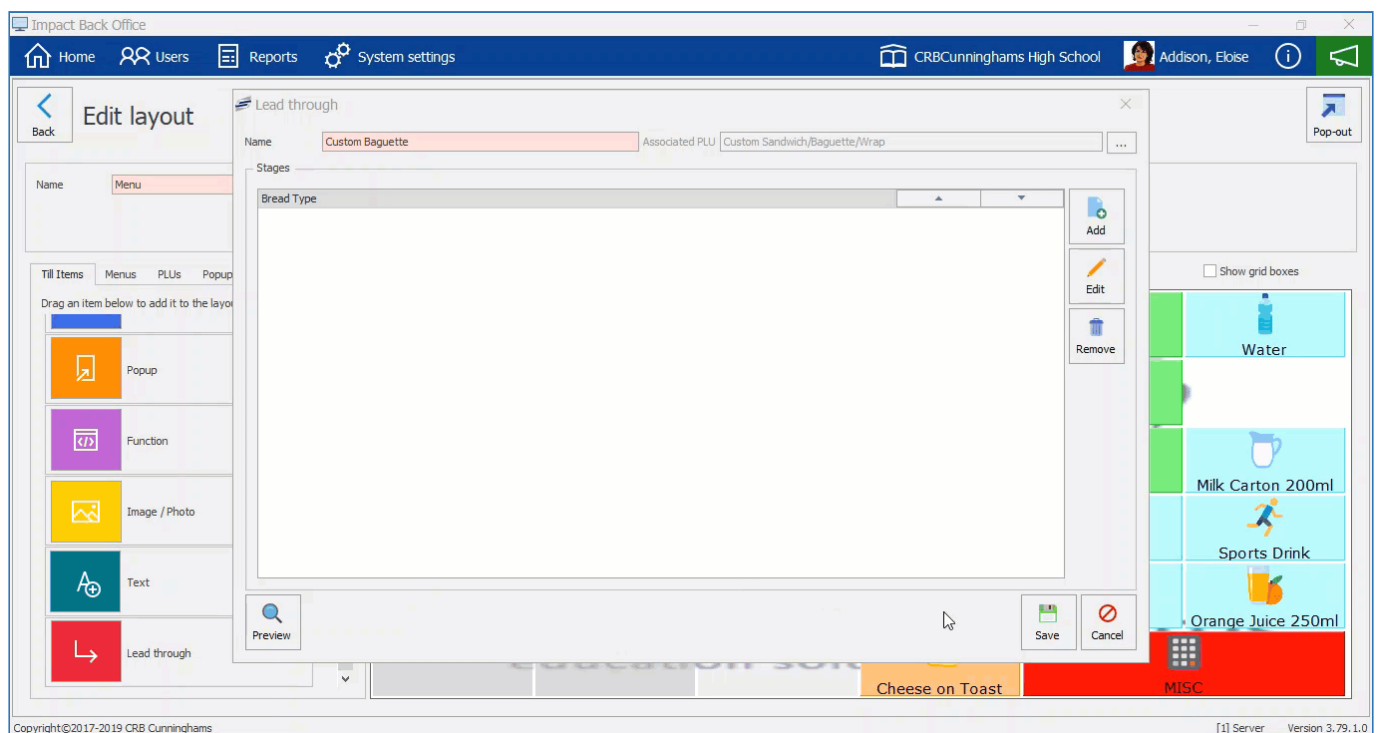
1. From the 'Till items' tab, click and drag the **Lead through** tile onto the layout, release the mouse when the button is where you would like it to be.
2. Enter a **Name** for the lead through.
3. Select a associated PLU by pressing . Select a PLU from the product list.

Adding Stages to a Lead through



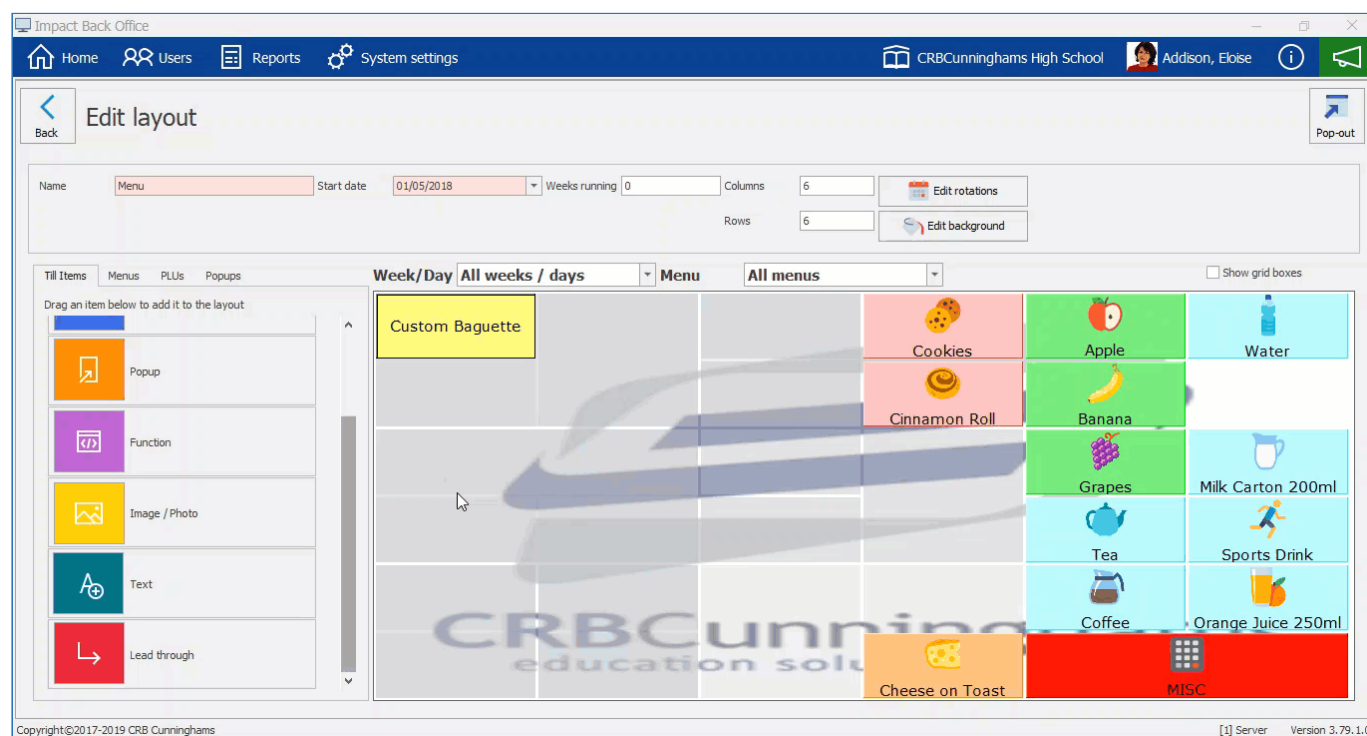
1. Press **Add** in the stages section.
2. Enter a **Name** for the Stage name.
3. Enter a Minimum and Maximum selection value.
4. Press **Add** and selection a PLU from the product list.
5. Press **Save**.

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.

Editing items on menus

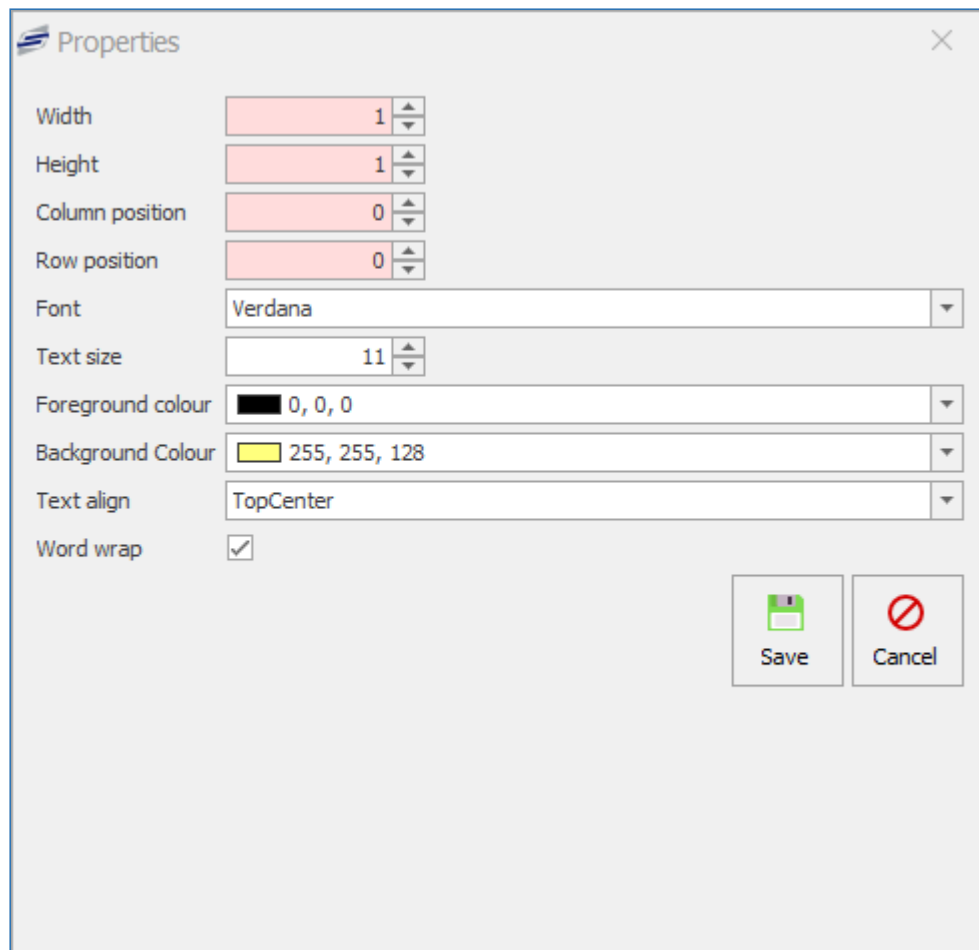


When items have been added to the menu, their properties – such as background colour, button width and height, font size and style – can be edited as required. This allows you to customise your layout to suit your needs, for example, you may want the items that are sold most commonly to have larger buttons and text than those that are sold less frequently.

Editing the Properties of an Item

The screenshot displays the 'Edit layout' screen in the Impact Back Office. The interface is designed for managing menu items. At the top, there's a navigation bar with 'Home', 'Users', 'Reports', and 'System settings'. The main header shows 'CRBCunninghams High School' and a user profile for 'Addison, Eloise'. Below this, the 'Edit layout' section includes a 'Back' button and a 'Pop-out' button. The central area features a grid of menu items. On the left, a sidebar lists 'Till Items', 'Menus', 'PLUs', and 'Popups'. The main grid has tabs for 'Week/Day', 'Menu', and 'All menus'. The 'Menu' tab is active, showing a grid of items like 'Wrap', 'Cookies', 'Apple', 'Water', 'Cinnamon Roll', 'Banana', 'Grapes', 'Milk Carton 200ml', 'Tea', 'Sports Drink', 'Coffee', 'Orange Juice 250ml', 'Cheese on Toast', and 'MISC'. A large watermark 'CRBCunninghams education solutions' is overlaid on the grid. The bottom of the screen shows 'Copyright ©2017-2019 CRB Cunningham' and '[1] Server Version 3.79.1.0'.

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

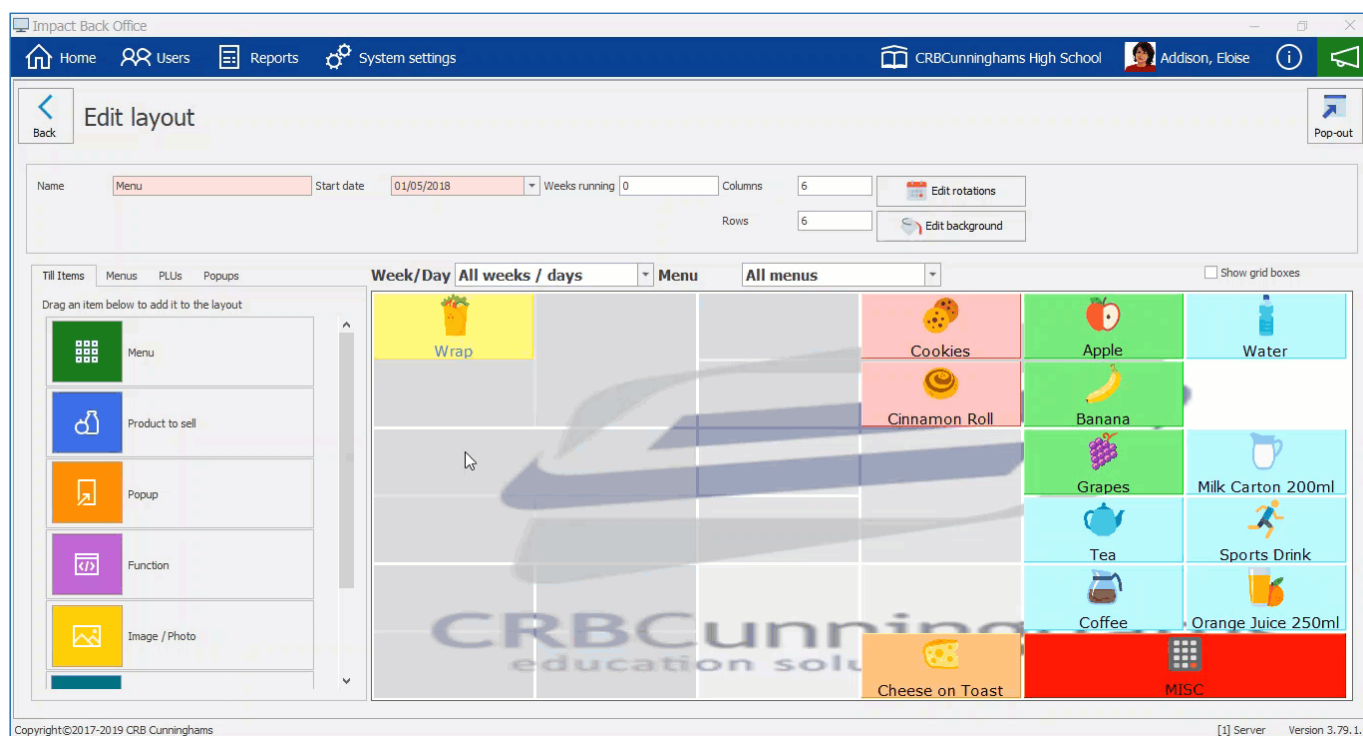
Text align: TopCenter

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.



Impact Back Office

Home Users Reports System settings CRBCunninghams High School Addison, Eloise

Edit layout

Name: Menu Start date: 01/05/2018 Weeks running: 0 Columns: 6 Rows: 6

Edit rotations Edit background

Till Items Menu PUUs Popups

Drag an item below to add it to the layout

Menu Product to sell Popup Function Image / Photo

Week/Day: All weeks / days Menu: All menus Show grid boxes

Wrap			Cookies	Apple	Water
			Cinnamon Roll	Banana	
				Grapes	Milk Carton 200ml
				Tea	Sports Drink
				Coffee	Orange Juice 250ml
			Cheese on Toast	MISC	

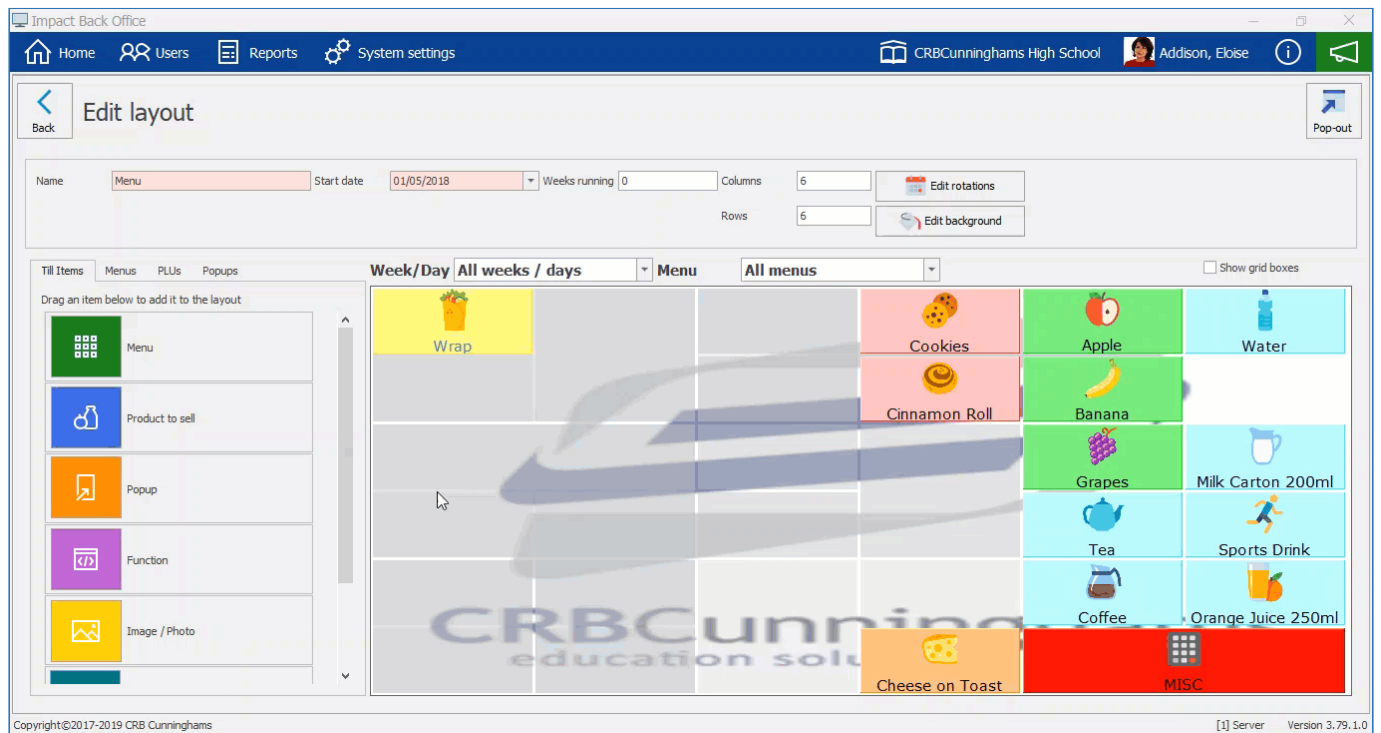
Copyright©2017-2019 CRB Cunningham [1] Server Version 3.79.1.0

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

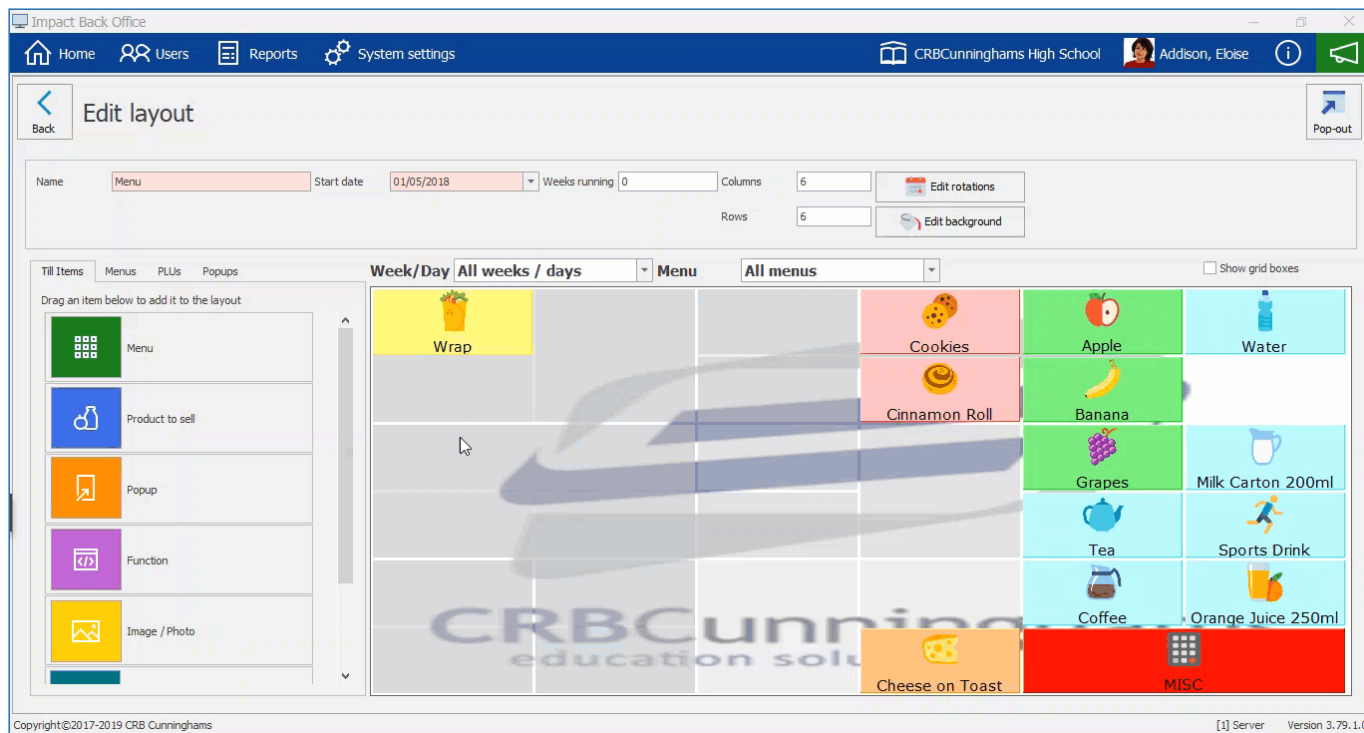
You can change the height size of the tile by using the up or down arrows. This can be useful if you want to show a button that is more popular on the menu.



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

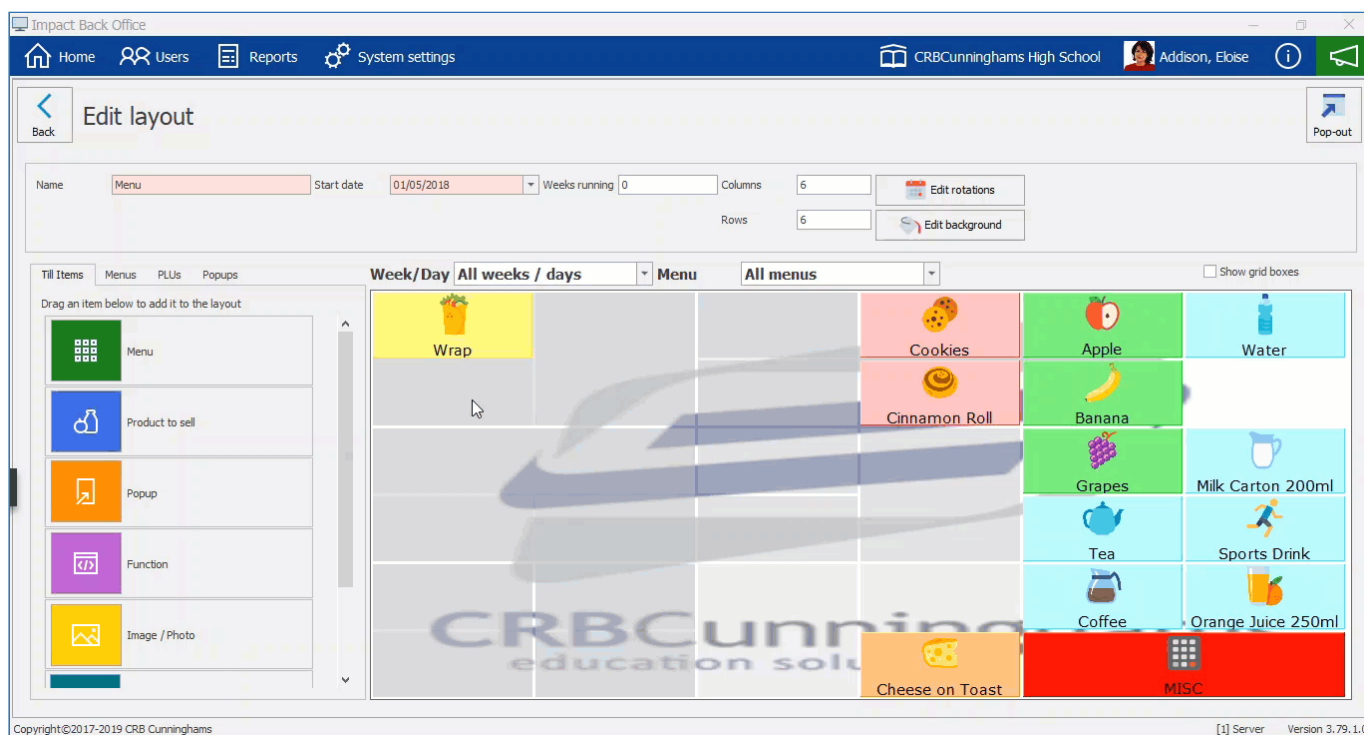
The tile will move to the column you select by using the up or down arrows. Alternatively you can drag the tile to your desired space on the layout.



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.

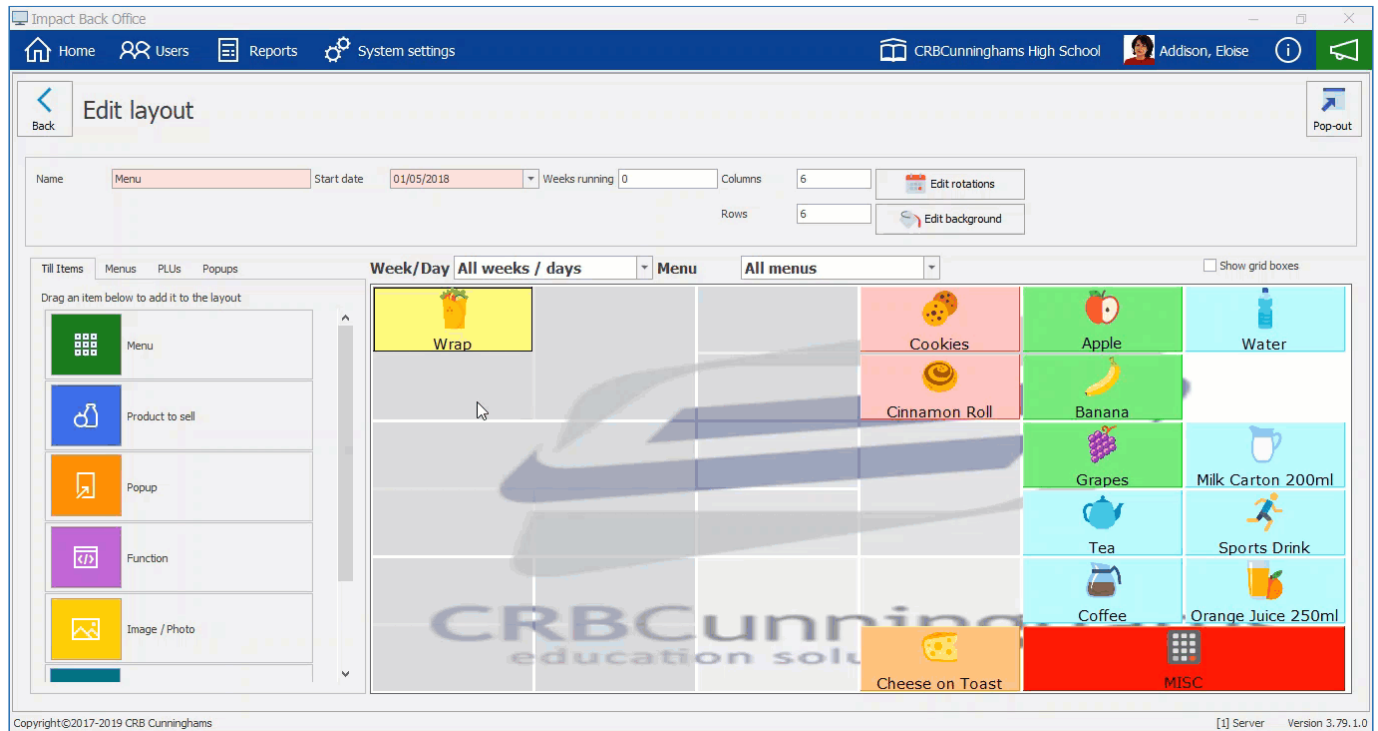


1. Right click on the item and press **Properties**.

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

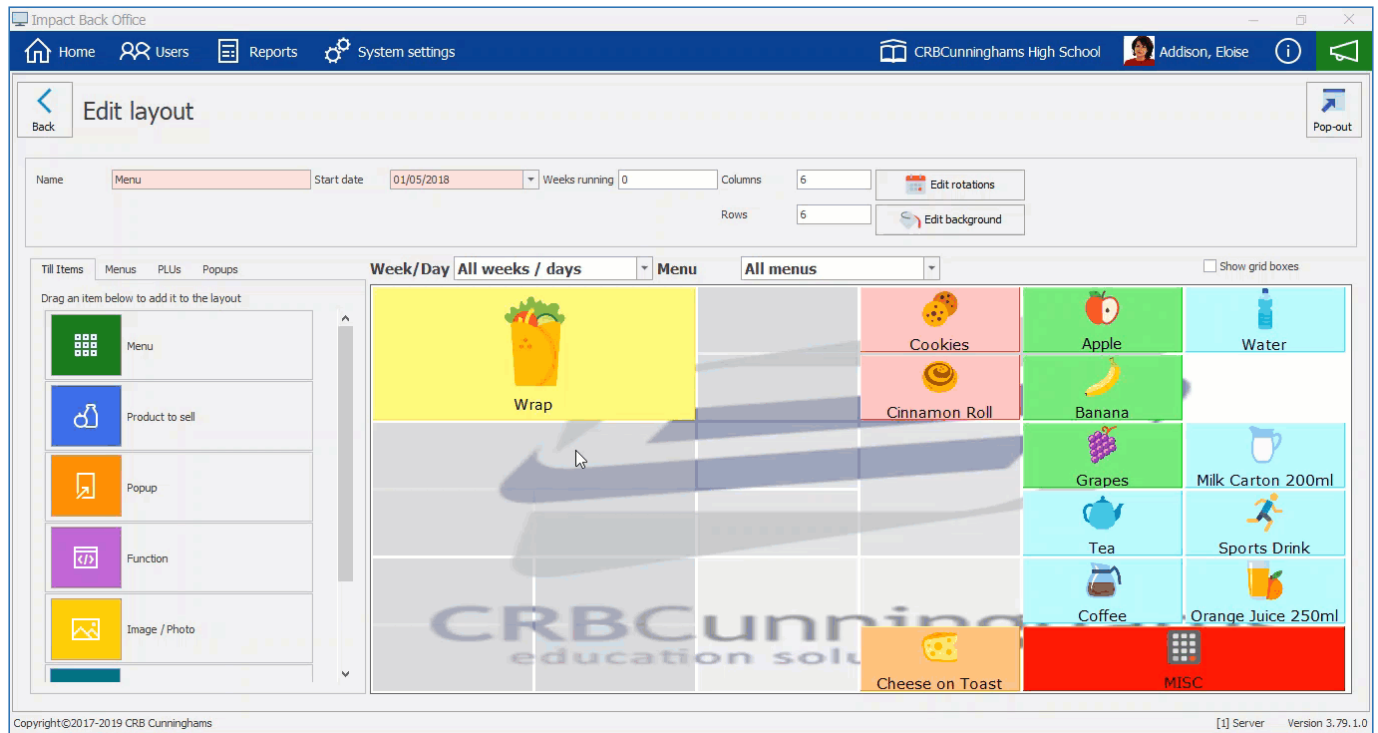
Select a font from the drop down list you wish to use. Fonts can be useful if you want a particular item to stand out on the menu and to make certain items more attractive to readers.



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

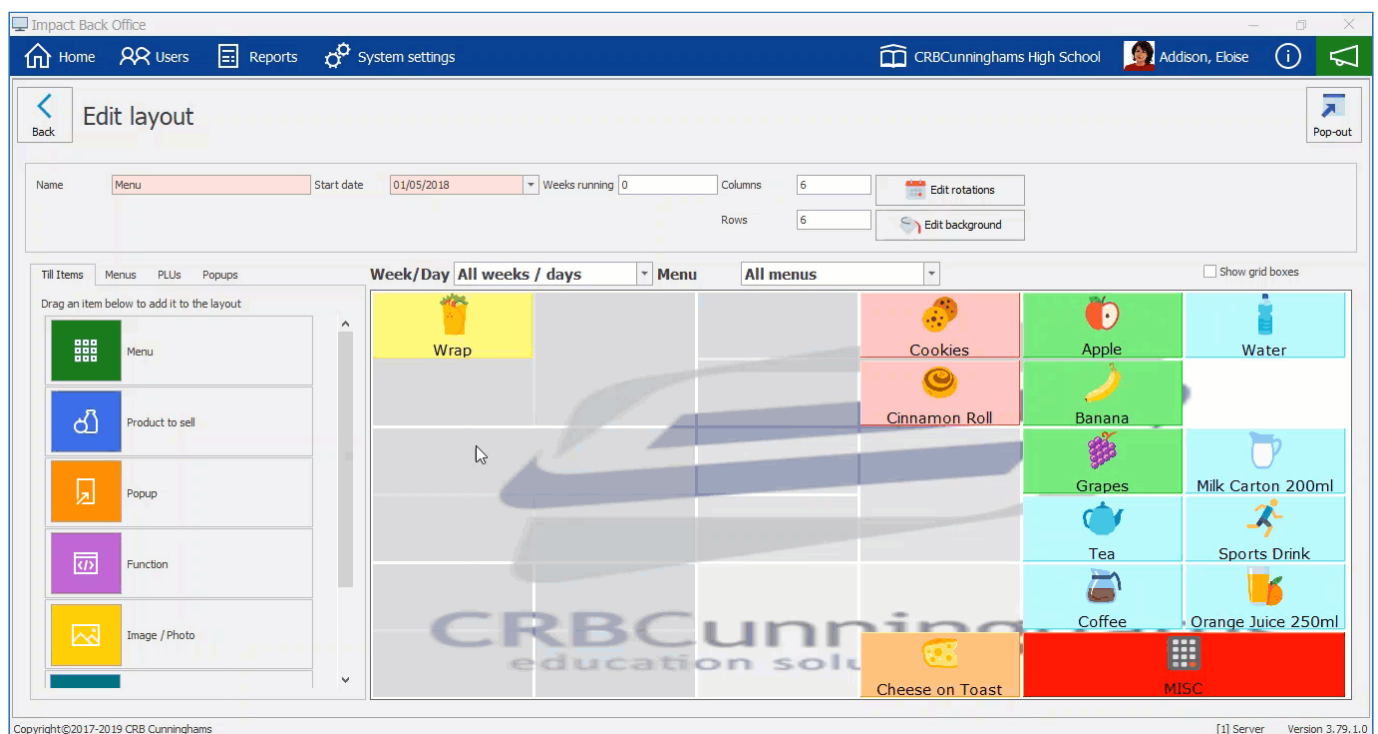
One reason larger sizes for text and other user interface elements is important is because it helps adjust the visual display to match the physical one, providing more comfort for users.



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

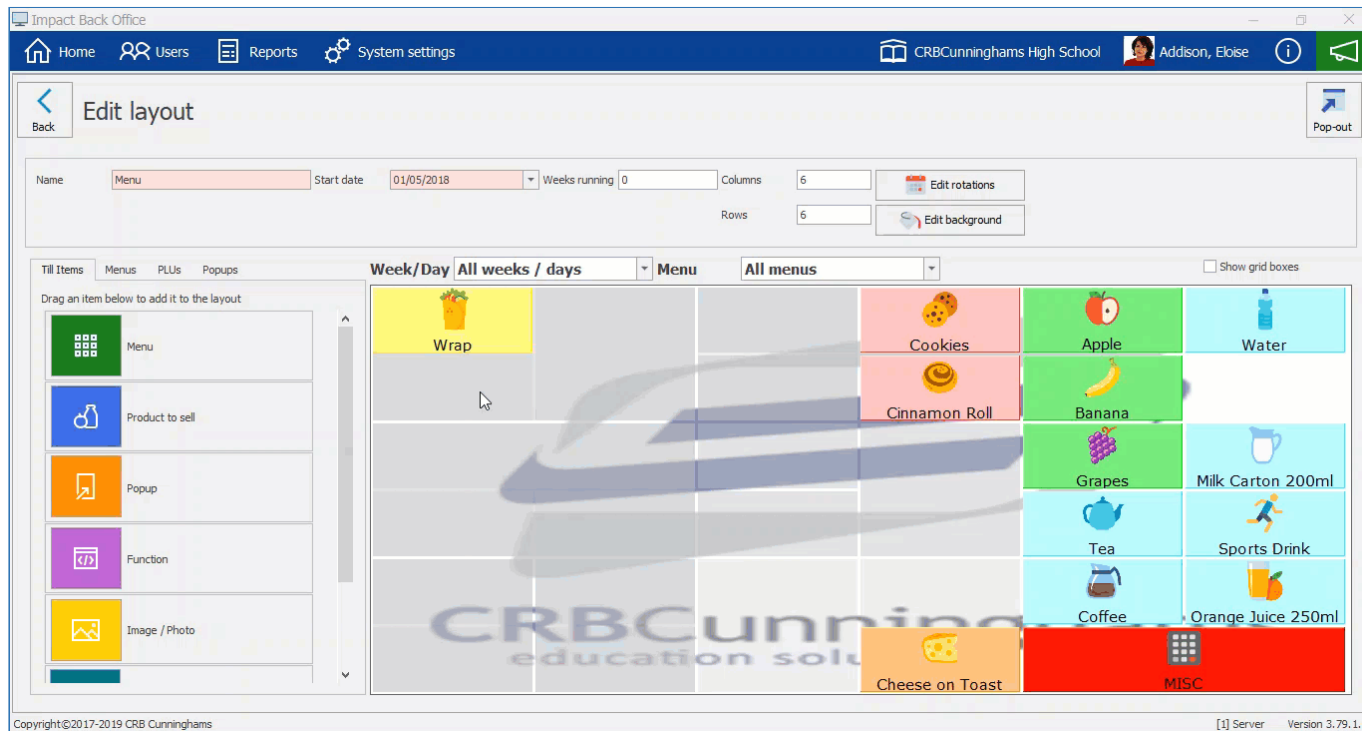
This is a key aspect to consider. It can be tempting to change font colours for effect, however it is important to consider the impact of this. For example, yellow text on a white background is particularly difficult to read and so a clear contrast such as black on white works well.



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

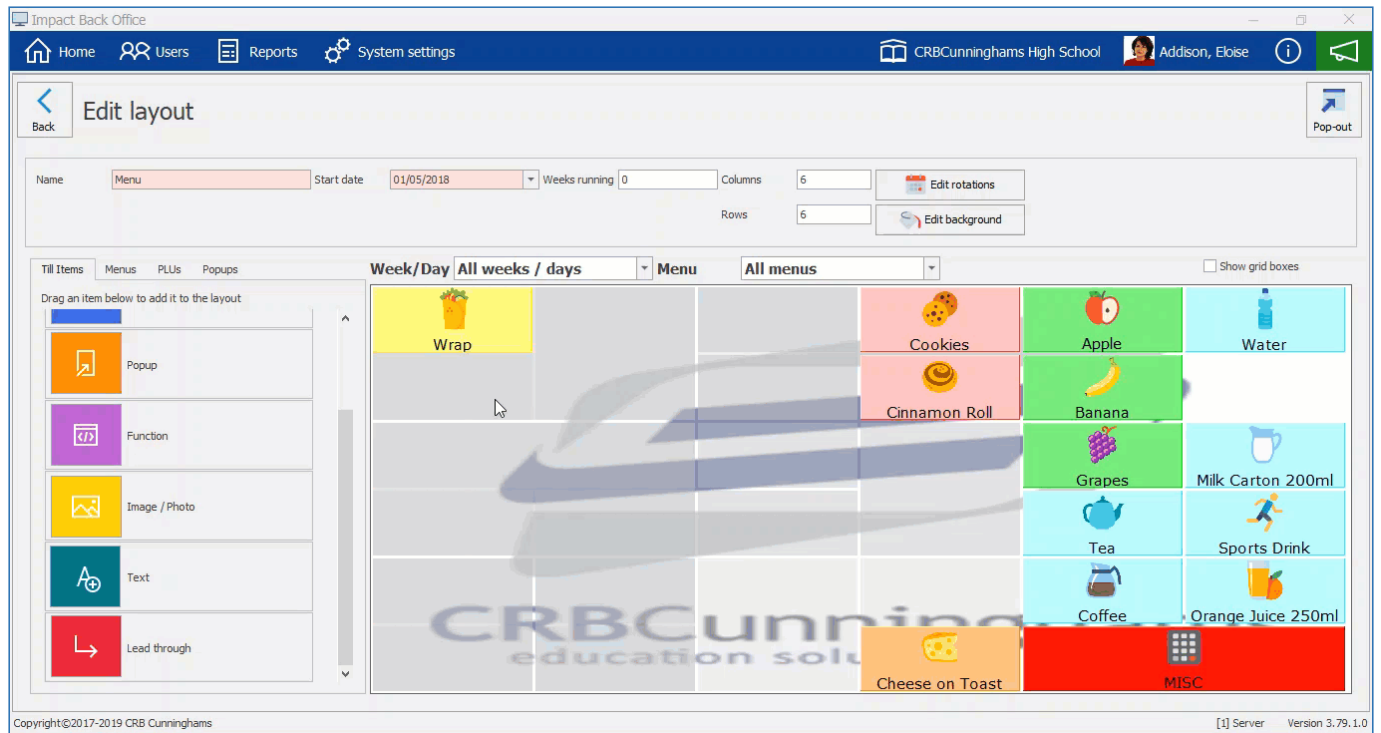
You can change your items background colours to help set a tone, make certain areas stand out on the menu, or reinforce your products.



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

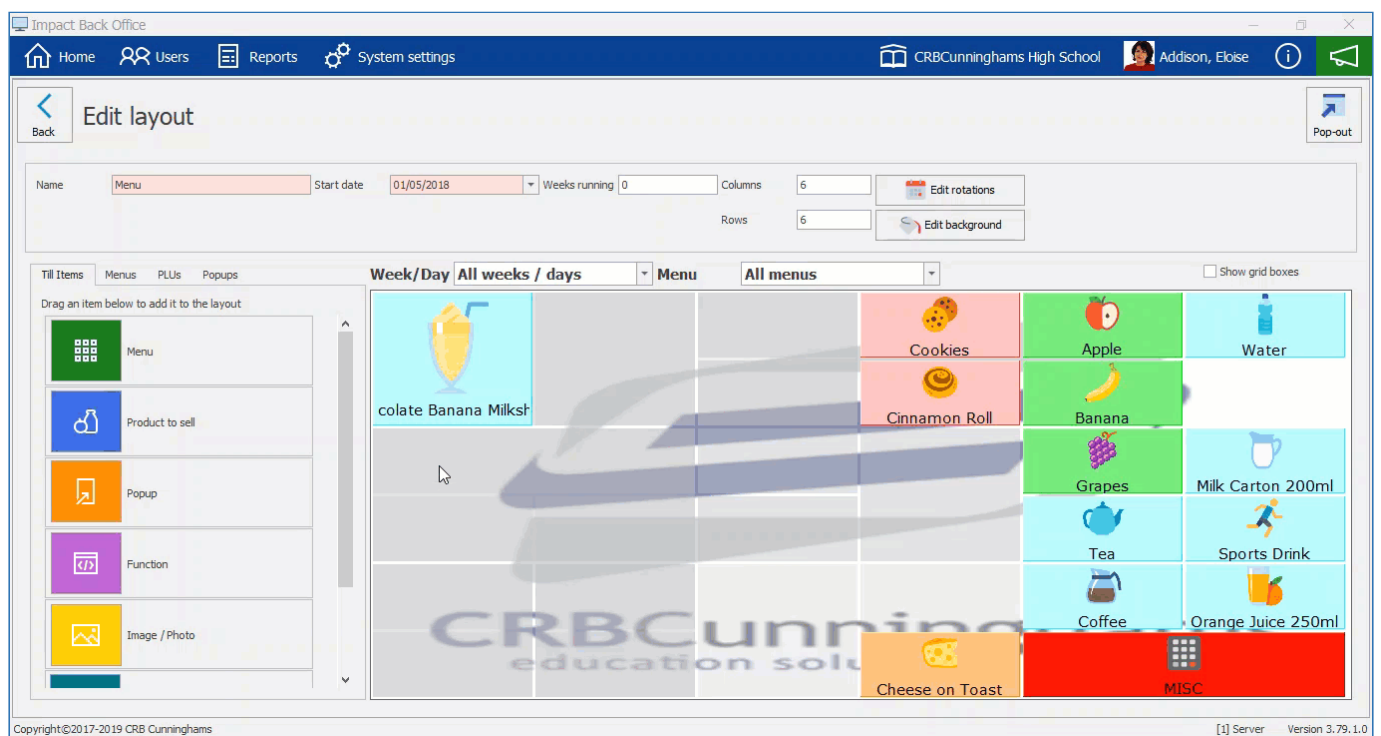
This option will move the text to a different location on the tile. It can be more pleasing on the eye to read the text from a different point of view.



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**

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 menu's.

1. Right click on an item on the menu and select **Delete**.
2. This will remove the item from the layout.

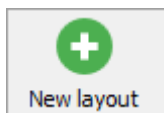
Pre-order layouts



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

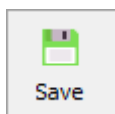
1. Press the **New layout** button.



2. Enter a name for the new layout and select **Pre-order** from the location type drop-down.

The screenshot shows a dialog box titled "Add layout" with a close button (X) in the top right corner. Inside the dialog, there are three input fields: "Layout name" with the text "Pre-order", "Location type" with a dropdown menu showing "Pre-order", and "Schools" with a dropdown menu showing "CRBCunninghams Secondary School". At the bottom right of the dialog, there are two buttons: "Save" with a green floppy disk icon and "Cancel" with a red circle and slash icon.

3. Press **Save**.



4. This will take you to the Edit pre-order periods section.

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

1. 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 rotations
------------	------------	----------------

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

1. Press the **Edit rotations** button.

Edit rotations

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

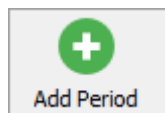
Week 3

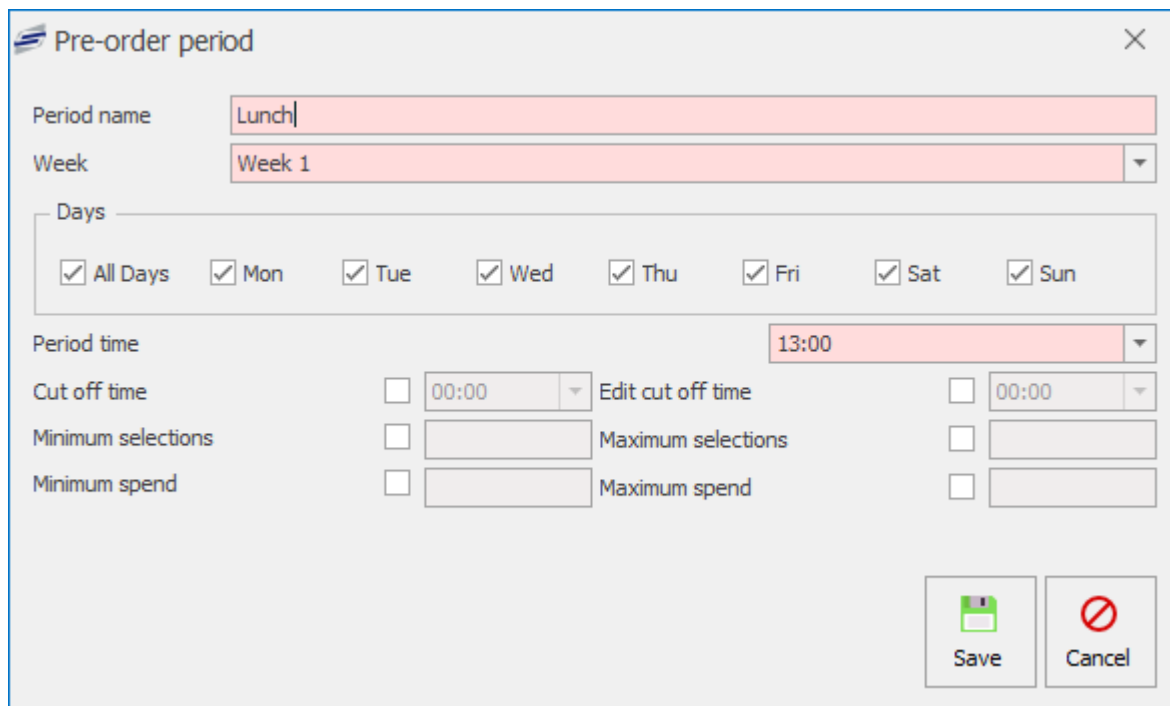
Week start	Week number
20/05/2019	1
27/05/2019	2
03/06/2019	3
10/06/2019	1
17/06/2019	2
24/06/2019	3
01/07/2019	1
08/07/2019	2
15/07/2019	3
22/07/2019	1
29/07/2019	2
05/08/2019	3
12/08/2019	1

Save **Cancel**

Adding a New Period

1. Press **Add Period**.





Pre-order period

Period name:

Week:

Days:

☒ All Days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Period time:

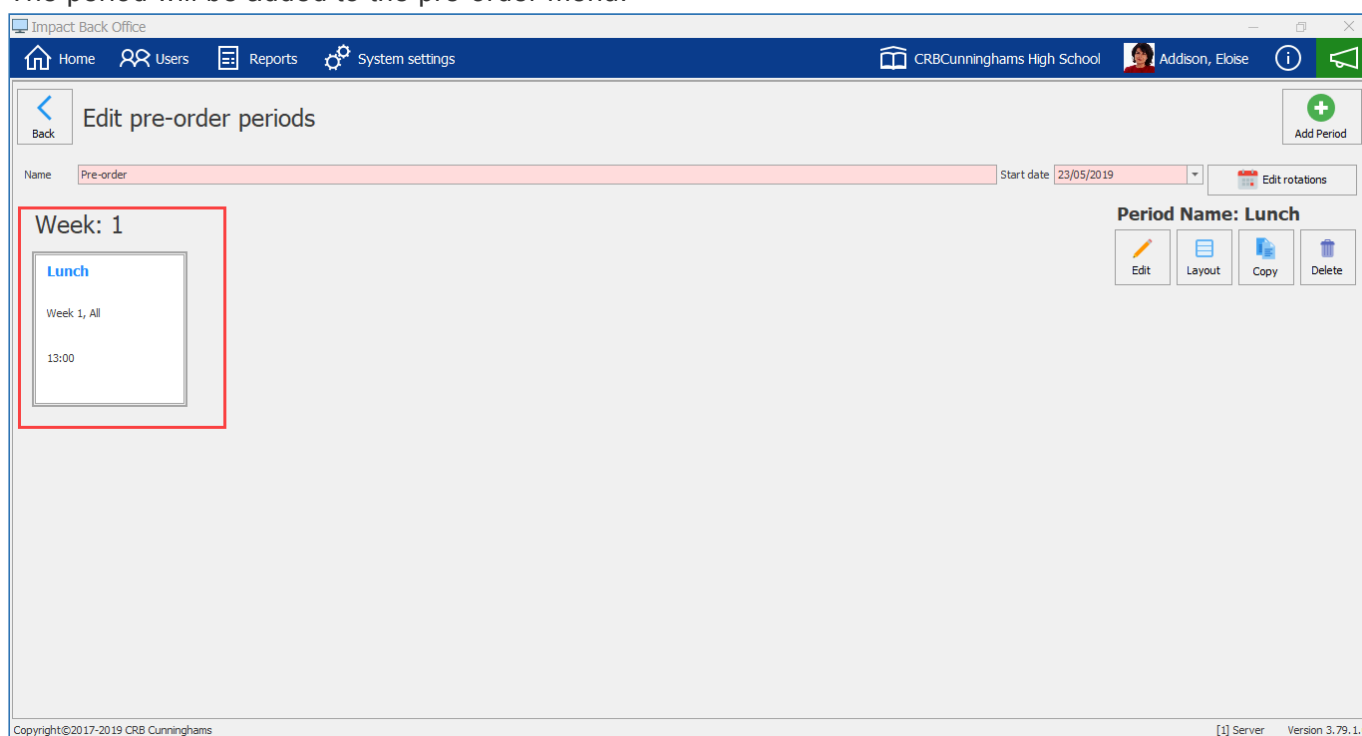
Cut off time: ☐ Edit cut off time ☐

Minimum selections: ☐ Maximum selections: ☐

Minimum spend: ☐ Maximum spend: ☐

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. You can activate a **Cut off time** which will determine when you can pre-order up to.
7. There are also options to change the **Edit cut off time** which will set a specific time that the user can edit an existing pre-order until.
8. You can also set a minimum and maximum selection value and a minimum and maximum spend limits.
9. 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 pre-order periods

Name: Start date:

Week: 1

Lunch

Week 1, All

13:00

Period Name: Lunch

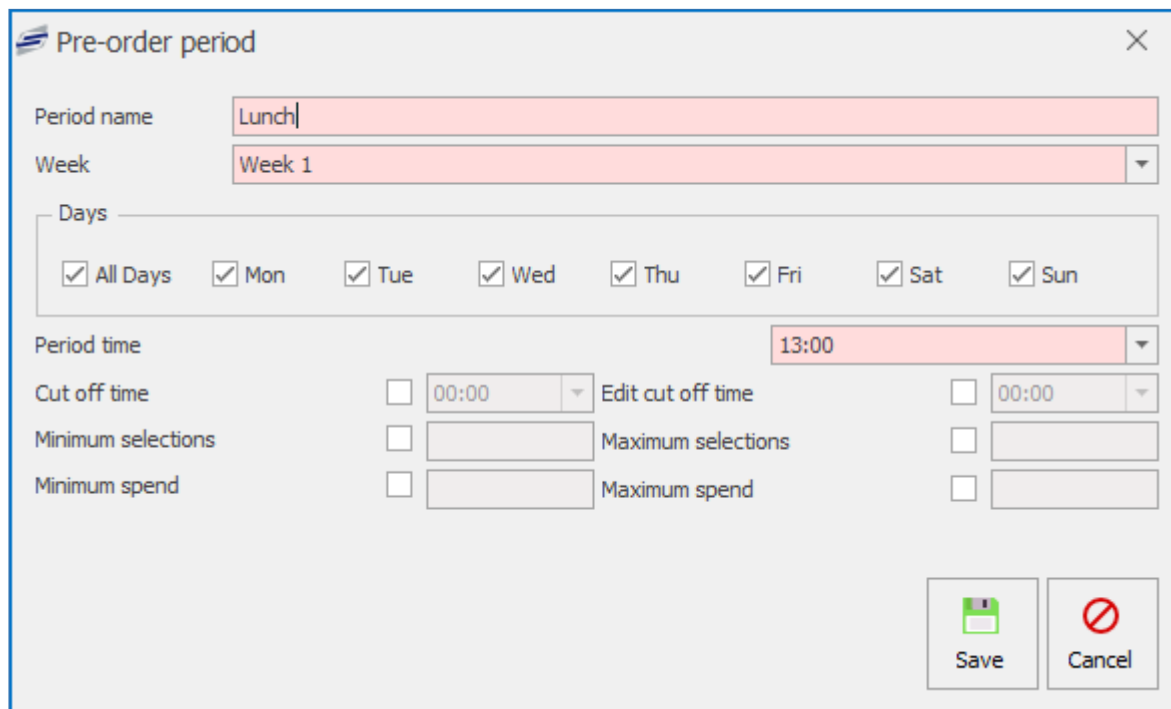
Copyright©2017-2019 CRB Cunningham [1] Server Version 3.79.1.0

Editing a Pre-order Period

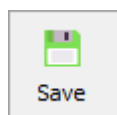
1. Press the **Edit** button.



2. Edit the period accordingly.

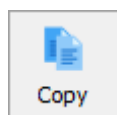


3. Press **Save**.

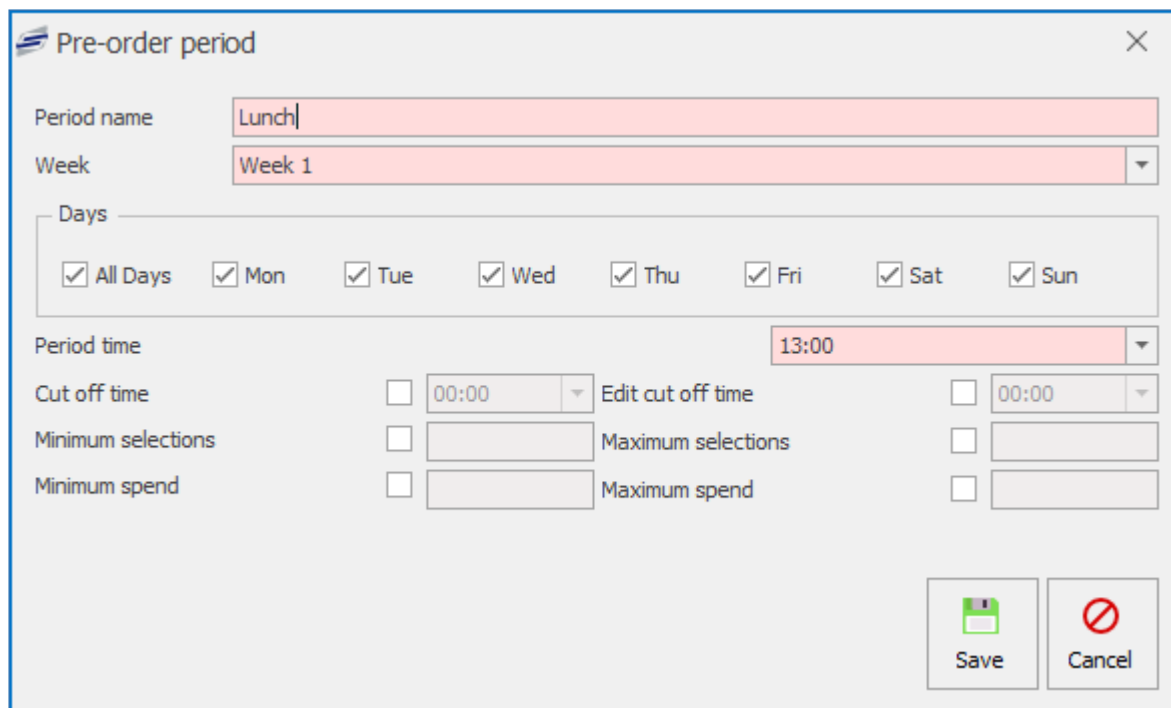


Copying a Pre-order Period

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: Lunch

Week: Week 1

Days: ☒ All Days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Period time: 13:00

Cut off time: ☐ 00:00 Edit cut off time: ☐ 00:00

Minimum selections: ☐ Maximum selections: ☐

Minimum spend: ☐ Maximum spend: ☐

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.

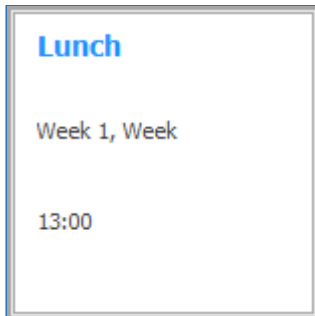
Editing the Pre-order layout & Creating new Menus & Items



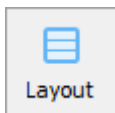
A Pre-order layout will normally consist of multiple menus with lead through items within them. The most common period would be lunch and a typical menu would be a grab and go bag consisting of a main item like a sandwich, a snack like a flapjack, and a drink like a bottle of water. Once a transaction 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.

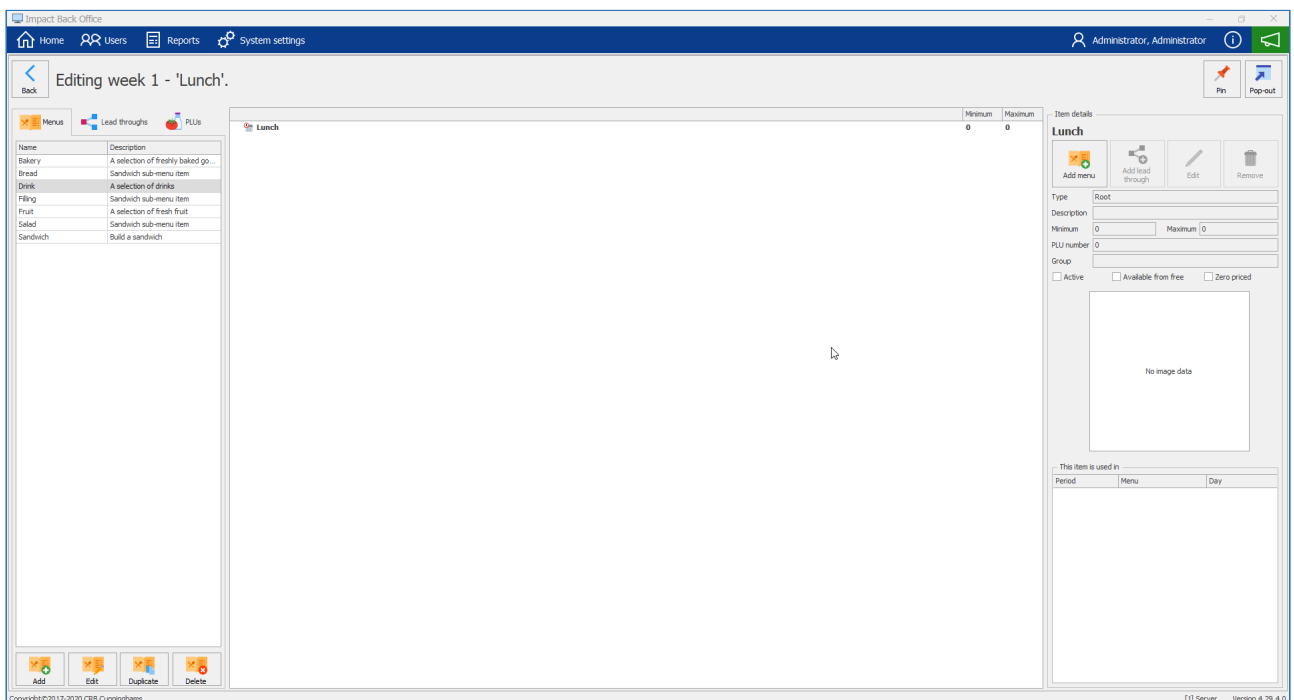
1. Select the Period you wish to create a layout for from the period grid.



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.


	Minimum	Maximum
Breakfast	0	0

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
--------	------	-----

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

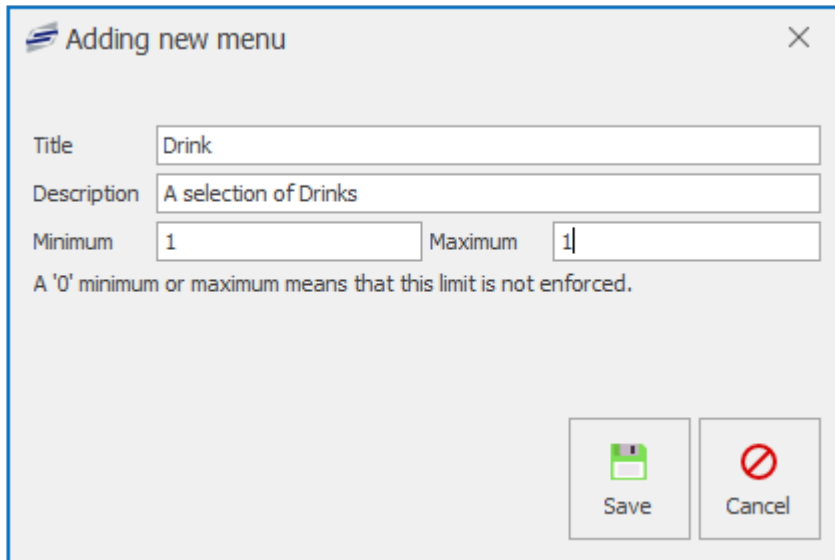
 Lead throughs

 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

1. 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

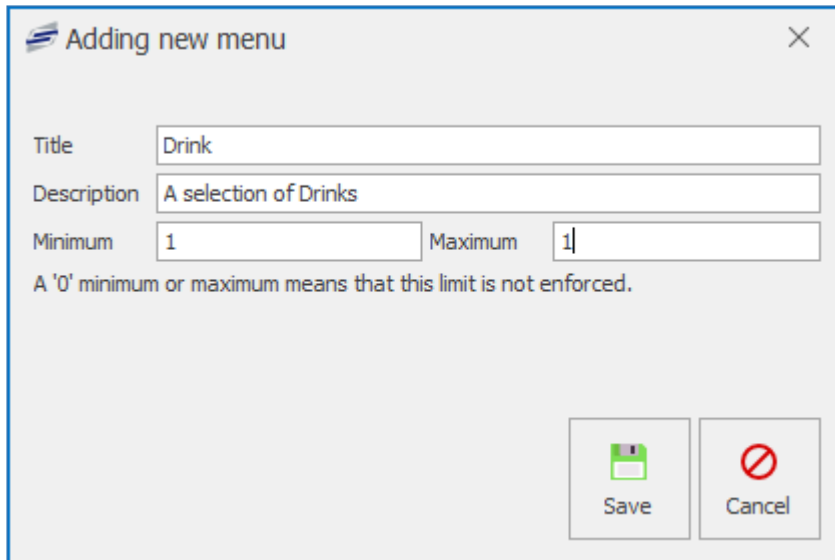
2. Press the **OK** button.

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 screenshot shows a dialog box titled "Adding new menu" with a close button (X) in the top right corner. The dialog contains the following fields and controls:


- Title:** A text input field containing the word "Drink".
- Description:** A text input field containing the text "A selection of Drinks".
- Minimum:** A numeric input field containing the value "1".
- Maximum:** A numeric input field containing the value "1".

Below the input fields, there is a note: "A '0' minimum or maximum means that this limit is not enforced." At the bottom right of the dialog, there are two buttons: "Save" (with a green 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

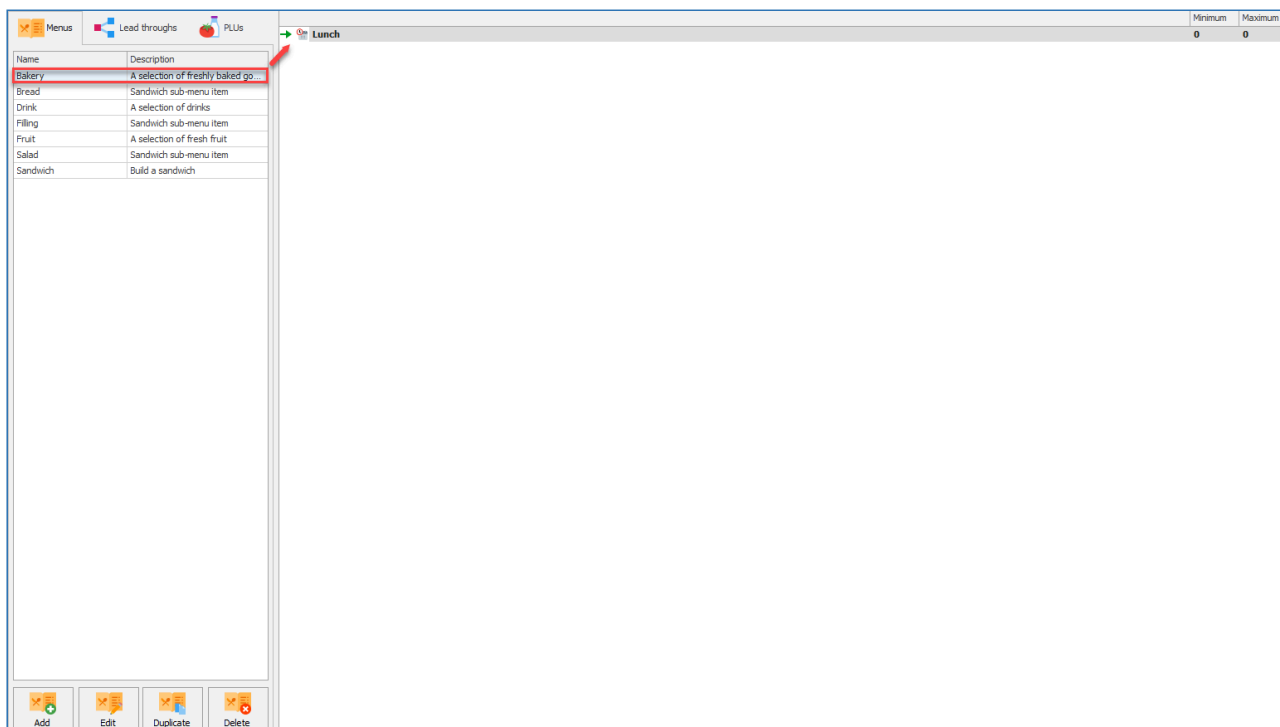
 Edit

 Duplicate

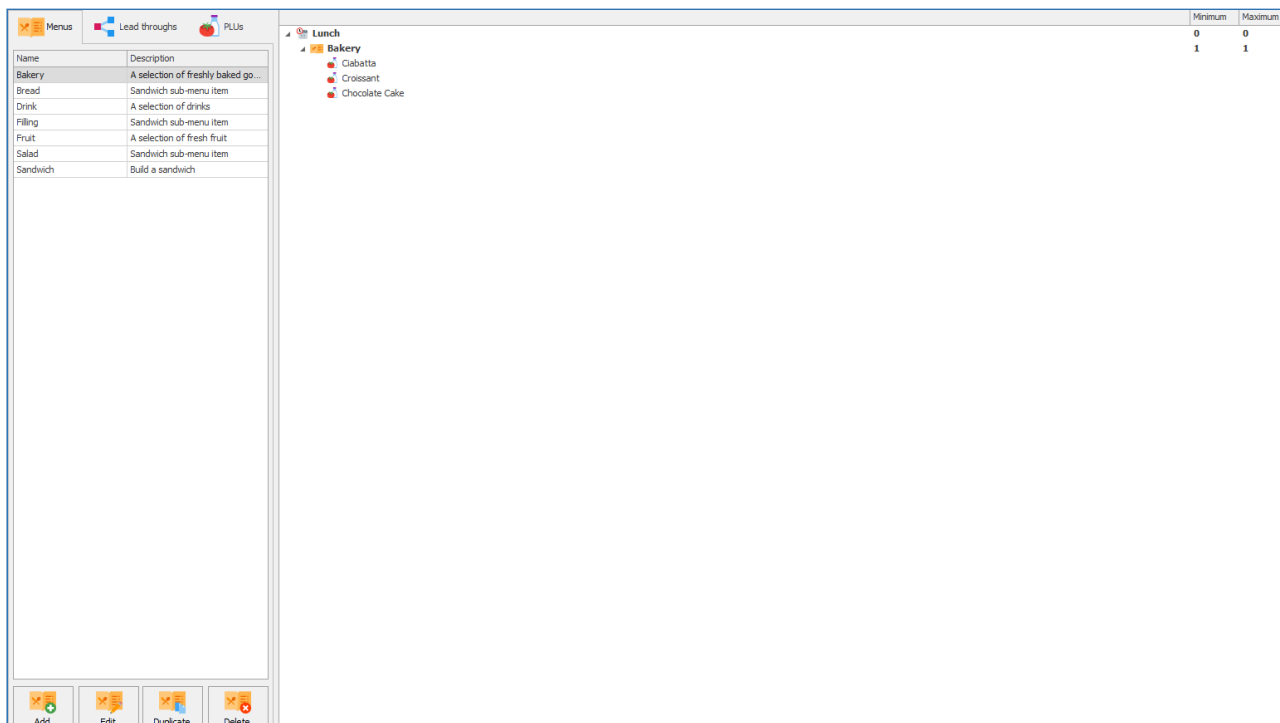
 Delete

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.



i 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.

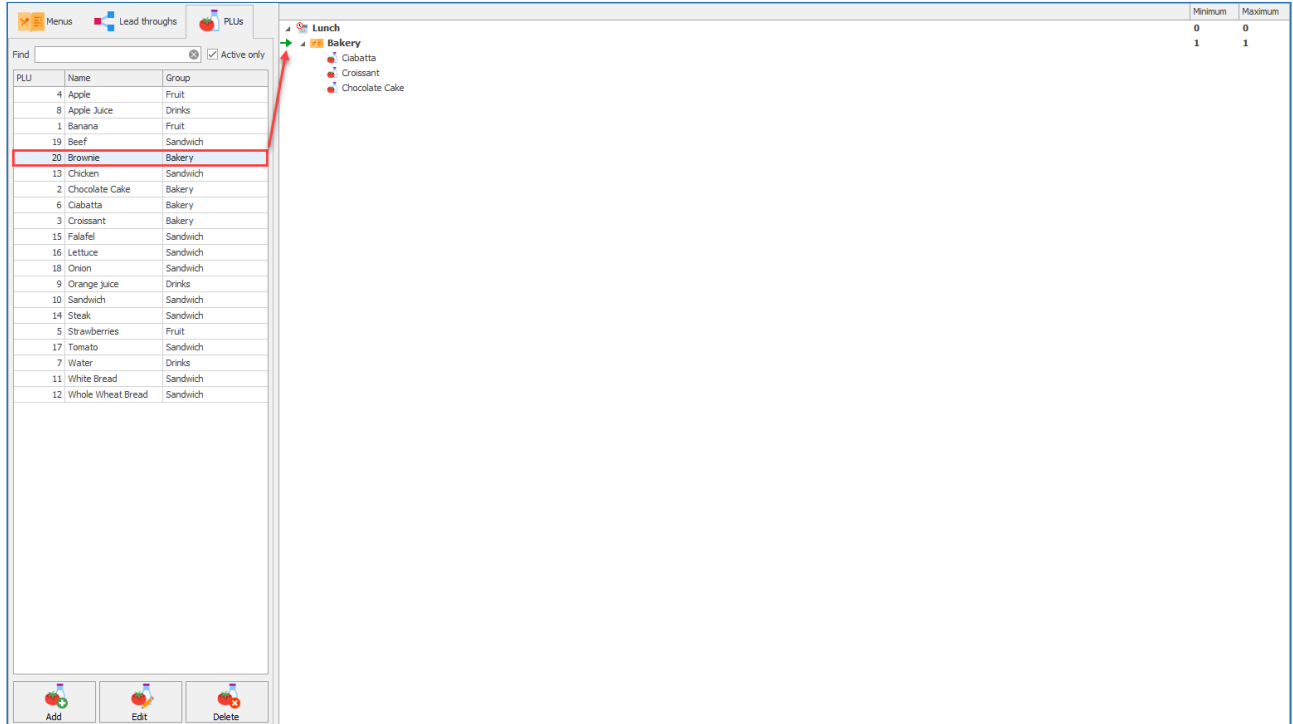
Linking PLUs to Pre-order Menus



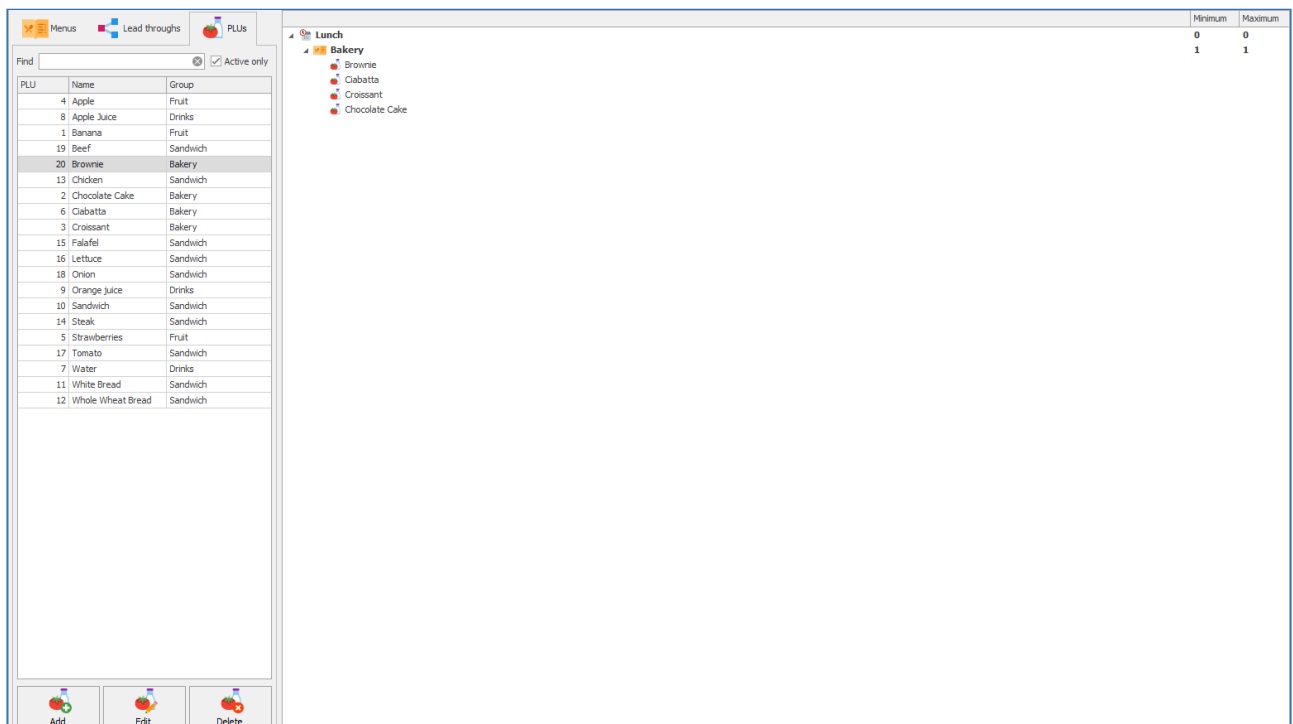
Once a menu has been created you will need to add items to sell against them. There are two methods you can use. You can simply add a standard PLU to a menu or you can add a lead through.

Linking a PLU to a Pre-order menu

1. Select the PLU you wish to link to a menu from under the PLU tab.

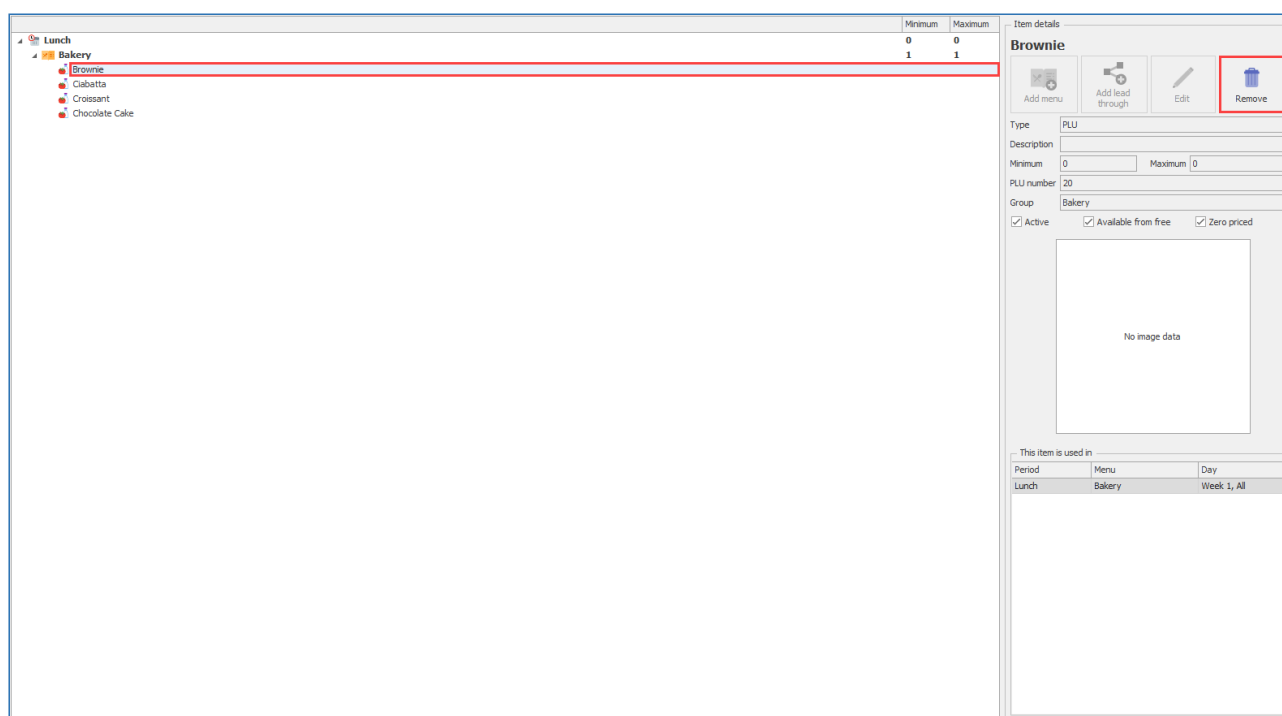


2. Left click the PLU you wish to link to the Pre-order menu.
3. Drag the selected PLU and drop it next to the menu you wish to add it to. This will add the PLU to the menu.



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 a software interface for managing PLUs (Product List Units). At the top, there are three tabs: 'Menus' (with a fork and knife icon), 'Lead throughs' (with a blue arrow icon), and 'PLUs' (with a tomato icon). The 'PLUs' tab is selected. Below the tabs is a search bar labeled 'Find' with a clear button (X) and 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 for '20 Brownie' is highlighted in grey. Below the table is a large empty rectangular area. At the bottom of the interface are three buttons: 'Add' (with a tomato and plus icon), 'Edit' (with a tomato and pencil icon, circled in red), and 'Delete' (with a tomato and minus icon).

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

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.

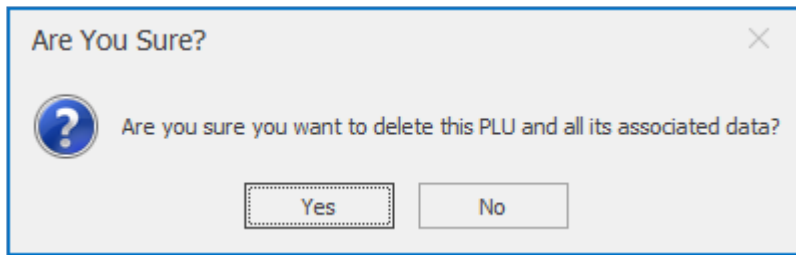


The screenshot shows the 'PLUs' tab in the software interface. At the top, there are three tabs: 'Menus', 'Lead throughs', and 'PLUs'. Below the tabs is a search bar with the text 'Find' and a search icon. To the right of the search bar is a checkbox labeled 'Active only' which is checked. Below the 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 highlighted with a red circle.

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.


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

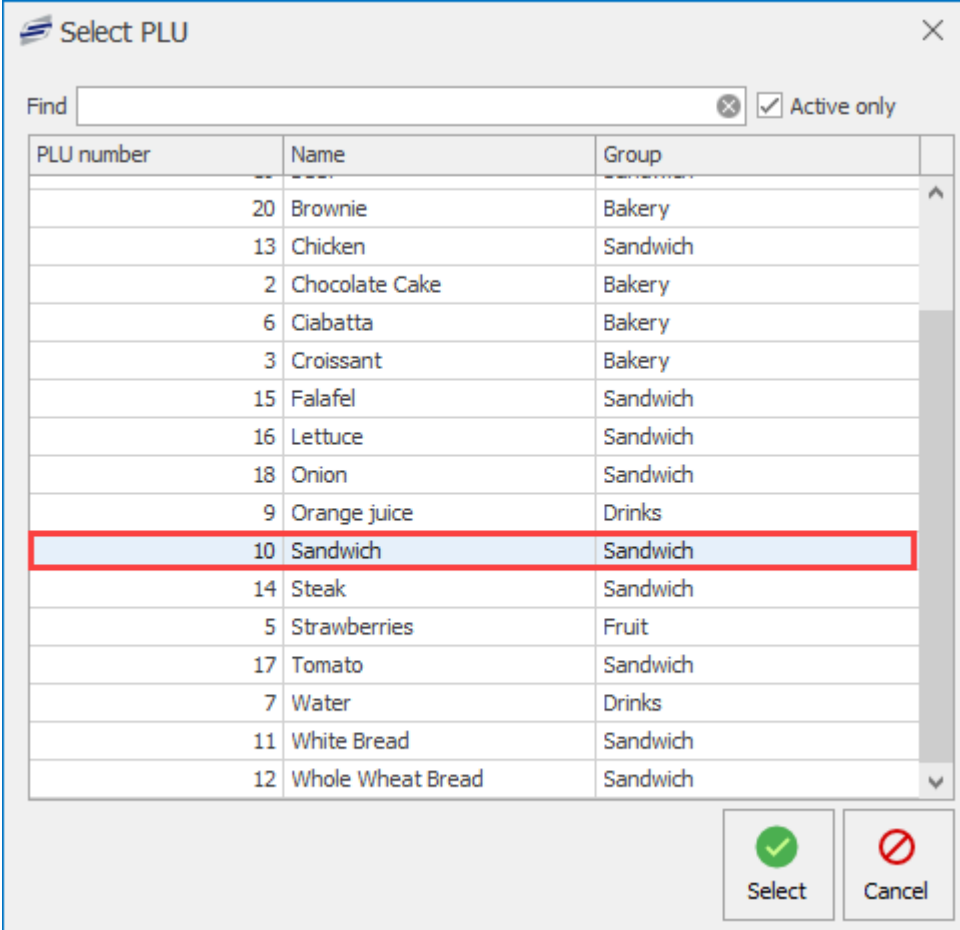
Name	Description
------	-------------

 Add

 Edit

 Delete

2. Select the PLU you wish to associate with the Lead through.

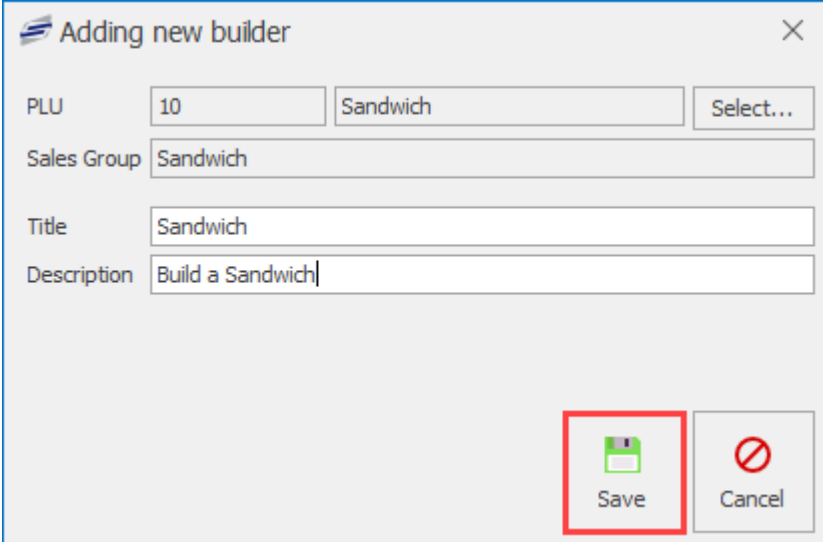
 Select PLU

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

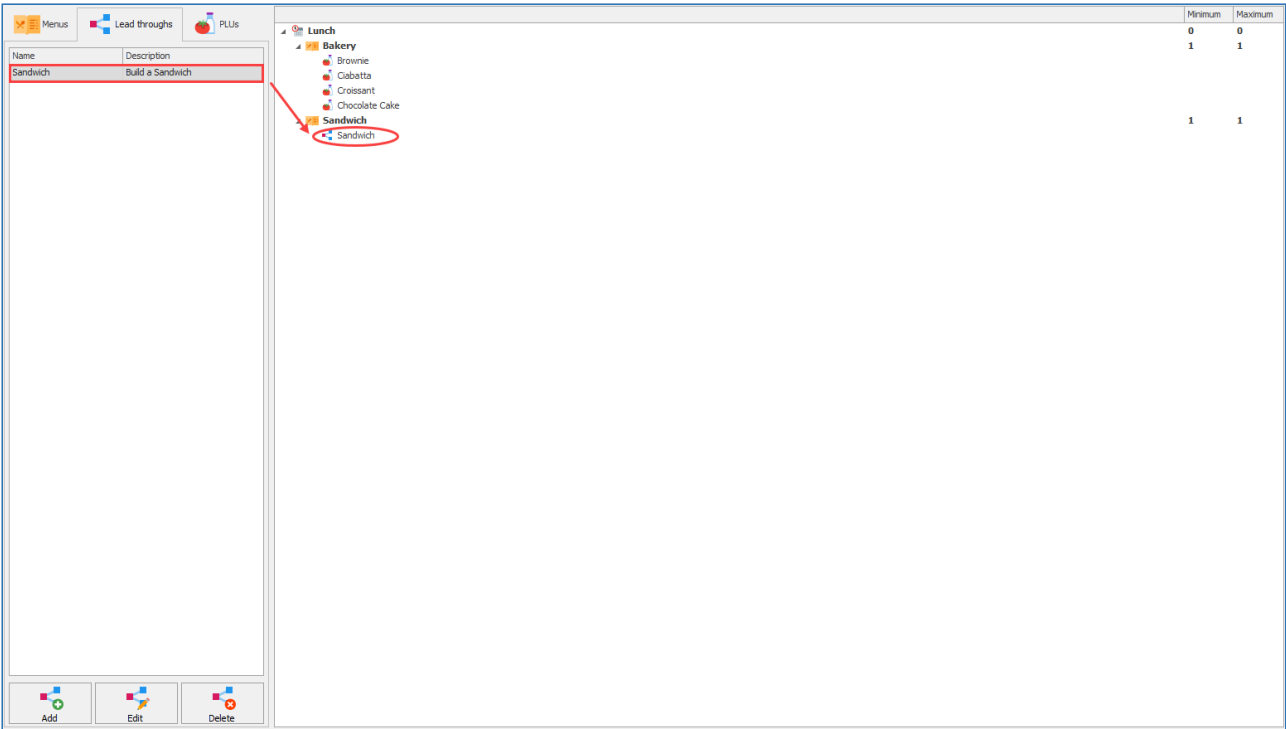
Description

☒ Save ☐ Cancel

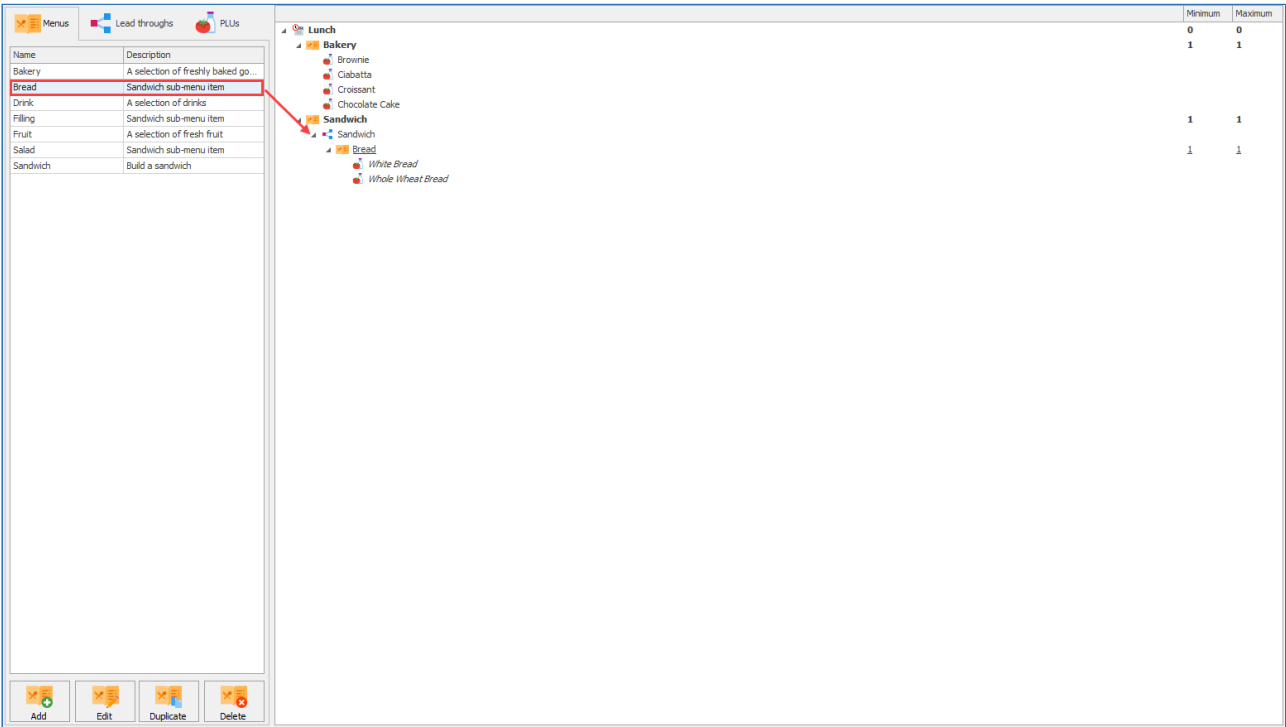
 You may need to create a new PLU to associate to the Lead through. Click the link for more information regarding Adding a new PLU.

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
Lunch	0	0
Bakery	1	1
Brownie		
Ciabatta		
Croissant		
Chocolate Cake		
Sandwich	1	1
Bread	1	1
White Bread		
Whole Wheat Bread		
Filling	1	1
Falafel		
Steak		
Beef		
Chicken		
Salad		3
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.

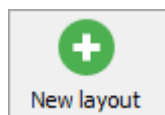
Smart Board layouts



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

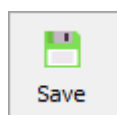
1. Press the **New layout** button.



2. Enter the name of the new layout and select **Smart board** from the location type drop-down list.

A dialog box titled "Add layout" with a close button (X) in the top right corner. It contains two input fields: "Layout name" with the text "Smart board" and "Location type" with a dropdown menu showing "Smart board". At the bottom right, there are two buttons: "Save" with a green floppy disk icon and "Cancel" with a red circle and slash icon.

3. Press **Save**



4. This will take you to the Edit smart board periods section.

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	Smart Board	Start date	29/04/2019	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	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 Smart board Rotations

1. Press the **Edit rotations** button.

Edit rotations

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

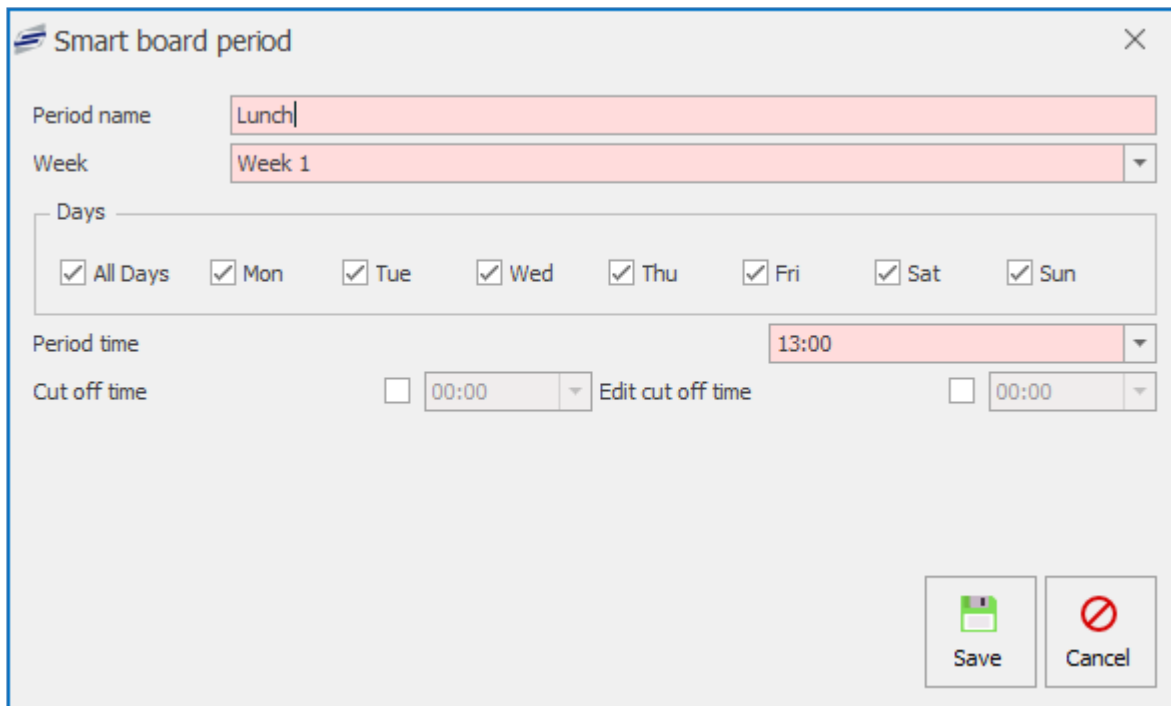
Save

Cancel

Adding a New Period

1. Press **Add Period**





Smart board period

Period name:

Week:

Days:

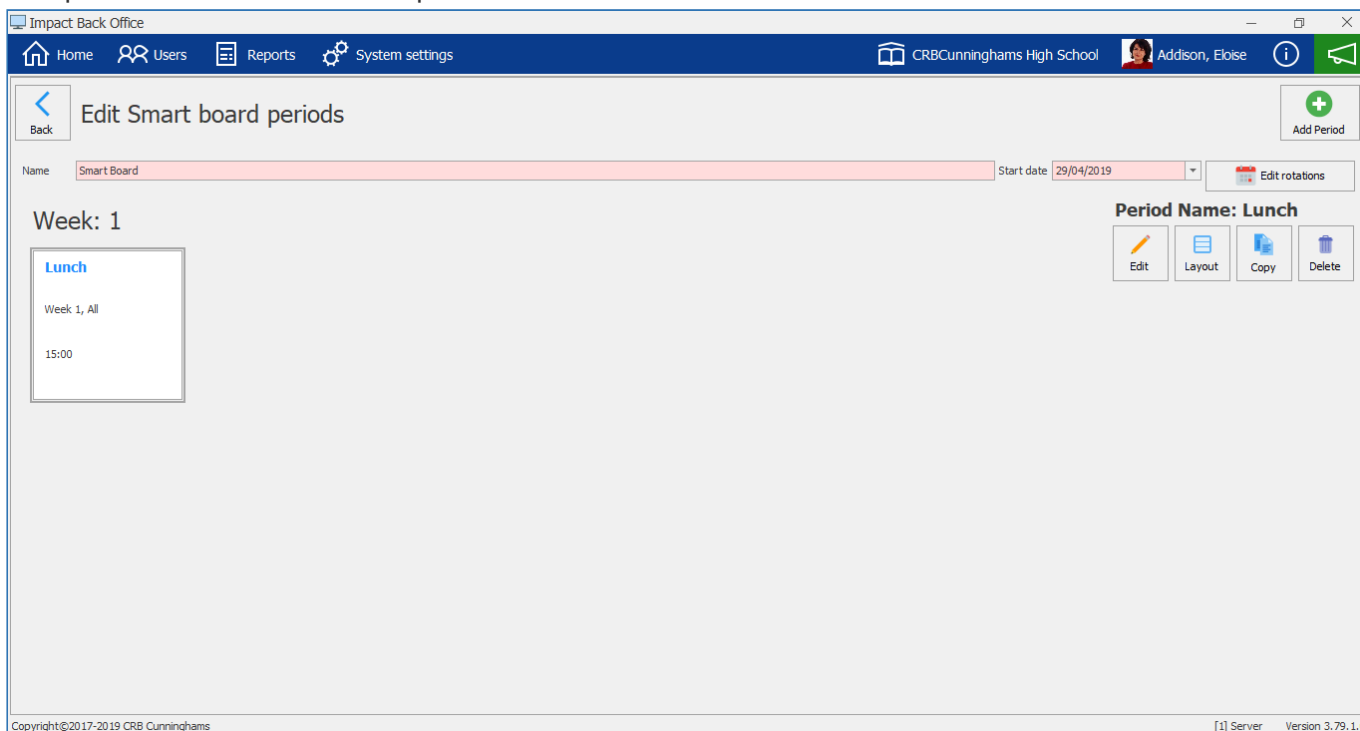
☒ All Days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

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:

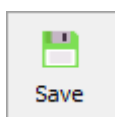
Days:

☒ All Days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Period time:

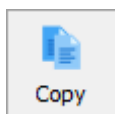
Cut off time: ☐ Edit cut off time ☐

3. Press **Save**.

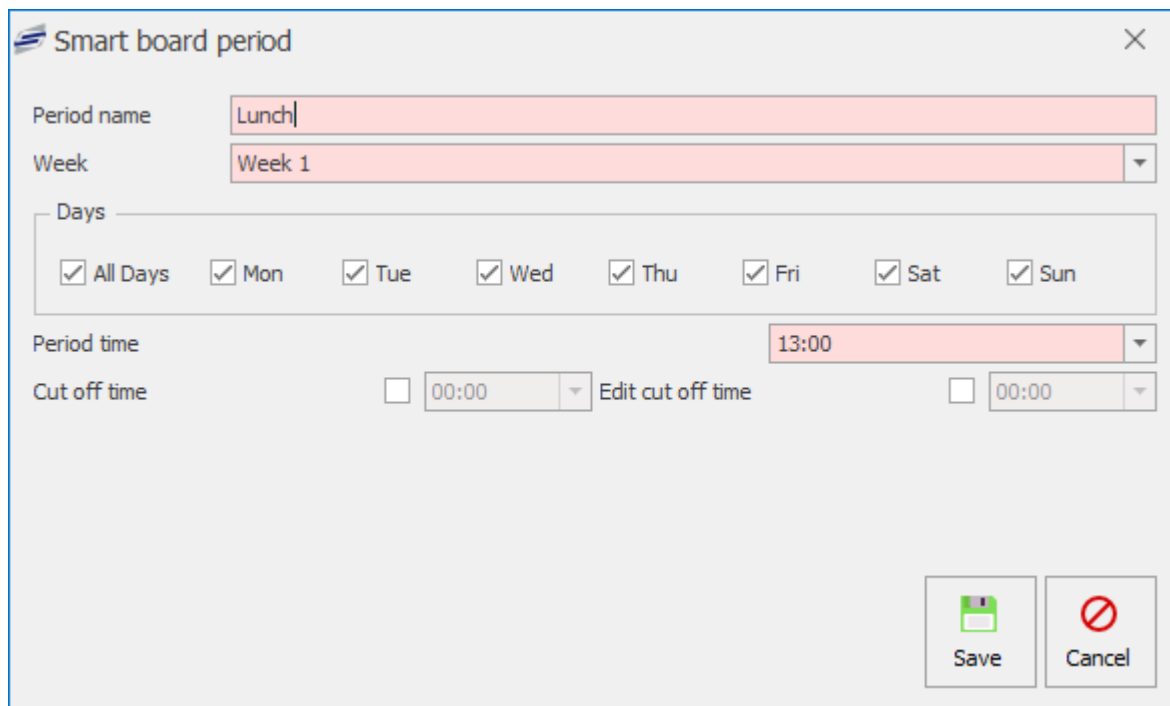


Copying a Pre-order Period

1. Select the Smart board Period you wish to copy.
2. Press the **Copy** button.



3. Edit the period accordingly.



The image shows a 'Smart board period' dialog box. It has a title bar with a close button (X). The dialog contains the following fields and controls:

- Period name:** A text input field containing 'Lunch'.
- Week:** A dropdown menu showing 'Week 1'.
- Days:** A section with checkboxes for 'All Days', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sat', and 'Sun'. All checkboxes are currently checked.
- Period time:** A dropdown menu showing '13:00'.
- Cut off time:** A section with two checkboxes and two time input fields. The first checkbox is unchecked, and the first time field shows '00:00'. The second checkbox is also unchecked, and the second time field shows '00:00'. There is a label 'Edit cut off time' between the two checkboxes.
- Buttons:** At the bottom right, there are two buttons: 'Save' (with a floppy disk icon) and 'Cancel' (with a red circle and slash icon).

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.

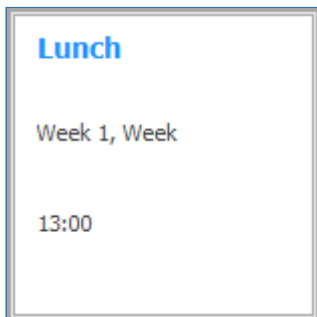
Editing the Smart board layout & Creating new Menus



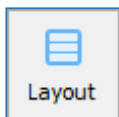
A Smart board layout will normally consist of multiple menus. The most common menu would usually be the lunch menu which would display a few meal choice options.

The first step to creating a menu in your smart board layout will be to add a menu and link PLUs to that menu.

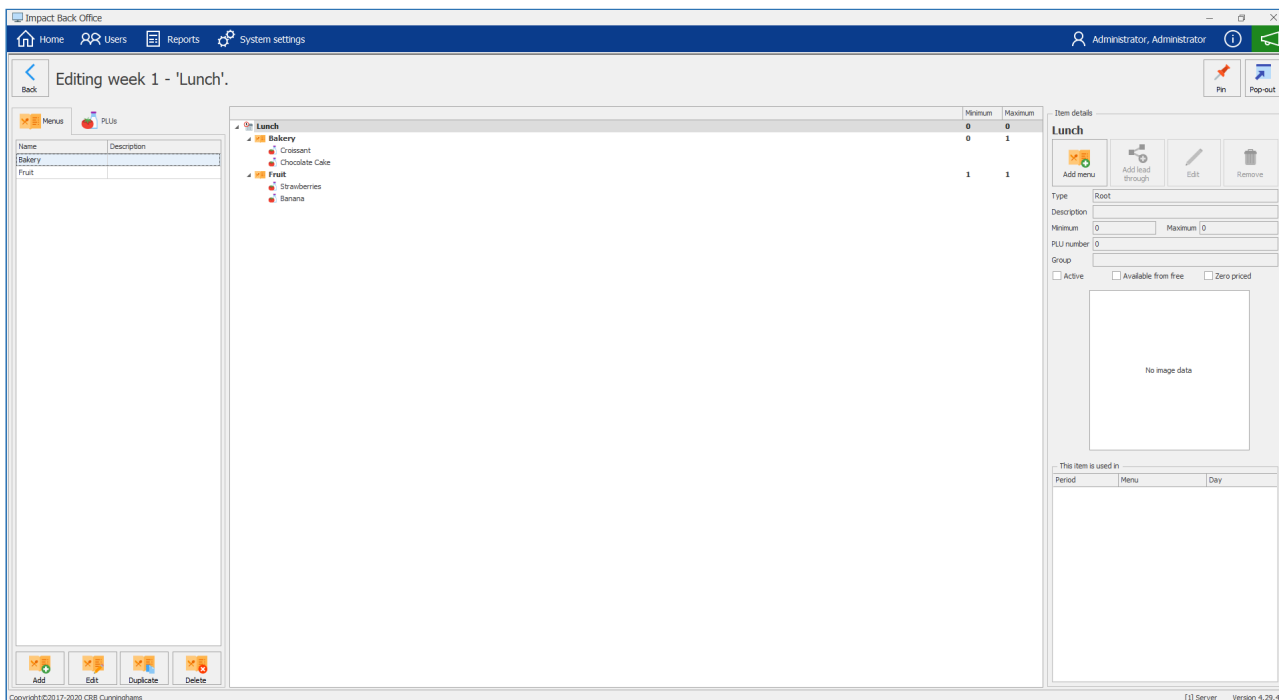
1. Select the Period you wish to create a layout for from the period grid.



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

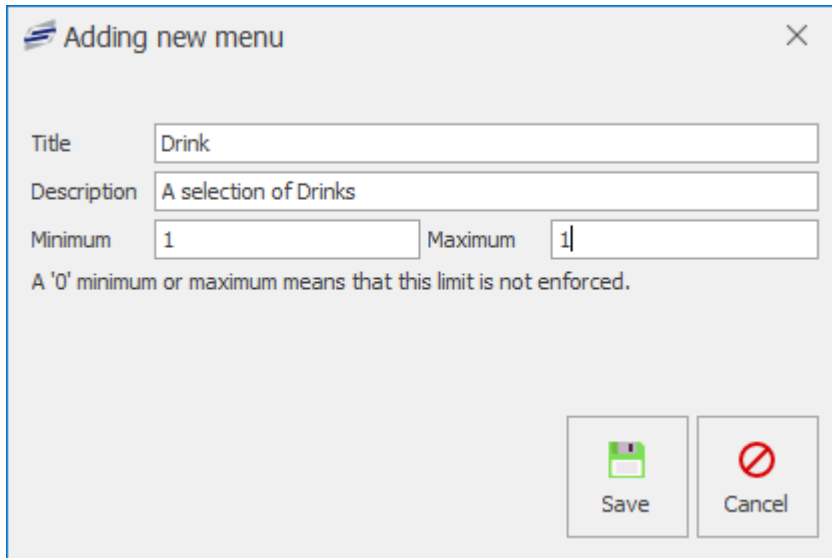


Duplicate



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.

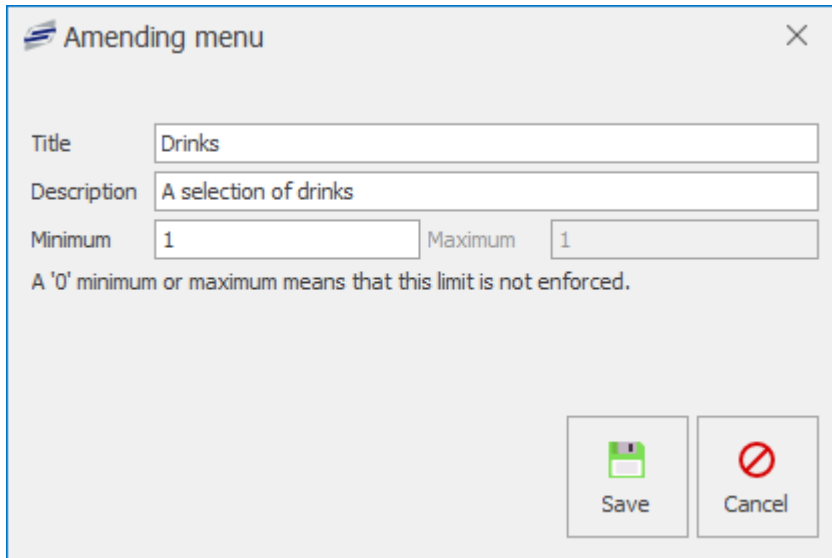
Editing an existing menu on the Smart board layout

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	

At the bottom of the screen, there is a toolbar with four icons: Add, Edit, Duplicate, and Delete. The Edit icon is circled in red.

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. The dialog 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".

Below these fields is a note: "A '0' minimum or maximum means that this limit is not enforced." At the bottom right of the dialog 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.


Menus


PLUs

Name	Description
Bakery	
Drinks	A selection of drinks
Fruit	

Add

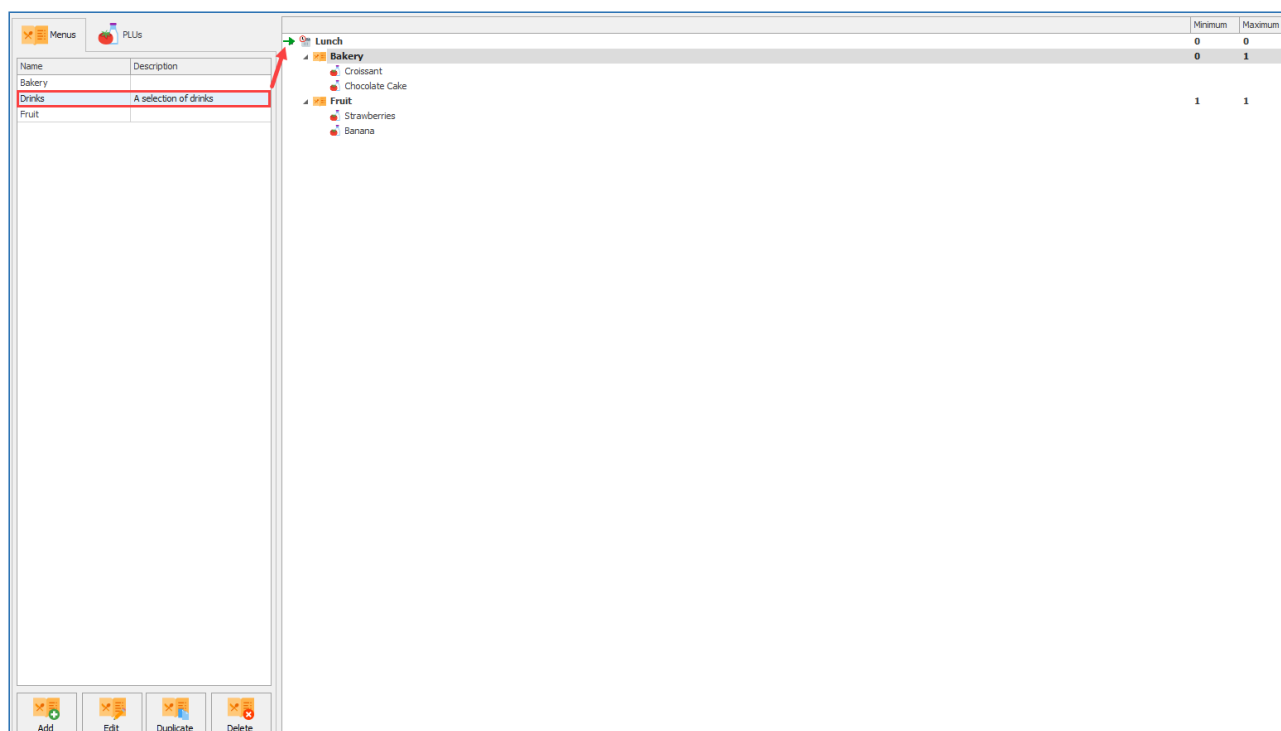
Edit

Duplicate

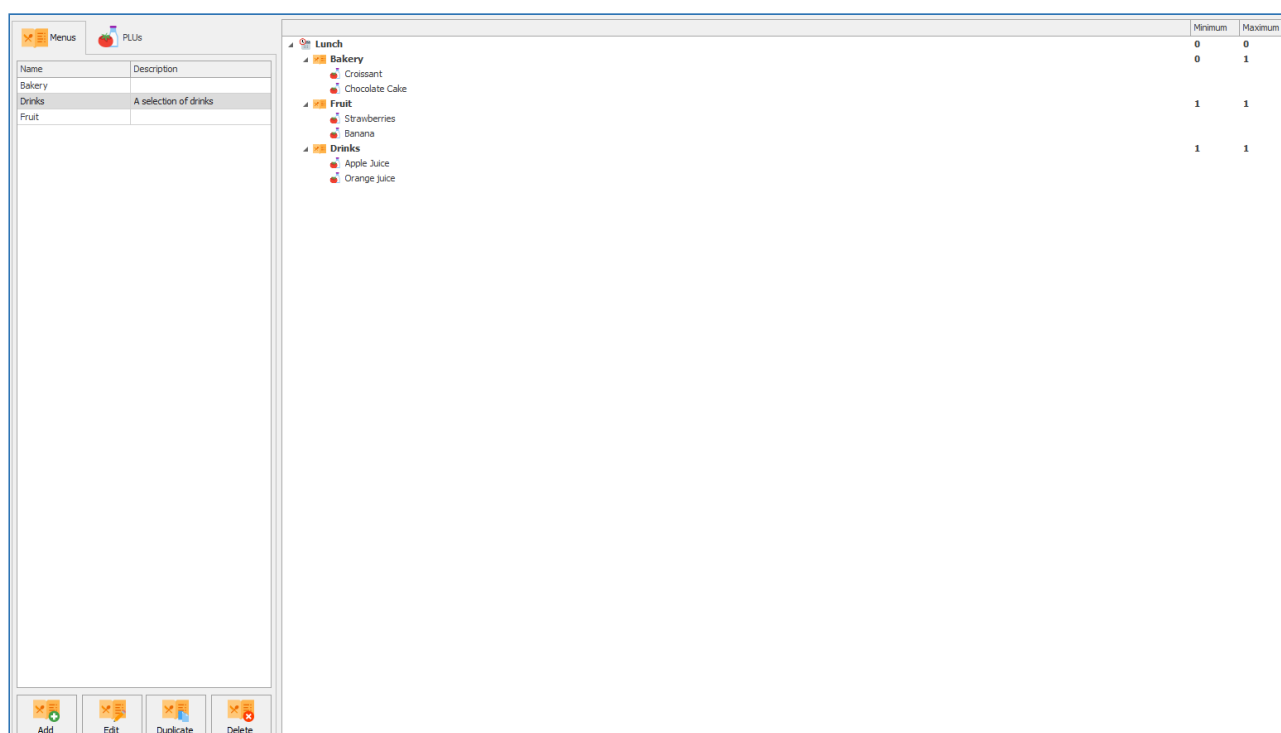
Delete

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.



i 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.

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		
Bakery		
Croissant	0	0
Chocolate Cake	0	1
Fruit		
Strawberries	1	1
Banana		
Drinks		
Apple Juice	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.

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		
Bakery		
Croissant	0	0
Chocolate Cake	0	1
Fruit		
Strawberries	1	1
Banana		
Drinks		
Apple Juice	1	1
Orange juice		

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 CRB Fusion 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 selected and highlighted with a red border. 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, represented by a trash can icon, is highlighted with a red border. Below the buttons, there are fields for 'Type' (set to PLU), 'Description', 'Minimum' (0), 'Maximum' (0), 'PLU number' (9), and 'Group' (Drinks). There are also checkboxes for 'Active', 'Available from free', and 'Zero priced'. A large empty box with the text 'No image data' is present. At the bottom, a table shows 'This item is used in' with columns for Period, Menu, and Day, containing one entry: Lunch, Drinks, Week 1, All.

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

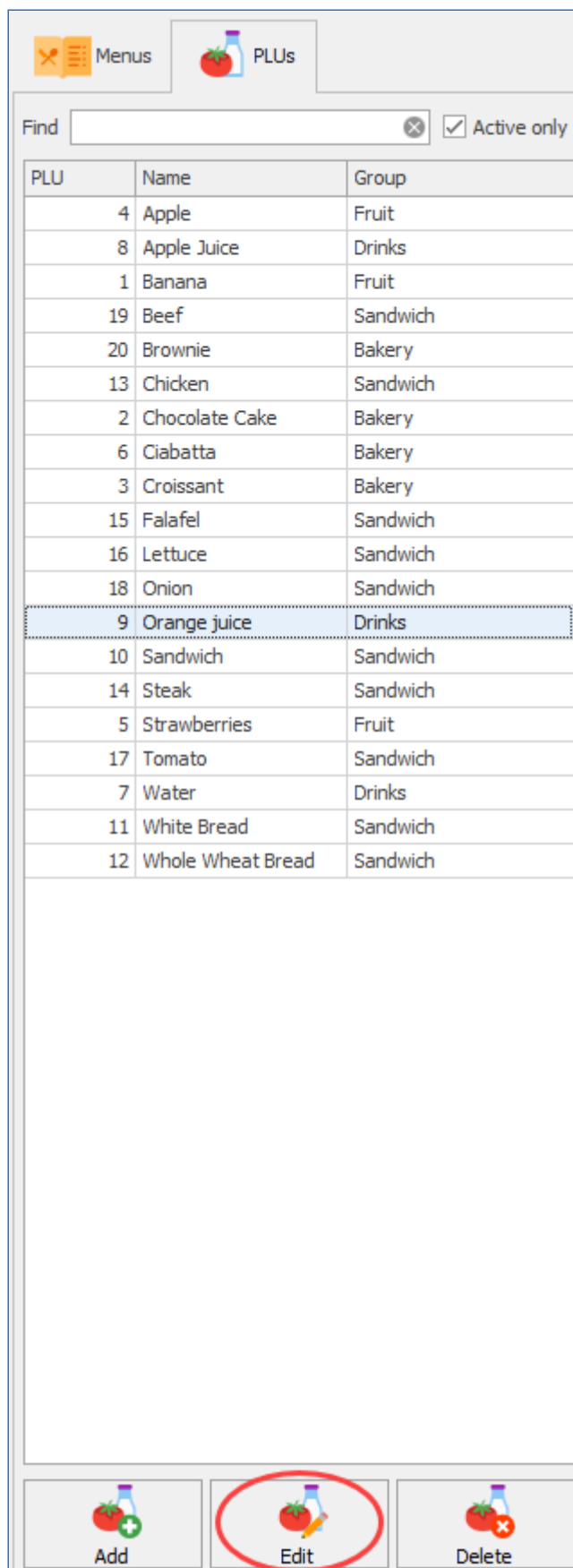
 Edit

 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

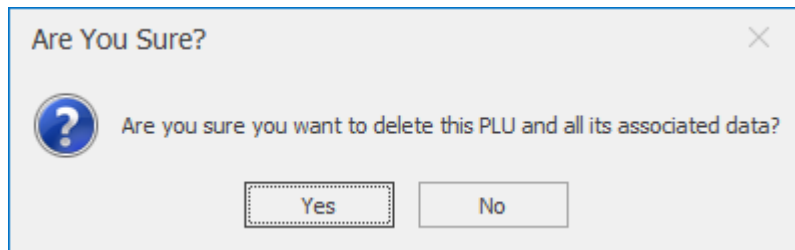
PLU	Name	Group
4	Apple	Fruit
8	Apple Juice	Drinks
1	Banana	Fruit
19	Beef	Sandwich
20	Brownie	Bakery
13	Chicken	Sandwich
2	Chocolate Cake	Bakery
6	Ciabatta	Bakery
3	Croissant	Bakery
15	Falafel	Sandwich
16	Lettuce	Sandwich
18	Onion	Sandwich
9	Orange juice	Drinks
10	Sandwich	Sandwich
14	Steak	Sandwich
5	Strawberries	Fruit
17	Tomato	Sandwich
7	Water	Drinks
11	White Bread	Sandwich
12	Whole Wheat Bread	Sandwich

 Add

 Edit

 Delete

- 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.

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.

Impact Back Office

Home Users Reports System settings Addison, Eloise

Manage revaluers

Location Name	Location ID	Port Name	Purse Name	Is Active	Modified	Last Pinged	Current Value	Current Status	Requested Status
Reval 1	6	COM1	Cashless	<input checked="" type="checkbox"/>	06/03/2018 16:00:16	06/03/2018 16:01:36	£95.40	WaitingForPerson	WaitingForPerson
Reval 2	7	COM1	Cashless	<input checked="" type="checkbox"/>	06/03/2018 16:12:14	06/03/2018 16:13:13	£53.60	WaitingForPerson	WaitingForPerson

Buttons: Start, Suspend, Empty, Activity, Refresh, Start all revaluers, Suspend all revaluers, Suspend and empty all revaluers, Time interval (seconds) 10

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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.

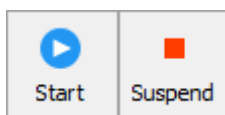
Starting / suspending all revaluers

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.

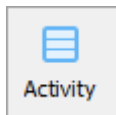
 Emptying the revaluers in this fashion simply sets the current value to £0.00. To reconcile the monies from inside each revaluer, you will need to run the cash up procedure.

 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 Addison, Eloise

Activity history for Reval 1

Start date: 06/03/2018 End date: 06/03/2018

Type: All Types Transaction number: [icon]

Date / Time	Transaction #	Type	Purse	Payment type	Paid	Free	VAT	Location #	Location name	User name	Entered by
06/03/2018 15:31:27	38	Manual Revaluer	Cashless	Cash	£0.20	£0.00	£0.00	6	Reval 1	Adams, Allison	Reval Manager, Rev...
06/03/2018 15:34:40	39	Manual Revaluer	Cashless	Cash	£25.00	£0.00	£0.00	6	Reval 1	Adams, Allison	Reval Manager, Rev...
06/03/2018 15:37:57	40	Manual Revaluer	Cashless	Cash	£2.60	£0.00	£0.00	6	Reval 1	Adams, Alfredo	Reval Manager, Rev...

Coin details list

Value	Count	Total
£0.10	1	£0.10
£0.50	1	£0.50
£2.00	1	£2.00

06/03/2018 15:41:06	41	Manual Revaluer	Cashless	Cash	£60.00	£0.00	£0.00	6	Reval 1	Adams, Dexter	Reval Manager, Rev...
06/03/2018 15:41:47	42	Manual Revaluer	Cashless	Cash	£7.60	£0.00	£0.00	6	Reval 1	Adams, Gary	Reval Manager, Rev...
06/03/2018 16:05:34	51	Reset Manual Revaluer			£0.00	£0.00	£0.00	6	Reval 1	Addison, Eloise	Addison, Eloise
06/03/2018 16:19:37	53	Reset Manual Revaluer			£0.00	£0.00	£0.00	6	Reval 1	Addison, Eloise	Addison, Eloise

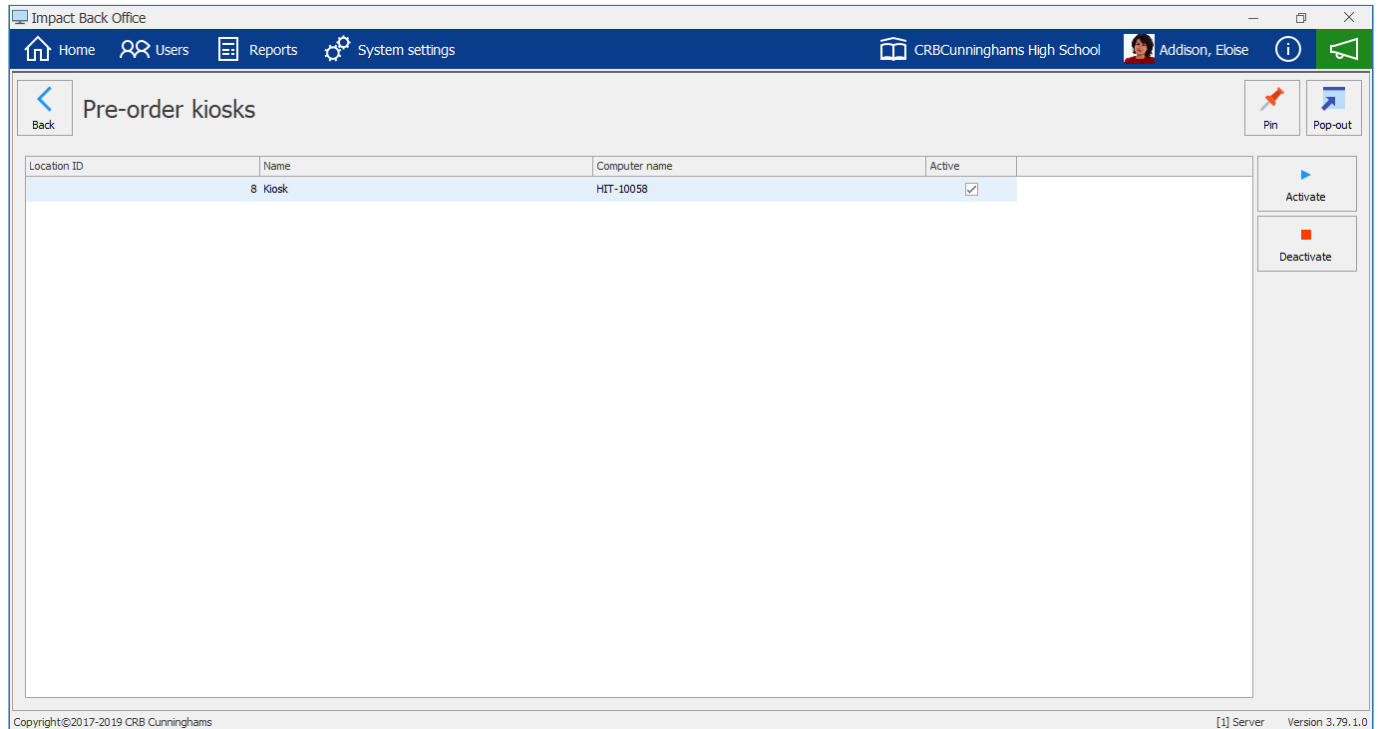
7 records found, last updated 06/03/2018 16:36:12

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Pre-order Kiosks

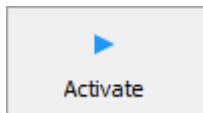


Pre-order kiosks can be controlled from this tile. You can change a pre-order status by making them active or inactive. This process will determine whether the users can access their accounts on the kiosks or not.



Activate

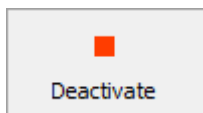
1. Select the Kiosk from the list.
2. Press the **Activate** button.



3. This will turn the Pre-order kiosk active and users can start making transactions if it is in the active time period.

Deactivate

1. Select the Kiosk from the list.
2. Press the **Deactivate** button.



3. This will make the Pre-order kiosk deactivate and users will not be able to make any pre-order transactions.

Vending



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

Location: Canteen vendor

Price Band: Student

Add
 Edit
 Remove
 Remove all
 Copy

PLU	Name	Price	Group
11	Crisps - Ready Salted		Cabinet 1
21	Haribo Starmix		Cabinet 2
30	Kit Kat	£0.75	Cabinet 3
31	Mars		Cabinet 3
40	Snack!	£0.80	Cabinet 4
41	Twirl		Cabinet 4
50	Bottle - Coke	£1.50	Cabinet 5
51	Bottle - Coke		Cabinet 5
60	Can - Coke	£0.85	Cabinet 6
61	Can - Coke		Cabinet 6

Add
 Edit
 Delete

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.

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	Payment type	Current value	Current status	Requested status
Reval 1	Cash	£95.40	WaitingForPerson	WaitingForPerson
Reval 2	Cash	£53.60	WaitingForPerson	WaitingForPerson
Till 1	Cash	£158.00		
Kitchen PC	Cash	£10.00		
Server	Cash	£30.00		

Total received : £347.00, Total for banking: £347.00

Start revals

Suspend revals

Cash up

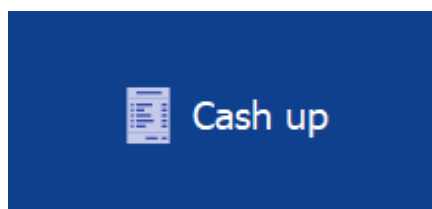
Report

Close

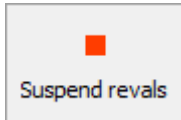
i If you have upgraded from the older Impact system, you will be familiar with the “Day End” process that was required to be ran daily. While the Cash Up process shares some similarities to the Day End function in the old system, it is not the same. The Cash Up process has no bearing on any reports (other 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

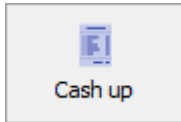


2. (If you do not have revaluation machines you can skip this part) Press the **Suspend revals** button.

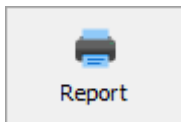


 This stops users putting money into the system until you have counted the cash in them and ensures that it balances with what is on the report.

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 vs what is displayed on the report and ensure that all matches ok.
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.

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
Revaluer 1	Stopped	Stopped
POS 1		
Server		

Updated 13/03/2020 08:35:33

Start revals

Suspend revals

Cash up

Report

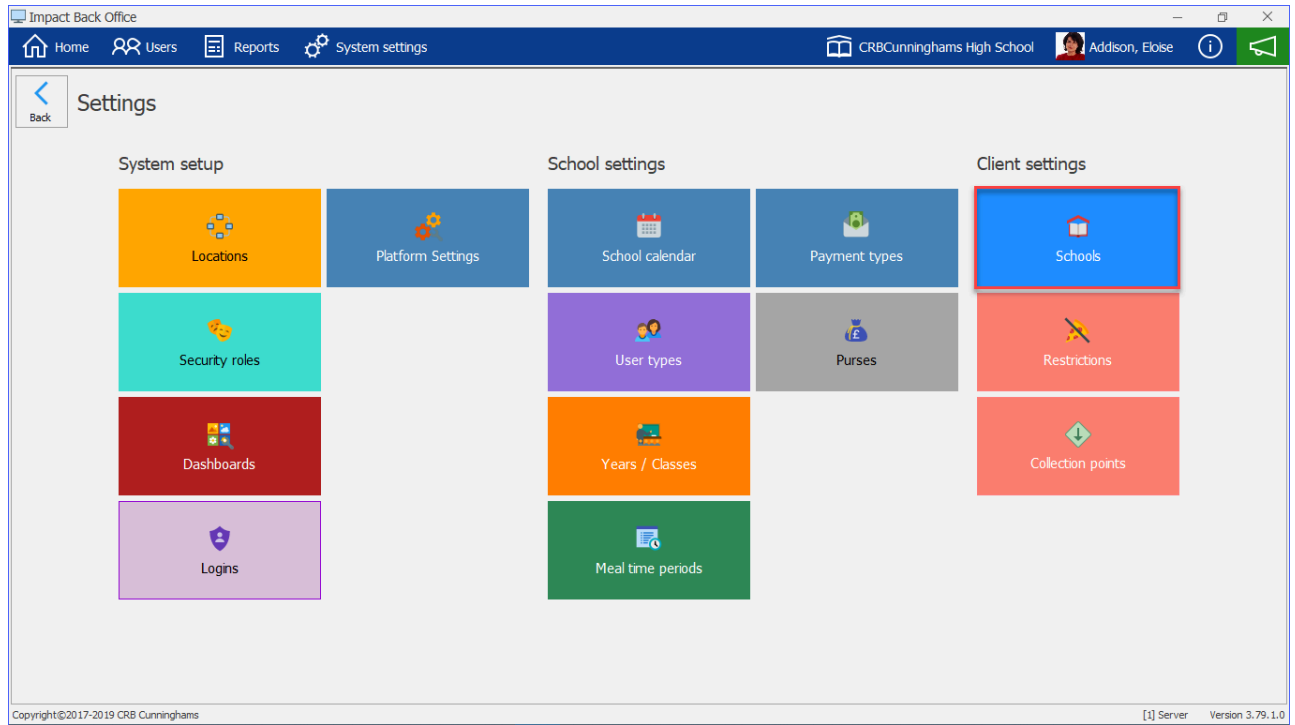
Variance report

Close

Enabling cash variance

To enable cash variance in Fusion:

1. Navigate to the System Settings and click on the Schools tile.

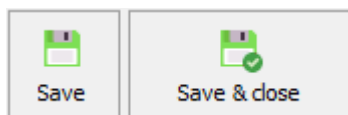


2. Select the school you wish to enable cash variance on and press the edit button on the right hand side of the screen.



3. Expand the Transactions tab by pressing anywhere on the tab's title.
4. Tick the box labelled 'Enable cash variance'

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.

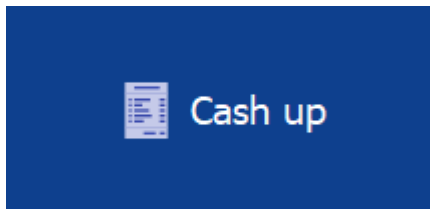
▼ Transactions

Enable cash variance	<input checked="" type="checkbox"/>	
Declare cash variance in PoS	<input checked="" type="checkbox"/>	
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	▼
		<input checked="" type="checkbox"/> Enable PDQ
		<input checked="" type="checkbox"/> Allow cashback
Cheque payments	Cheque	▼
Default add value payment type	Cash	▼
Default add value purse	Catering	▼

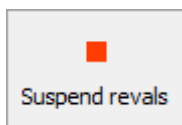
Performing a cash up with cash variance enabled

To perform a cash up with cash variance enabled:

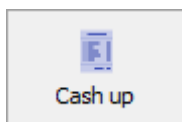
1. From the home screen, click on the **Cash up** tile



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
Location type: Back office					
<input checked="" type="checkbox"/>	Server	£50.00	£10.00	£12.00	<input type="checkbox"/>
Location type: Point of sale					
<input checked="" type="checkbox"/>	POS 1	£96.30		£18.80	<input type="checkbox"/>
Location type: Revaluer					
<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.

 Save

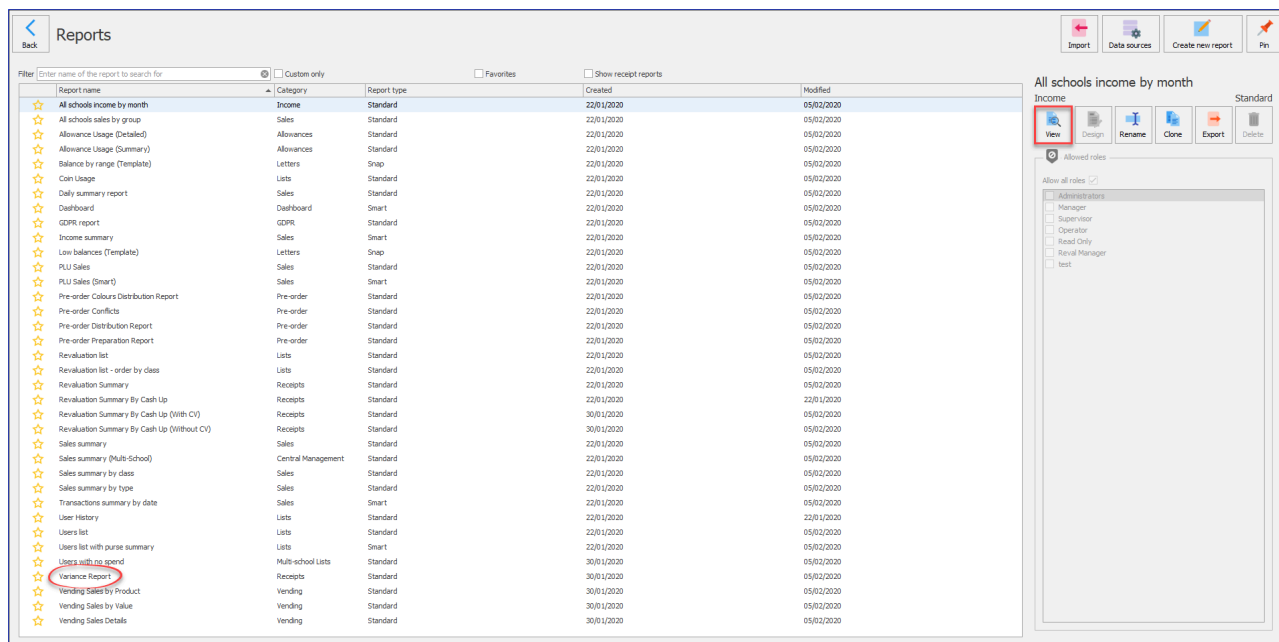
Viewing the cash variance report

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.



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

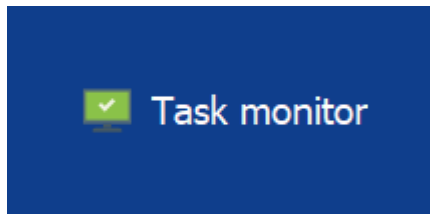


Date	Cash			Cheque			Card			Empty	Performed by
	Entered	Calculated	Difference	Entered	Calculated	Difference	Entered	Calculated	Difference		
Location : POS 1 [Point of sale]											
13/03/2020 08:44 AM	£96.30	£0.00	-£96.30	£0.00	£0.00	£0.00	£18.80	£0.00	-£18.80	Yes	Administrator Administrator
13/03/2020 08:58 AM	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	Yes	Administrator Administrator
Total for Location	£96.30	£0.00	-£96.30	£0.00	£0.00	£0.00	£18.80	£0.00	-£18.80		
Location : Revaluer 1 [Revaluer]											
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
Total for Location	£35.00	£0.00	-£35.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00		
Location : Server [Back office]											
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
Total for Location	£50.00	£0.00	-£50.00	£10.00	£0.00	-£10.00	£12.00	£0.00	-£12.00		
Total	£181.30	£0.00	-£181.30	£10.00	£0.00	-£10.00	£30.80	£0.00	-£30.80		

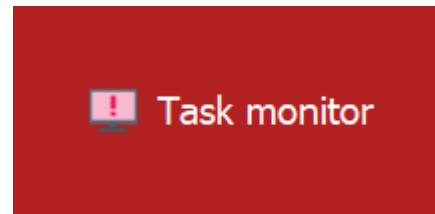
Task Monitor



Impact Fusion utilises scheduled tasks to automate recurring procedures such as creating a backup of the database. The task monitor provides a method for us to check the status of the tasks that have ran. The Task Monitor is a “Live” tile. This means that the tile will change the icon displayed and change colour to red to alert you to an issue.



No errors



An error has occurred

After opening the task monitor, any tasks that have failed will be highlighted in red whereas tasks that have successfully ran will not be highlighted.

<input type="checkbox"/>	Program name	Arguments	Run result	Run time	Run duration	Computer name	IP	Message	Acknowledged
<input checked="" type="checkbox"/>	Impact.DatabaseUtility.CommandLineRunner, V...		Failure	05/03/2018 17:00	00:00:00:100	CARL-TRAINING	172.16.12.255	You must enter a valid backup folder...	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Impact.DatabaseUtility.CommandLineRunner, V...		Success	27/02/2018 17:00	00:00:13:524	CARL-TRAINING	172.16.12.255		<input type="checkbox"/>

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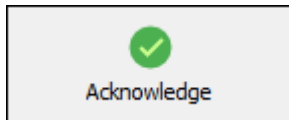


A single error – or even a few occasional errors – is nothing to worry about and will happen from time to time and will often correct themselves. If however, a task is constantly failing, you should contact CRB Cunningham Support and they will look into it for you.

Acknowledging errors

To return the task monitor tile to its normal state, we can acknowledge the errors using this process;

1. Using the checkboxes, select the messages that you wish to acknowledge. You can click the checkbox in the heading to select all.
2. Press the **Acknowledge** button.



3. The tasks will now be marked as 'Acknowledged' and the task monitor tile will revert back to its normal state.

IP	Message	Acknowledged	
172.16.12.255	You must enter a valid backup folder...	<input checked="" type="checkbox"/>	
172.16.12.255		<input checked="" type="checkbox"/>	

System check

Point of Sale

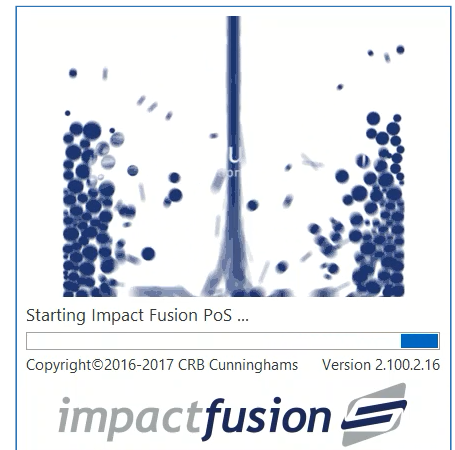


The Point of Sale (Pos) is the software that is used at the till point to sell products to customers. Predominantly used in Secondary schools and occasionally in Primary schools.

Starting the software & logging In



When you turn on your till, the Impact Fusion Point of Sale software will start automatically. This is indicated by the animated CRB Cunninghams 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.

i 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.



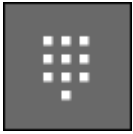
Biometrics (Fingerprint)

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.

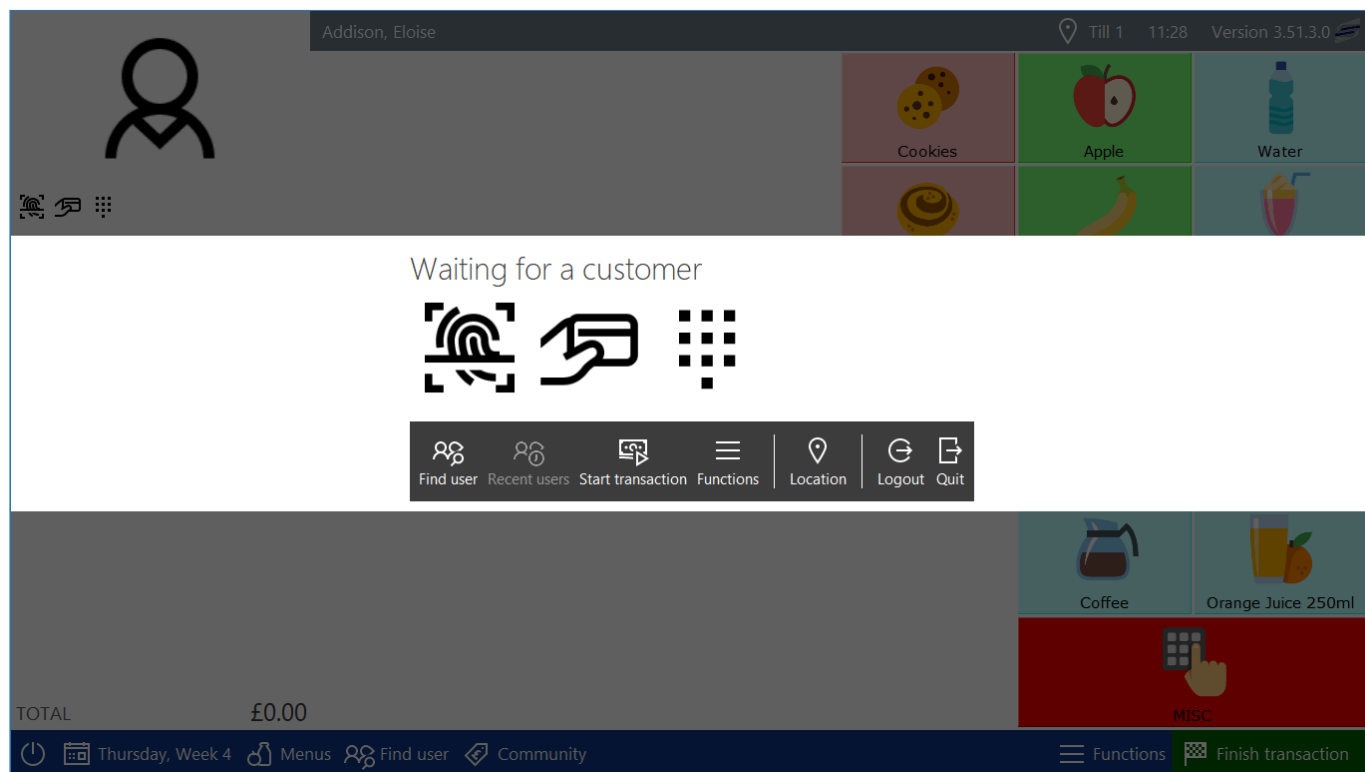
Performing a sale



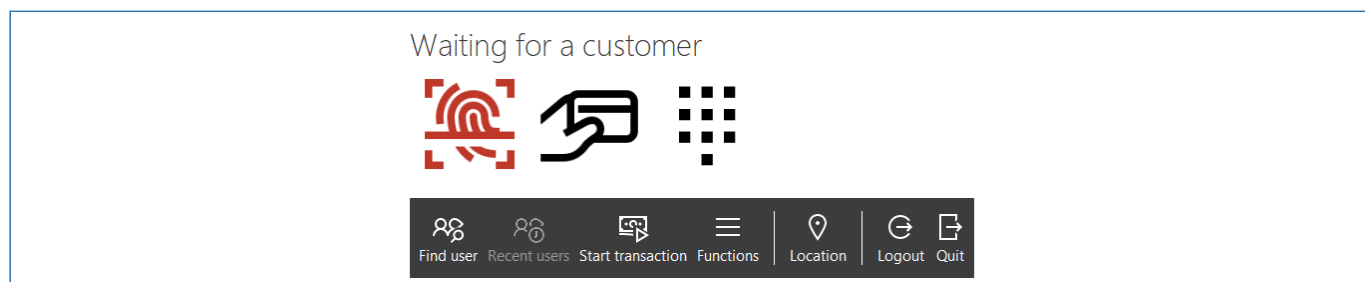
Once logged in, you will be presented with the 'Waiting for a customer' prompt. This prompt will display the methods that a user can use to open their account. For example, if a customer can use a card, the card icon will be displayed.



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](#).

Opening a user account



Impact Fusion allows user accounts to be opened using biometrics, cards, PIN 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.



Waiting for finger

>



Finger down

>



Match found

or



No match found



Waiting for card

>



Reading card

>



Card found

or



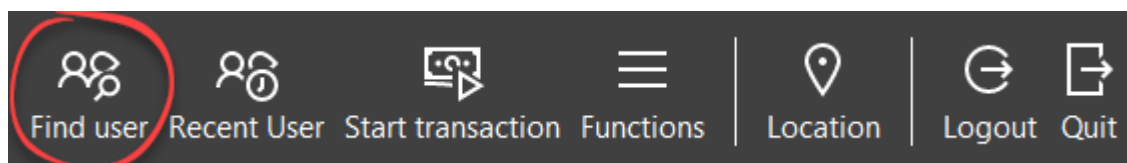
Card not found

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.



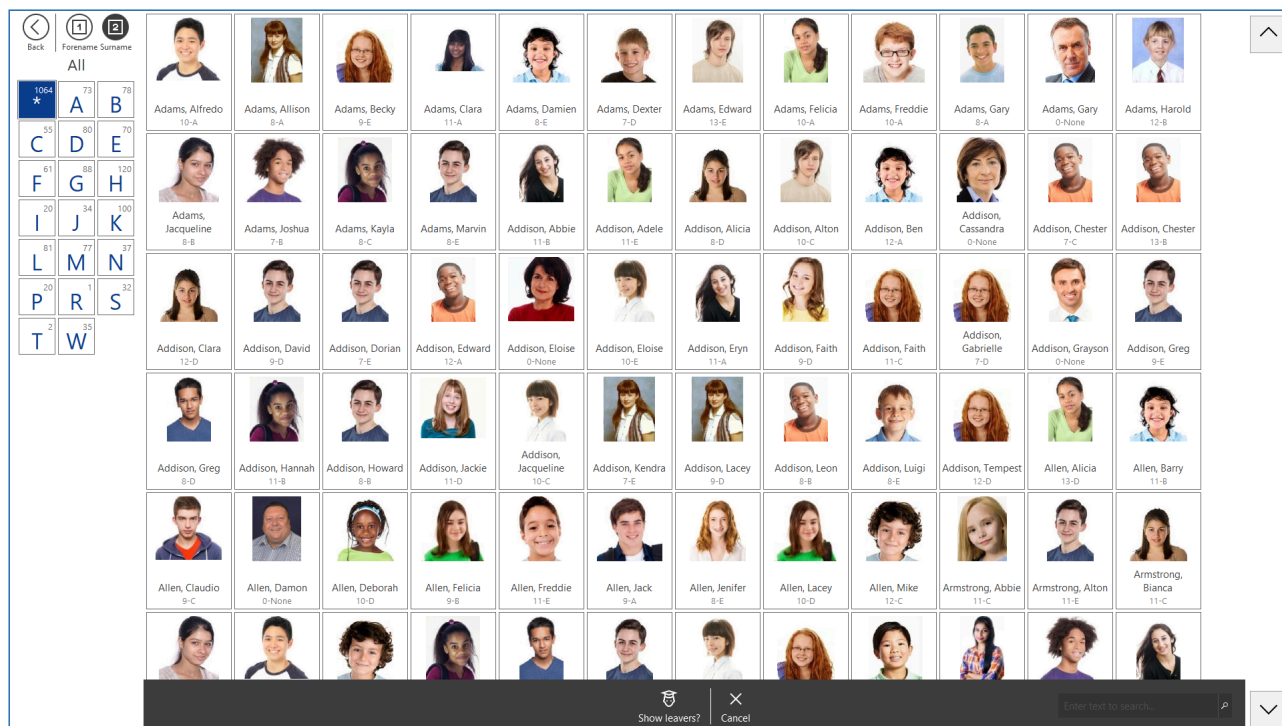
To find a user manually;

1. Press the **Find user** button from the menu.



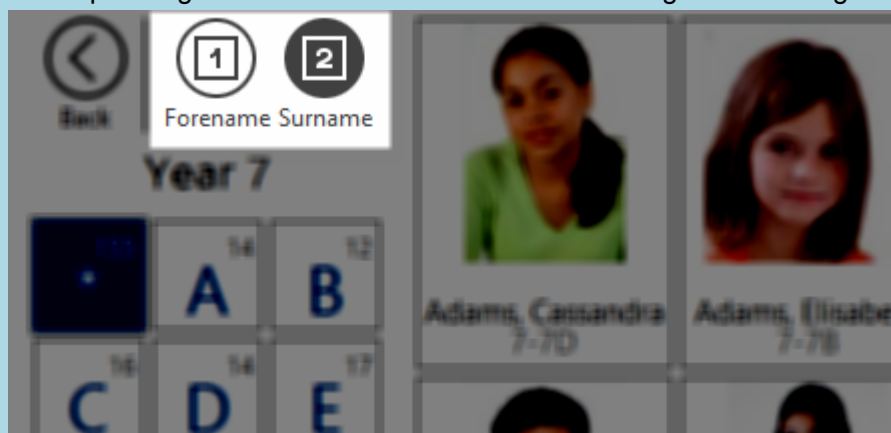
If this is not the first time the Find user feature has been used today, the grid will show the last set of users. You can press the **Back** button from the top-left corner to return to the list of years.

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.

i Switch between Surname and Forename using the buttons at the top and press the letter corresponding to the first initial. The letters on the grid will change as required.



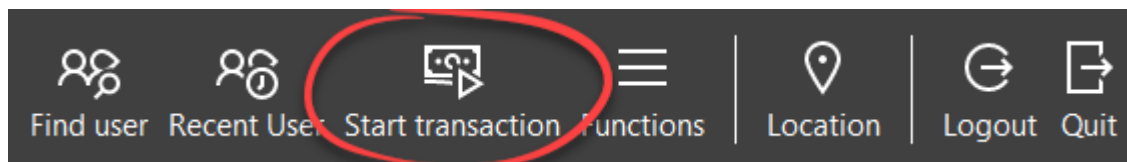
4. Then select the user from the list. The Find user screen will close and the user's account details will be opened on the till.




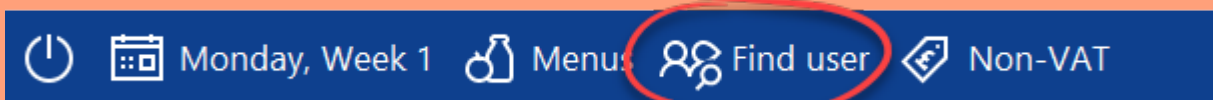
Start a transaction without a user present

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.



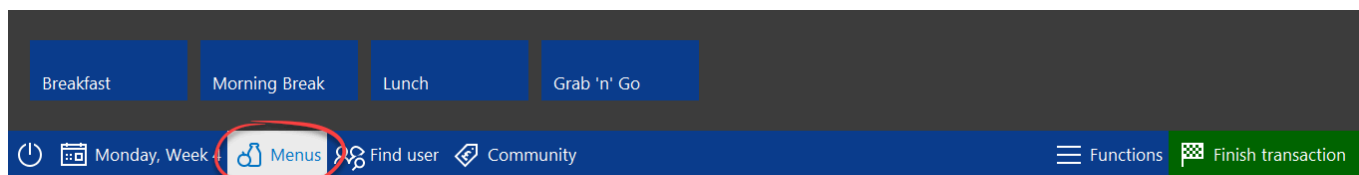
 You will need to open a user's account before you are able to Finish the transaction. The user can place their finger or card onto the reader or you can manually find an account by pressing the Find user button from the toolbar at the bottom of the screen.



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.



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.

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.

The screenshot shows the CRB Fusion app interface. On the left, there is a transaction list with the following items:

Item	Quantity	Price
Meat Meal of the Day	1	£2.00
Chocolate Milkshake	1	£0.60
Cupcake	1	£0.50
TOTAL		£3.10

The total value of £3.10 is circled in red. The right side of the screen displays a menu grid with various food items, each with an icon and a label: Vegetarian Meal of the Day, Nachos, Sushi Box, Hamburger, Pasta Meal, Hotdog, Chips, Tacos, and Baguettes, Sandwiches Wraps. The Cupcake item in the transaction list is highlighted in blue. At the bottom of the screen, there is a navigation bar with icons for a power button, calendar, Thursday, Week 4, a menu icon, Find user, Student, and 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.

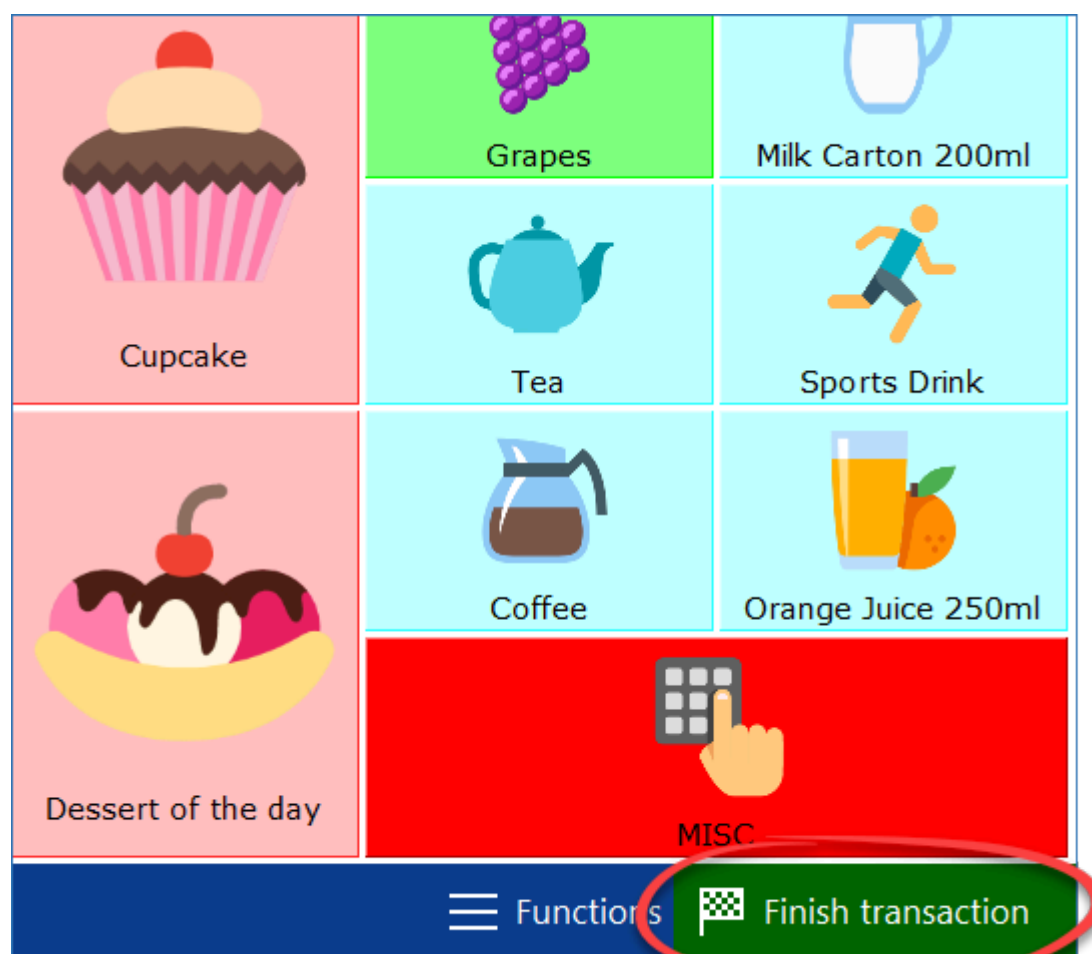
Using the delete row button



The delete row button will remove the entire row from the transaction regardless of whether the quantity was '1' or '100'.

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

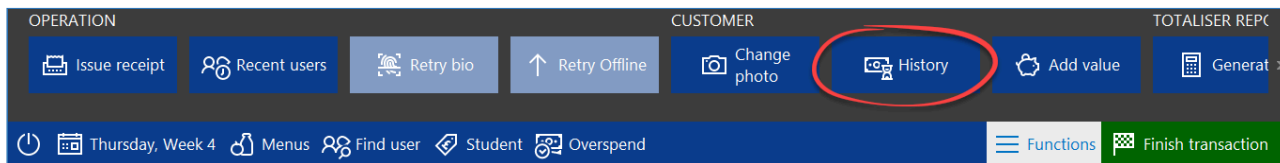
Pressing 'No' will return you to the sale where you can void any items that were causing them to go over their available balance.

Refunding items

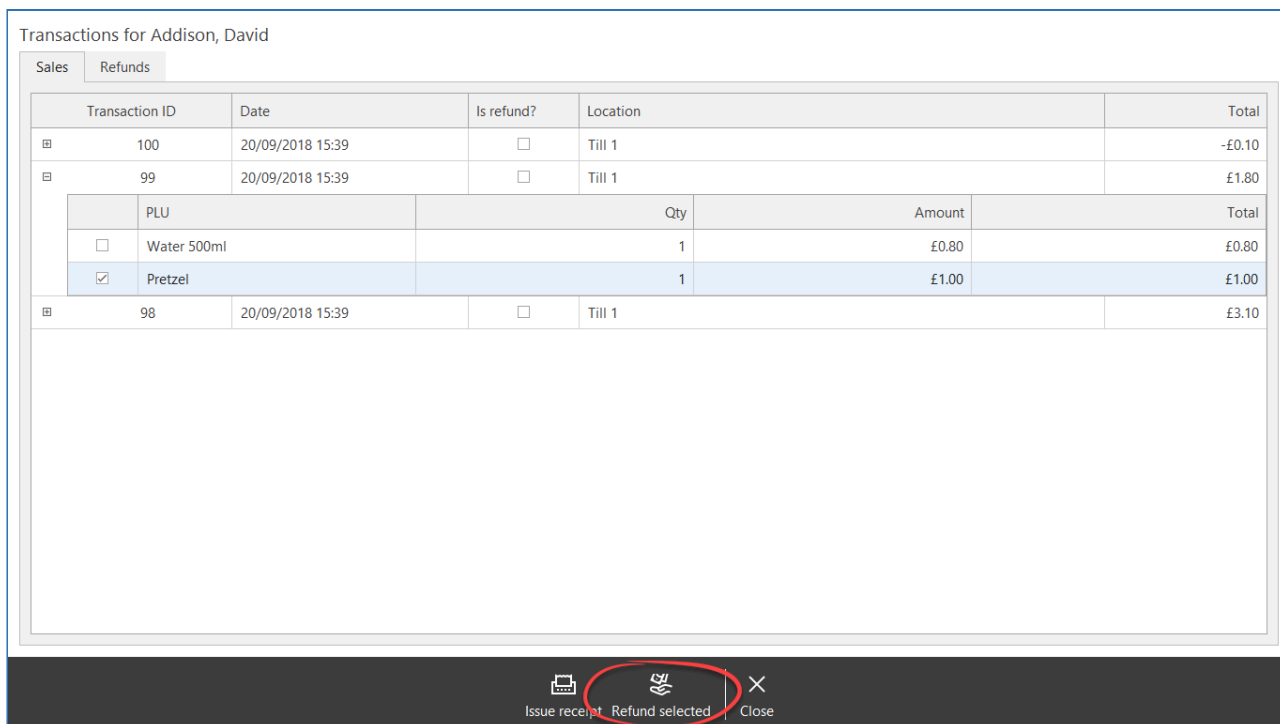


Items that have been purchased that day can be refunded via the Point of Sale. Once refunded, this money will be returned to the users account instantly.

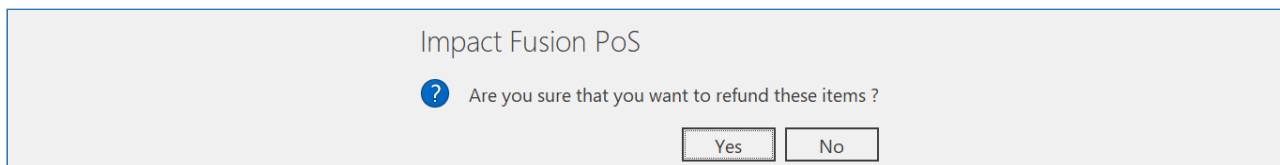
1. Open a users account.
2. Press the **Functions** button and select **History** from the menu.



3. Staying on the 'Sales' tab, select the item(s) to be refunded and then press the **Refund selected** button.



4. Press **Yes** to confirm the refund.



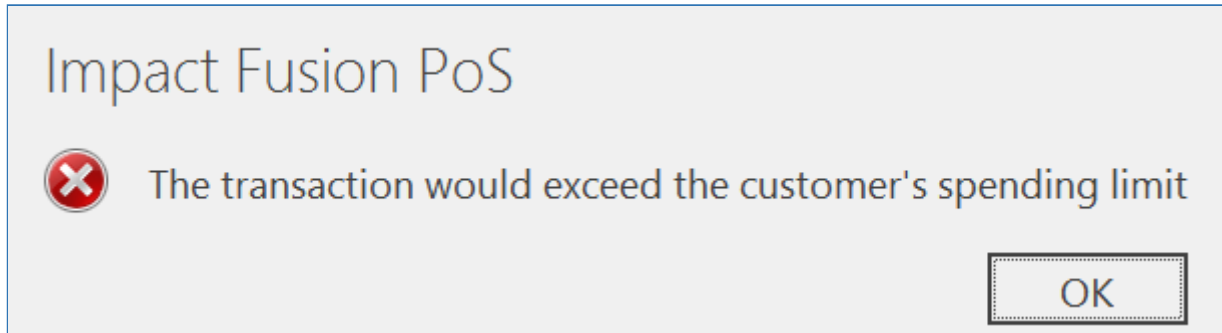
5. Press **Close** to return to the menu.
6. Enter any items to be sold or press **Finish transaction** to close the account.

Limits and allowances

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:

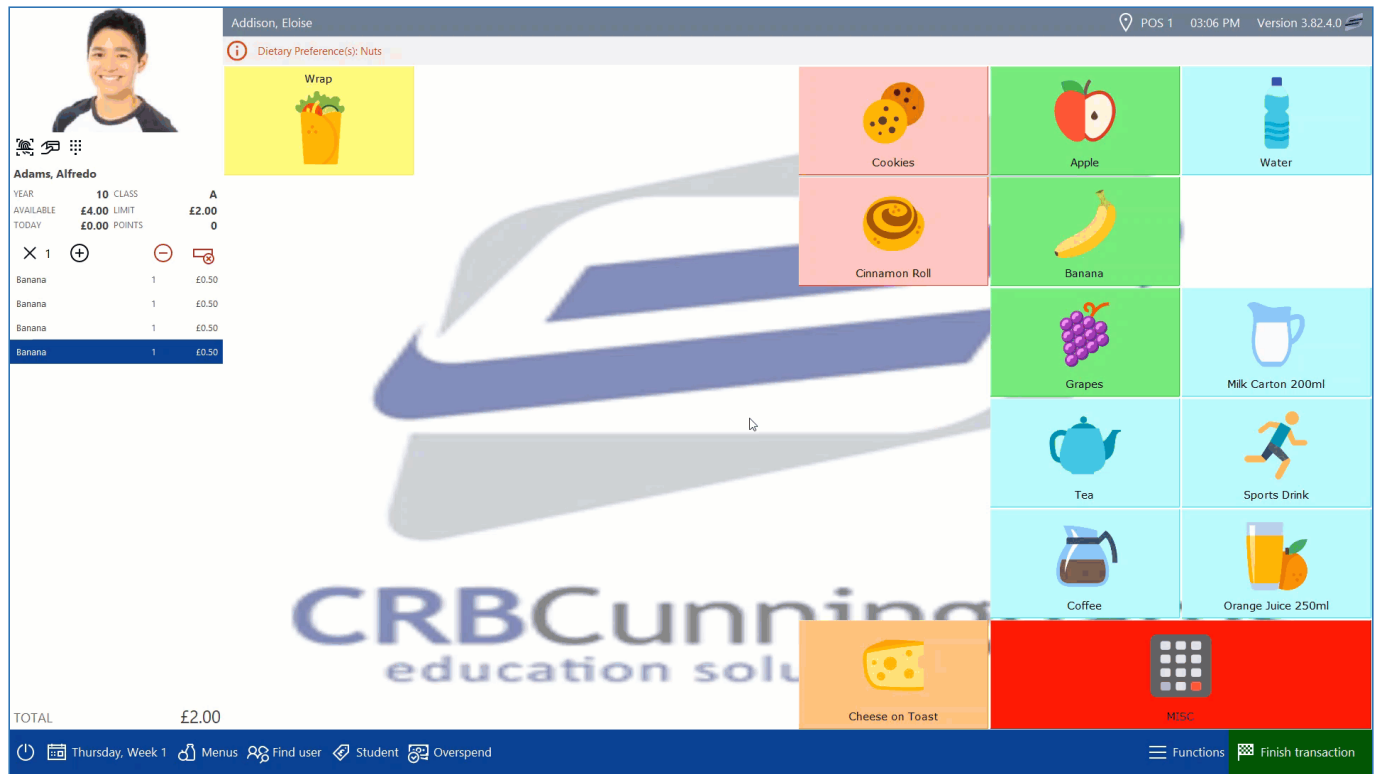


This is because this transaction will take the user over their daily spend limit or they do not have enough money on their account to purchase the selected items. This will either be the global limit that is set against the card type or the Daily/Break limits set on an individuals account in Fusion Back Office.

To rectify this:

1. Press **OK**.
2. Void any items to take the customer under their limit (displayed top-left).
3. Press **Finish**.

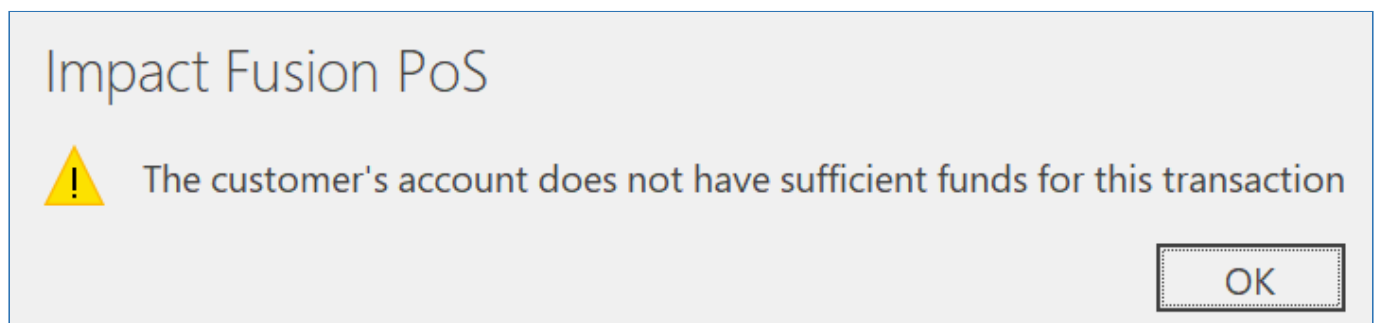
Below is an example showing what happens when a user's transaction tries to go over the daily limit set on their account. In this instance the user has a daily limit of **£2.00** and has already had 4 bananas put through the till equalling the daily limit. This means that the user will not be able to 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.

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.

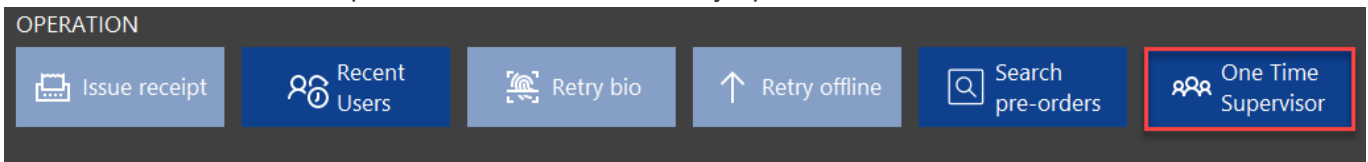
"Classic" Method

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.

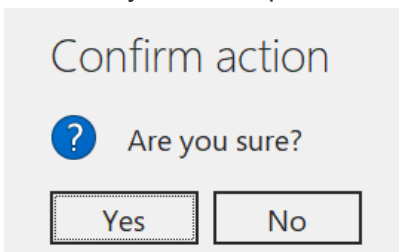
1. Open the staff member's account, then click the functions button located in the bottom right hand corner of the screen.



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.

Supervisor allowance detected.



This user is eligible for a supervisor allowance, would you like to assign one?

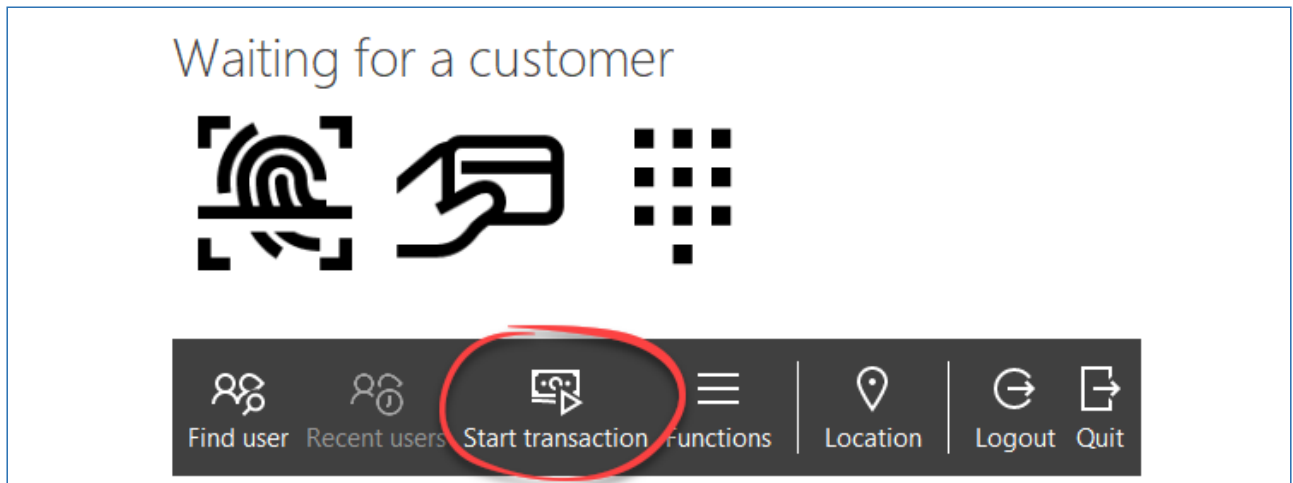


The prompt method must be enabled in the school settings in the Fusion Back Office client. This can be found under the Transactions tab on the school settings page.

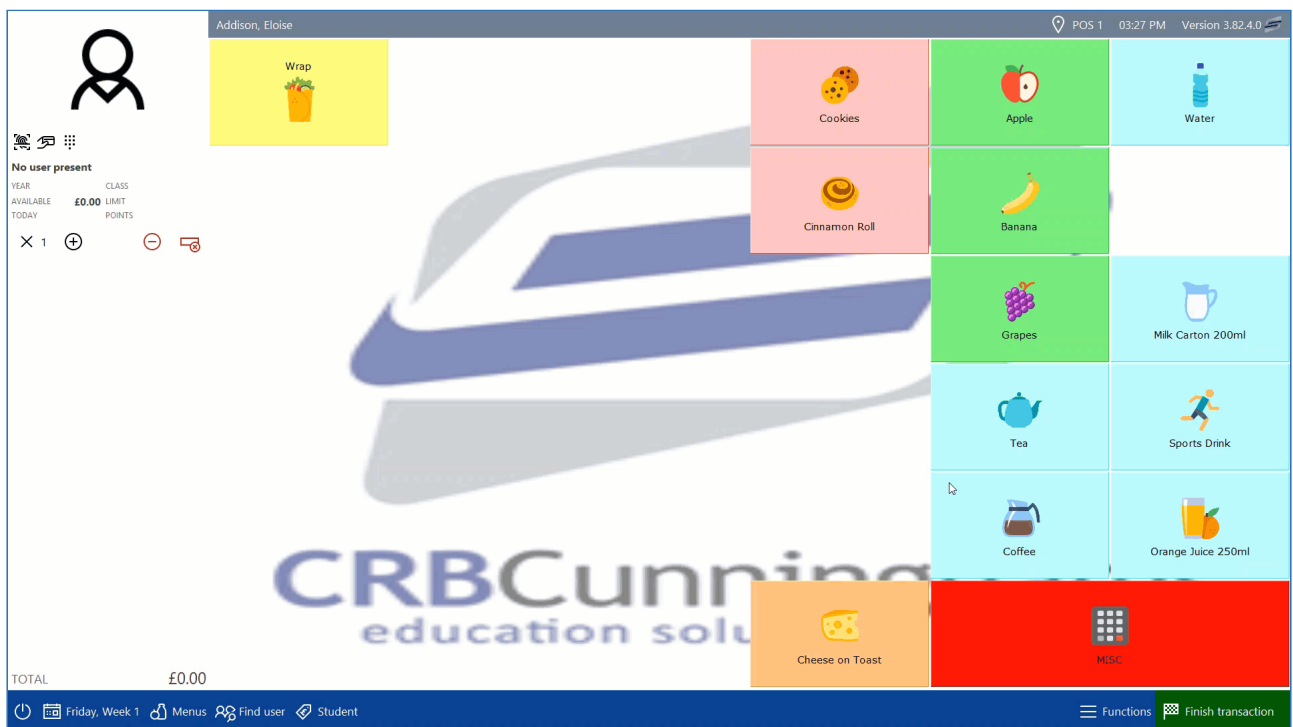
Cash and debit/credit card sales

Performing a Cash sale

1. Press the **Start transaction** button on the POS 'Waiting for a customer' section.



2. Press Items from the POS layout and press the **Finish transaction** button.



3. The **Receive payment** screen will appear. On the left will be the **Receipt** and Items listed with quantity and value with a total amount due at the bottom. The **Amount tendered** allows you to enter the amount in 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

Coffee	1	£1.00
Banana	1	£0.50

Amount tendered

£0.00

7	8	9
4	5	6
1	2	3
0	<	C

Tender options

£1.50	£50.00	£20.00
£10.00	£5.00	£2.00
£1.00	£0.50	£0.20
£0.10	£0.05	£0.02
£0.01		

AMOUNT DUE £1.50

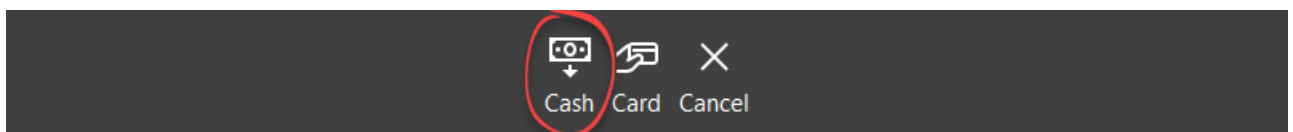
CHANGE DUE £0.00

Cash

Card

Cancel

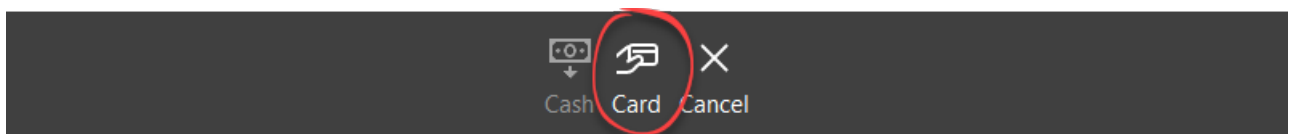
4. Once an amount has been entered press the **Cash** button.



5. This will finish the sale and return back to the “Waiting for a customer” screen.

Debit/credit card sales

1. A Debit payment will start the same as a standard cash sale but when the **Finish transaction** button has been pressed you can press an option to pay by **Card** button next to the **Cash** button.



2. Press **Yes** or **No** to confirm the PDQ payment completed successfully.

Confirm payment

Amount to enter: £0.50

Did the PDQ payment complete successfully?

Yes

No

3. This will finish the sale and return back to the “Waiting for a customer” screen.

PDQ Cashback

Collecting Pre-orders from a PoS



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



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

Adams, Alfredo
YEAR 10 CLASS A

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.



Search for pre-orders

Barcode

100050190

Or

Pre-order number

Search Close

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.

Pre-order number

Input the pre-order number

3

7	8	9
4	5	6
1	2	3
0	<	C

OK Cancel



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



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**.

Logging off and shutting down

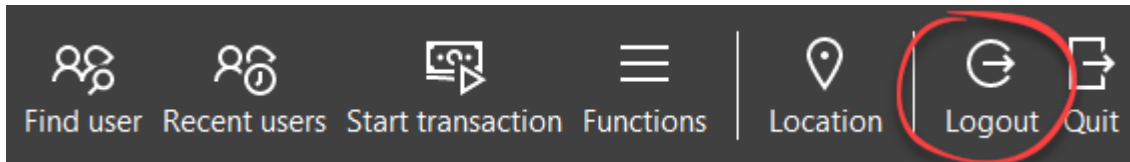


While the Impact Fusion Point of Sale is not in use, it is recommended that you log off. This will prevent any unauthorised people using the software but also allow another member of staff to log in using their credentials.

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.

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.

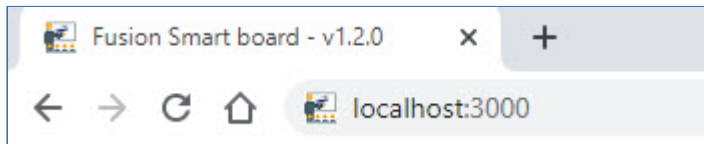


Starting the Smart board & logging In

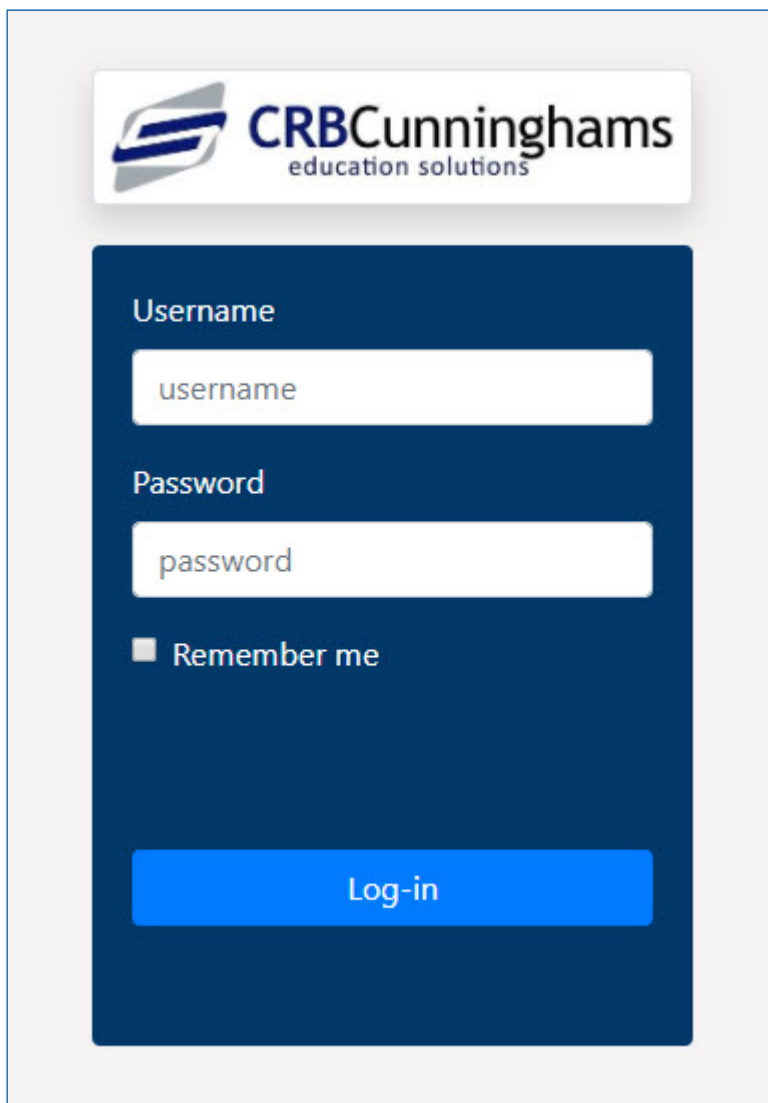


There are a few ways to start the Smart board software and all are URL based. You can enter the URL directly into the web browser, open via a saved bookmark within the web browser or from a shortcut created which will open the URL.

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 login page features the CRBCunninghams logo at the top, which includes a stylized 'C' icon and the text 'CRBCunninghams education solutions'. Below the logo is a dark blue login form with white text and input fields. The form contains a 'Username' label, a text input field with the placeholder 'username', a 'Password' label, a text input field with the placeholder 'password', a checkbox labeled 'Remember me', and a blue 'Log-in' button at the bottom.



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

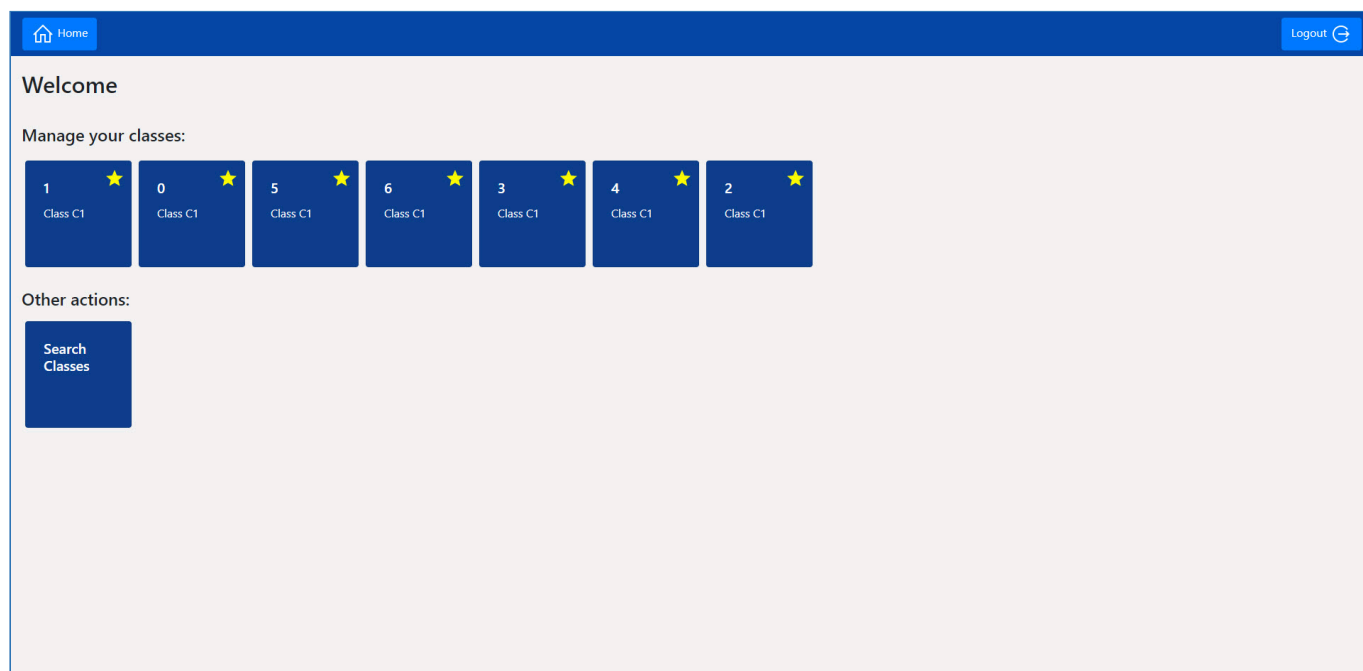


minutes, the user will be logged out of the session and will need to sign back in again. If the user clicked the Remember me option they will be signed in until the user signs out manually.

Managing the Home Screen



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 else where that can start the smart board software.



Title Bar

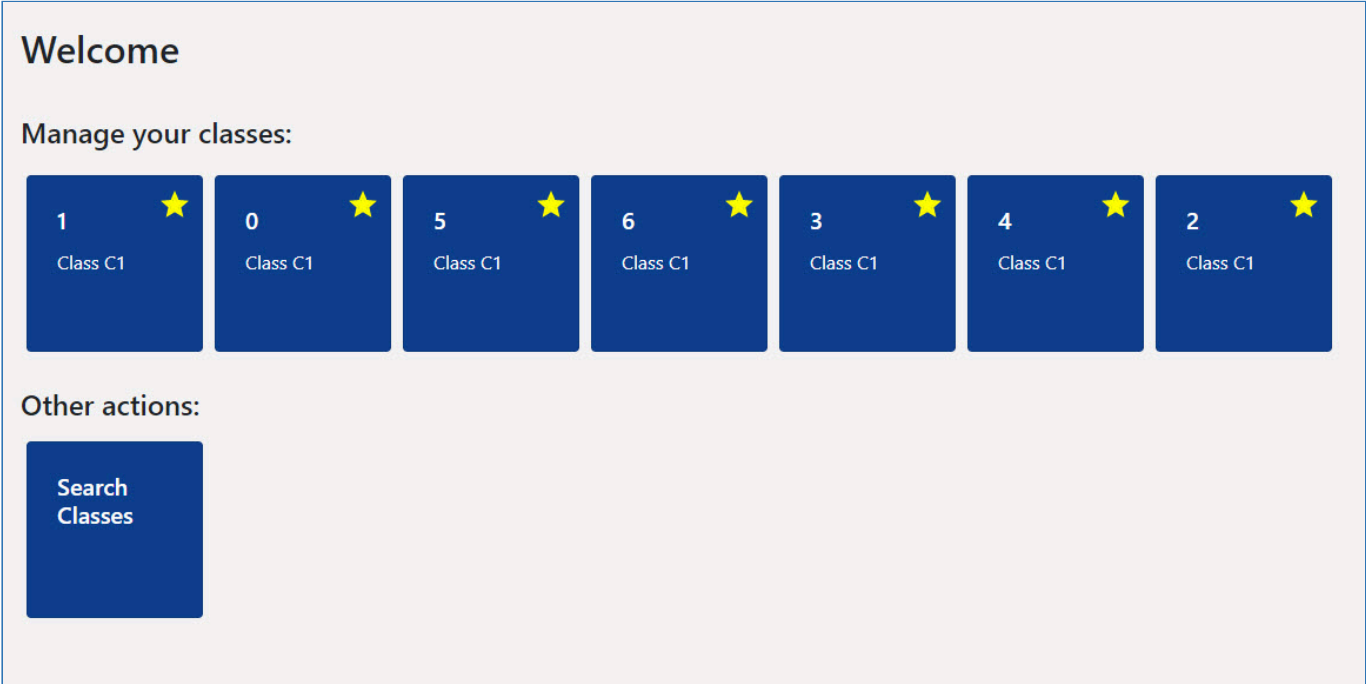


The Home button will take you back to the Smart board Home screen when you are in another selected screen.



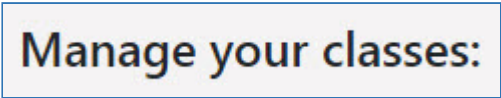
The Logout button will allow the user to log out of their smart board account and return to the log in screen.

Home Screen



Manage Your Classes

You will see any starred classes under the manage your classes section.



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.

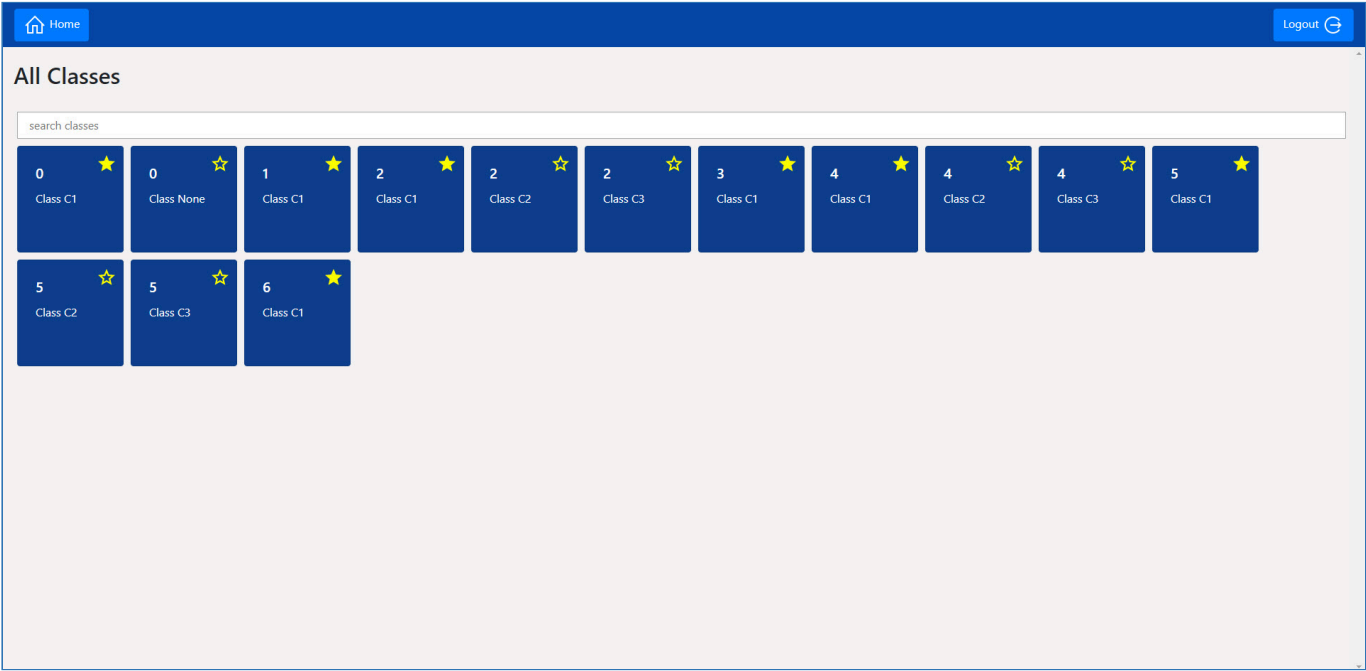
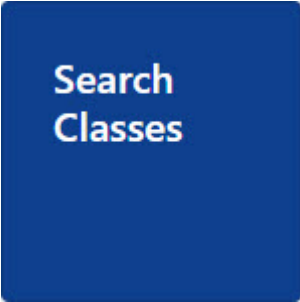


Other Actions

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.



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.

0

Class None

★

This class only has a Gold outline around the Star and will not show on the Favourite Classes grid on the Home screen.

1

Class C1

★

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.

search classes

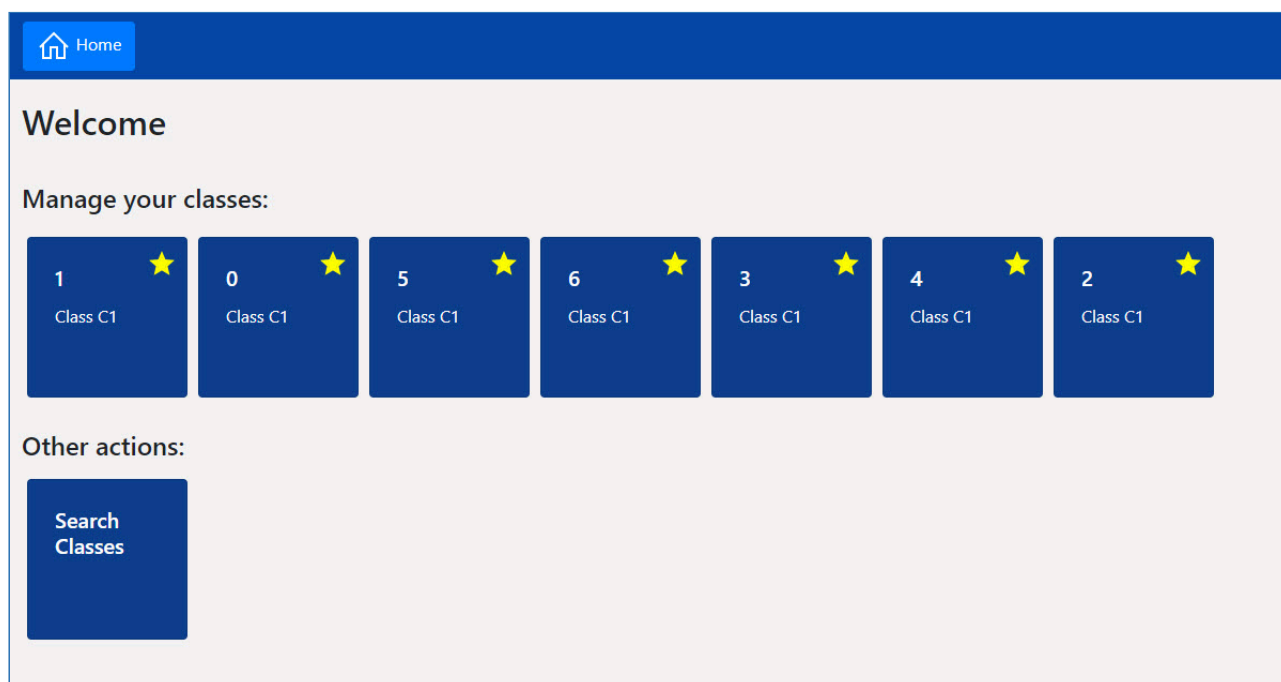
Make an order

The next few pages discuss the process that the user will need to do to make an order using the Smart board.

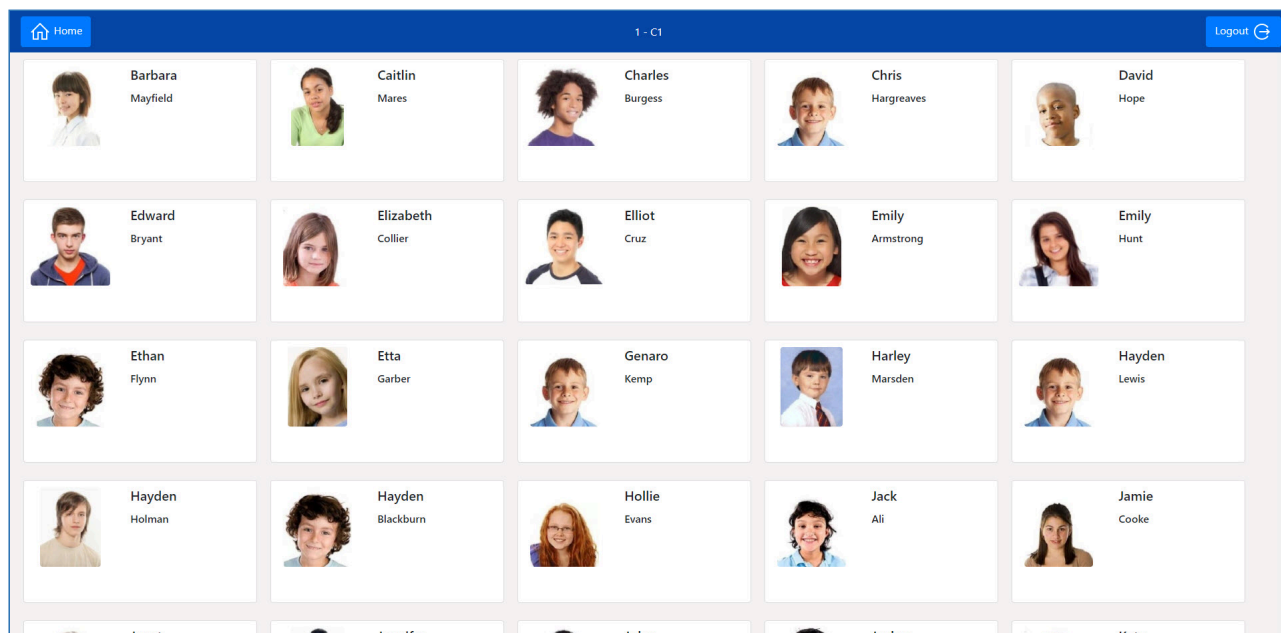
Opening your account

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.



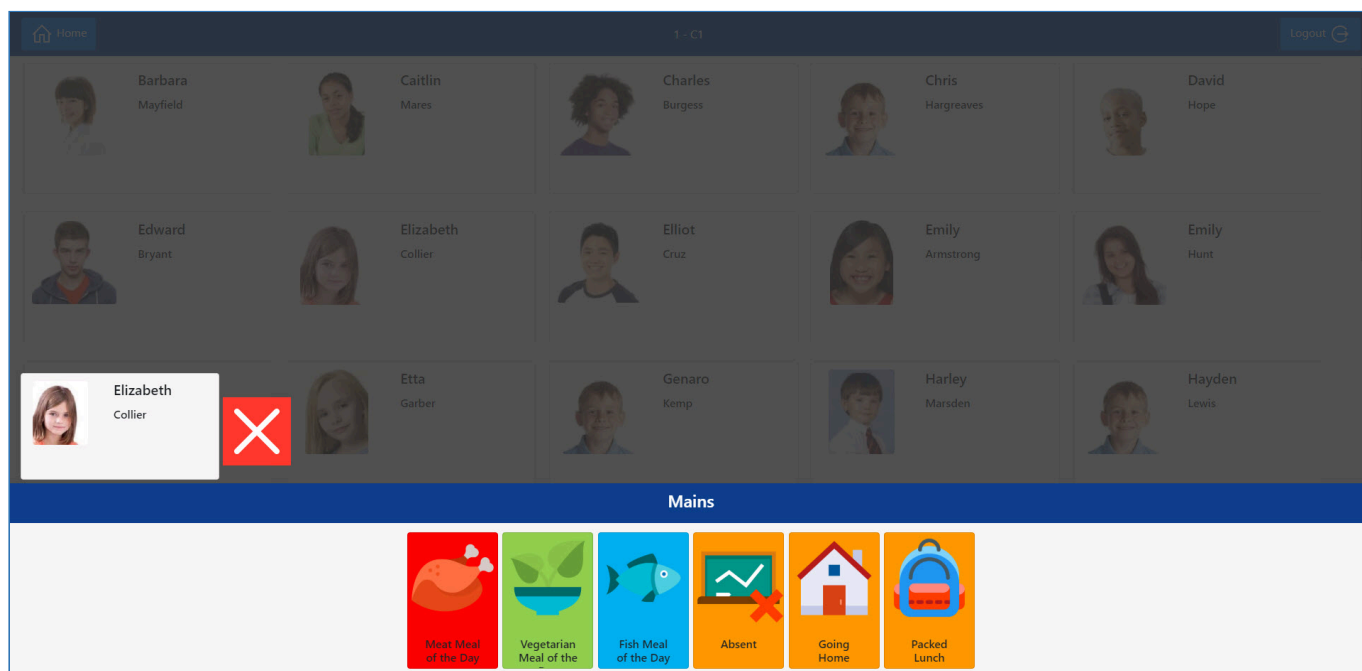
2. When you have selected a class you will be shown a grid of users associated with that class.



3. Select a User from the grid to start the transaction.

Select your Items

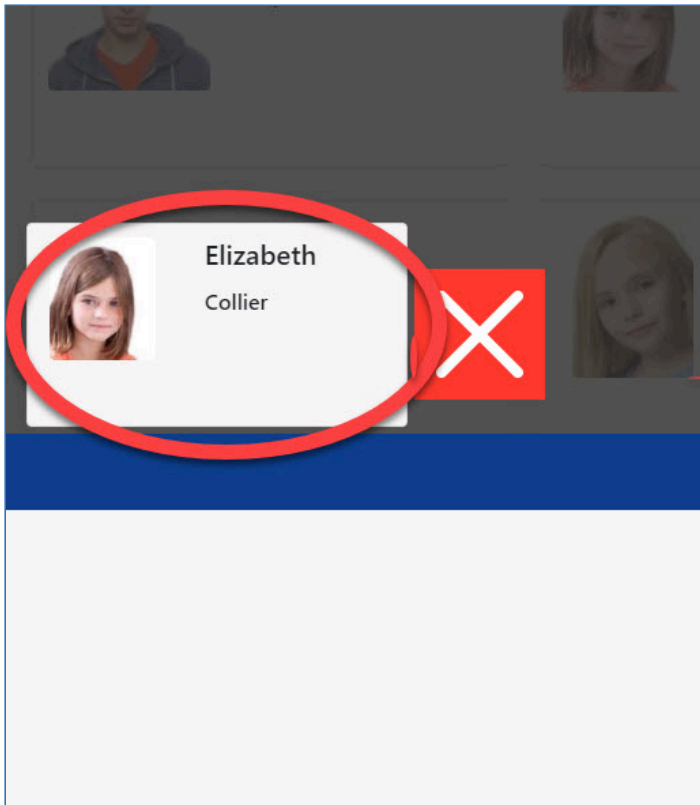
Once you have selected an account from the classes screen, you can start selecting the items that you wish to purchase. The order the menus are shown in is dependant on the order in which the menus were created in Fusion Smart board layouts, with the first menu created being shown at the bottom of the 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

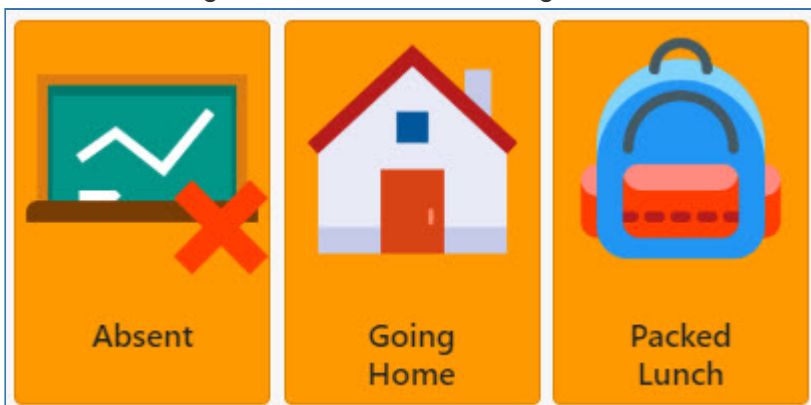
The Users name will be shown on the left of the screen and the user grid will dim to indicate that you are in a transaction.



The name of the menu will be displayed in the blue title bar above the items grid.

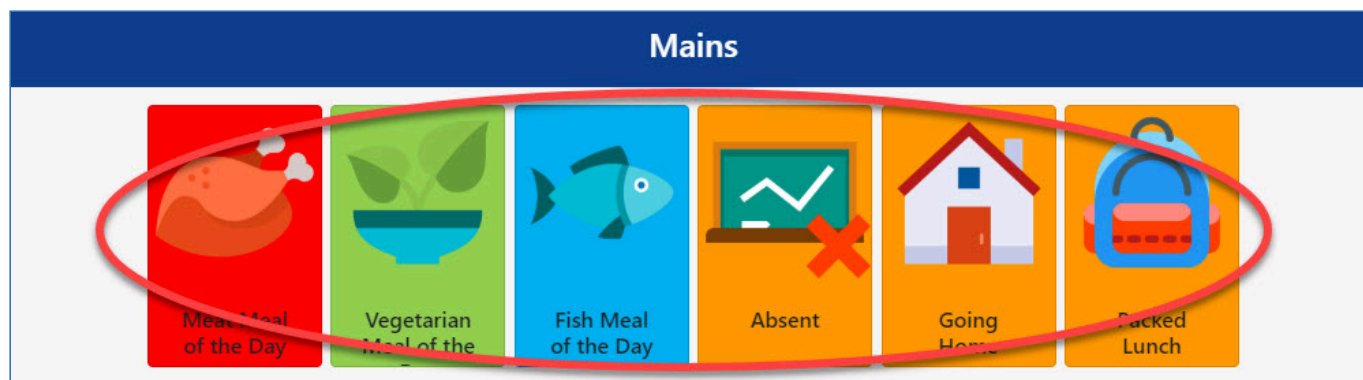


On the first menu there will also be 3 additional items available as a default to indicate whether the user is Absent, Going Home for lunch or having a Packed Lunch.



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.



i 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




To log out of the Smart board software you can click the Logout button on the Title bar at the top from any screen.

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

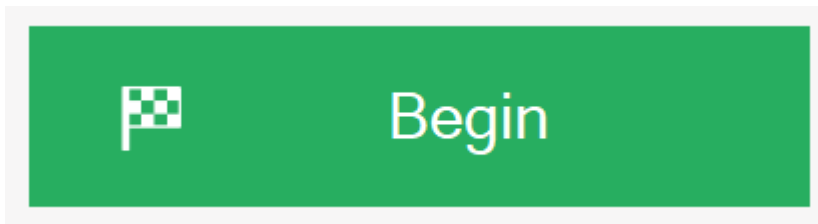
The next few pages discuss the process that the user will need to follow to make an order using the kiosk.


1. [Opening your account](#)
2. [Choose pre-order period](#)
3. [Select your items](#)
 - a. [Multi-part items](#)
4. [Confirming your order](#)

Opening your account

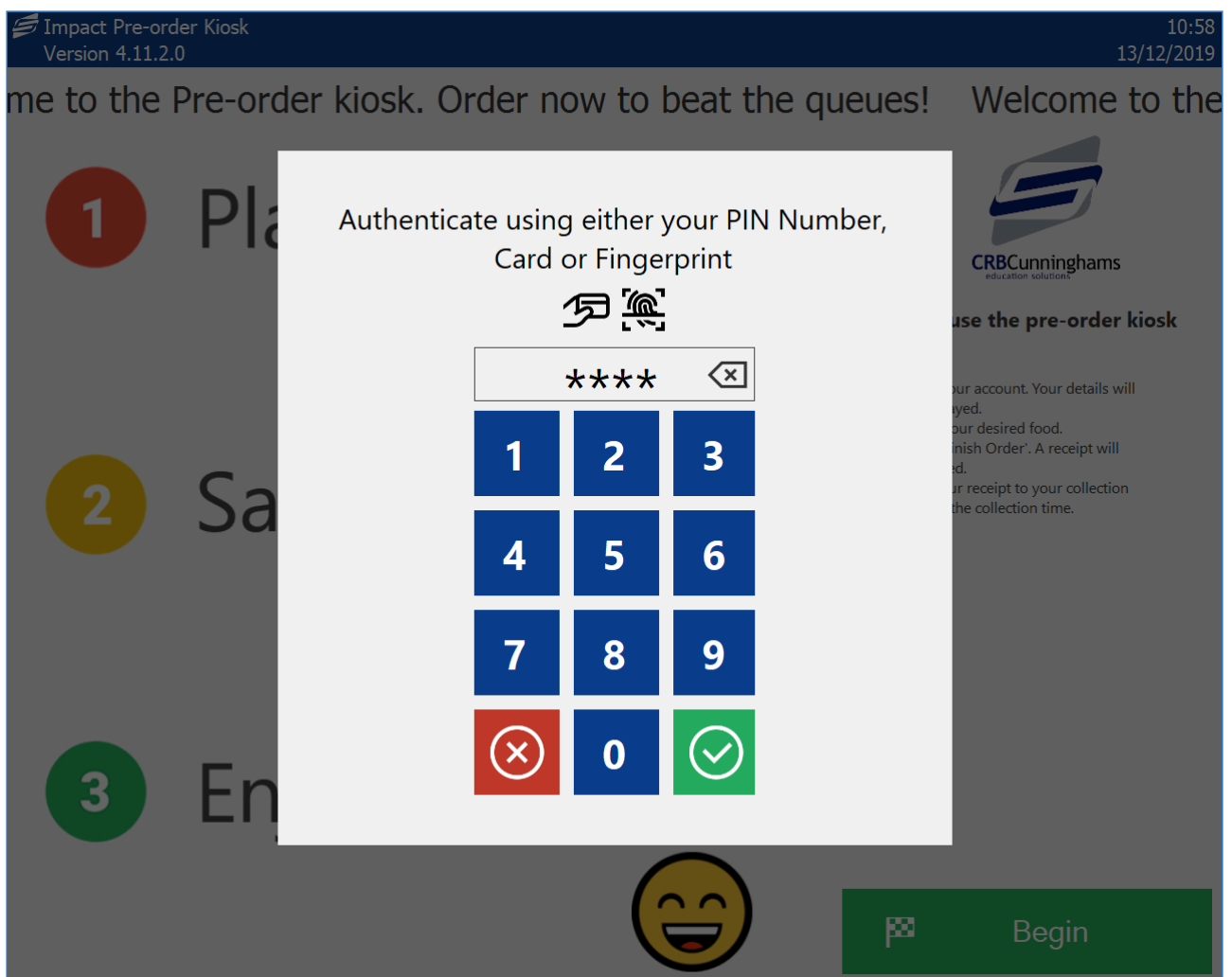
Before you can place an order, you first need to open your account.


1. To start the process, press the **Begin** button from the bottom-right corner.

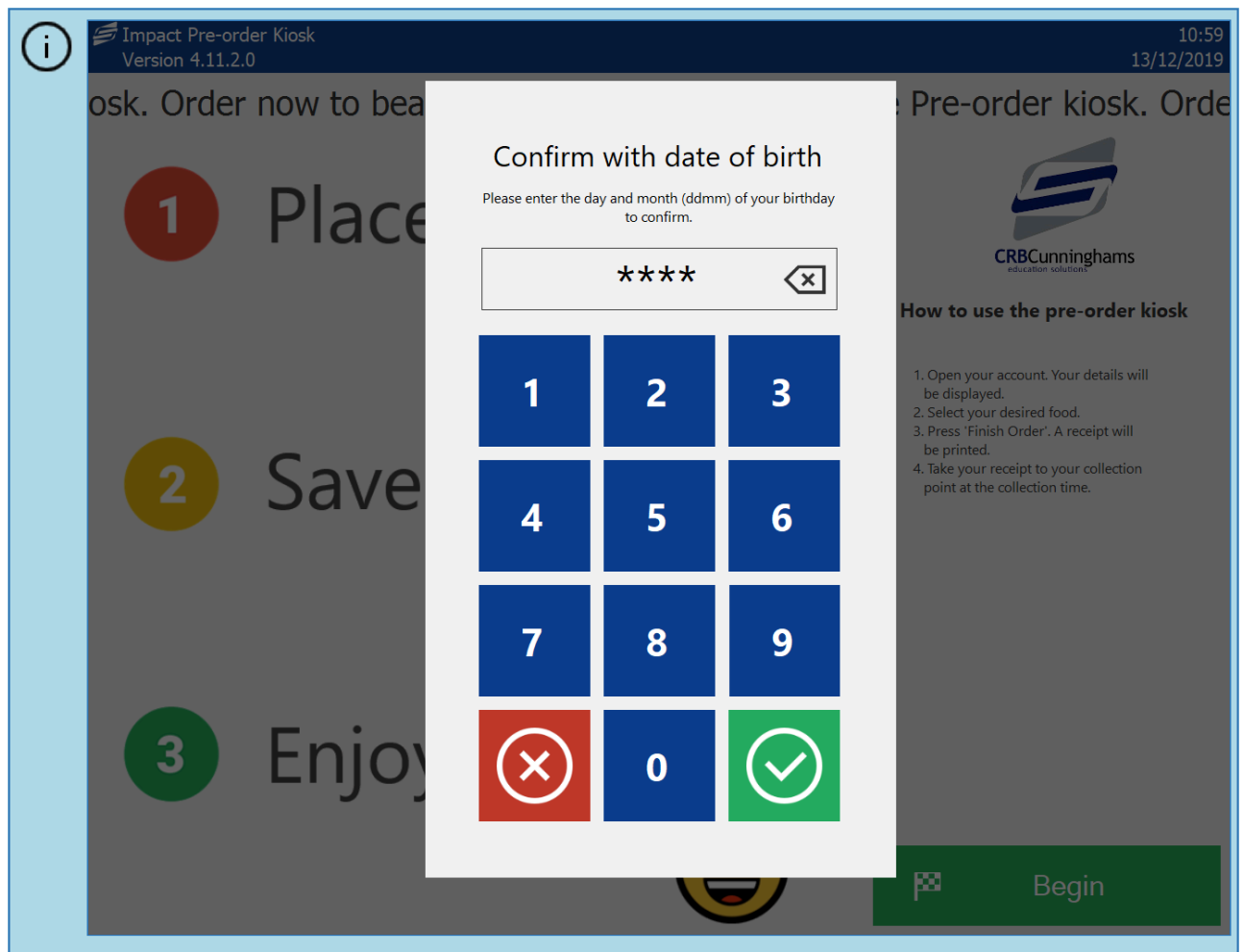


 If you are using a card or fingerprint to find your account you can skip pressing the Begin button.

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.

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

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.

The screenshot shows the 'Impact Pre-order Kiosk' interface, Version 4.11.2.0. At the top right, the time is 14:25 and the date is 13/12/2019. The user's profile is 'Allan, Lara (Y12C4)' with a photo of a young woman. Below the profile, it shows 'Spent Today: £0.00', 'Limit: £5.00', and 'Balance: £6.88'. To the right, the date and time are 'Mon 16/12/2019 @ 11:00' and the location is 'Dining hall'.


The main menu is titled 'Sandwiches' with a red circle containing '0/2' and the text 'Please select at least 1 and no more than 2 items from this section'. Below this, there are two columns of sandwich options:

Item	Price
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


On the left side of the menu, there are sections for 'Snacks' and 'Drinks'. At the bottom right, the 'Total' is £0.00. There are two buttons: 'Cancel Order' (with a red 'X' icon) and 'Finish Order' (with a green checkmark icon).

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 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

2/2

Please select at least 1 and no more than 2 items from this section

Sandwiches

Min: 1 Max: 2

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

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 0/1
Min: 1 Max: 1

Filling 0/1
Min: 1 Max: 1

Salad 0/4
Max: 4

Sauce 0/2
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.

i 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.

The screenshot displays the 'Impact Pre-order Kiosk' interface, Version 4.11.2.0. The top header shows the time 14:37 and date 13/12/2019. Below the header, a user profile for 'Allan, Lara (Y12C4)' is shown with a photo and spending details: Spent Today: £0.00, Limit: £5.00, Balance: £3.48. The current date and time are 'Mon 16/12/2019 @ 11:00' and the location is 'Dining hall'.

The main section is titled 'Custom Sandwiches/ Baguette/ Wrap'. It features four stages of selection: Bread type (1/1), Filling (1/1), Salad (3/4), and Sauce (0/2). Each stage has a 'Min: 1 Max: 1' or 'Max: 4' indicator. Below the stages, a message states 'Please select no more than 4 items from this section'. Four items are shown in a grid: Cucumber (1), Lettuce, Red Onion (1), and Tomato (1), each with a price of £0.00.

On the right side, a list of items is shown with their prices and 'Remove' buttons: Custom Sandwiches/ (£1.80), Sandwich - White Bread (£0.00), Chicken (£0.00), Cucumber (£0.00), Red Onion (£0.00), and Tomato (£0.00). The total price is £1.80.

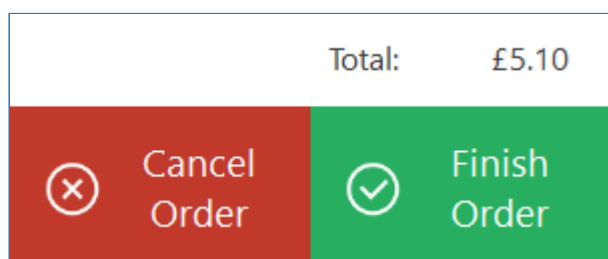
At the bottom right, there are two buttons: 'Cancel Item' (red) and 'Finish Item' (green).

- 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.

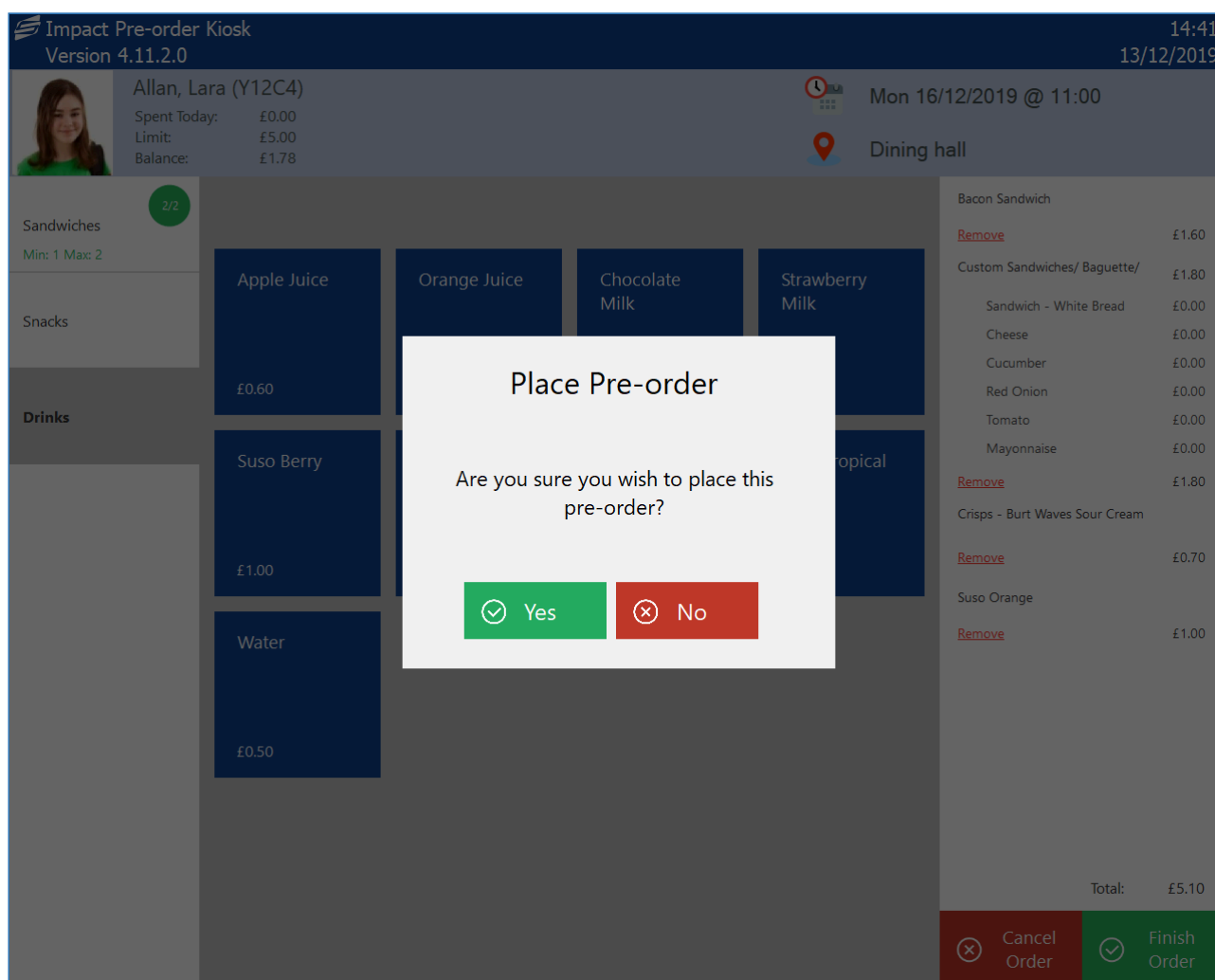
Confirming your order

Once you have selected all of the items that you wish to purchase, you need to finish the transaction.

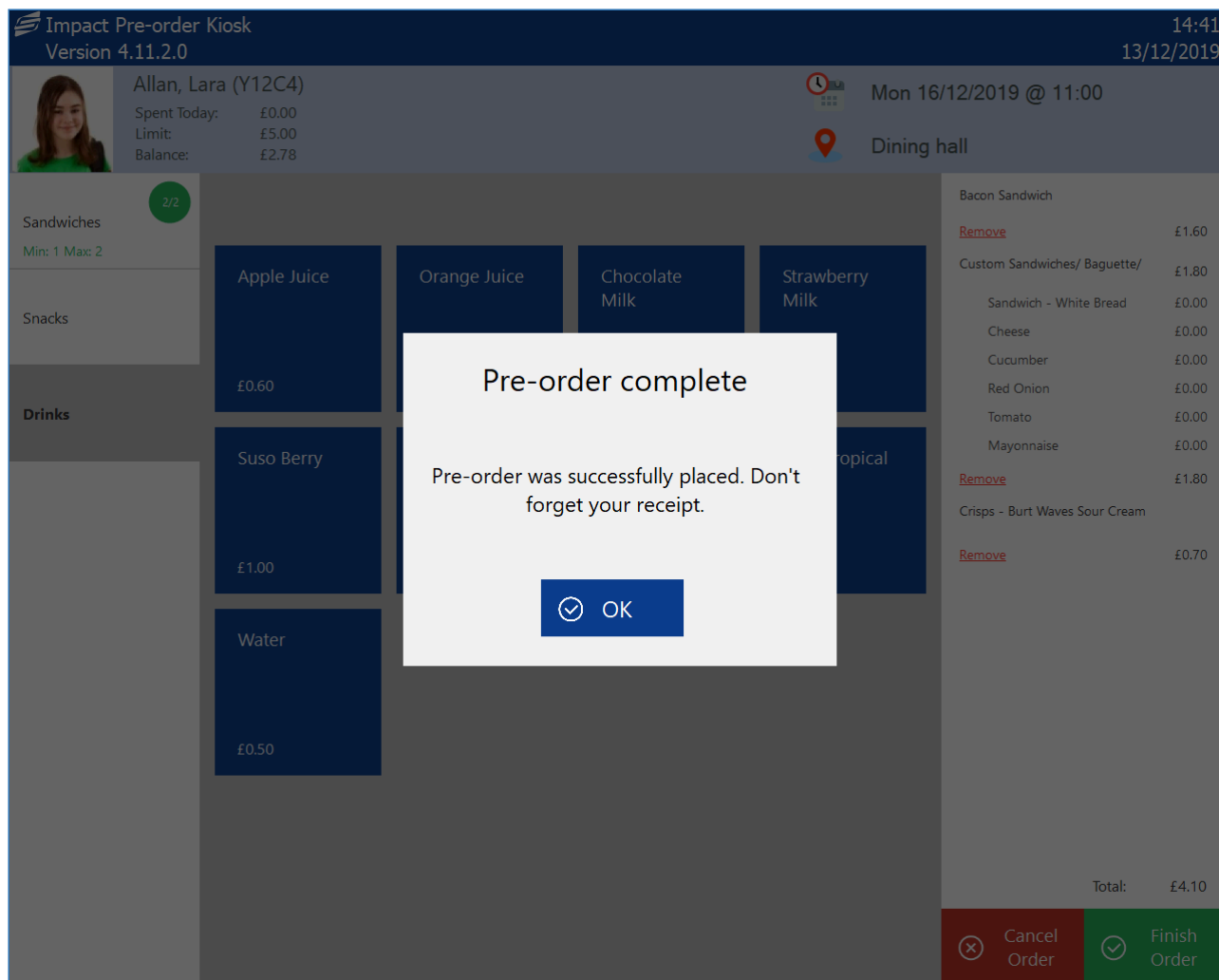
1. Press the green **Finish Order** button in the bottom right of the screen.




2. 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

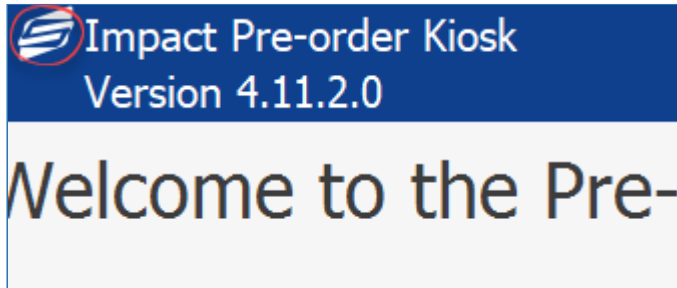
The pre-order kiosk application is designed to run unattended on a kiosk within the school. Day-to-day, there should be very little requirement for any management of it, but from time-to-time, you may need to perform some simple management tasks such as changing the time the kiosk is allowed to be used and to turn it off.

Accessing the kiosk management

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 Cunningham logo (top-left corner) 10 times in succession




2. This will take you to the login screen. Use your credentials to log in and press the green **Login** button.



.....		
7	8	9
4	5	6
1	2	3
0	<	C
 Login		 Cancel
		

Version 4.11.2.0
Copyright©2017-2019 CRB Cunningham

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 version	4.11.2.0
Communications version	3
Computer name	
IP address	

Location details

Location	22
Location name	Kiosk
Super group	

Kiosk details

Fast printing enabled	<input checked="" type="checkbox"/>
Printer name	COM3
Allow pre-order for next available date	<input checked="" type="checkbox"/>
Minimum user credit	£0.00
Maximum incorrect PIN attempts	5
Maximum receipt reprints	1
Idle timeout	30.0
Home page text	Welcome to the Pre-order kiosk. Order now to beat the queues!
Opening times	06:00 - 18:00
Home page image	<div>No image data</div>

  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.)

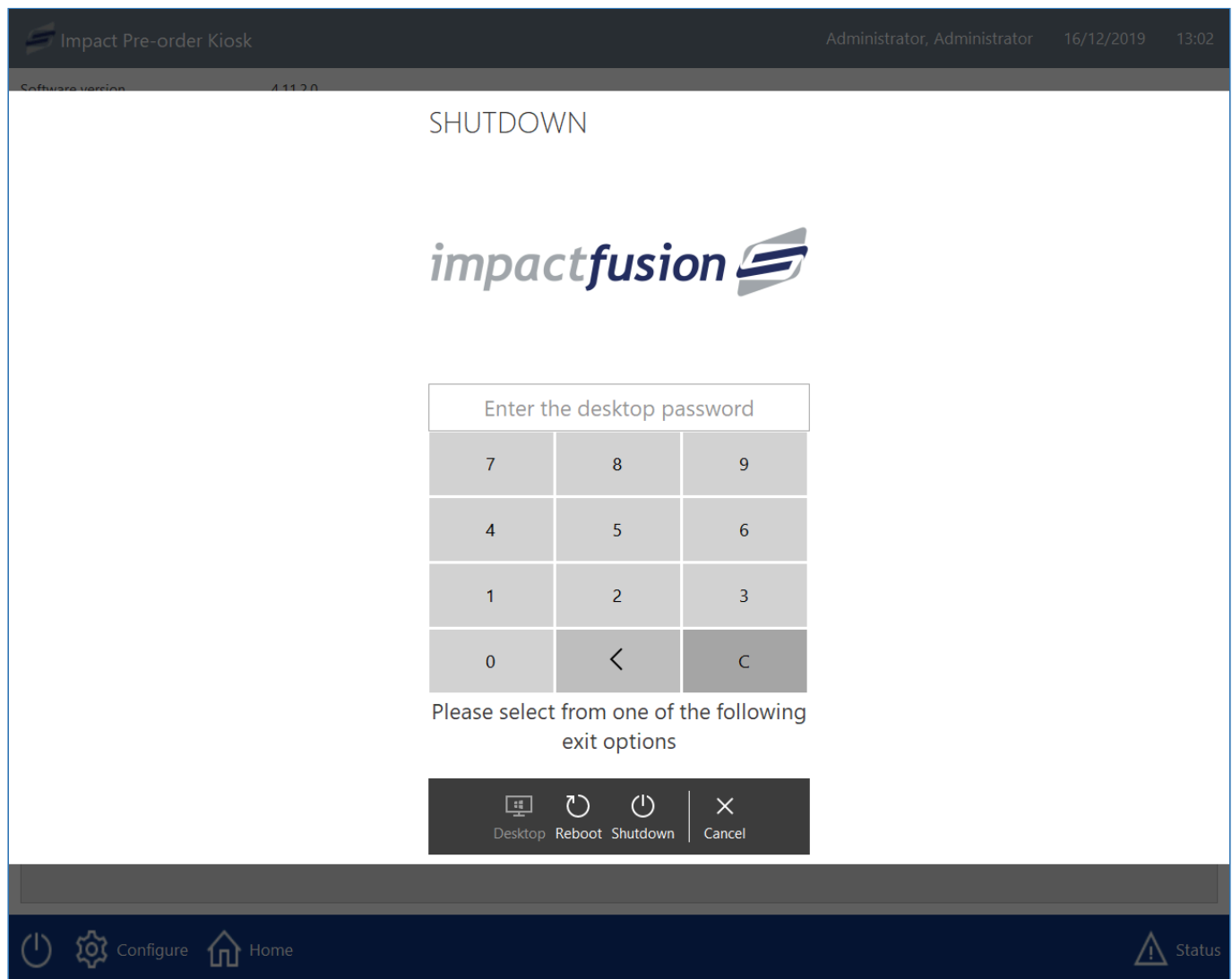


The Home option logs the user out and returns to the home screen.

Power options



Pressing the power button, will give you three options; Desktop, Reboot, and Shutdown. Each of these are discussed below.



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



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

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	<input checked="" type="checkbox"/> Login?	<input checked="" type="checkbox"/> User authentication?	
PIN entry	<input checked="" type="checkbox"/> Login?	<input checked="" type="checkbox"/> User authentication?	<input checked="" type="checkbox"/> DOB confirm?
Cards	<input checked="" type="checkbox"/> Login?	<input checked="" type="checkbox"/> User authentication?	<input type="checkbox"/> 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 ddmm 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	Allow users to use a registered card to open their account and place an

	authentication?	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.

Pre-order kiosk

This section contains settings for the behaviour of the pre-order kiosk application.

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	This is the text that scrolls accross the top of the home screen.

page text		
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'.

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.

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 Baud: 9600 [Test]

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

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.

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 to


1

Place your order




2


Save time



3


Enjoy your food!




CRBCunninghams
education solutions

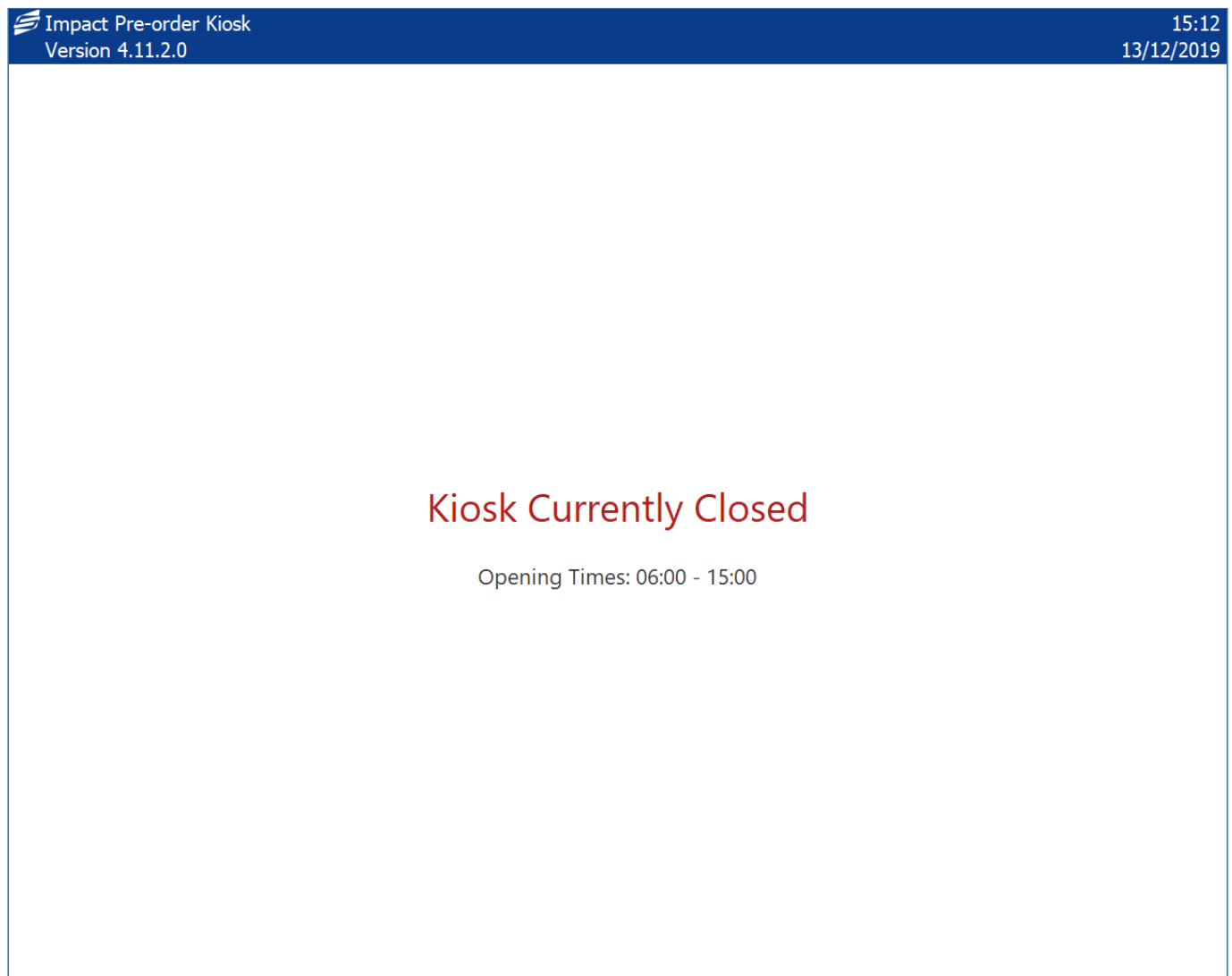
How to use the pre-order kiosk

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**

Troubleshooting the kiosk: “Kiosk Currently Closed”

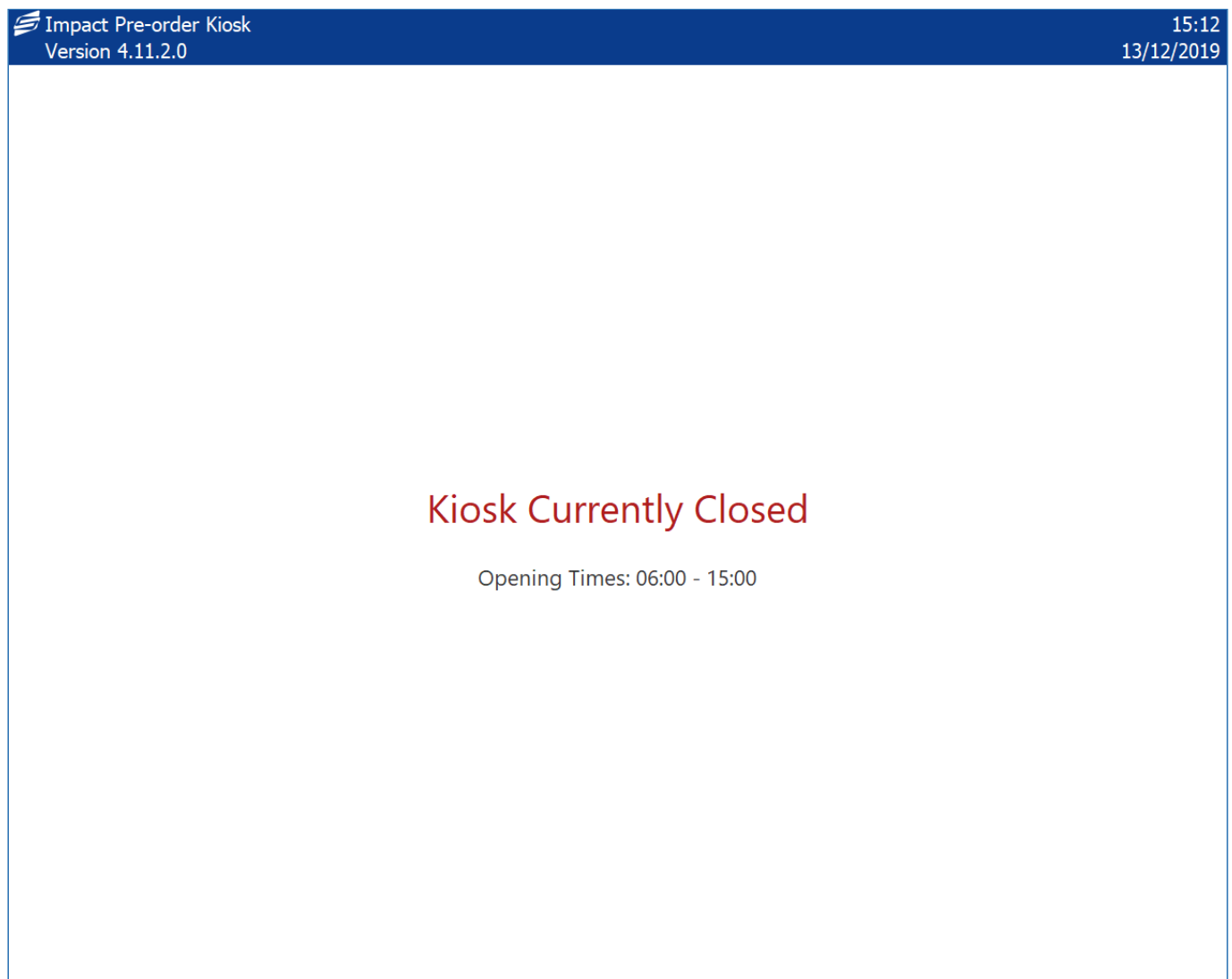
Occasionally the kiosk will display a screen that says that “The Kiosk is currently closed” (like the one below) that indicate that there may be an issue with the kiosk. These are usually pretty minor and require no user intervention before the kiosk becomes fully operational again.



- 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

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.

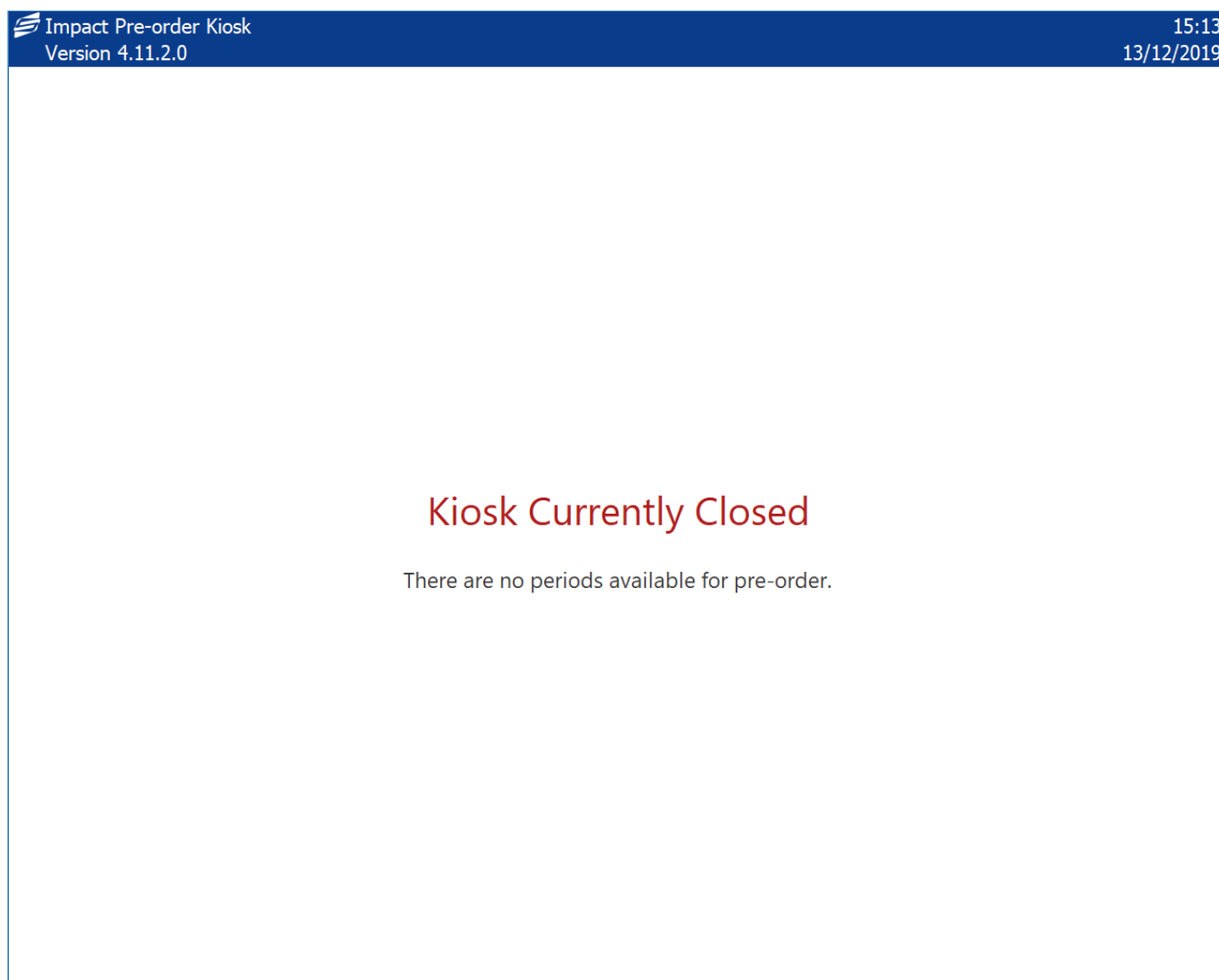


Solution

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](#).

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.



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.

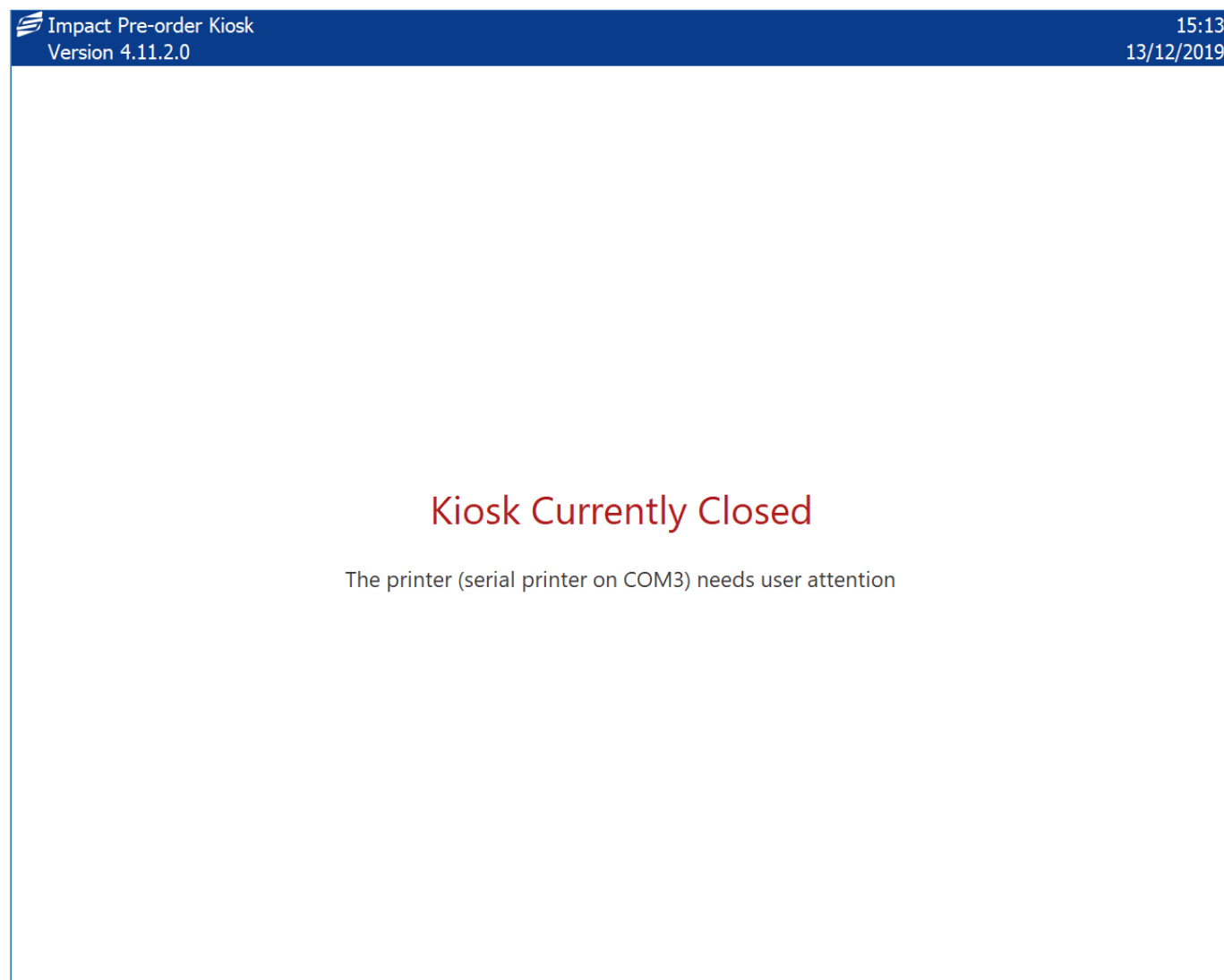
The second possible issue is that the pre-order layout does not contain any available pre-order periods (i.e. a rotational menus and the weeks have ran out.)



Information on how to alter your pre-order layout can be found [here](#).

The printer needs user attention

If there is an issue with the attached receipt printer, the below screen will be displayed.

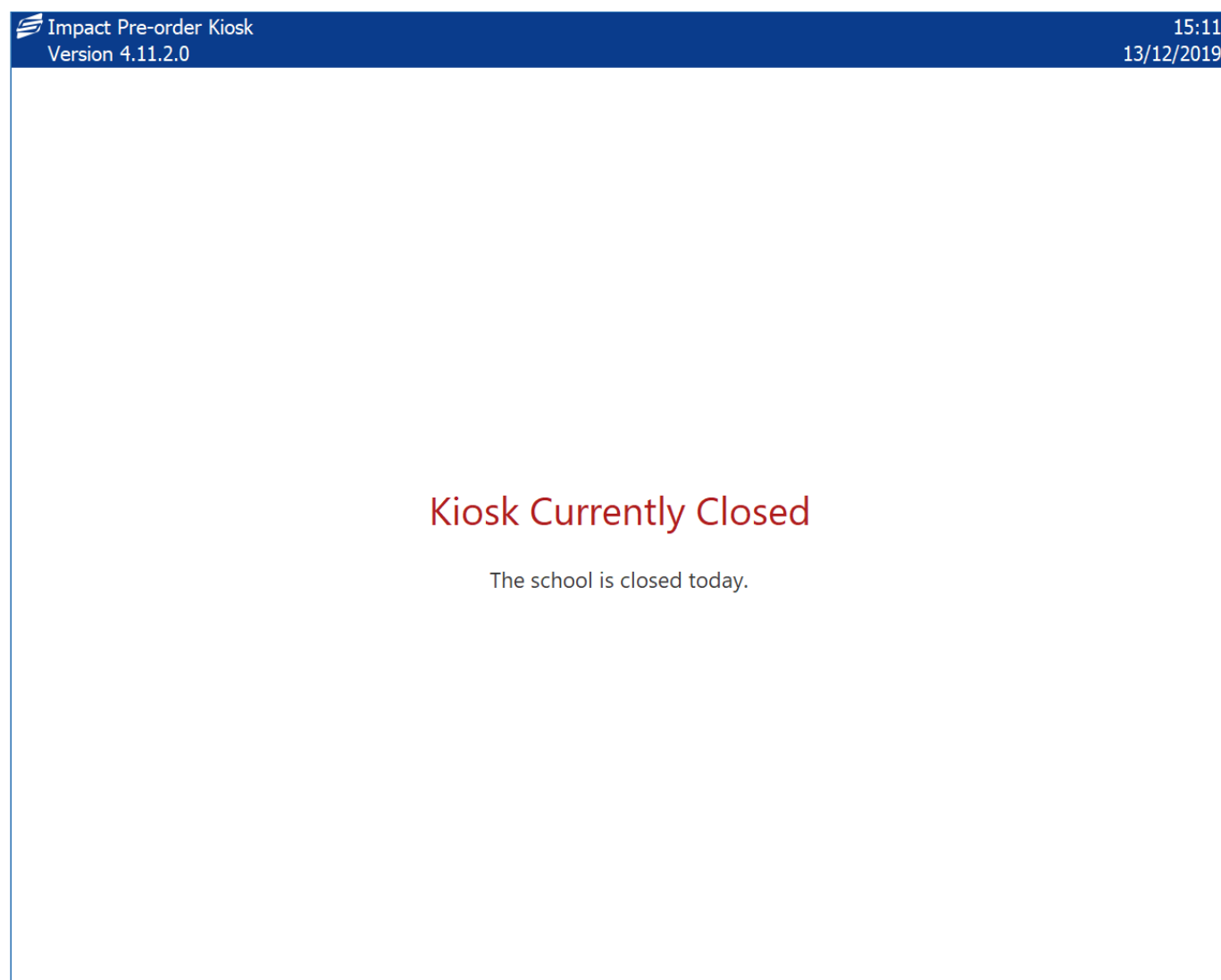


Solution

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.

The school is closed today

The kiosk will only work on days where the school calendar has the school listed as Open.

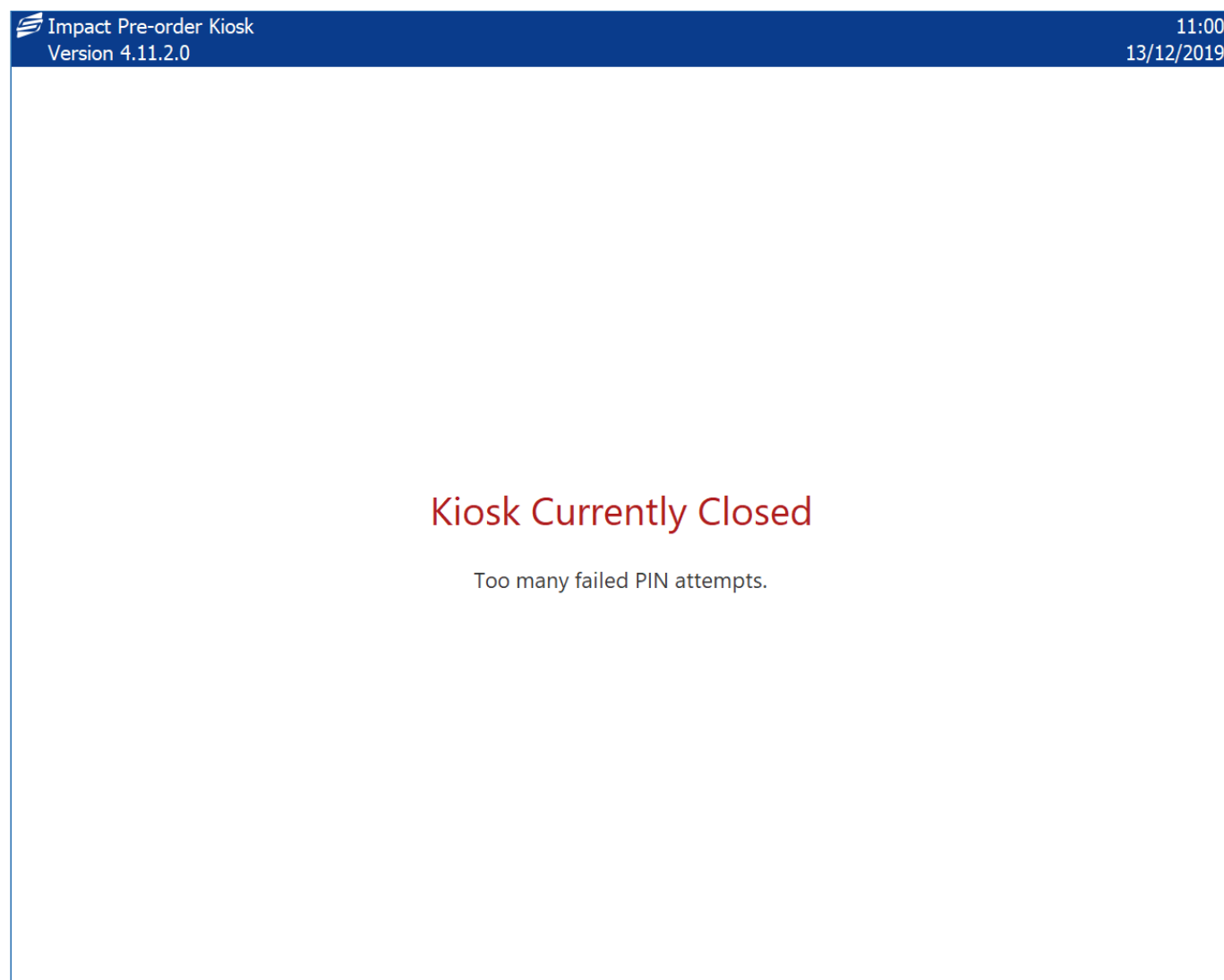


Solution

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'.

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.



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.

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 'Borders' user label would allow for ad hoc allowances to be added to all borders.

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.

The screenshot shows a software window with four tabs: 'Basic details', 'Limits', 'Allowances', and 'Labels'. The 'Labels' tab is active. Inside the tab, there are two checkboxes: 'Update?' (checked) and 'Clear?' (unchecked). To the right is a list box containing 'Border' and 'Sixth Form', both of which are checked. Below the list box is a 'Mode' section with three radio buttons: 'Add selected labels' (selected), 'Remove selected labels', and 'Set all users to selected labels'. At the bottom left of the tab area is a 'Label text' input field and an 'Add label' button. At the bottom right of the window are two buttons: 'Update' (with a green checkmark icon) and 'Cancel' (with a red prohibition icon).

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.