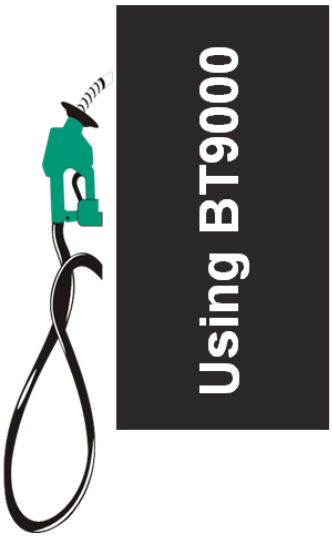


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Prepared by Bulloch Technologies

Bulloch
TECHNOLOGIES INC

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# About This Manual

## About this Manual

Today gasoline stations do more than just sell gasoline…..they sell several types of fuel, car washes, fast-food and convenience store items. The list goes on depending upon the petroleum company. This translate into many activities to manage and that's where the BT9000 comes in.
This chapter describes why the manual was written, provides an overview of each section and describles the icons and conventions used.

## Purpose of this manual

This manual is intended to help you prepare your site for the BT9000 system and use it productively, once the system has been installed and configured. This is usually performed by the installation contractor, or your Petroleum Company's technical support group.
The set up will include information such as:

- Number of dispensers
- Gasoline products available
- Blending ratios
- Tax rates
- Language preferences
- Paypoint preferences
- Other basic information which must be defined by your site

**The configuration instructions are not included in this manual.**

## Intended Audience

This manual is intended for use by all gasoline station employees, from cashiers to Retailers.

If you are new to the BT9000, you can use this manual as an introduction to the system. If you are an experienced user, you will find it useful for quick reminders.

## How to use this manual

This manual is organized into the following chapters:

1. **About this Manual** describes the icons and conventions used in this manual.
2. **Introducing the BT9000** describes the Bulloch Technologies BT9000 system. It shows the basic principles of using the system that you need to know in order to perform cashier and management tasks.
3. **Signing-on** shows you how to start your shift by signing-on to the BT9000 system.
4. **Preparing your Site** takes you through the steps necessary to customize the BT9000 system for your station.
5. **Setting up Store Data** shows you how to configure store items, departments, accounts receivable, accounts payable, payouts, speedkeys, deal groups and price groups.
6. **Selling Gasoline** shows you how to perform various types of gasoline sales.
7. **Selling Store Items** shows you how to perform the sale of store items like chocolate bars and motor oil.
8. **Accepting Payments** shows you how to accept payment for gasoline or store items by cash, credit, debit, fleet cards or on account.
9. **Cashier Reports** describes the Shift Report in detail and lists the reports that can be printed from this mode.
10. **Managing Sales** describe the functions that Managers can use to audit transactions and print standard reports.
11. **Logs** describe the various logs that are available in the BT9000.
12. **Setup** describes how to configure messages, passwords and store options.
13. **Managing Store Info** describes tasks that should be performed on a daily basis or a periodic basis.

## Conventions

This is how we show certain types of information in this guide. Being familiar with these conventions will make it easier for you to use the guide.

### Warnings

A warning is important information that must be read before continuing and is indicated by a stop sign in the margin, as in the following example:

**Warning**. Activating store data accepts the changes you've made and overwrites the existing information.

### Notes

A caution is important information that indicates a potential problem and is indicated by an exclamation point, as in the following example:

**Note.** In manager's mode, pressing the [ENTER] key in the middle of a line deletes the information to the right of the cursor and moves the cursor to the next field.

## Screen Messages

Screen messages look like this:

## Icons used in this manual

Below is a list of standard icons used in this manual and what they mean. Icons usually appear in the left margin of the page and are intended to draw your attention to an interesting or important point.

The pump nozzle has been lifted.

The pump nozzle has been replaced.

The system makes a beeping sound.

Tap on a key to enter information.

# Introducing The BT9000

## Introducing the BT9000

The BT9000 was designed with several features to simplify your business processes and make your station run smoothly.

This chapter describes the BT9000, its parts and its features.

## System Overview

The BT9000 is designed to help you manage island traffic and look after the needs of your customers.

The BT9000 controls and monitors up to 24 pumps.

The BT9000 is your electronic cash register and tracks sales of fuel, non-gas products, payouts and accounts receivables.

As your POS (point of sale) payment terminal, credit, debit, gift and Loyalty cards can be authorized and recorded.

The BT9000 also handles other devices like scanners, debit pin pads, price signs, in-tank monitoring systems and customer displays

**Multi Paypoint** refers to two or more computers linked together in a networked environment to enable the exchange and sharing of information. This type of connection is usually referred to as a direct cable connection, in which one computer is designated as the '*Main console'* or paypoint # 1 and the other computer is designated as the '*Slave*' or paypoint # 2.

MENU

## *Flexibility*

The BT9000 was designed with the ability to toggle back and forth between the cashier's and manager's mode. A grey [MENU] key is located on the right hand side of the cashier's screen. Simply press the [MENU] key at any time. Any work you are doing in the manager's mode will still be available when you switch back to that mode. When you are in the background menu, the [MENU] key is red.

There are however, some critical functions in the manager's mode that will not allow you to switch back to the cashier's mode until all data entries have been saved.

## The Cashier Screen

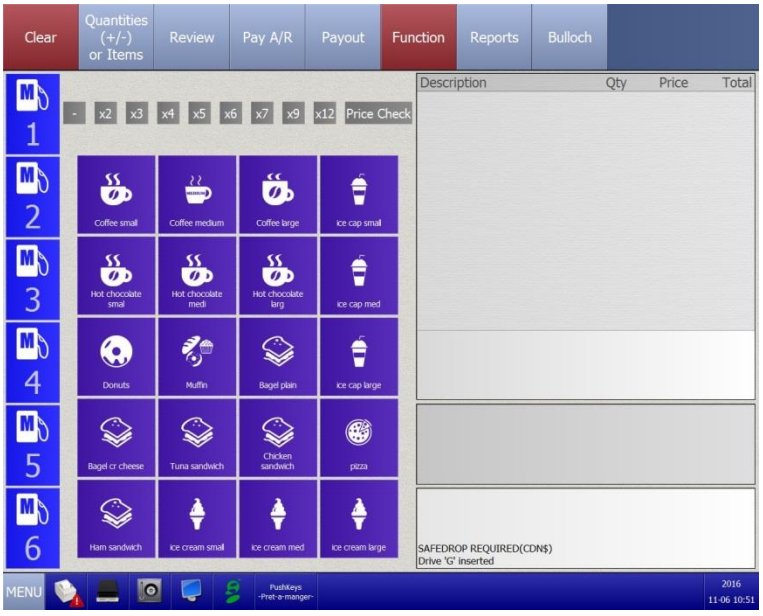
The screen is divided into easily readable function areas. The cashier screen has 8 main parts:

1. The sales area
2. The sales information area
3. The Tip line
4. System messages
5. Status indicators
6. Push keys
7. The Pump/AFD (Card Reader in Dispenser) area
8. The Function bar

1. **The Sales Area**. The sales area has two modes. When you are in the Cashier's mode, the screen displays information regarding the current sale. When you are in the Manager's mode, the screen displays various menu options that are configured in the BT9000. To toggle back and forth from the Cashier mode to the Menu mode, simply press the [MENU] key located on the top of the cashier screen.
2. **The Sales Information Area**. The subtotal, taxes and grand total are displayed towards the bottom of the screen as the sale progresses.
3. **The Tip Line**. The tip line provides you with helpful hints or instructions (if applicable) on next steps to take
4. **System Messages**. Important system messages appear at the bottom of the screen such as safedrop required and backup required.
5. **Status Indicators**. Status indicators show you the condition of the printer, safe drop indicators and the network status for bank debit and credit card authorization.
6. **Push key area**. This area displays the push keys that are configured in the system.
7. **Pump/AFD (Automated Fuel Dispenser) Area**. The status of each pump/AFD is displayed beside the pump number.
8. **Function bar**. The function bar displays the various functions available. **Note:** The function bar can be located on the top of the cashier screen or on the bottom of the cashier screen, depending on your site's configuration.

## Left-handed touchscreen

Functionality allows you to configure the cashier screen to accommodate left-handed CSRs and move the function keys to the top of the screen. More information is detailed in the Utilities/User Interface menu.



## Monitoring System Status

The system status indicators display the status of the equipment connected to the BT9000 such as the printer, the scanner or the networks that authorize debit, credit and fleet cards.

| Indicator | Description | What it means |
|---|---|---|
| C1 | White C1 | No issues with credit. |
| OKD | White OKD | No issues with debit. |
| C1 | Yellow C1 | Communication was lost with the credit provider. Should be re-established with the next credit card swipe. |
| NP | Yellow NP | No polling. Call your company's help line if the problem persists. |
| NC | Yellow NC | Serious problem. Call your company's help line. |

### Master VS Slave

Almost all of the data is stored onto the hard drive of the '*Master*' (paypoint # 1). When a Reconciliation and Close is executed, the data from the '*Slave*' (paypoint # 2) is copied onto the 'Master'. However, some data is paypoint specific.

### Printer

You will have one high-speed thermal Receipt/Report Printer installed at each paypoint. All of your reports will be printed with the thermal printer.

***To Change the Paper:***

- Push the gray button below "feed" to open the cover.
- Insert a new paper roll feeding from underneath (see diagram inside printer cover).
- Close printer cover.

### Hardware Components

The BT9000 operates on an All-in one POS Touch screen system.

A Manager's keyboard (standard PC keyboard), used for text entry, may be installed as well.

Your system may be equipped with a multi-line customer display that allows the customer to view details of their transaction, and provides short scrolling advertising or information messages.

### Ongoing Care

The BT9000 system has been carefully set up to deliver fast and reliable performance. On a day-to-day basis it will continue to serve you well as long as you observe a few basic common sense rules.

Keep drinks and food away from any system components to avoid spills. Also, don't take notes on the equipment, and try to keep it clean and bright.

### Cary Keyboard

Some sites may have a Cary Keyboard installed at their site. The keyboard is used constantly and deserves the best care. Keep your fingers clean and clean the keycaps regularly with a soft cloth lightly dampened with window cleaner. Unplug the keyboard while cleaning it. **Turn off the computer before unplugging the keyboard.** A special cleaning card and solution is available to keep the card reader functioning reliably.

### Monitor Screen

Use a soft cloth, which has been lightly dampened with window cleaner, to clean it once or twice a week. **Do not spray any liquid directly on the screen!**

### Printer

The printer should always be turned ON, as will be indicated by the ON/OFF light. There is very little that will go wrong with a thermal printer that cannot be fixed by simply opening the unit and resetting the paper.

Make sure that nothing is left sitting on top of this unit, and that the cables are not jammed up against other things.

Make sure you always have an ample supply of paper on hand.

## General Hardware Considerations

### UPS

We strongly recommend that you install an **Uninterruptible Power Supply** (UPS).
The UPS is a hardware device that provides a backup power source in case of a power outage (blackout), brownout or a surge in power. A UPS provides enough power for the computer to shut down properly or to remain up during a temporary power outage or brownout.

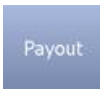
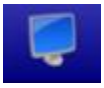
The UPS should be placed on the floor.

The full sized keyboard will not be used very often and can be placed out of sight on top of the CPU.

## Cashier Mode

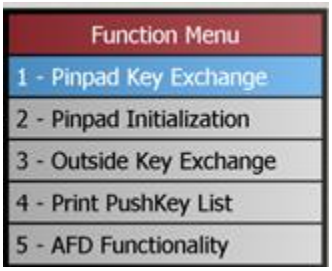
When the BT9000 is turned on, the system automatically goes into the Cashier mode. In the cashier mode, you can authorize pumps; monitor pumps sales in process, enter transactions and get authorization for debit, credit, fleet and gift card transactions.

## Available function keys on the Cashier Screen

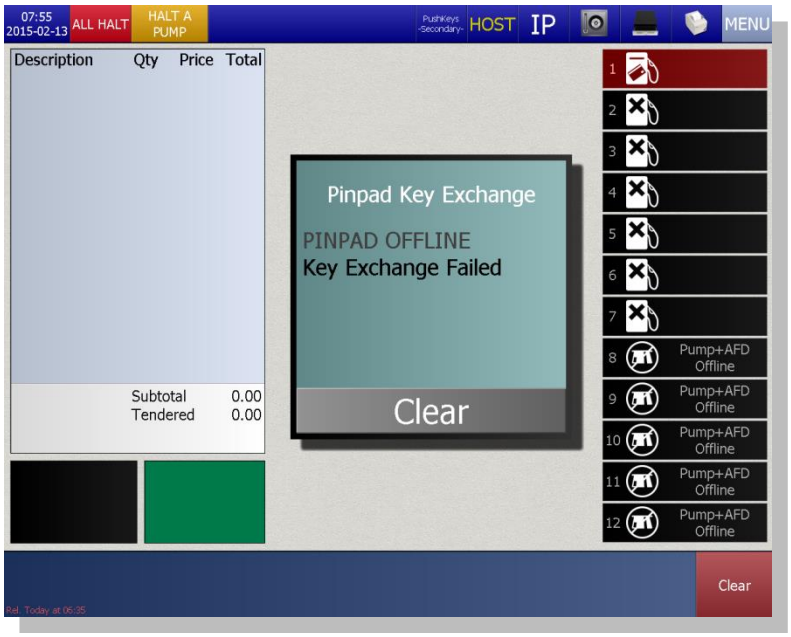
| | | | |
|---|---|---|---|
| | Displays the version of software installed on the system | | Accepts payment for an existing account |
| | Displays the names of available reports in a pop up window | | Displays previous sales for purposes of viewing, reprinting or voiding a receipt for a customer |
| | Displays a list of available functions in a pop up window | | Allows you to sell an item by entering an item number. Also used to process a negative item transaction |
| | Used to set up a prepaid fuel sale |  | Used to process a payout |
| | Used to halt and unhalt pumps | | Used to halt and unhalt one pump |
| | Displays information such as IP addresses and transactions in the Store and Forward files |  | Displays information about the paypoint such as the paypoint number, machine name and IP address |
| | Used to record Canadian and American safe drops | | Used to open the cash drawer |
| | Used to print receipts | | Allows you to switch from primary to secondary push keys |
| | Used for quantity sales | | Used to do a price check |

## Function key

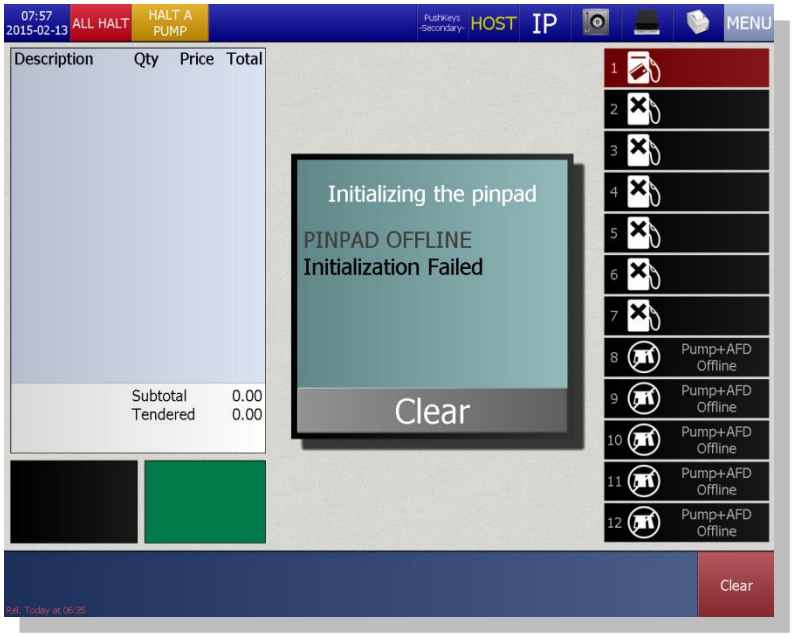
When you select the [Function] key, the following options are available:



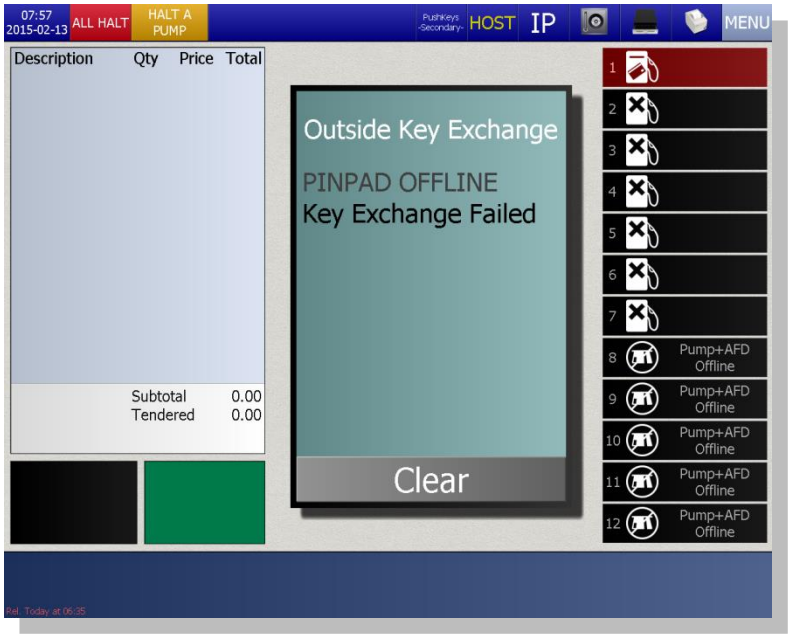

Tap on the [Pinpad Key Exchange] key to do a pin pad key exchange. If the pin pad key exchange fails, the following screen will be displayed:



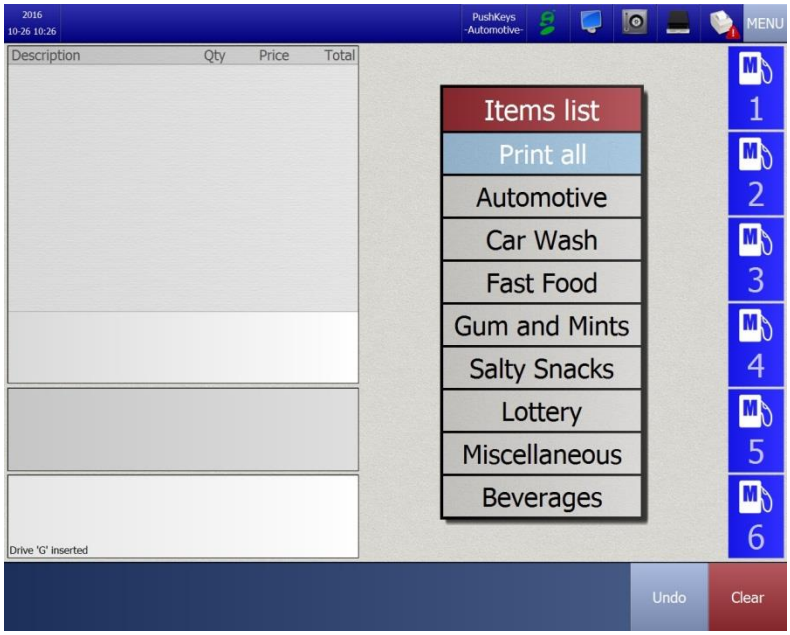

Tap on the [Pinpad Initialization] key to initialize the pin pad. If the pin pad initialization fails, the following screen will be displayed:




Tap on the [Outside Key Exchange] key to do an outside key exchange. If the initialization fails, the following screen will be displayed:

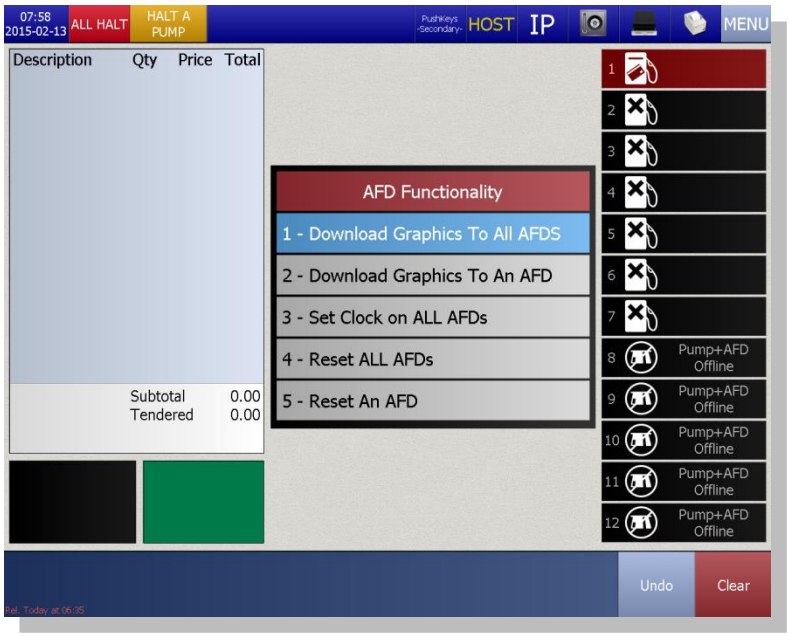



Tap on the [Print PushKey List] key to print a list of the push keys configured in the system. The following list will be available.




Select one of the lists from the menu displayed.

Tap on the [AFD Functionality] key. The following options will be available:

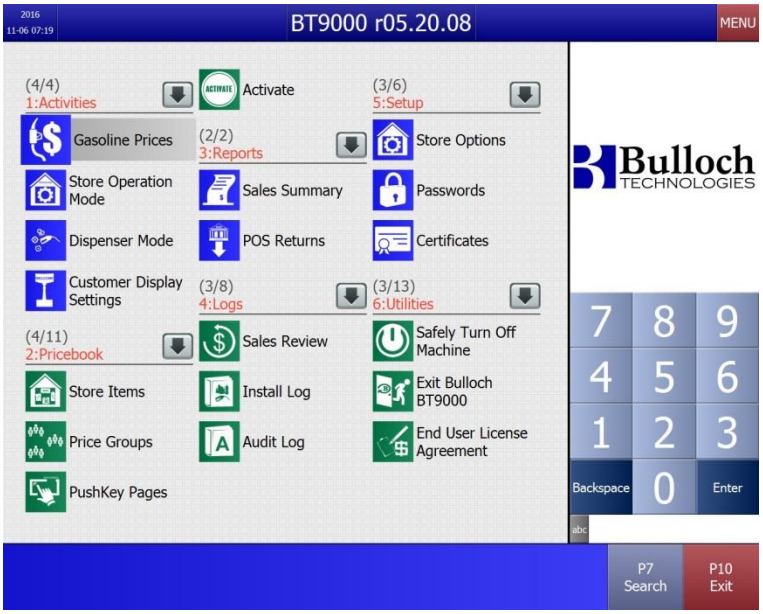


## Manager Mode

To enter the manager mode, press the [MENU] key. When you are in the background menu, the Menu key is red. In this mode, you can update store data, change fuel prices and modify other station information when needed.
Pump authorization always takes priority. Press the key to authorize the pump then press the key again to complete the editing task. If you are in a menu option where the pump control key is not visible, press the [MENU] key to authorize the pump then press the [MENU] key again to return to the menu.

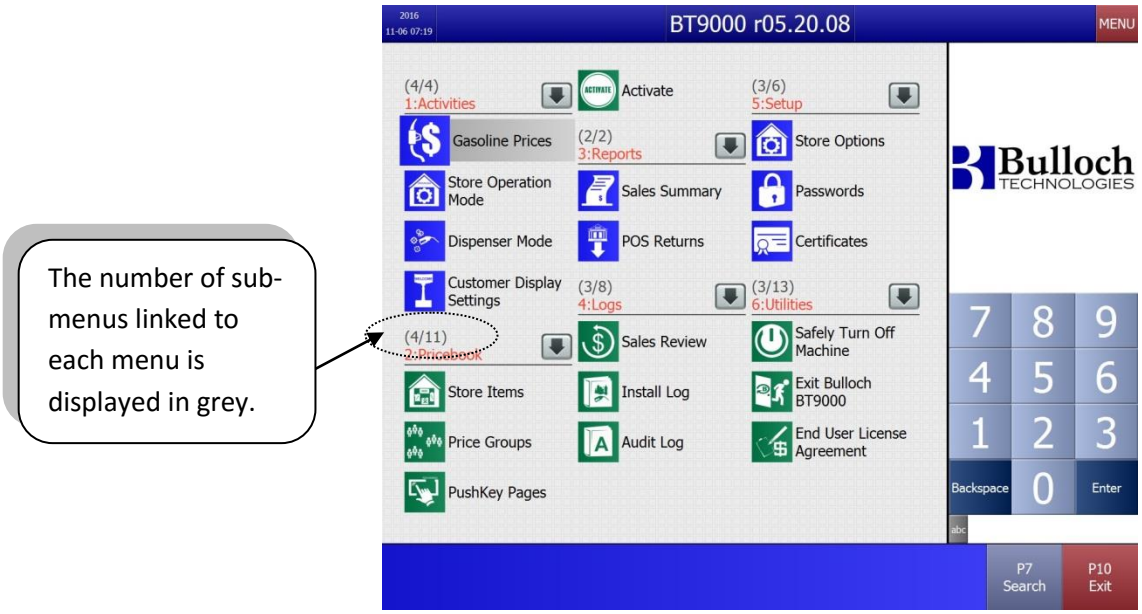
## Selecting Menu Options

Tap on the [MENU] key to enter the manager's mode. ***Use the pad of your fingertip, not your fingernail.*** The Menu screen will be displayed:

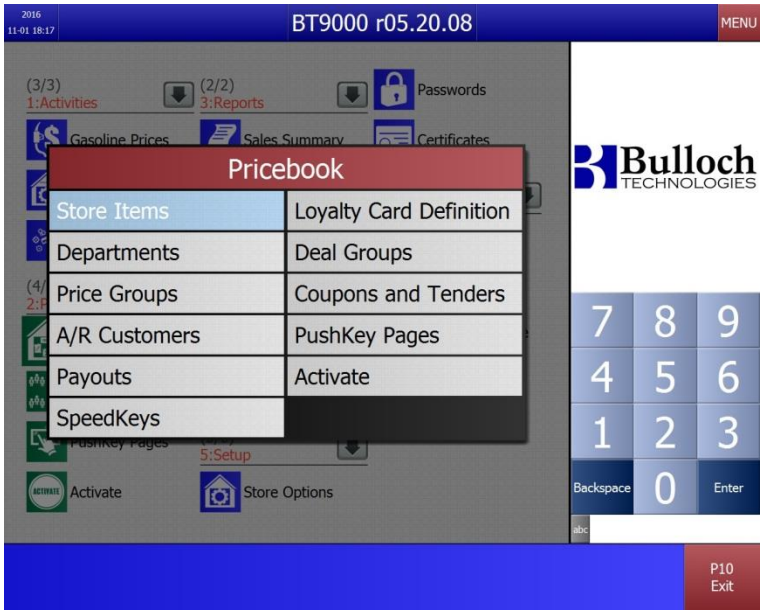



- A list of available menus is displayed on the screen.
- Each menu is numbered. They are:
  1. Activities
  2. Pricebook
  3. Reports
  4. Logs
  5. Setup
  6. Utilities

The number of sub-menus linked to each menu is displayed in grey, immediately above the name of the menu.  For example, the Pricebook menu has 11 sub-menus.

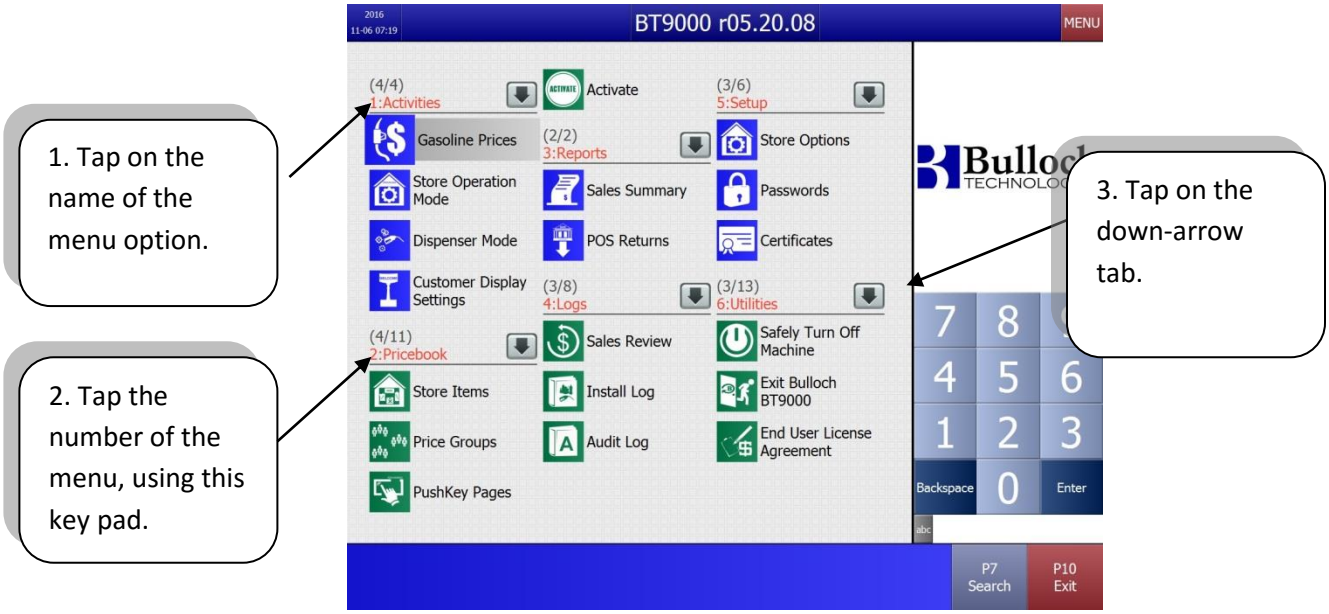



When you tap on a menu or on the down-arrow tab, all sub-menus are displayed on the screen. For this example, the Pricebook menu was selected:




**There are 3 ways to access a menu**.

1. Tap on the name of the menu option
2. Tap the menu # (number), using the key pad on the right-hand side of the screen
3. Tap on the down-arrow tab




## Modifying the way the data is displayed on the screen

In certain menu options, the way the information is displayed on the screen can be viewed in 2 different formats.
By pressing the icon that is configured to the immediate left of the [MENU] key, the screen layout will change.

Different icons are available, depending on your site's configuration:

When you tap on the blue icon, the screen layout changes from one column to two columns. To return to the previous layout, tap on the blue icon once again.

When you tap on the [Reports One Column] icon, the information on the screen is displayed in one column.

When you tap on the [Reports Two Columns] icon, the information on the screen is displayed in two columns.

## Entering your password

By entering your password you confirm that you have read and agreed to the terms of the End User Licence Agreement, located in the Utilities/End User Licence Agreement menu.

# Signing On

## Signing On

Cashiers begin their shift by signing on and end by balancing their cash. The BT9000 helps by automating this process and by creating shift reports.
These reports total the sales and indicate that a new shift has started.

This section describes how to start a shift by creating and printing shift change reports.

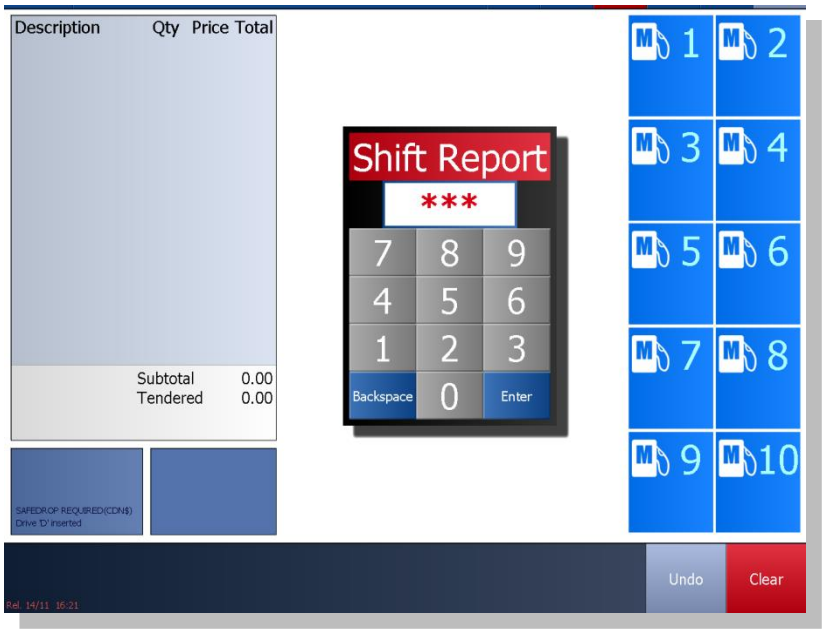
## Performing a shift change

To sign on to the BT9000, you must start your shift by printing the Shift Change Report for the previous shift.

Tap the [Reports] key, located on the bottom row of the cashier screen.

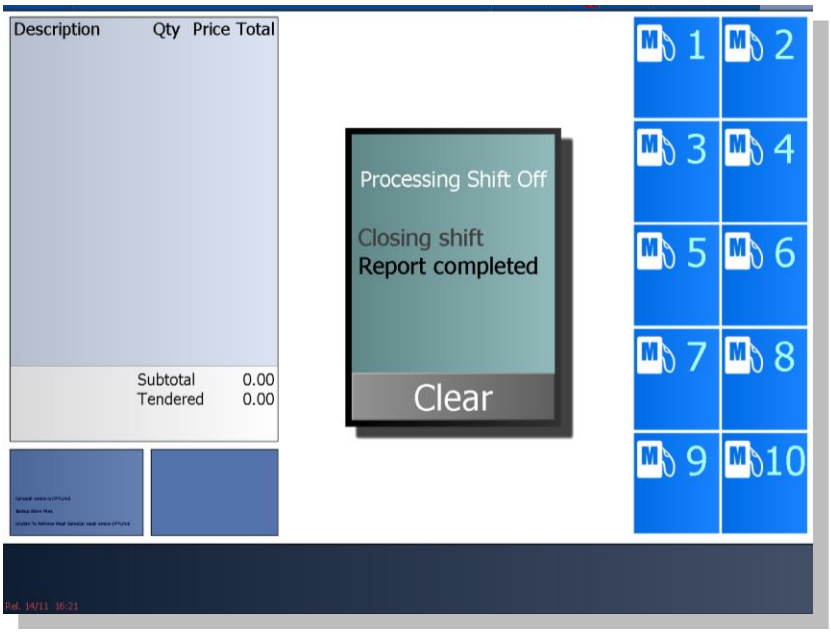
The Reports menu will be displayed on the screen.

Tap the [Shift Change] key. The [Enter Password] screen will be displayed:




Tap in your password. The previous shift is closed and a Shift Report is printed. This report can take up to one minute to print. Messages on the screen will let you know how the shift change is progressing.

When the Shift Report is done printing, a message on the screen will indicate that the Report is completed.




Tap on the [Clear] key.

# Preparing Your Site

## Preparing Your Site

This section describes the steps to take to set up your site on the BT9000. We explain:

- how to configure offsets
- how to set up your fuel prices
- how to configure the Pricebook menu items

BT9000 will simplify the day-to-day management of your station if you take advantage of the features the system has to offer. For example, you can do the following:

Set up speedkeys for commonly purchased items to save time and avoid keying errors.

Enter promotional or informational messages that are displayed on your cash register and the pumps.

Enter rates so your system automatically calculates the tax.

Set up departments and price groups to make changing prices fast and easy.

Before you can start recording sales, payments and other transactions with BT9000 there are various tasks that must be completed to prepare your site. Setup tasks are typically performed by the station Manager or the shift Supervisor, as long as their password is configured with the appropriate security level.

The list on the next page identifies the tasks that should be completed before opening your site and the menu options available for completing such tasks.

## Tasks

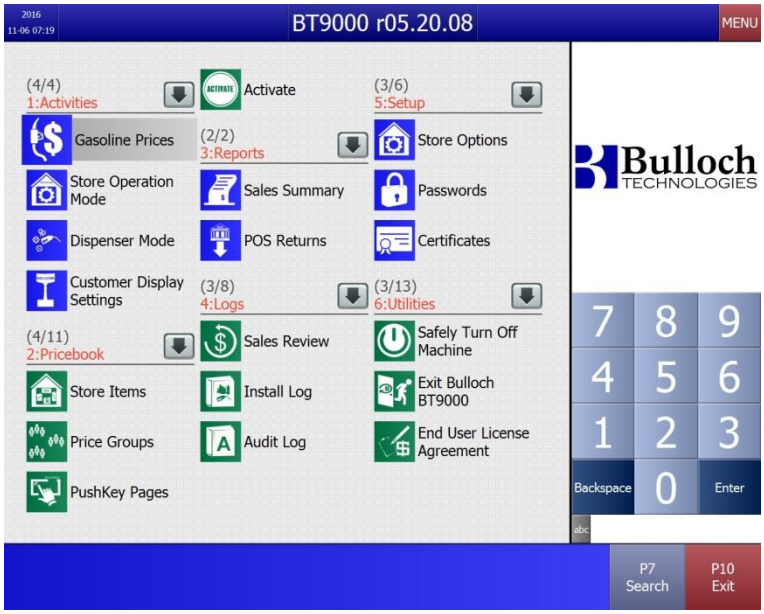
| Task | Description | Where to find it |
|---|---|---|
| | **Gasoline Prices** | |
| **Configure Gasoline Price Offsets** | **Mandatory** | **Main Menu**<br>- *Activities*<br>- *Gasoline Prices* |
| **Set Gasoline Prices** | **Mandatory**<br>Set prices for all grades of gasoline | **Main Menu**<br>- *Activities*<br>- *Gasoline Prices* |
| **Set up Store Options** | **Mandatory**<br>Enter the customer language, safe drop amounts, applicable tax rates and the corresponding tax registration numbers | **Main Menu**<br>- *Setup*<br>*- Store Options* |
| **Set up Passwords** | **Mandatory**<br>Enter a password for each employee requiring access to the system | **Main Menu**<br>- *Setup*<br>*- Passwords* |
| **Set up Store Messages** | **Mandatory**<br>Enter trailer messages that will appear at the bottom of the customer gasoline purchase or car wash receipt | **Main Menu**<br>- *Setup*<br>**-** *Store Messages* |
| **Set up AFD Messages** | **Optional**<br>Enter the message to be displayed on the AFD reader display. You can enter up to 5 different messages | **Main Menu**<br>- *Setup*<br>**-** *AFD Messages* |

| Task | Description | Where to find it |
|---|---|---|
| | **Store Data Maintenance** | |
| **Define Store Items** | **Mandatory**<br>Enter store items | **Main Menu**<br>- *Pricebook*<br>**-** *Store Items* |
| **Define Departments** | **Mandatory**<br>Set up department codes and descriptions for sales reporting | **Main Menu**<br>- *Pricebook*<br>**-** *Departments* |

| | | |
|---|---|---|
| **Define Price Groups** | **Optional**<br>Enter the group number and description to categorize store items that sell at the same price | **Main Menu**<br>- *Pricebook*<br>**-** *Price Groups* |
| **A/R Customers** | **Optional**<br>Enter the codes and names of customers who pay on account. | **Main Menu**<br>- *Pricebook*<br>**-** *A/R Customers* |
| **Set Payout Codes** | **Optional**<br>Enter the allowable types of payouts | **Main Menu**<br>- *Pricebook*<br>**-** *Payouts* |
| **Define Speedkeys** | **Optional**<br>Map special keys on the keyboard to sell items without having to scan or enter the item code | **Main Menu**<br>- *Pricebook*<br>**-** *Speedkeys* |
| **Define Loyalty Card Definitions** | **Optional**<br>Define the various loyalty cards that could be configured in the system | **Main Menu**<br>- *Pricebook*<br>**-** *Loyalty Card Definition* |
| **Configure Deal Groups** | **Optional**<br>Configure deal groups | **Main Menu**<br>- *Pricebook*<br>**-** *Deal Groups* |
| **Define pushkey Pages** | **Optional**<br>Configure pushKey pages | **Main Menu**<br>- *Pricebook*<br>**-** *PushKey Pages* |
| **Configure Coupons and Tenders** | **Optional**<br>Configure coupons and tenders | **Main Menu**<br>- *Pricebook*<br>**-** *Coupons and Tenders* |
| **Activate Store Data** | **Mandatory**<br>Ensures that any changes to store data are effective immediately | **Main Menu**<br>- *Pricebook*<br>**-** *Activate* |

## Selecting Menu Options

Tap on the [MENU] key to enter the manager's mode. A Menu screen similar to the one below will be displayed:




## Available function keys

MENU — Press the [MENU] key to enter the Manager's mode. The Main Menu appears inside the Sales Screen. Press the [MENU] key to return to the cashier screen

Backspace — Use the backspace key to erase the last characters that you keyed in before hitting the [Enter] key. This works in either cashier or manager mode. Keep pressing the key to erase an entire line

Enter — Press the [Enter] key to accept your entry and move to the next field

P7 Search — Press the [Search] key to narrow your search

Exit — Exits from the Main Menu and returns to the cashier's mode

## Gasoline Prices

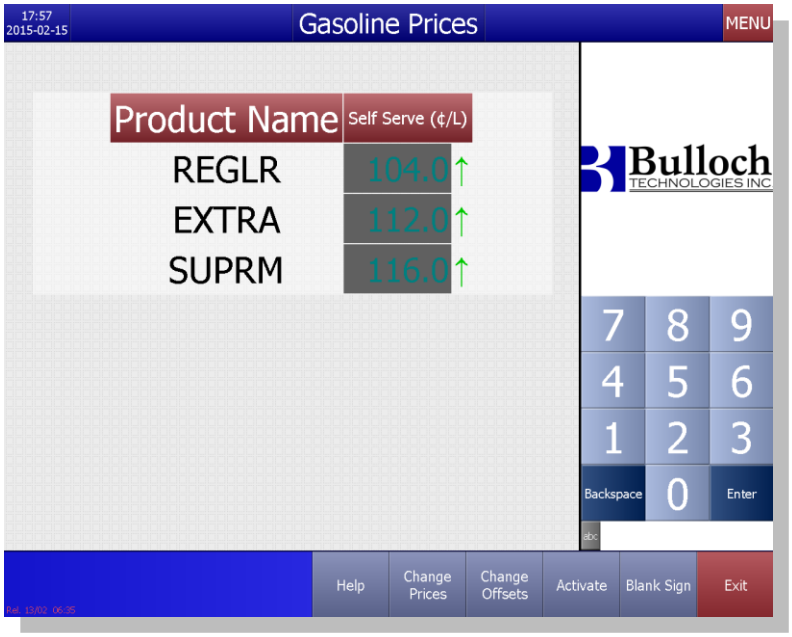
The BT9000 can track sales for any type of fuel. Gasoline fuels can use base and offset prices to automate price changes for different grades. The lowest grade of fuel, more commonly referred to as 'Regular', is used as a base for setting all other prices.

Offsets are entered to calculate the price for higher grades. Prices for non-gasoline fuels like diesel, propane and natural gas are entered manually.

From the *Main Menu*, select *Activities*. A box is displayed with the following choices:

1. Gasoline Prices
2. Store Operation Mode
3. Dispenser Mode
4. Customer Display Settings

Tap on the *Gasoline Prices* menu. The [Gasoline Prices] menu is displayed:




On your screen, you will see a table that contains product names. The Gasoline Prices screen displays prices by product and type of service.

## Available function keys

**Keys on the Cashier screen:**

| | | | |
|---|---|---|---|
| Help | Displays a help screen | Activate | Allows you to activate the prices to pump and price sign |
| Change Prices | This key allows you to change the base price of any fuel that is not an offset. The price is displayed in red | Blank Sign | Allows you to blank out the price sign |
| Change Offsets | Displays a popup screen where you can define the standard offset amounts | Exit | Exists the screen and returns to the Main Menu |

**Keys on the Cary Keyboard:**

| | | | |
|---|---|---|---|
| | Displays a help screen | | Allows you to activate the prices to pump and price sign |
| | This key allows you to change the base price of any fuel that is not an offset. The price is displayed in red | | Allows you to blank out the price sign |
| | Displays a popup screen where you can define the standard offset amounts | | Exists the screen and returns to the Main Menu |

**Warning**. As part of your initial setup, you must set an Offset amount before entering a fuel price.

## Price Offsets

Price offsets are the differences in price between the grades of gasoline. Gasoline prices fluctuate often but the price differences, or *offsets* between grades typically remains constant. The price for Regular grade (lowest grade of gasoline) is used as the base price from which the prices for higher grades are calculated.

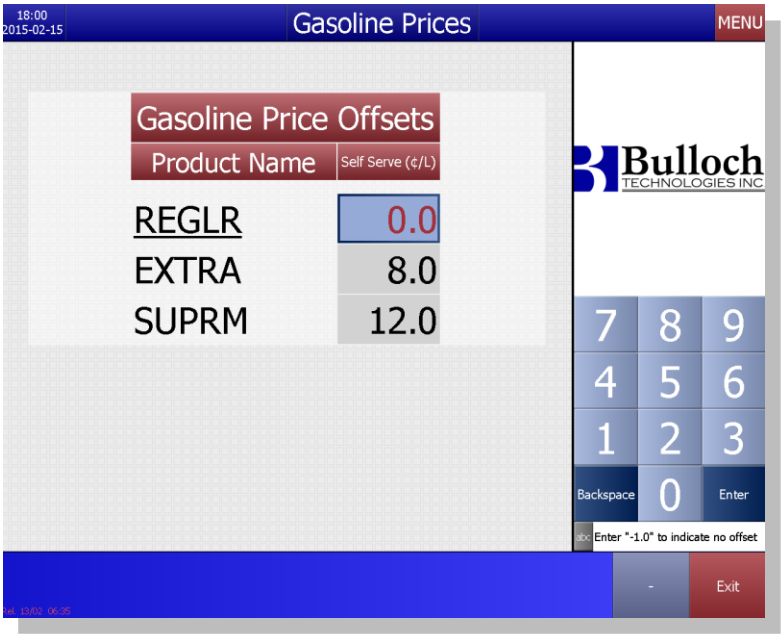
Instead of modifying gasoline prices manually, you can apply price offsets (spreads) to calculate the price of all grades of gasoline for you at one time. Whenever the price of 'the Regular' gas changes, the prices of the other grades also change according to the offset value.

Before you can apply price offsets to gasoline prices, the offset values must be defined.

| Field Name | What it means |
|---|---|
| **Enter Password** | Enter your password. Station employees can use this function if their password is defined with the appropriate security level. |
| **Product Name** | This column lists the various grades of gasoline products that your station sells. These products are set up when the system is installed. |
| **Self-Serve (¢/L)** | Enter the cents per litre price. |
| **Full Serve (¢/L)** | Enter the cents per litre price. |

## Entering Price Offsets

Tap on the [Change Offsets] key to change the offset price for grades of gas above Regular and enter your password. The following screen will be displayed:



Enter the offset amount for each gasoline product in the appropriate column of the price table. Offsets are entered with one decimal place. The decimal point is an optional entry. For example, if you type 80 the result will be 8.0.

**Note**. Enter ***-1.0*** for products which are not affected by offsets (i.e. Diesel, Propane or Natural gas).

When all offsets have been configured, press the [Exit] key to return to the Gasoline Price screen. All offset prices will automatically be updated.

## Entering Gasoline Prices

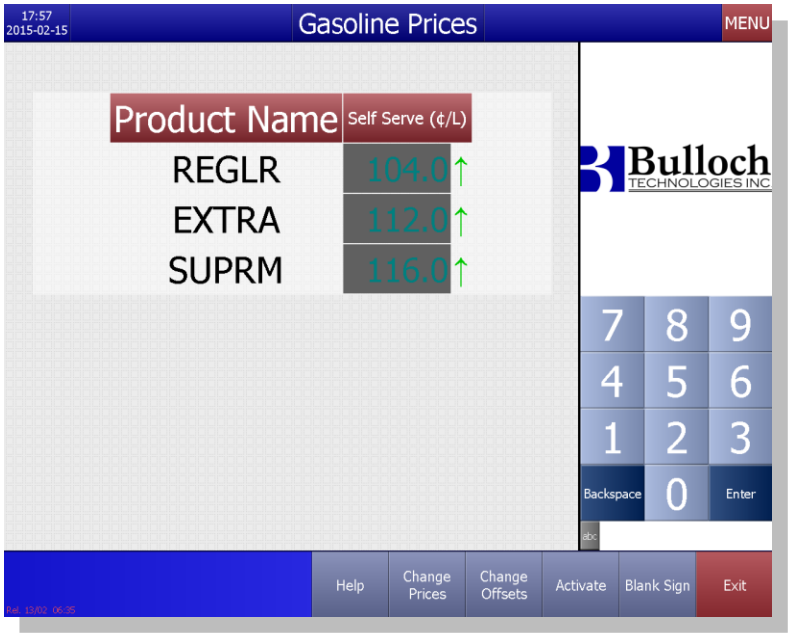
Once the offsets have been entered, the unit price of 'Regular' grade gasoline and non-gasoline fuels that your station sells must be entered.

From the *Main Menu*, select *Activities*. A box is displayed with the following choices:

1. Gasoline Prices
2. Store Operation Mode
3. Dispenser Mode
4. Customer Display Settings

The option '*Gasoline Prices'* will be highlighted.

Tap on the [1-Gasoline Prices] key. The following screen will be displayed:



Tap on the [Change Prices] key to change the base price for gasoline and normal prices for non-gasoline fuels.

A pop-up screen appears, prompting you to enter a password:

Enter your password and press the [Enter] key. The cursor appears next to the first changeable item.

Enter the price per litre for Regular and press the [Enter] key. Prices are entered with one decimal place. The decimal point is optional. For example, if you type:

1059 = 105.9

Press the [Activate] key. Prices at the pump (and on the price sign, if applicable), are activated. A price change report will automatically print to confirm new and old prices. It is important to confirm that the price change was done accurately.

On your screen, you will see the following message: ***'Fuel price change successfully activated. Press any key to continue'.***

**Note**. Price activation can take place right after you enter a price change or you can return to the gasoline prices screen to activate prices at a later time.

**Note**. Some sites may have their MID (price sign) connected to the BT9000. If the price of fuel is going up, change the MID sign (price sign) first, then the fuel price. If the price of fuel is going down, change the fuel price first, and then change the MID sign (price sign).

**Note**. The prices that can be changed are displayed in red. Prices that already have offsets applied to them cannot be changed, and are displayed in black.

## Activating Pump and Sign Prices

As mentioned before, fuel price activation can take place immediately after a price change or you can return to the Gasoline Prices screen to activate prices at a later time.

Tap on the [Activate] key. If your site does not have a price sign, the prices will be activated on the pumps and a price change report will print immediately.

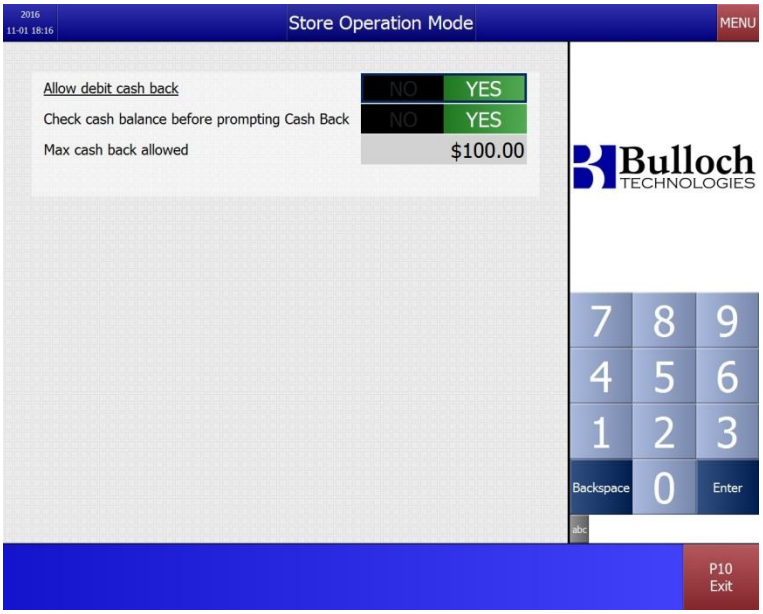
If your site has a price sign connected to the system you will see a popup window.

**Note.** You have the option of activating prices for the pumps, the price sign, or both simultaneously. If you choose 'Pumps Only', you will have to return for 'Price Sign Only' or vice versa.

**Multi Paypoint.** Setting the base price and the offsets must be done from the Main console.

## Store Operation Mode

If cash back is allowed, the following menu option will be available:



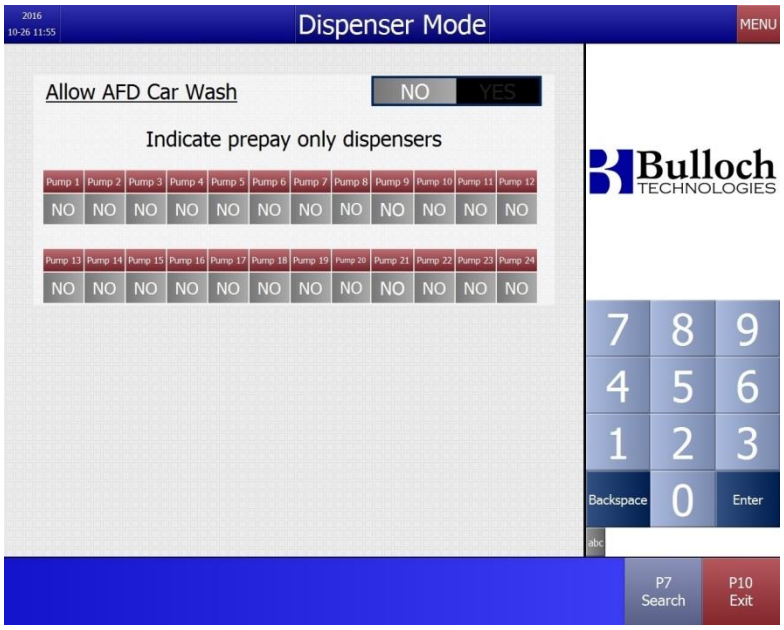
With your cursor positioned next to ‘Allow debit cash back’, tap on the ‘YES’ key.

With your cursor positioned next to ‘Check cash balance before prompting Cash Back`, tap on the ‘YES’ key.

With your cursor positioned next to ‘Max cash back allowed’, enter an amount.

Tap on the [Exit] key to save the changes.

## Dispenser Mode




## Turning the Car Wash option off at the pump

Next to the words ‘Allow AFD Car Wash’, if you modify the flag from ‘Y’ to ‘N’, when the customer inserts a card in the AFD, the AFD will not prompt the customer for a Car Wash purchase.

With your cursor positioned next to ‘Allow AFD Car Wash’, tap on the ‘N’ or the ‘Y` key.

Tap on the [Exit] key to save the changes.

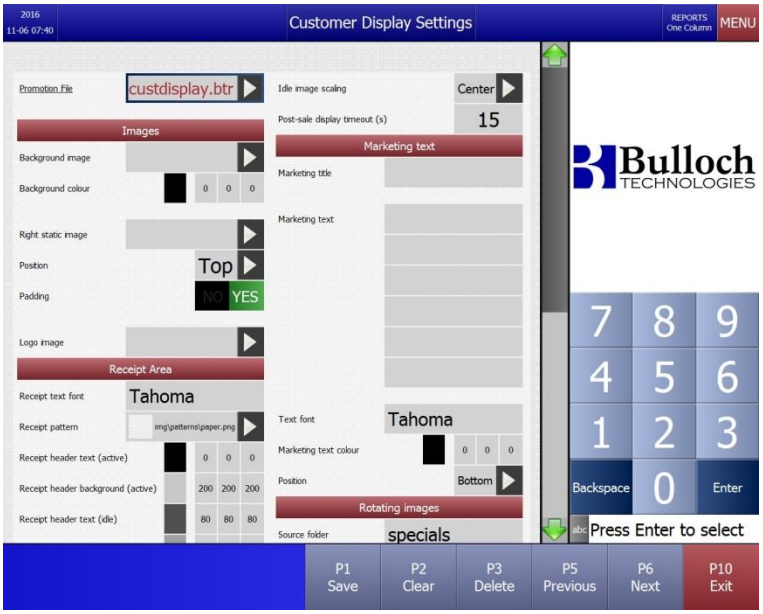
## Configuring Prepay Only Dispensers

To configure a pump to be a ‘prepay only’ pump, modify the flag from ‘N’ to ‘Y’.

Tap on the [Exit] key to save the changes.

## Customer Display Settings

If a customer display is installed, the following menu option will be available:




This menu option will be configured on the day of the system installation.

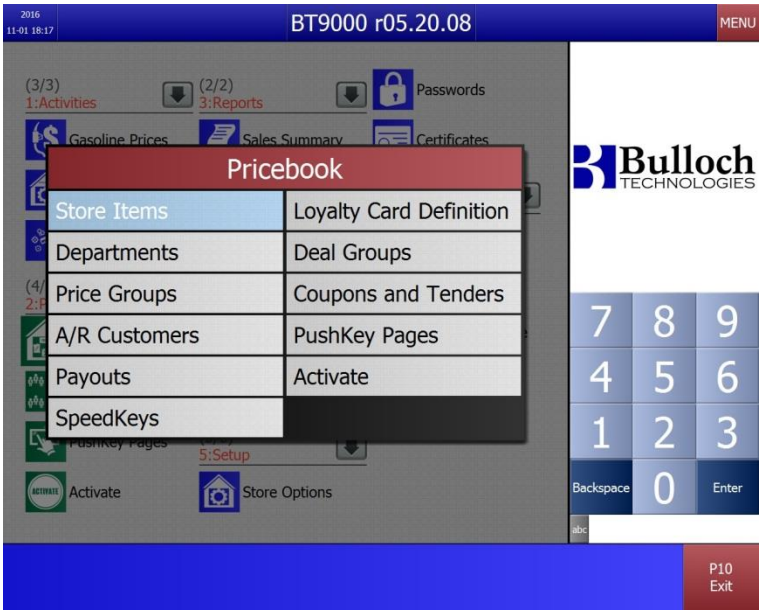
# Setting up Store Data

## Setting up Store Data

Store data refers to non-gasoline items and services sold at your station. The information is grouped into the screens shown below. This section begins with the procedures common to all store tables. Any procedures unique to a specific table are included in the field descriptions of that table.

The Pricebook menu allows you to record and save information pertaining to store items, departments, speedkeys, price groups, Loyalty Card Definition, Coupon and Tenders, pushkey pages, deal groups and your accounts for payouts and receivables.

From the *Main Menu*, select *Pricebook*. The following screen will be displayed:




**Note:** The Pricebook menu may vary from one company to another.

## Initial Set-up

For the initial set-up of store data, the sub-menus in the Pricebook menu should be configured in the order below. After the initial set-up, you can add or change an entry from these tables in any order.

| Order | Store Data Table | Description | |
|---|---|---|---|
| **1** | **Department** | **Mandatory** | Contains categories of store items and services for reporting. |
| **2** | **Price Groups** | **Optional** | Contains groups that you can assign to store items and services. Allows you to change prices by group rather than individually. |
| **3** | **Store Items** | **Mandatory** | Contains the non-gasoline items and services sold at your station. |
| **4** | **A/R Customers** | **Optional** | Contains a list of customers who pay 'on account'. |
| **5** | **Payouts** | **Optional** | Contains categories of items or services you received for which payment is issued in cash. |
| **6** | **Speedkeys** | **Optional** | Contains the speedkeys customized for your station's keypad. |
| **7** | **Loyalty Card Definition** | **Optional** | Contains the loyalty cards customized for your site. |
| **8** | **Deal Groups** | **Optional** | Contains the deal groups customized for your site. |
| **9** | **PushKey Pages** | **Optional** | Contains configuration options for pushKeys. |
| **10** | **Coupons and Tenders** | **Optional** | Contains the coupons and tenders customized for your site. |

## Maintaining Store Data

The data in the BT9000 is grouped into records for Store Items, Departments, Price Groups, A/R customers, Payouts, Speedkeys, Loyalty Card Definition, Deal Groups, Coupons and Tenders.

You can perform the following tasks in all Pricebook sub-menu screens:

- add records
- modify records
- delete records
- print a listing of records
- enter inventory counts

- enter inventory deliveries and transfers

The procedures to complete these tasks are common to all Pricebook sub-menu tables. Any procedures unique to a specific store data table are included with the field descriptions of that table.

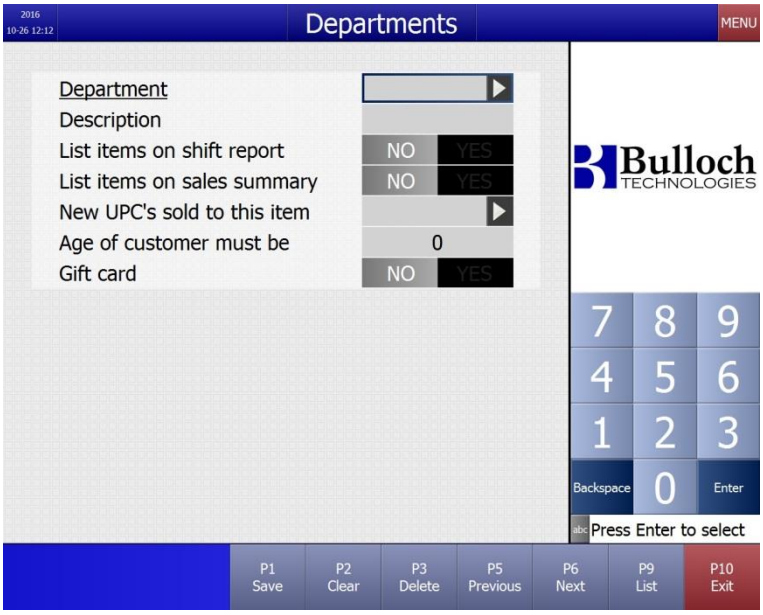
## Adding or changing records

All of the fields on a screen make up one record. The first field is an identifier. Entering a value in the first field displays all the other field values associated with it. Some fields are linked to values in other tables for quick entry.

## Departments

Departments are used to group sales of store items and services for summarization and reporting. You can create up to 999999 departments.

From the *Main Menu*, select *Pricebook/Departments*. Enter your password. The Department screen will be displayed:




Some additional instructions may appear at the bottom of the screen, depending on the field selected.

## Available function keys

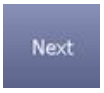
**Keys on the Cashier screen:**

Saves your entry

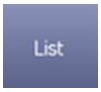
Clears the screen

Deletes the department

Displays the previous department



Displays the next department



Produces a printout of all departments on file

Exits this screen and returns to the Pricebook menu

**Keys on the Cary keyboard:**

Saves your entry

Clears the screen

Deletes the department

Displays the previous department

Displays the next department

Produces a printout of all departments on file

Exits this screen and returns to the Pricebook menu

| Field Name | What it means |
|---|---|
| **Enter Password** | Enter your password. Station employees can use this function if their password is defined with the appropriate security level. |
| **Department** | Enter a department number from 1 to 6 digits. The system checks to see if this number is currently in use. If it exists, the rest of the data is displayed on the screen. |
| **Description** | Enter the name of the department, up to a maximum of 18 characters. As a guideline, type this name in the format you prefer to see on your sales reports that print the department name. |

| | |
|---|---|
| **List Items on shift report** | Indicate if you want itemized sales for store items under this department to be listed on the Shift Report.<br> <br>**Warning.** Some departments may sell many items during a shift. This report may be quite long. |
| **List Items on sales summary** | Indicate if you want itemized sales for store items under this department to be listed on the Sales Summary.<br> <br>**Warning.** Some departments may sell many items during a shift. This report may be quite long. |
| **New UPC's sold to this item** | This function allows you to associate new items to specific departments. |
| **Age of customer must be** | Indicate the age that the customer must be to purchase items in this department. |
| **Gift card** | If this flag is set to 'YES', a pop up screen will be displayed on the screen, asking you to swipe a gift card for activation. |

## Price Groups

Price Groups are used to group multiple items as one price. For example, if your site sells all 355ml cans of pop separately by brand and by unique item numbers, you could assign all of these items to the same group since they all sell for the same price.

Assigning similar store items to a price group means that whenever the price changes for items in this group, only the price group needs to be changed. This change is automatically applied to all items under the group and saves you the time and effort of changing prices for each item.

From the *Main Menu*, select *Pricebook/Price Groups*. Enter your password. The following screen will be displayed:

## Available function keys

**Keys on the Cashier screen:**

Save — Saves your entry

Clear — Clears the screen

Delete — Deletes the price group

Previous — Displays the previous price group

Next — Displays the next price group

List — Allows you to print Price groups only or Groups and Items

Exit — Exits this screen and returns to the Pricebook menu

**Keys on the Cary keyboard:**

Saves your entry

Clears the screen

Deletes the price group

Displays the previous price group

Displays the next price group

Allows you to print Price groups only or Groups and Items

Exits this screen and returns to the Pricebook menu

| Field Name | What it means |
|---|---|
| **Enter Password** | Enter your password. Station employees can use this function if their password is defined with the appropriate security level. |
| **Price group** | Enter a number, from 1 to 13 digits, to identify the price group. If the number you enter has already been used, the rest of the information is displayed. |
| **Description** | Enter a name that describes this group. The name can be up to 18 characters. |
| **Price** | Enter a price that applies to all items belonging to this price group. |
| **Quantity Pricing** | Quantity pricing allows you to sell loose items at a discount price, even if the product does not have a UPC code for bulk packaging. You can enter a discount price for up to 3 different quantities. |

## Setting up Price Groups

Each item assigned to a price group is individually priced until a new price group is entered here. This new price applies to all store items of the same group.

Using the keypad located on the right-hand side of the screen, enter a price group number and press the [Enter] key.

Enter a name that describes this price group.

Tap the Price field. Using the keypad, enter a price that applies to all items belonging to this price group.

In the Quantity Pricing field, tap the *Qty* key located next to' A')'. Type in the number 2 and press the [Enter] key.

Still in the Quantity Pricing field, tap the *Price* key. Enter the price that you would like to charge for 2 of the same item and press the [Enter] key.

Tap the [Exit] key to exit the Price Groups screen.

Tap the [Yes] key to save the changes.

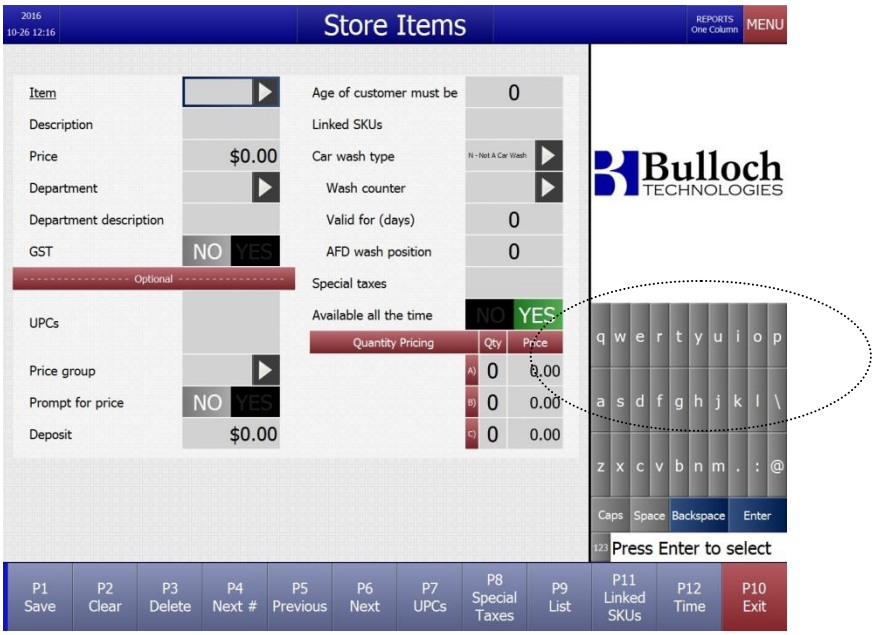
## Store Items

Store items refer to non-gasoline merchandise and services sold at your station such as cigarettes, candy bars and convenience goods. SpeedKeys can be assigned to each item for faster entry at the cash register. Refer to the section on SpeedKeys for details.

From the *Pricebook* Menu, select *Store Items*. Enter your password when prompted. The following screen will be displayed:

This screen allows you to view and update items for sale in Cashier mode.

For text entry, tap on the [abc] key located on the keypad, immediately under the [Backspace] key. To return to the numeric keypad, tap on the [123] key located under the [Caps] key.




## Available function keys

**Keys on the Cashier screen:**

| | | | | | |
|---|---|---|---|---|---|
| Save | Saves your entry | Previous | Displays the previous store item | List | Displays a Print Item List window |
| Clear | Clears the screen | Next | Displays the next store item | Next # | Displays the first available item number |
| Delete | Deletes the store item | UPCs | Displays a popup for entering UPC numbers | Exit | Exits this screen and returns to Pricebook menu |
| Time | Displays specific days and times when an item can and/or cannot be available for sale. The default is 'Y' – available at all times | Special Taxes | Handles special taxes | | |

**Keys on the Cary keyboard:**

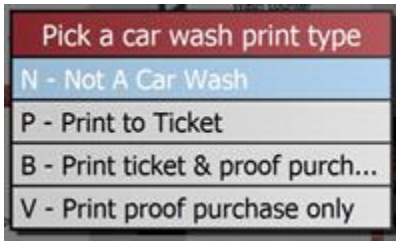
| | | | | | |
|---|---|---|---|---|---|
| P1 Save | Saves your entry | P5 Previous | Displays the previous store item | P9 List | Displays a Print Item List window |
| P2 Clear | Clears the screen | P6 Next | Displays the next store item | P4 Next # | Displays the first available item number |
| P3 Delete | Deletes the store item | P7 UPCs | Displays a popup for entering UPC numbers | P10 Exit | Exits this screen and returns to Pricebook menu |
| P12 Time | Displays specific days and times when an item can and/or cannot be available for sale. The default is 'Y' – available at all times | P8 Special Taxes | Handles special taxes | | |

| Field Name | What it means |
|---|---|
| **Enter Password** | Enter your password. Station employees can use this function if their password is defined with appropriate security level. |
| **Item** | Unique code assigned to a product. Numeric and leading zeros are ignored. Enter a number up to 13 digits. If the number you enter matches the item number of a store item currently on file, its details will be displayed. |
| **Description** | Enter a description of the item up to 18 characters. This description will be printed or displayed on reports, receipts and store item listings. |
| **Price** | Enter the price with or without the decimal point. A price of zero is valid. |
| **Department** | Enter a valid department number for this item. If you don't know the number, tap on the field next to the word 'Department' for a list of valid codes. Select the department and press the [Enter] key again to select it. |
| **Department description** | The name of the department selected is displayed on the screen. |
| **GST** | Y indicates that GST is to be applied to sale. |
| **PST** | Y indicates that PST is to be applied to sale. |
| **UPCs** | Scan the UPC number that is on the item label. If you are not scanning the UPC, you **must** press on the field next to UPCs and enter the code manually. |

| | |
|---|---|
| **Price group** | Code for assigning items to groups for ease of general price changes. Used primarily to maintain inventory by UPC. Refer to Price Group section for more details. |
| **Prompt for Price** | N (indicates that price many not be overridden in Attendant mode).<br>Y (indicates that customer care representative will be prompted to enter price when selling). |
| **Deposit** | Enter the deposit amount associated with this item. It is important to remember that GST and PST do not apply to deposits. |
| **Age of customer must be** | By inserting an age such as 19 in the field entitled 'Age of customer must be', a pop-up window will be displayed when selling the product. |
| **Car wash type** | Indicates if the item can be printed on a car wash ticket. There are 4 options. |
| **Wash counter** | This is where you will be linking the car wash product codes to the car wash relays (or counters). |
| **Valid for** | Identifies how many days the car wash ticket is valid for. |
| **AFD wash position** | Configure the car wash types in the order that you would like them to appear outside at the AFDs. |
| **Special taxes** | This tax is used at locations that have prepared foods e.g. Tim Horton's. Tax rules on food differ from the tax rules on other non-gas items. |
| **Available all the time** | This flag allows you to select specific days and times when an item can and/or cannot be available for sale. The default is 'Y' – available at all times. |
| **Quantity Pricing** | This function also allows you to set up Quantity pricing. For example, you may offer a special price of $7.00 for two packages of cigarettes. Under the QTY column, enter the number 2; under the Price column, enter 7.00. Press [P1] Save to save. |

## Configuring Store Items

For car wash items, you will have to define a print type. See the following screen:




**1 N – Not A Car Wash** Not a car wash.

**2 P – Print to Ticket** Applies to primary car wash items. Prints a ticket for every sale.

**3 B – Print ticket & proof purchase** Prints a ticket and a receipt.

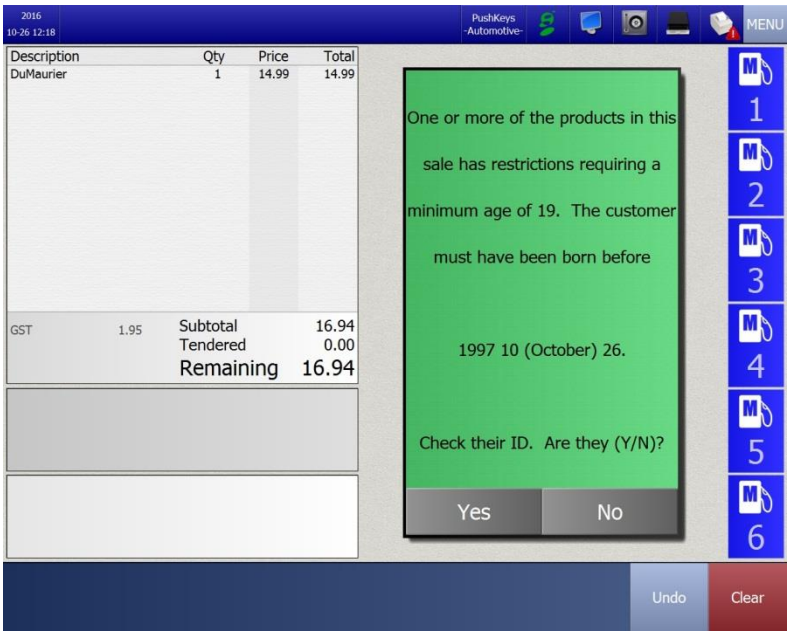
**4 V – Print proof purchase only** Prints a receipt only.

To view items (for viewing or updating) use [Previous] to scroll backwards, [Next] to scroll forwards, or enter Item number and press [Enter]. After entry or update, press [Save].

## Age of customer must be

By inserting an age such as 19 in the field entitled ‘Age of customer must be’, a pop-up window will be displayed when selling the product.
In the next example, when the ITL cigarette was set up, ‘19’ was configured as the age that the customer must be to purchase the product.

When you sell the product, a popup window appears to remind you to check the customer’s ID.



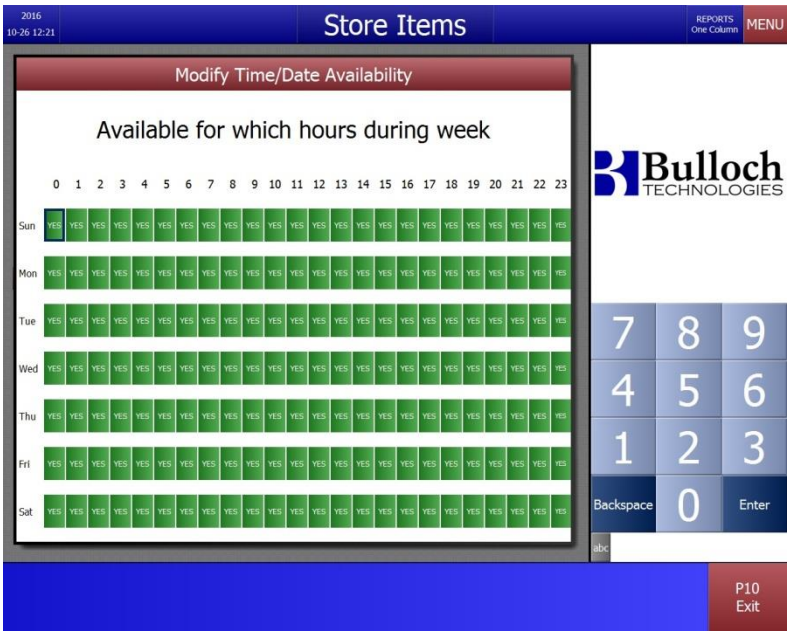

If the customer cannot provide adequate proof of age, press the ‘No’ key and the sale will be cancelled.

## AFD Wash Position

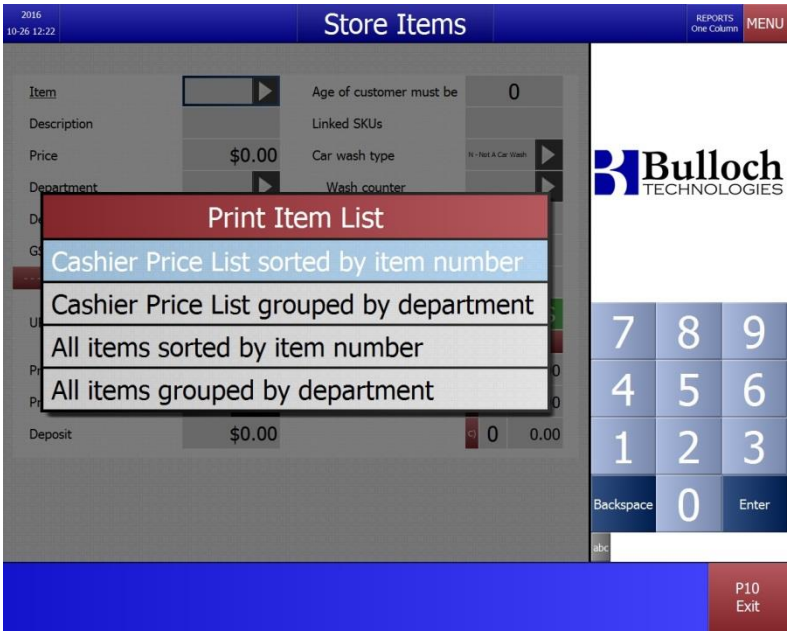
This flag setting allows you to identify the order in which the car wash types will appear outside at the AFDs.

## Available all the time

This flag allows you to select specific days and times when an item can and/or cannot be available for sale. The default is ‘Y’ – available at all times.




To print a listing of the items set up in the Store Items menu, tap the [List] key. A 'Print Item List' pop-up window will appear, providing you with the four following options:



Tap on one of the reports.

Answer ‘Yes’ to the message ***‘Is the printer ready Y/N’***. The selected list

will print.

Tap on the [Exit] key to exit out of the popup window.

**Note**. Cashier Price List and Cashier Price List Sorted by Department will probably be most useful to you.

## Adding or changing records

Enter the appropriate information for each of the fields on the screen.

Tap on the [abc] key.

Using the keyboard displayed on the screen, type in the customer's name and tap on the [Enter] key.

Tap on the [Enter] key to accept the change and proceed to the next field.

To move from one field to the other, simply tap on another field.

Tap on the [UPCs] key should you wish to add or link a UPC code to the item.

Enter the number using the numeric keys on the keypad. Sites that have scanning capability can also enter the UPC by scanning it in at this point.

Tap on the [Save] key to save your entry without leaving the screen. The screen is cleared, ready for your next entry.

When you have entered all the new records and/or changes required, tap on the [Exit] key to return to the Pricebook Menu. If you have not yet saved your entry, another popup screen is displayed asking you to do so.

For a field where you have to provide data, e.g. Department, if you tap on the key next to the word Department, a 'Departments List' popup window will be displayed, detailing all of the departments that are set up in your system.

Highlight the appropriate department and press the [Enter] key again to select it.

## Deleting store records

Some fields are linked to fields in other tables. For example, price groups and departments are assigned to store items. Before you delete a record, make sure that it is no longer linked to other table records.

To delete a UPC code, tap on the UPC. A popup window is displayed, detailing the UPC's that are linked to the item number.

Highlight the UPC that you wish to delete and tap on the [Delete] key.

Tap on the [Exit] key to exit from the popup window.

To delete an entire record, type in the item number to display the record on the screen. Tap on the [Delete] key.

A popup screen appears, asking you to confirm the deletion. Tap on the [YES] key to delete the record.

## A/R Customers

Accounts Receivable customers do not pay at the time of their purchases. They make their payments on their account at a later date. The payments can be processed at the cash register as well.

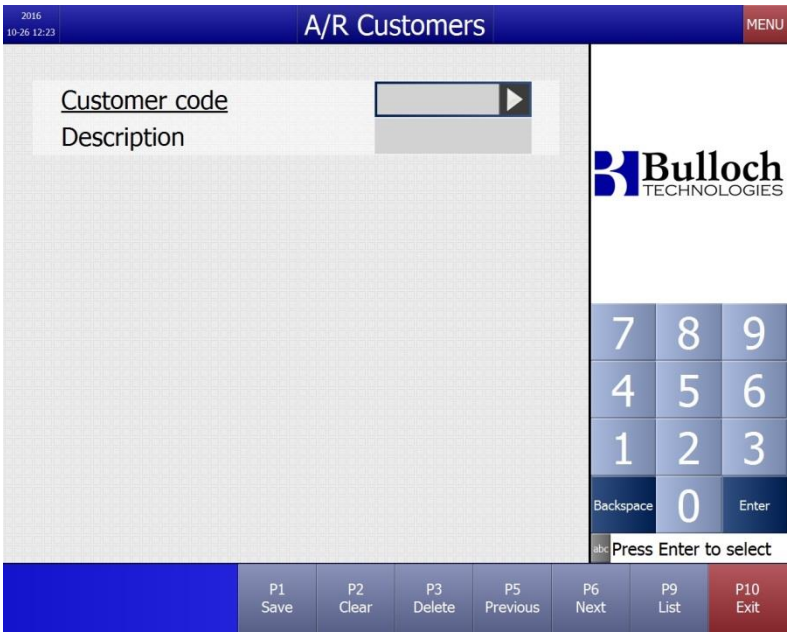
**Note**. The BT9000 does not keep weekly/monthly records of purchases processed using the Accounts Receivable function. The BT9000 does not produce Accounts Receivable statements.

Account Receivable details will be captured and printed out on the Shift Report/Daily Summary report.

If you choose to use this functionality, you may want to record your customers' accounts receivable information in a separate ledger.

'On Account' sales are entered using the [On A/R] key. Payments are processed using the [Pay A/R] key on the cashier screen. Each A/R customer must be set up in the system before you can process 'on account' sales and accept 'on account' payments.

From the *Main Menu*, select *Pricebook/A/R Customers*. Enter your password. The following screen will be displayed:




## Available function keys

**Keys on the Cashier screen:**

Save — Saves your entry

Clear — Clears the screen

Delete — Deletes the A/R customer

Previous — Displays the previous A/R customer

Next — Displays the next A/R customer

List — Allows you to print a list of A/R customers configured in the system

Exit — Exits this screen and returns to the Pricebook menu

**Keys on the Cary keyboard:**

Saves your entry

Clears the screen

Deletes the A/R customer

Displays the previous A/R customer

Displays the next A/R customer

Allows you to print a list of A/R customers configured in the system

Exits this screen and returns to the Pricebook menu

| Field Name | What it means |
|---|---|
| **Enter Password** | Enter your password. Station employees can use this function if their password is defined with the appropriate security level. |
| **Customer Code** | Enter a number, up to 13 digits, to identify the customer. This code can be entered by the cashier for 'on account' sales and payments. |
| **Description** | If the customer code is already on file, the customer's name is displayed automatically, otherwise enter the name of the new customer. |

To set up a new customer, tap on a number and then tap on the [Enter] key.

Tap on the [abc] key.

Using the keyboard displayed on the screen, type in the customer's name and tap on the [Enter] key.

Tap on the [Save] key to save the entry.

To generate a printout of all customers on file, tap on the [List] key. A popup window will appear, asking you - 'Is printer ready'.

Tap on the [YES] key.

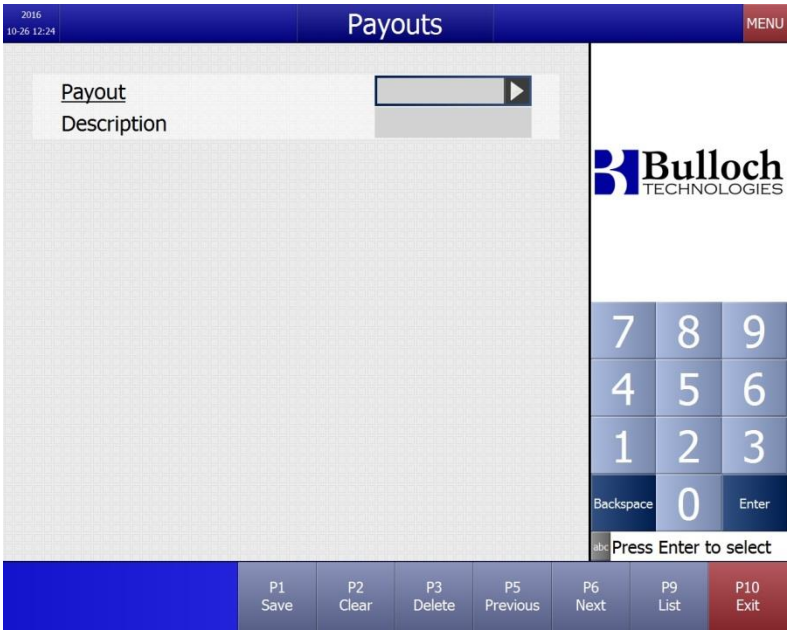
Tap on the [Exit] key to exit the screen. You will be returned to the *Pricebook* menu.

If you would like to look at other customers set up in your A/R file, tap on the [Previous] key to scroll backward, or the [Next] key to go forward.

## Payouts

Payouts refer to cash payments from the cash register for various incidentals such as newspaper deliveries, lottery payouts (winners), drive-offs. These categories are assigned a payout code, which is entered by the cashier tapping on the [Payout] key on the cashier screen.

From the *Main Menu*, select *Pricebook/Payouts*. Enter your password. The following screen will be displayed:



## Available function keys

**Keys on the Cashier screen:**

Saves your entry

Displays the next payout code

Clears the screen

Allows you to print a list of payout codes configured in the system

Deletes the payout code

Exits this screen and returns to the Pricebook menu

Displays the previous payout code

**Keys on the Cary keyboard:**

Saves your entry

Displays the next payout code

Clears the screen

Allows you to print a list of payout codes configured in the system

Deletes the payout code

Exits this screen and returns to the Pricebook menu

Displays the previous payout code

| Field Name | What it means |
|---|---|
| **Enter Password** | Enter your password. Station employees can use this function if their password is defined with the appropriate security level. |
| **Payout** | Enter a number, up to 13 digits, to represent a category for which a payout can be made. This code is required when a payout transaction is processed at the cash register. If the code you enter already exists, the description is displayed. |
| **Description** | Enter a description of the payout up to a maximum of 18 characters. |

To enter a new Payout code, enter a numeric code, up to 13 digits and press the [Enter] key. Your cursor should be positioned next to 'Description'.

Tap on the [abc] key.

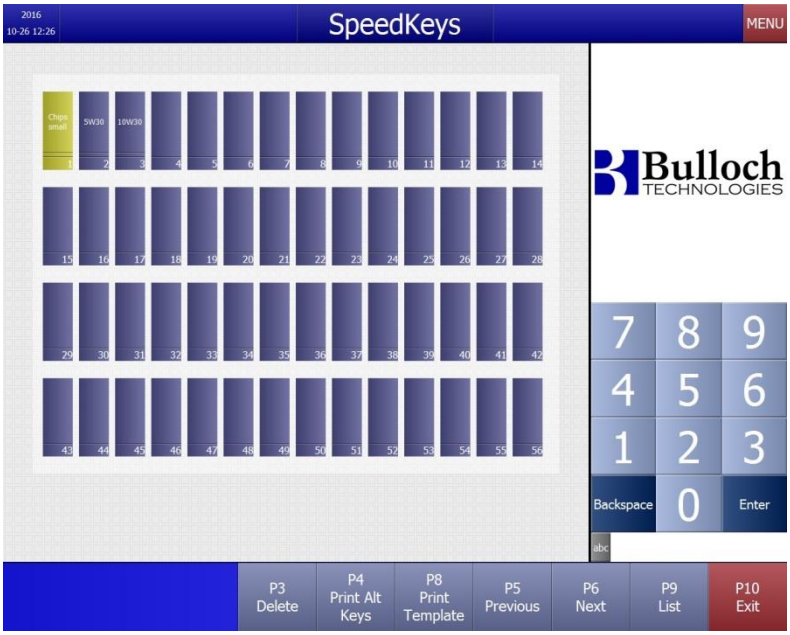
Using the keyboard displayed on the screen, type in the description of the payout.

Tap on the [Exit] key and tap on the [Yes] key to save the changes.

## Speedkey Lookup Table

Each key on the speedkey table can be configured to an item number for fast data entry. Instead of typing the item # simply press the appropriate speedkey. The item description is displayed on the cashier's screen.

The speedkey tablet has 56 primary keys and 56 secondary keys, when you press the [Shifted] key. From the *Main Menu*, select *Pricebook/Speedkeys*.



## Available function keys

**Keys on the Cashier screen:**

Deletes the speedkey

Displays the next speedkey

Prints a list of the configured speedkeys

Allows you to print a template of the speedkeys configured in the system

Displays the previous speedkey

Prints a list of the configured speedkeys

Exits the screen and returns to the Pricebook menu

**Keys on the Cary keyboard:**

Deletes the speedkey

Displays the next speedkey

Prints a list of the configured speedkeys

Allows you to print a template of the speedkeys configured in the system

Displays the previous speedkey

Prints a list of the configured speedkeys

Exits the screen and returns to the Pricebook menu

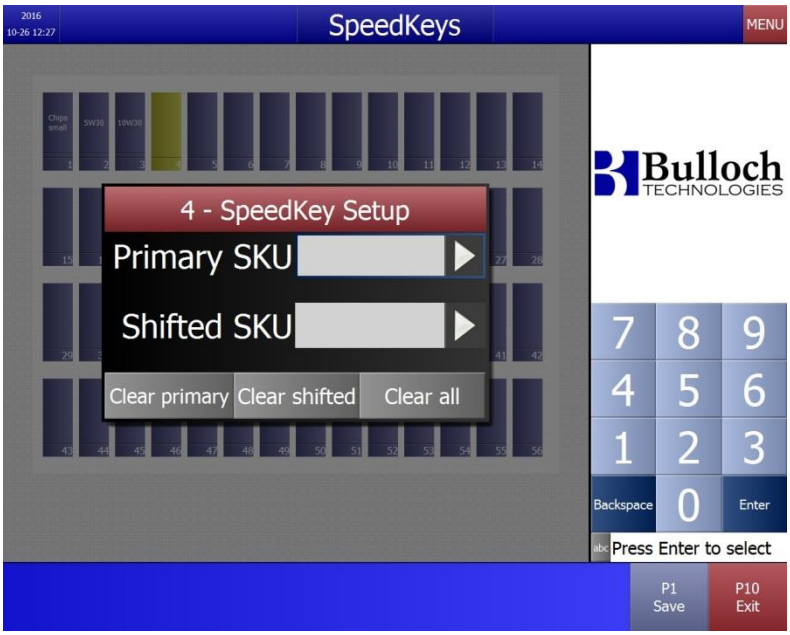
## Moving Around the Speedkey Lookup Table

There are two methods to move around the speedkey grid. You can move around using the keypads in the Speedkeys menu or the manager's keyboard.

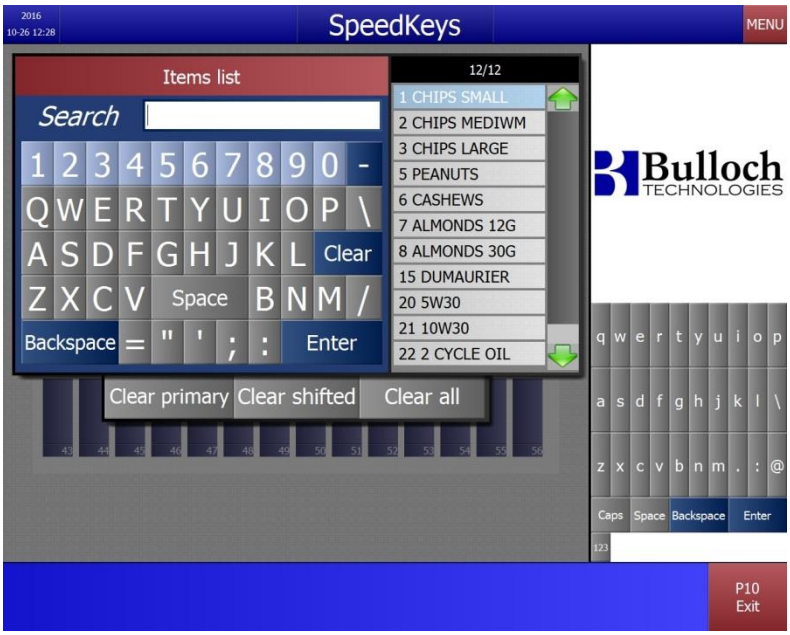
### Using the keypads in the Speedkeys menu

Press the key on the tablet that you want to work with. The key # turns yellow.

Tap on the key. The following screen is displayed:




Tap on 'Primary SKU'. The 'Items List' menu is displayed:




Select an item from the menu. If the item you want is not displayed on the screen, press the green 'down' arrow or press the [Next] key.

Tap on [Exit] if you do not want to set up a secondary key.

To clear a primary key, tap on [Clear primary].

To clear the entire key, tap on [Clear all].

**Setting up a secondary key**

Tap on the desired key.

Tap on 'Shifted SKU'.

The 'Items list' window will be displayed.

Select an item from the menu.  If the item you want is not displayed on the screen, press the green down arrow or press the [Next] key.

To clear the shifted key, tap on [Clear shifted].

Tap on the [Exit] key and tap on the [Yes] key to save the changes.

## Using the manager's keyboard

Using the manager's keyboard, locate your arrow keys.

The [→] key moves the cursor forward and the [←] key moves the cursor backwards.

Using the arrow key, select another speedkey.

From the popup window, select [Primary SKU]. Select the item number that you want to configure onto the key.

If the item you want is not displayed on the screen, using the down arrow key, arrow down until you locate the item and tap on the item.

Press [Exit] to exit and save your changes.

## Configuring Deal Groups

A deal group is a combination of two or more items to create a price that is different from the individual items sold.

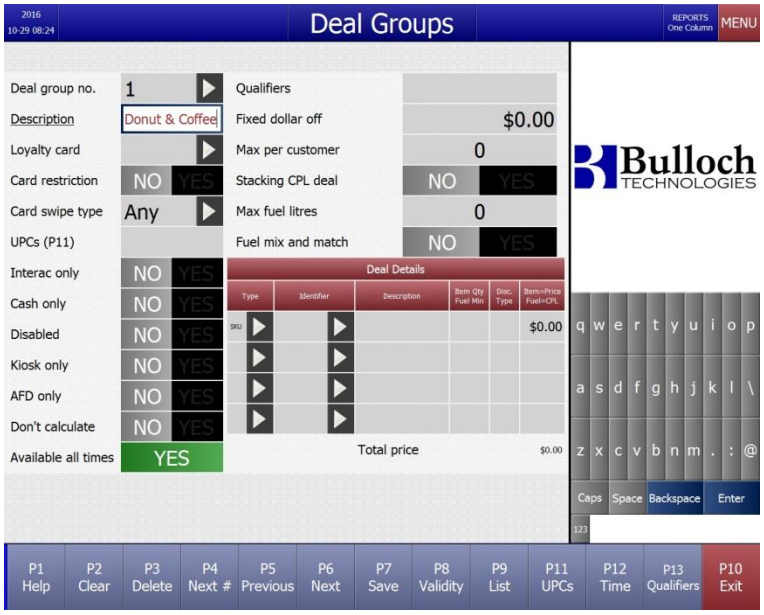
From the *Main Menu*, select *Pricebook/Deal Groups*. Enter your password. The following screen will be displayed:

| Field Name | What it means |
|---|---|
| **Enter Password** | Enter your password. Station employees can use this function if their password is defined with the appropriate security level. |
| **Deal Group no.** | Enter a number, up to 13 digits, to represent a category for which a payout can be made. This code is required when a payout transaction is processed at the cash register. If the code you enter already exists, the description is displayed. |
| **Description** | Enter an English description of the payout up to a maximum of 18 characters. |
| **Loyalty card** | Select a loyalty card. |
| **Card restriction** | Enter [Yes] or [No] to card restrictions. |
| **Card swipe type** | Enter a card swipe type – Any, EMV, Proximity or Swipe. |
| **UPCs** | Tap on the [P11] tab to add a UPC. |
| **Interac only** | Enter [Yes] or [No]. |
| **Cash only** | Enter [Yes] or [No]. |
| **Disabled** | Enter [Yes] or [No]. |

| | |
|---|---|
| **Kiosk only** | Enter [Yes] or [No]. |
| **AFD only** | Enter [Yes] or [No]. |
| **Don't calculate** | Enter [Yes] or [No]. |
| **Available all times** | Enter [Yes] or [No]. |
| **Qualifiers** | Identify the qualifiers. |
| **Fixed dollar off** | Enter a fixed dollar off. |
| **Max per customer** | Enter a max per customer. |
| **Stacking CPL deal** | Enter [Yes] or [No]. |
| **Max fuel litres** | Enter the maximum fuel litres. |
| **Fuel mix and match** | Enter [Yes] or [No]. |

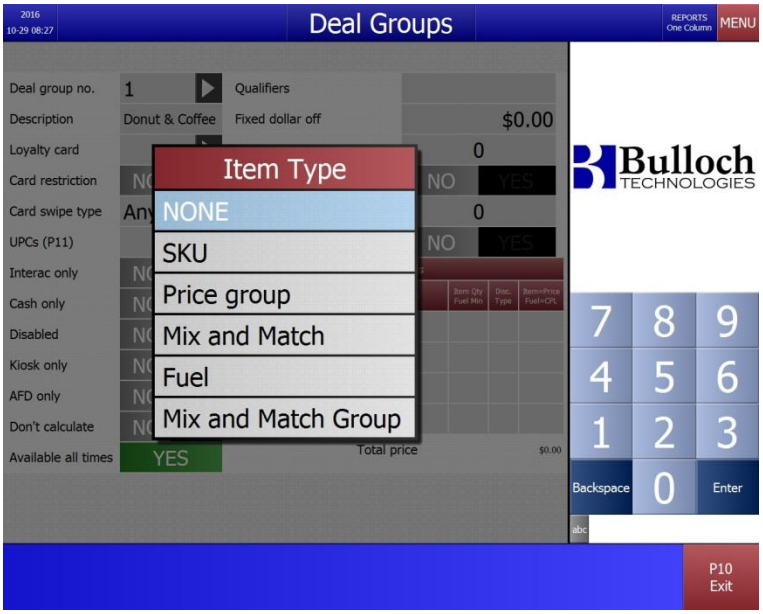
Tap on the [Deal group no.] tab and enter a number.

Tap on the [Description] tab and enter a description for the Deal Group.



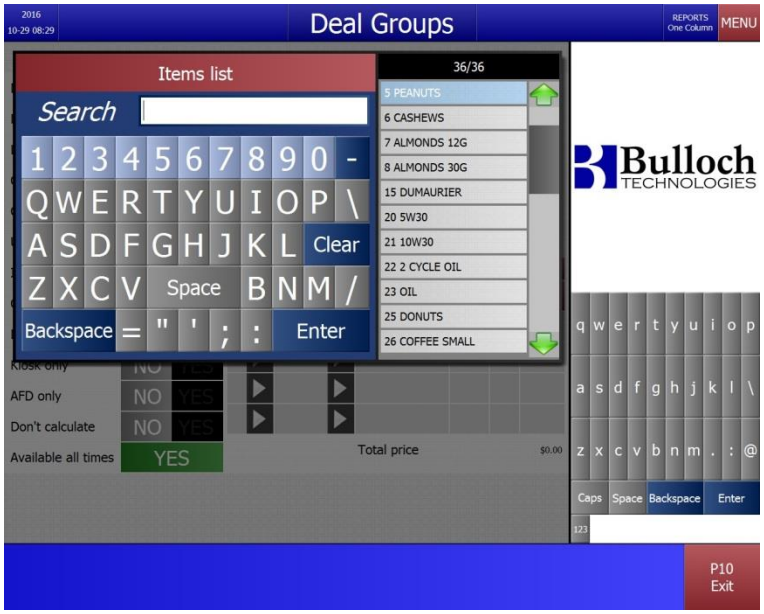
Tap on the first tab under the [Type] column.

An [Item Type] window will be displayed. Arrow down and select [SKU].




Tap on the first tab under the [Identifier] column.

An [Items list] window will appear. Select an item from the drop down window.

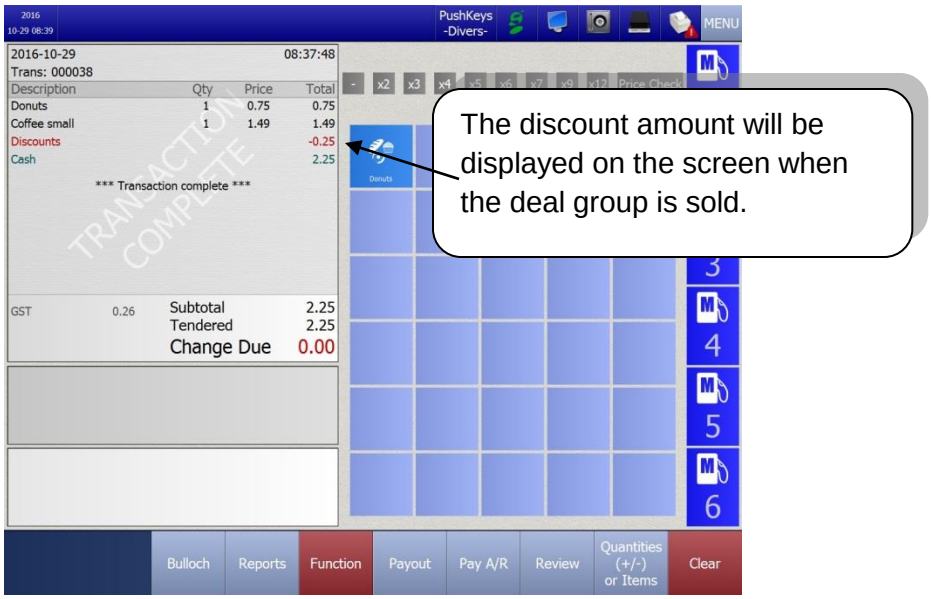



Under the [Item Qty] tab enter the number 1.

Under the [Item-Price] tab, enter a discounted price for the item. Repeat this process again for the 2nd item.

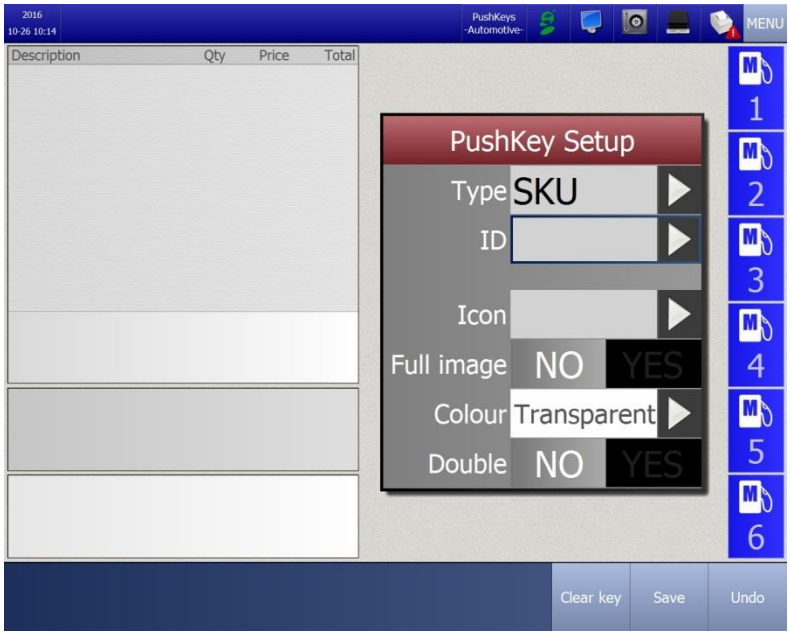
Tap on the [P10] to exit. Activate store data.

The discount $$ will appear on the cashier screen when the deal group is sold.




## Configuring Push Keys

To configure a push key, press and hold your finger on the push key. The following screen will be displayed:

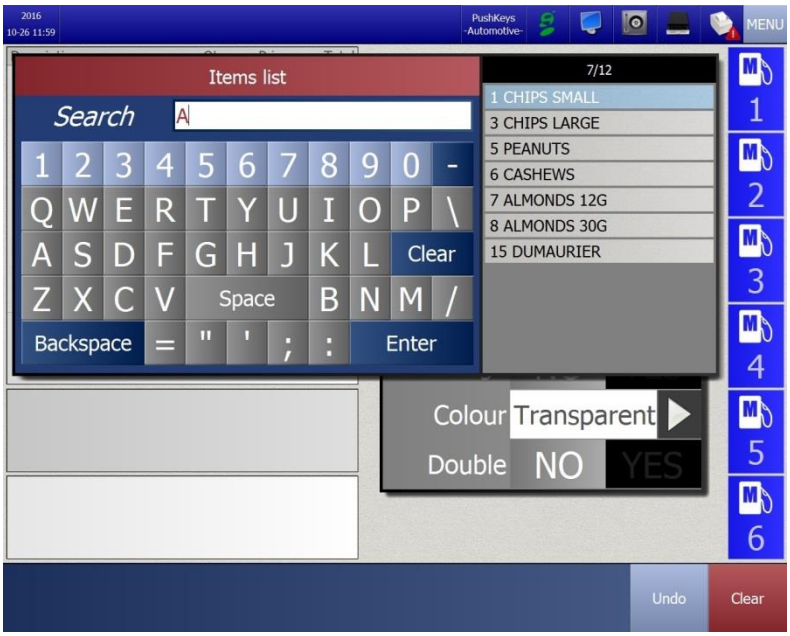



Tap on the [Type] field 2 times. The following screen will be displayed:

Choose a push key type. For this example, we will configure the push key with a SKU. Tap on SKU. Tap on [ID] 2 times. The following screen will be displayed:

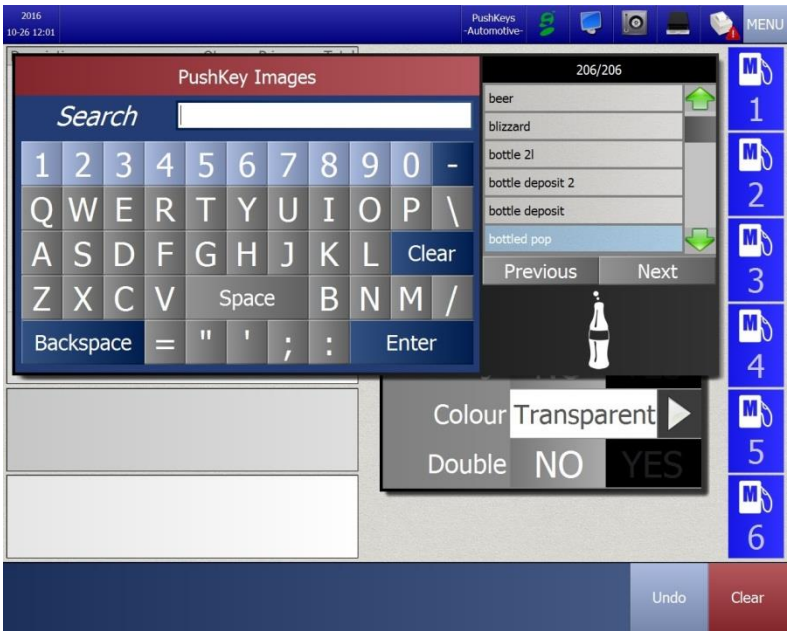
If you know the name of the item, type it in the [Search] box. When you type

the first letter of the item, a list of items that begin with that letter will be displayed on the screen.




Select the item from the list.

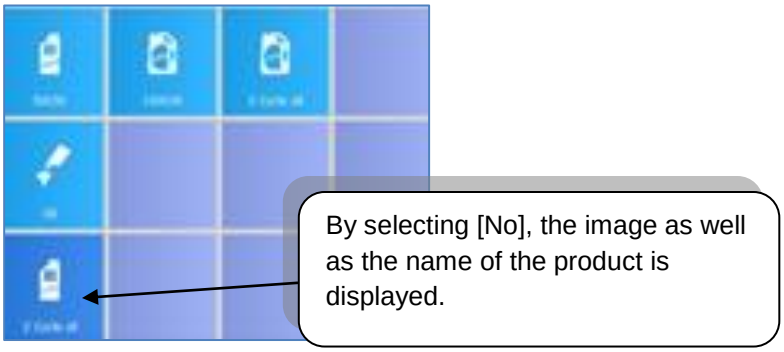
Tap on [Icon] 2 times and select an image from the pop up box.



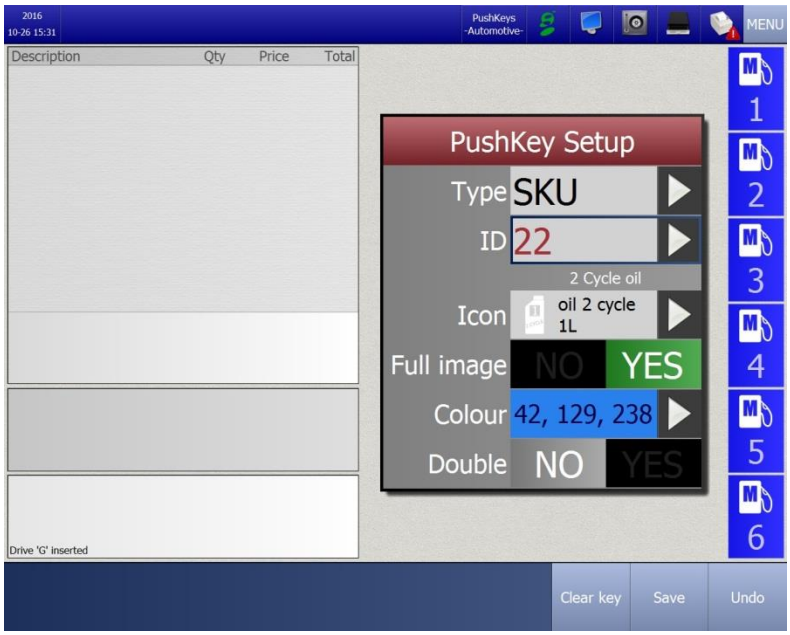
Tap on [Full image] and select No or Yes.

In the following example, we selected [No].

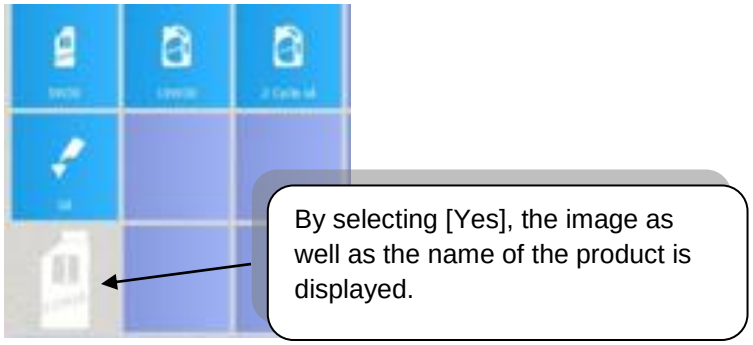
If you select [No], the image as well as the name of the product will be displayed in the pushKey.



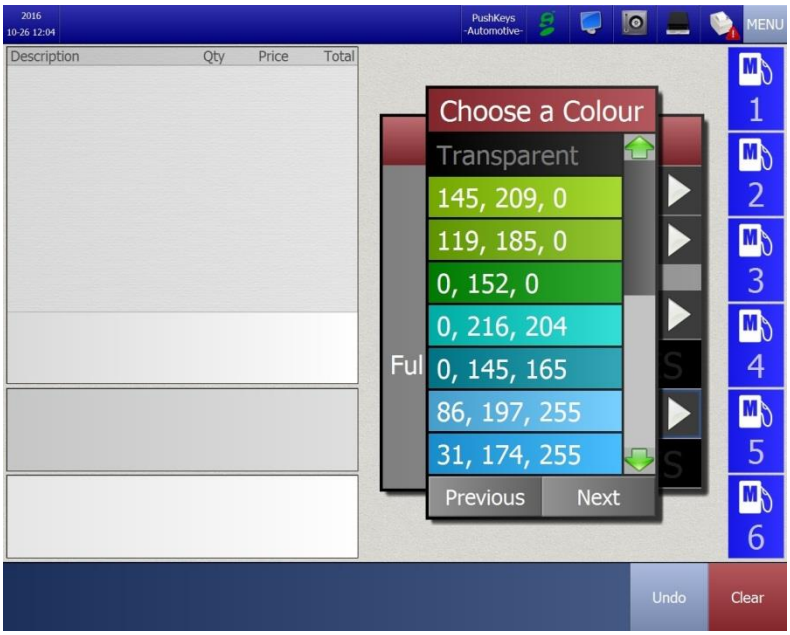

In this next example, we selected [Yes].




If you select [Yes], only the image of the product will be displayed in the pushkey.



Tap on [Color] 2 times and select a color from the pop up box.



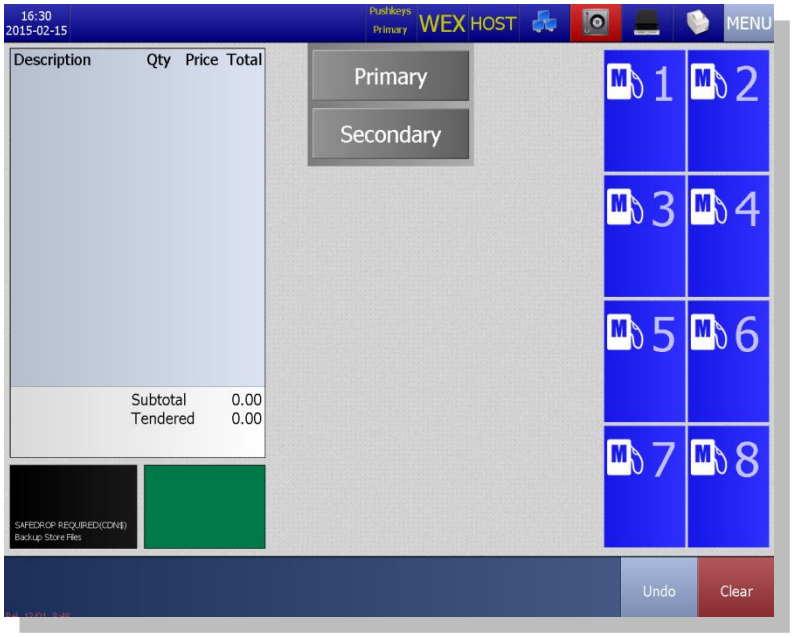

Tap on the [Save] key. The pushKey is configured.

**To configure a double key**

If you want to configure a pushKey that spans across the area of 2 push keys, tap 2 times on the [Double] icon and select the [YES] key.

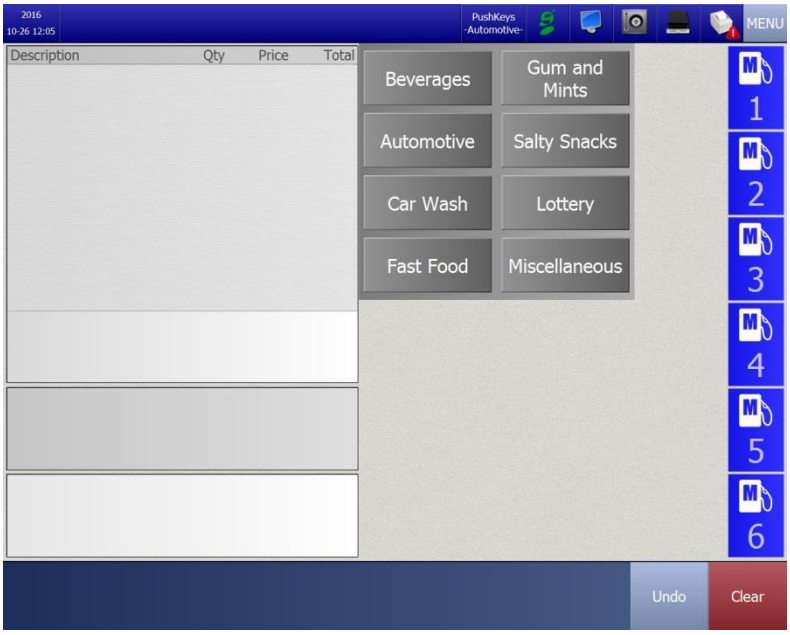
**To configure additional pushKeys**

Tap on the [Pushkeys] icon, located on the top row of the cashier screen. Initially, when your system is installed, the following screen will be displayed:

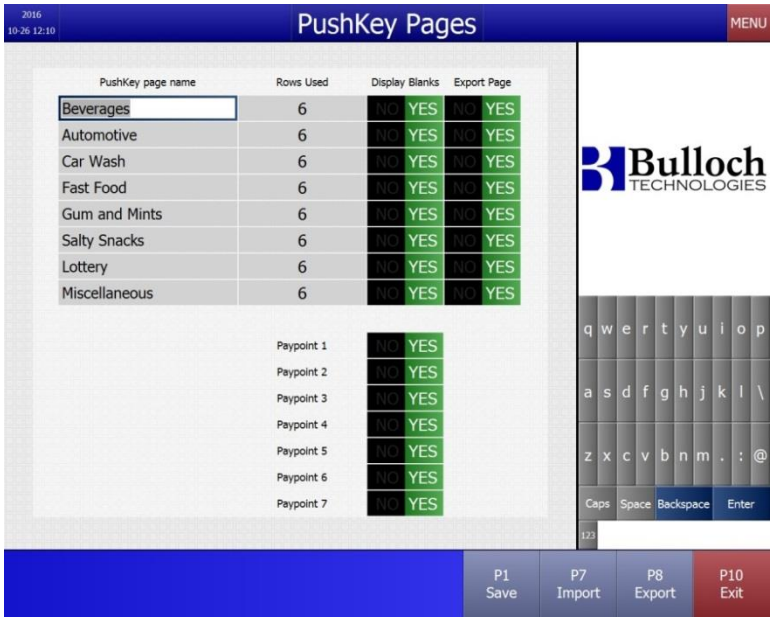



Tap on the [Secondary] key and repeat the steps for configuring a pushKey.

**Note:** You can configure up to 8 pages of pushKeys. As well, you can assign a unique name to each pushKey page.

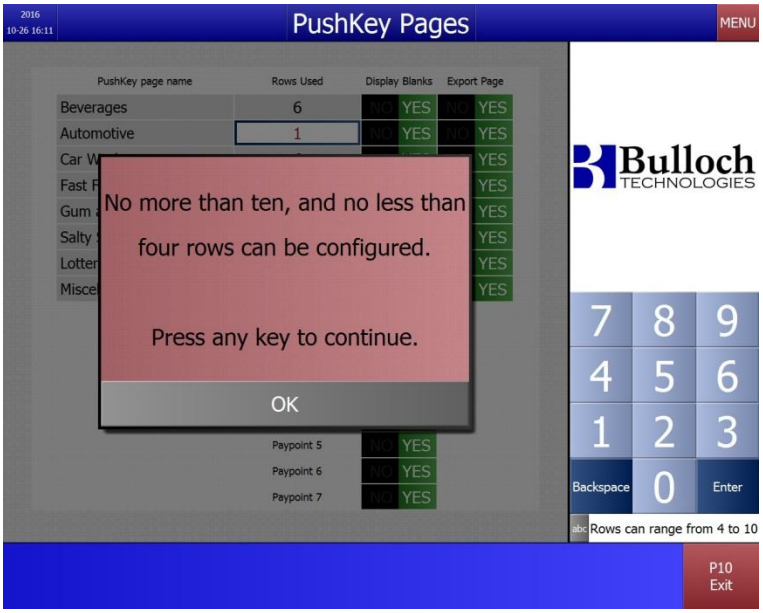


From the Pricebook menu, select PushKey Pages.

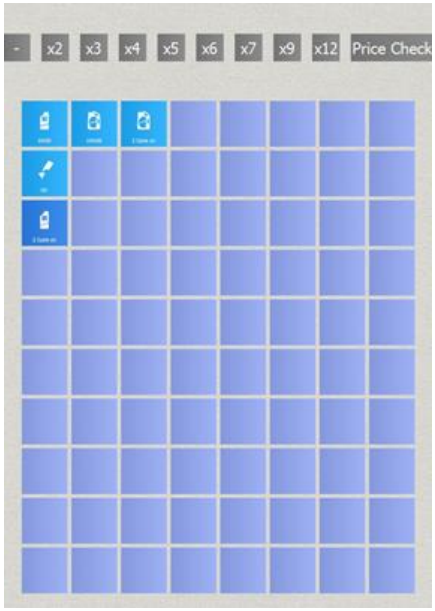



Tap on the field under [PushKey page name]. Enter a name for the pushKey set.

You can configure how many rows of pushKeys will be displayed on the cashier screen. However, no more than ten and no less than four can be configured.



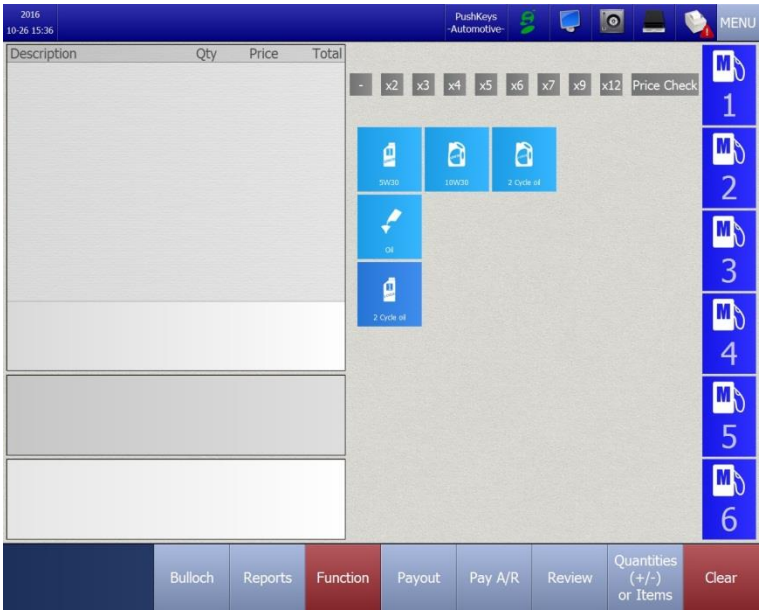
In the next example, we selected 10 rows:




In the next example, we selected 6 rows:

Functionality allows you to choose whether or not to display blanks on the cashier screen.

If you answer [No] to display blanks, only the pushKeys that are configured will be displayed on the cashier screen:




**Export page:** Answer [Yes] or [No] to indicate if you allow the pushKey pages to be exported to other paypoints.

**Paypoint:** Identify the paypoints where the pushKeys will be configured.

## Activate Store Data

Before you can use the information that has been set up or changed in any of the Pricebook screens, you must first activate the data.
From the *Main Menu*, select *Pricebook/Activate*. The following screen will be displayed:

Tap on the [Yes] key.

# Selling Gasoline

## Selling Gasoline

There are many stations that sell other fuels such as diesel and propane in addition to gasoline – which is not a problem for the BT9000. Whether you have standard self-serve or full-serve pumps, the BT9000 can manage your sales.

This chapter describes how to sell fuel on standard, manual and AFD pumps. It also describes the pump status indicators, how to handle stacked sales, how to accept payment for pre-paid gasoline sales, how to cancel prepayments and how to monitor, halt and restart pumps.

## Types of gasoline pumps

The BT9000 connects to all common makes of pumps. There are three types of pumps that gasoline can be sold from:

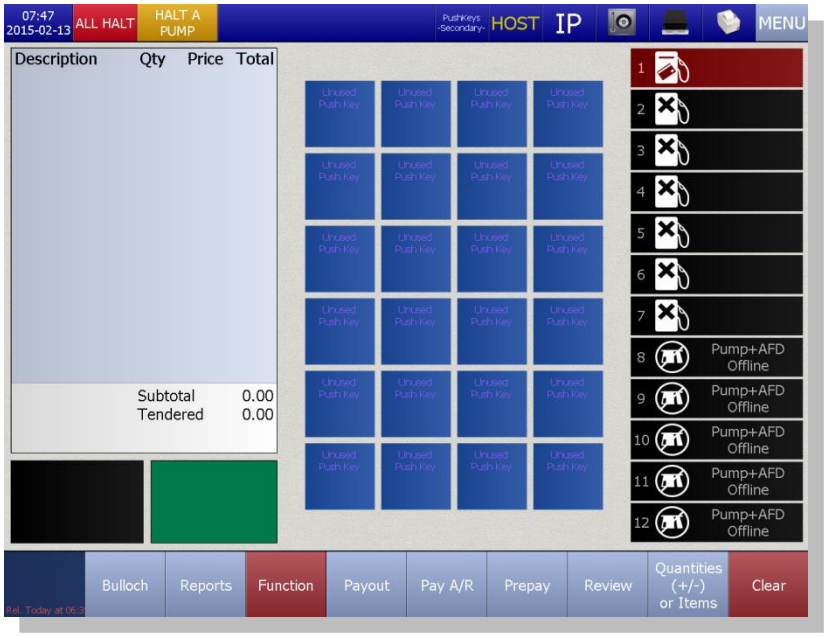
1. Standard pumps that are connected to the BT9000
2. Manual pumps that are not connected to the BT9000
3. AFD – Automated Fuel Dispenser – which are connected to the BT9000 and allow customers to pay directly at the pump with a bank credit or debit card.

## Monitoring pump status

The BT9000 can monitor up to 24 fuelling positions and includes an additional pump to handle voids. Each number except for the last one matches a physical pump.

Pump numbers appear either on the right side of the cashier screen or the left side of the cashier screen, depending on your site's configuration. Self-serve pump numbers are displayed in red, full-serve pump numbers are displayed in green, manual pumps are displayed in blue and pumps that are offline are displayed in black.

The current pump status will always be shown in the square beside each pump number on the screen.




**A voided fuel sale will be located on the bottom bar of the cashier screen or on the top bar of the cashier screen, depending on your site's configuration.**

## Status indicators

The current pump status will always be shown in the square beside each pump number on the screen.

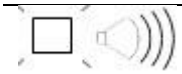
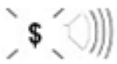
- AFD pumps are red and have a symbol of a pump with a credit card across it.
- Manual pumps are displayed in blue with the first letter of the product associated with the pump or in the case of it being multi-product configured the letter 'M'.
- Standard full-serve pump #'s are green.
- Standard self-serve pump are red and have a symbol of a pump.

The amount of the current sale is displayed to the right of the status box. Each pump can hold sales information for two sales.

A complete list of status indicators are shown in a table below.

## AFD Messages

AFD messages appear in the same area as the sale status. They tell the operator what is going on at the pump. A complete list of AFD messages appears at the end of this chapter.

| Status box | Description | What it means |
|---|---|---|
| | Pump on a red square | The pump is idle. |
| | Credit card on a red square | The AFD pump is idle. |
|  | A white flashing square and continuous beeping | The pump nozzle has been lifted. You must authorize the pump before it can be used. |
| | Pump on a gold square | The pump has been authorized, but is not yet being used or the grade has not been selected. |
| | Picture of a nozzle on a green square | The customer has started pumping. |
| | $ on a purple square and a double beep | The pump nozzle has been replaced and the sale amount is on the screen. |
|  | Flashing $ and continuous beep | A second customer has lifted the pump nozzle before the first sale was cashed out. |
| | $ on a purple square and two dollar amounts | There are two sales on the same pump, current and stacked. The second customer has replaced the nozzle on the gas pump. |
| | H on a red square | The attendant has halted the pump. |
| | Pump with an X | Standard self-serve pump is offline. |
| | Circle with a credit card with a line going across it | AFD pump is offline. |
| | L on a purple square | The pump is locked while it is being cashed out at another paypoint. This only applies to multi paypoints. |
| | M on a blue square | The pump is functioning in manual mode and is not connected to the BT9000. |
| | Flashing X | There is an AFD problem the cashier must attend to. |

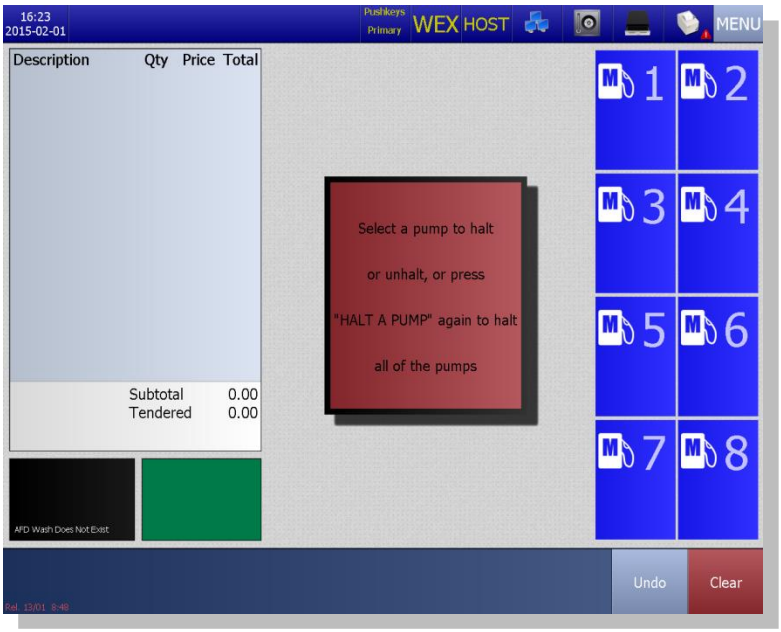
## Halting pumps

In the event of an emergency, the operator can stop one or all pumps.

**Note**. This only applies to standard pumps that are connected to the BT9000.

### To halt one pump

Press the [HALT A PUMP] key. The system asks you for the number of the pump that you wish to halt.



Press the appropriate pump number.

The pump status indicator for that pump changes to an H on a red background. The pump is now halted.

### To restart the pump

Press the [HALT A PUMP] key.

Press the appropriate pump number.

### To halt all of the pumps

Press the [ALL HALT] key.

The pump status indicator for all pumps changes to an H on a red background. All pumps are now halted.

### To restart all pumps

Press the [ALL HALT] key.

## Selling gasoline on a full-serve pump

To sell gasoline on a full-serve pump, simply pump the gasoline. The pump status indicators are the same for self-serve and full-serve pumps. Cashier intervention is not required for full-serve pumps.

The BT9000 keeps track of two active sales for each pump. If the first sale is for cash and the customer has not requested a receipt, you do not have to cash out the first transaction. After the second sale on that pump is completed, the BT9000 will stack the first sale. After the third sale, the first sale is automatically cleared from the system.

There may be two sales on each pump. It is recommended that you cash both sales out before doing a shift change.

## Split-serve sites

Some split-serve sites do not use the BT9000 to cash out their full-serve sales. The system is only used for changing full-serve prices and to generate pump meter reads. Often, in those situations, the BT9000 is configured to cash out the full-serve sales automatically when the hose is replaced.

## Selling gasoline on a standard pump

There are two types of sales that can be made on a standard pump:

1. Normal – a customer dispenses fuel then comes inside to pay
2. Prepaid – a customer prepays his fuel sale then dispenses the fuel

## Available function keys

| | | | |
|---|---|---|---|
| Override | Allows you to modify the price of an item or apply a discount to a fuel transaction | Cash Tenders | Proceeds with a cash payment |
| On A/R | Processes an 'on account' sale | Undo | Erases the last action. For example, if an item sold is not desired, if payment mode has been selected but customer asks for more items, etc. |
| Quantities (+/-) or Items | Allows you to sell a product by simply entering the product's item number. Also used to process a negative item sale | Clear | The clear key removes everything entered on the screen and cancels the transaction. There are some transactions, such as credit card requests that cannot be cancelled once they are in progress |
| Cards | Proceeds with a credit payment | Prepay | Used to set up a prepaid fuel transaction |

**Note: <u>If the [Tender and Undo icons in foreground] tab is configured to [YES] in the User Interface menu, the following function keys will be available:</u>**

| | | | |
|---|---|---|---|
| | Processes an 'on account' sale | | Proceeds with a cash payment |
| | Proceeds with a credit payment | | Erases the last action |

## Normal sales (Pay after you pump)

In a normal sale, the customer dispenses his own fuel then comes inside to pay for his purchase. The following example shows a normal sale on a gasoline pump that is connected to the BT9000 system.

A customer lifts the nozzle of a gasoline pump. The status indicator displays a white flashing square and beeps repeatedly.

**You must authorize the pump before the customer can begin dispensing fuel.**

Press the corresponding key to authorize the pump. If the pump screen is not visible, you will hear a beeping sound. Press the [MENU] key to return to the cashier screen and authorize the pump. The pump status box displays the following:

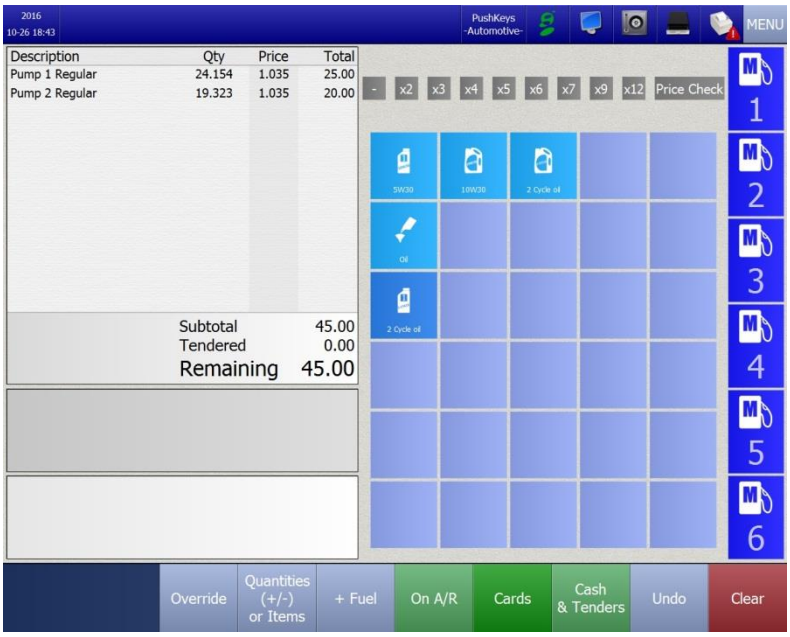
Pump on a gold square means the pump is now ready for use by the customer.

Nozzle on a green square means the customer is now dispensing fuel.

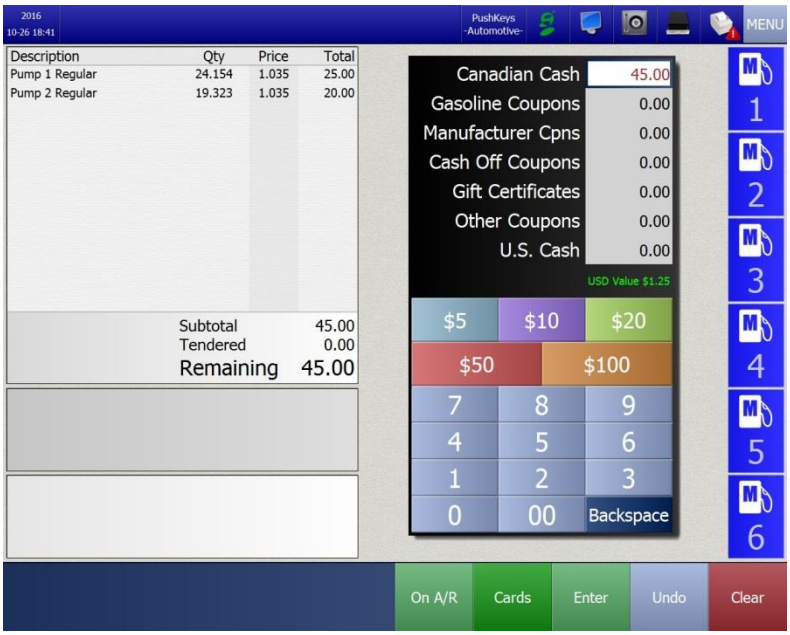
Dollar sign on a purple square and a double beep means the customer has hung up the hose on the gasoline pump.

The customer arrives inside to pay for his gasoline.

Press the appropriate pump key(s) to view the details of the transaction. The volume of gasoline sold and the amount sold is displayed.



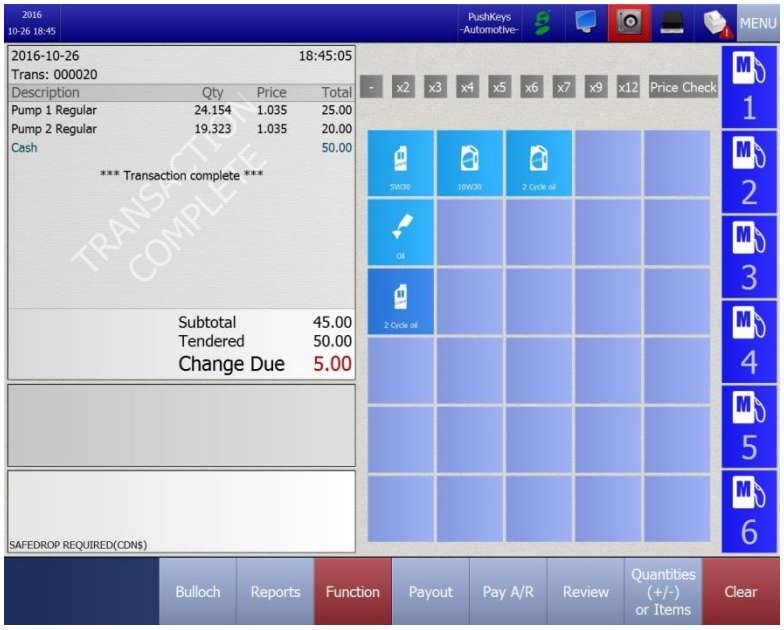
Press the [Cash Tenders] key to tell the system that the customer is paying by cash.




If you received exact change, tap on the [Enter] key. If you did not receive exact change, type over the amount tendered. Press the [Enter] key. As well, you can select a pre-set key.

**Note**. The BT9000 system enters the decimal points automatically. For example, for 25.00, simply enter [2] [5] [00].

The system calculates the change due, if any.



The cash drawer opens.

Give the customer any change due.

If the customer requests a receipt for his transaction, tap on the [Printer] icon.

**Multi Paypoint**. Depending on how your system is configured, both paypoints can authorize an inside pump sale, show a sale in progress or prepare a pump for payment. However, this functionality may be de-configured at your site. To view the pump status, press the relevant PUMP KEY. The current pump status will be shown in the square beside each pump number on the screen.

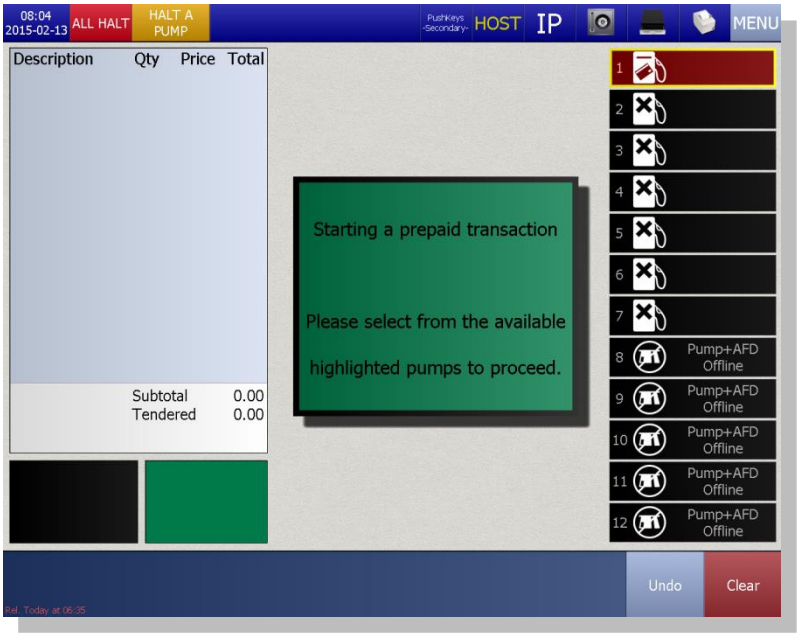
## Pre- pay Sales (Pay before you pump)

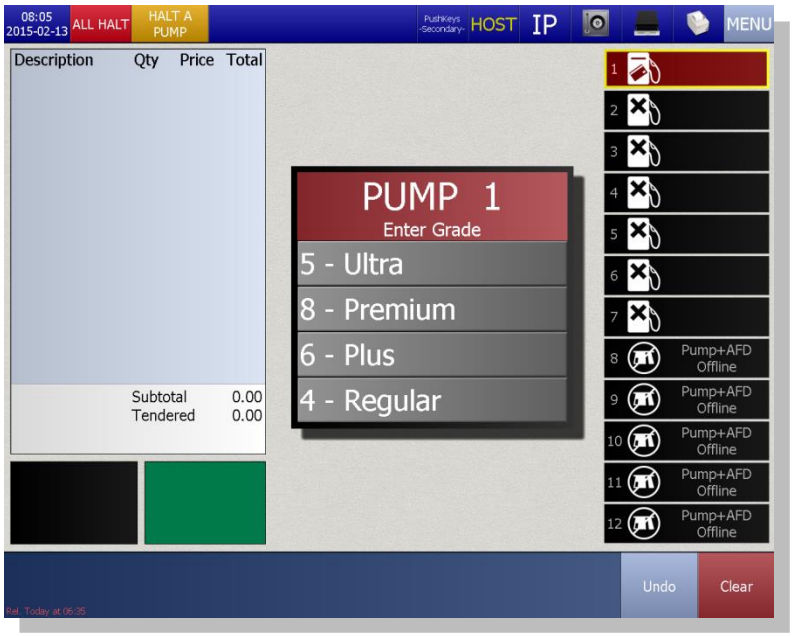
Pre-paying a pump is used to accept/secure payment for a sale BEFORE the fuel is dispensed. Prepaying a pump is also a good way of determining, for a customer, if there is enough credit left on his credit card.

The following example shows a pre-pay sale that was paid by cash.

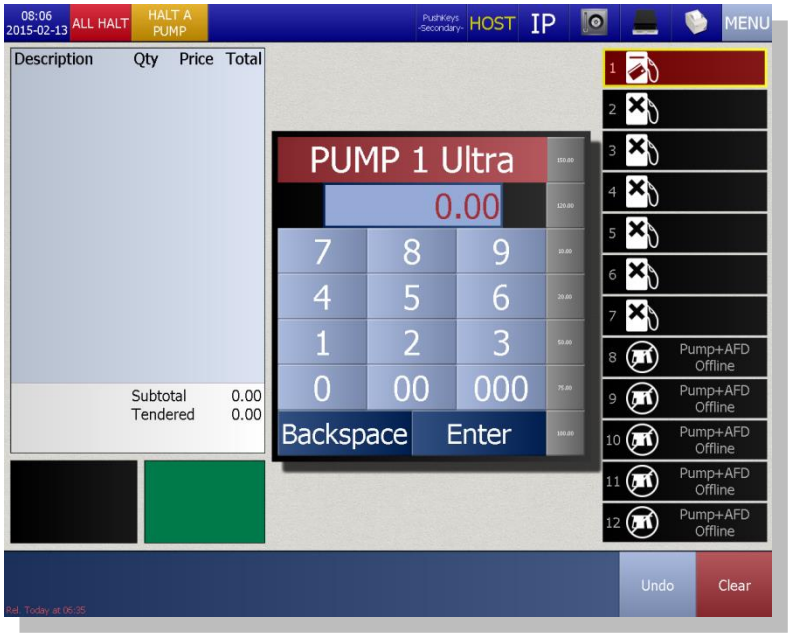
The customer arrives inside to pre-pay for his fuel transactions.

Tap on the [Prepay] key.

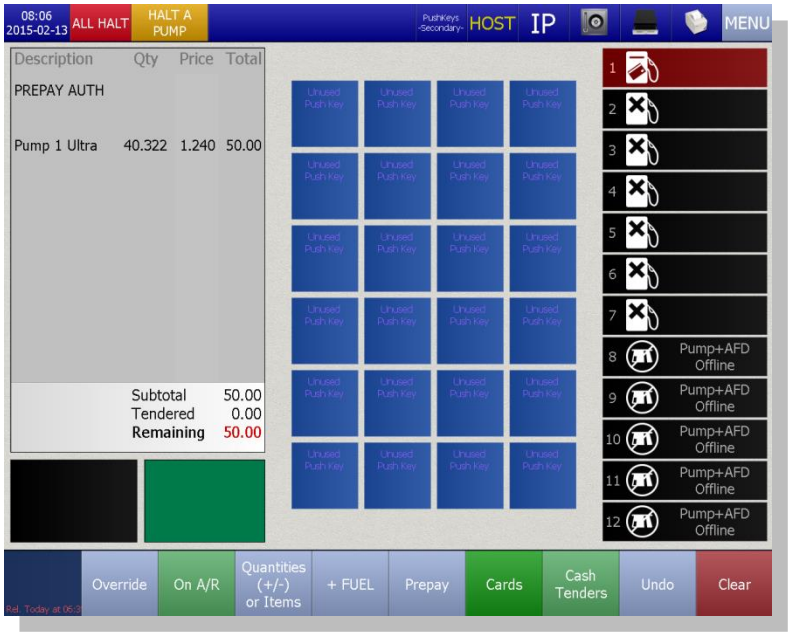


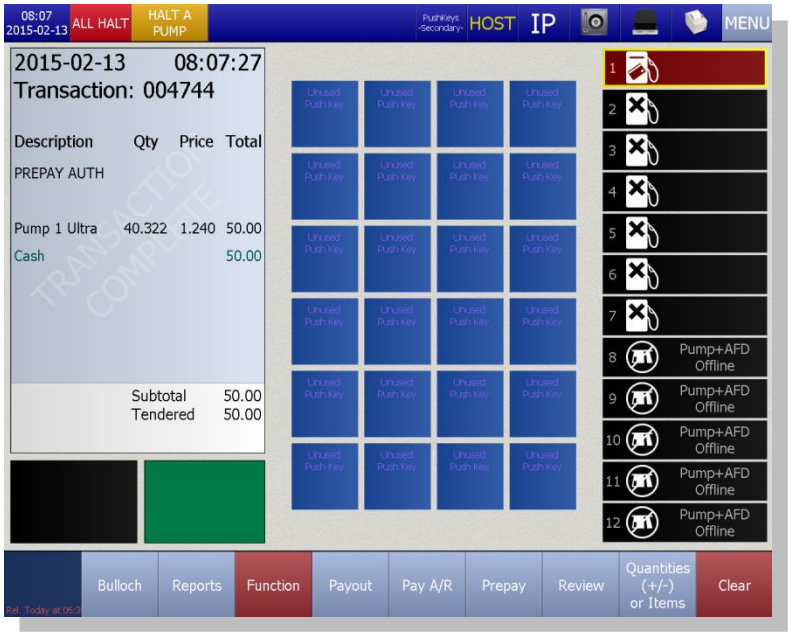
Select the grade of fuel that the customer wants. In this example, the customer requested Ultra fuel. The following screen will be displayed:




Enter the prepay amount and tap on the [|Enter] key.




Enter the method of payment, cash for this example. The pump is outlined in yellow.

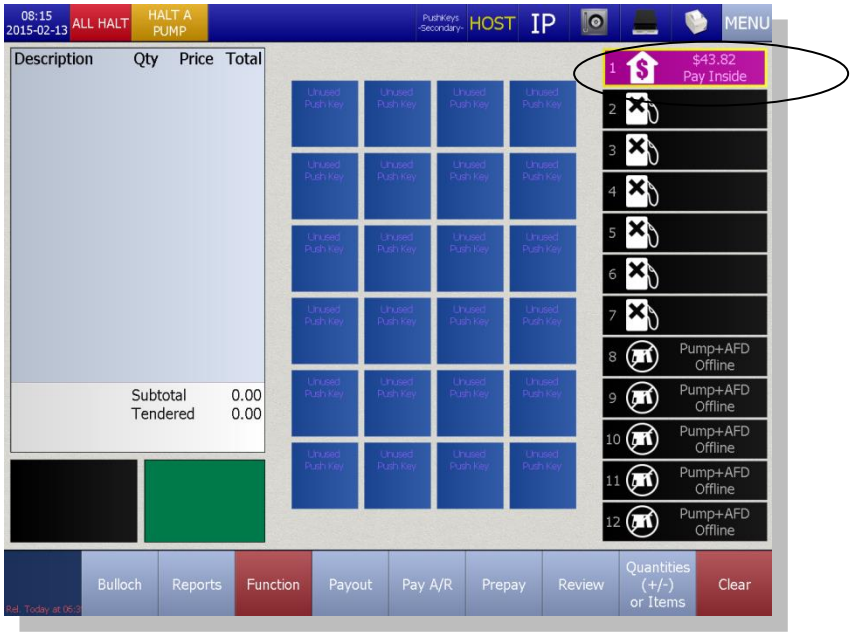



You must authorize the pump before it can be used.

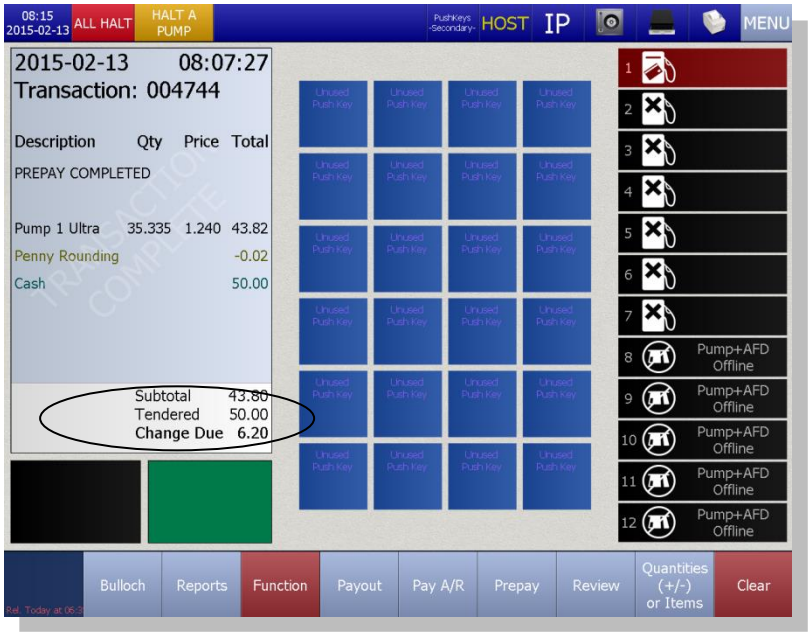
The customer is pumping gasoline.

The customer finished pumping gasoline. The pump number is returned to its original color. If the sale is within 2 cents of the pre-pay amount, the sale is automatically cashed out.

If the customer pumped less fuel than was paid for, a dollar sign appears in the pump status box for that pump.



Press the appropriate pump key. The system displays any change due.



The cash drawer opens.

Give the customer any change due.

If the customer requests a receipt for his transaction, tap on the [Printer] icon.

**Multi Paypoint**. The pump must be activated at the paypoint where the pre-pay was set up.

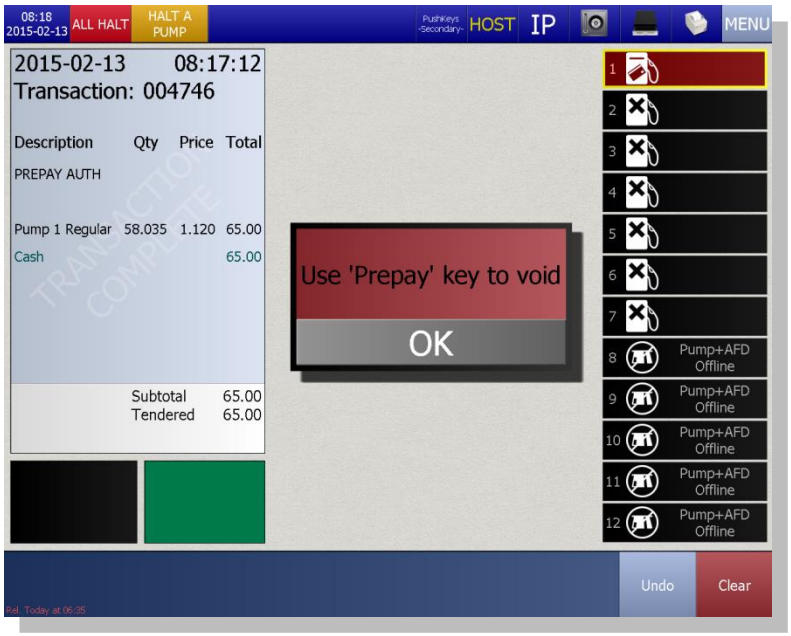
## Cancelling a prepay

If the customer reconsiders or you entered a wrong amount or wrong pump number, you can cancel a prepaid amount.

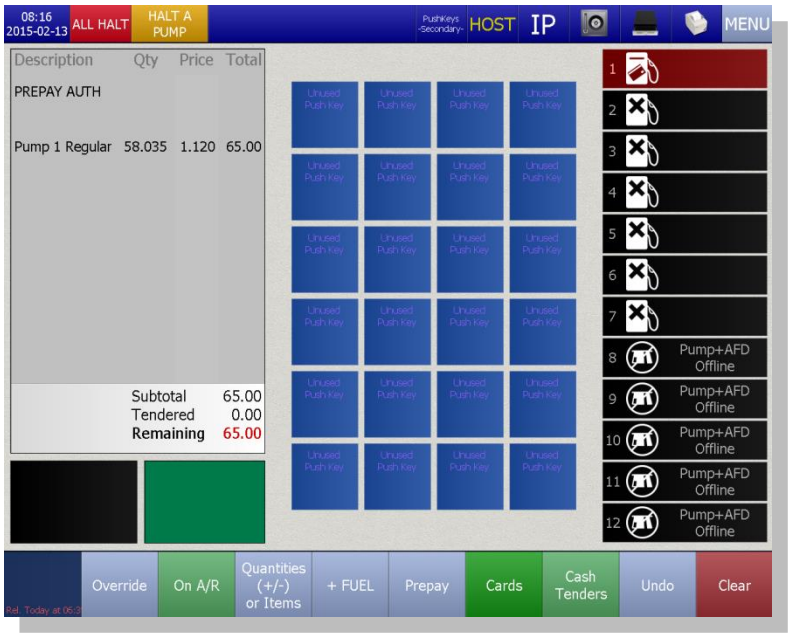
If you have not accepted payment, simply press the [Clear] key.

If you have accepted payment, you must press the [Prepay] key.

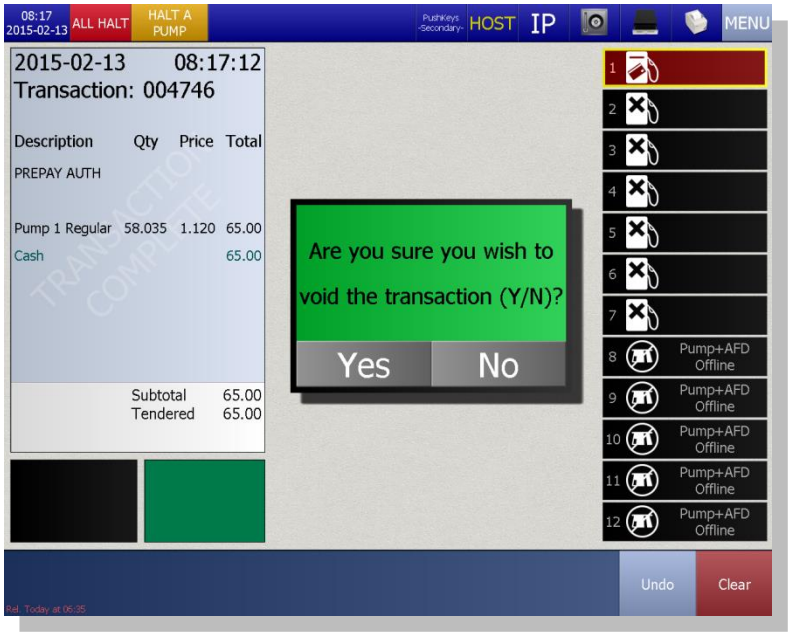
If you try to cancel a prepaid fuel sale by voiding it through the [Review] function, the following screen will be displayed.



To cancel a prepaid fuel sale, press the [Prepay] key and the pump number.

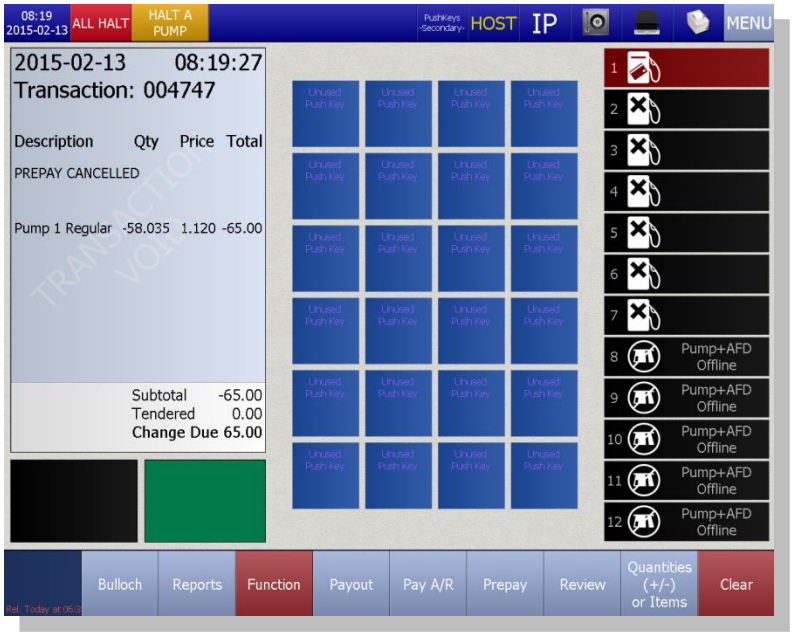



The system asks you to confirm that you want to void the transaction. Press the [YES] key.



Tap on the [Yes] key.

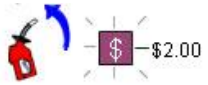
The pump returns to its normal color.




## Stacked Gasoline Sales

Once a customer has finished dispensing fuel and has come inside to pay, another customer may arrive and start pumping gasoline from the same pump. Since the first customer hasn't paid for his sale yet, his sale becomes stacked. The following example shows how to handle stacked sales.

The first customer has hung up the nozzle.




A second customer picks up the nozzle for the same pump.

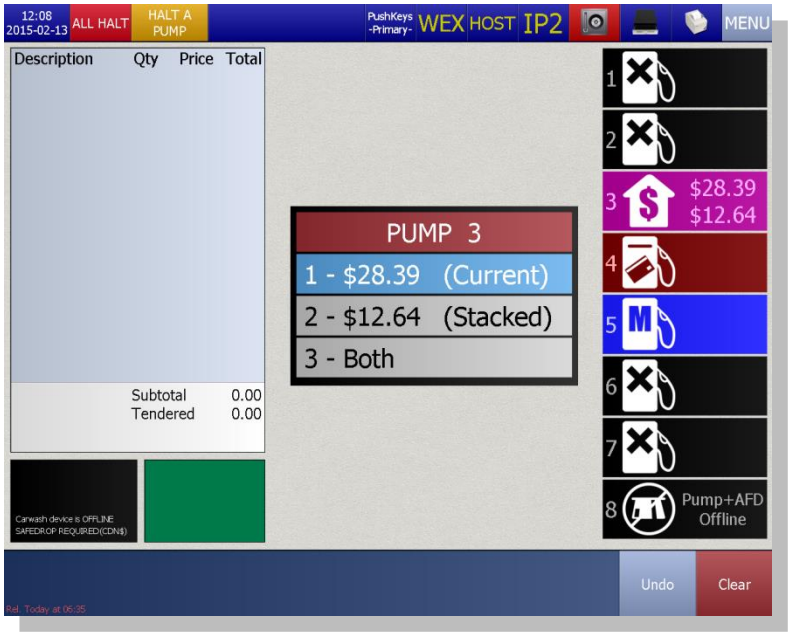
The second customer has started pumping fuel.

The second customer has replaced the nozzle.

Press the pump key.

A popup window will appear. You will have the choice of cashing out:

1. Current sale
2. Stacked sale
3. Both sales




Select the option from the list for the sale to be cashed out.

The sale can now be cashed out as a regular sale.

## Combining Sales from Different Pumps

If a customer wants to pay for two sales which used two different pumps on one transaction, press the [PUMP] number key for the first pump, the [+Fuel] key and the [PUMP] key for the second pump.

## Overriding the Pump Price

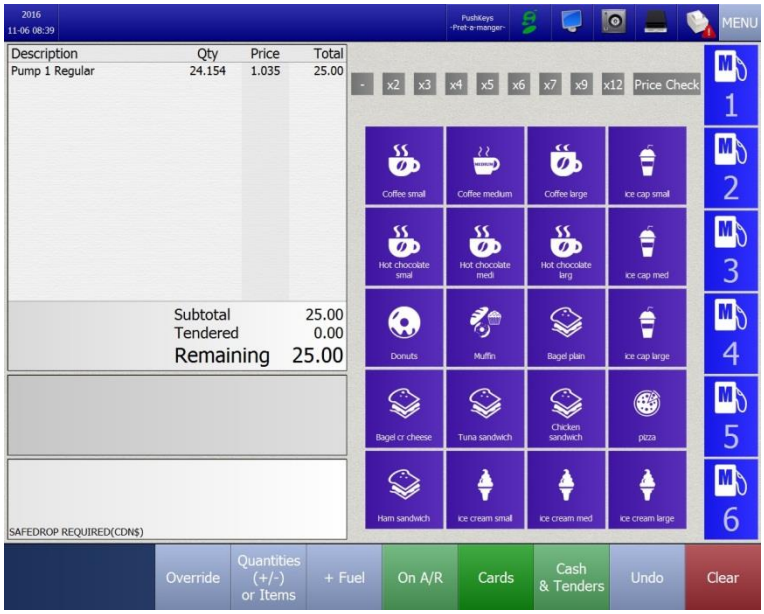
Functionality in the BT9000 allows you to change or override a pump price, for one of four reasons:

1. Normal (Cents per litre discounting)
2. Pump Tests
3. Native road tax exemptions
4. Customer drive-off

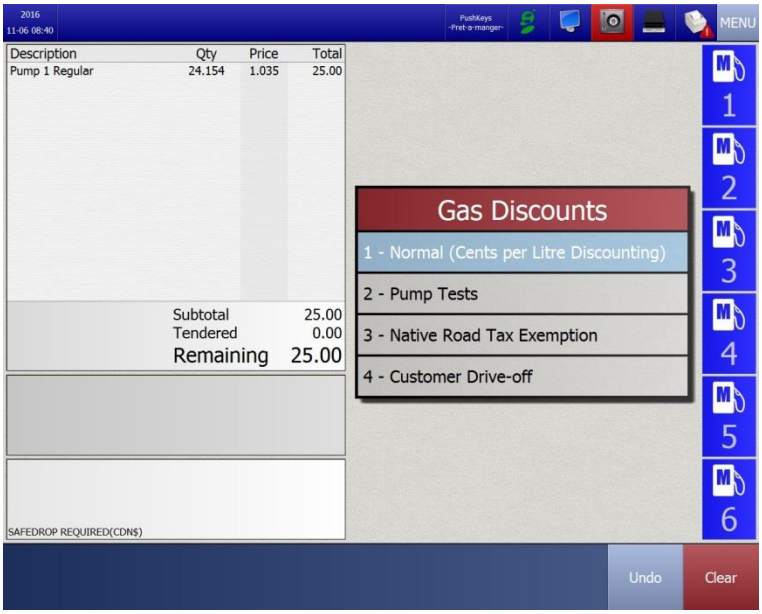
**The overrides must comply with your company's policies on fuel overrides**.

In the following example, we will apply a 'Normal cents per litre' discount.

Tap on the relevant pump key to bring the sale onto the screen.



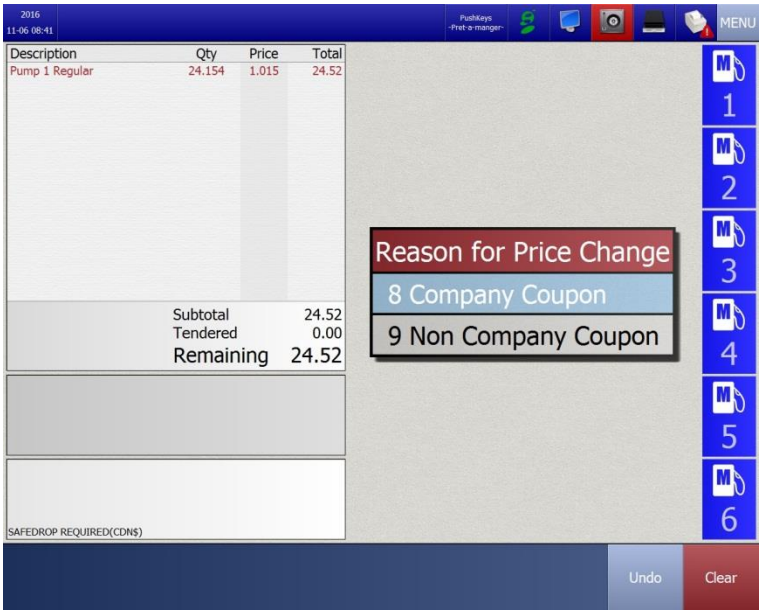
Tap on the [Override] key. A screen will be displayed:



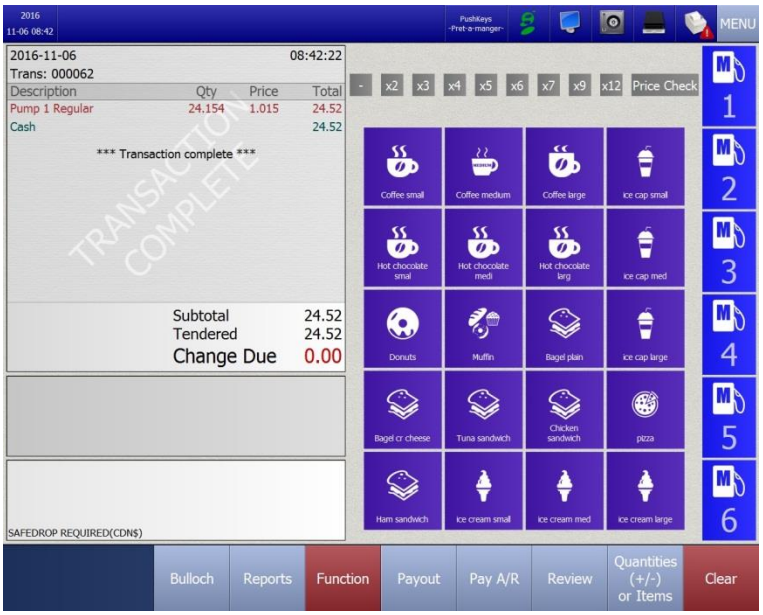

Tap on '*Normal cents per litre Discounting'*. The following screen will be displayed:

Enter a '*cents per litre'* discount and press the [Enter] key OR select one from the list displayed on the right-hand side of the [GASOLINE PRICE CHANGE] BOX.

**Note**. The discount must be between 0 and the original price. The following screen will be displayed:




Tap a reason from the drop down list. The screen will display the new price.




Select a method of payment and complete the transaction.

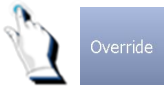
The cash drawer opens.

Give the customer any change due.

## Pump Tests

Functionality in the BT9000 allows you to allocate fuel sales that were generated when your pumps were being calibrated or repaired.

To process a pump test, press the relevant pump number. The screen will display the pump sale information.




Tap on the [Override] key. The following screen will be displayed:

Tap on the 'Pump Tests' option. The litre amount will remain on the screen but the dollar amount will be reduced to zero. Press the [Cash Tenders] key followed by the [Enter] key.

The BT9000 automatically reassigns the fuel volume back into the appropriate tanks.

## Native Road Tax Exemptions

The BT9000 allows for native road tax exemptions.

To process a transaction for a customer who has proof of being exempt from paying specific taxes, press the relevant pump number. The screen will display the pump sale information.

Tap on the [Override] key. A pop up screen will be displayed.

Select option 3, 'Native Road Tax Exemption'.

Select a method of payment and complete the transaction.

The appropriate tax will automatically be removed from the sale.

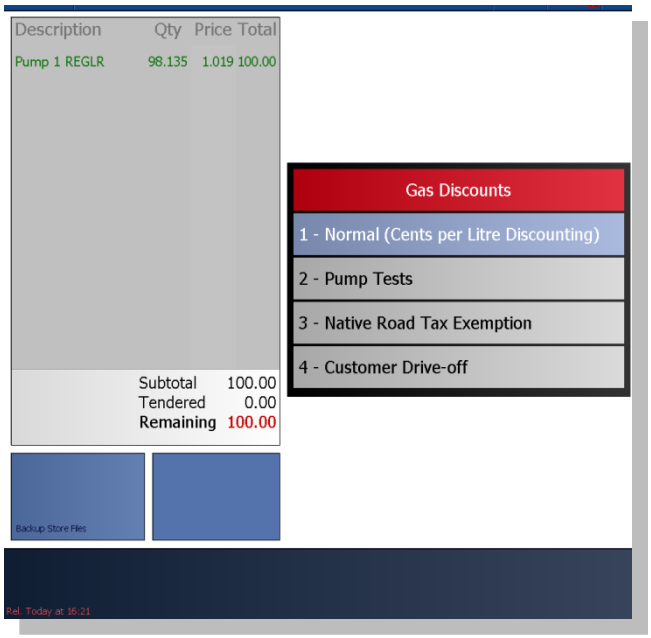
## Customer Drive-off

Functionality in the BT9000 allows you to allocate fuel sales as Customer drive-offs, need be.

To process a customer drive-off, press the relevant pump number. The screen will display the pump sale information.

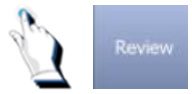
Override

Tap on the [Override] key. The following screen will be displayed:

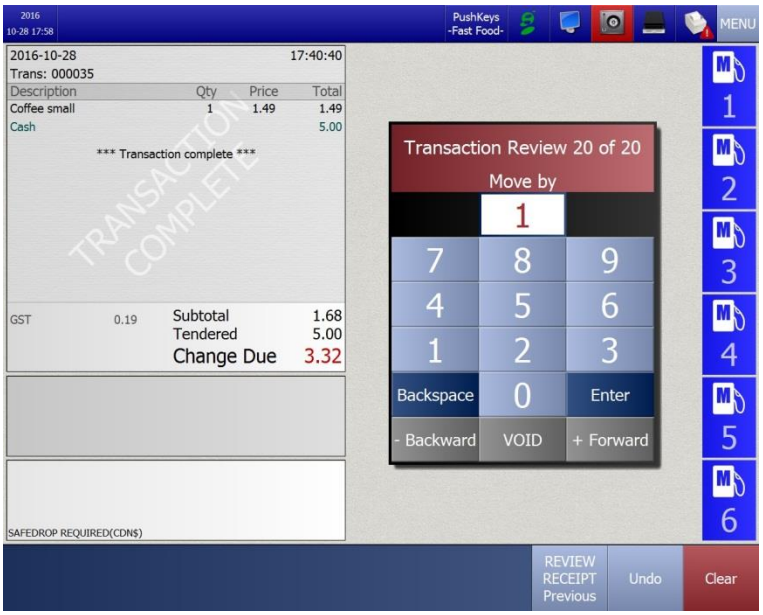



Tap on the 'Customer Drive-off' option. The litre amount will remain on the screen but the dollar amount will be reduced to zero. Press the [Cash Tenders] key followed by the [Enter] key.

## Displaying Previous Sales




Press the [Review] key. The most recent sale will be displayed on the screen.



***Going backward***

Tap on the [-Backward] key or on the [REVIEW RECEIPT Previous] key to continue displaying past receipts until the appropriate receipt is displayed on the screen.

To skip backward a number of receipts, enter the number of receipts you want to skip and press the [-Backward] key.

***Going forward***

Press the [+Forward] key to continue displaying the most recent receipts until the appropriate receipt is displayed on the screen.

To skip forward a number of receipts, enter the number of receipts that you want to skip and press the [+Forward] key.

***Printing the currently displayed receipt***

Tap on the printer icon to print the receipt that is currently displayed on the screen.

The word 'DUPLICATE' or 'COPY' will be displayed on the receipt, unless this is the first time the receipt is printed.

Printing a receipt automatically exits the review receipt mode. If you wish to exit without printing a receipt, press the [CLEAR] key.

**Note**. Only sales within the current shift can be displayed.

Previous shift receipts can be found in Store Logs under Sub Menu 'Transaction Review'.

## Correcting Mistakes

Voids are necessary when a customer reconsiders a particular method of payment or when you enter incorrect information.
Voids are used most often when an incorrect pump was cashed and the mistake was noticed after the sale was completed.

If you have not gone any further, simply press the correct pump number. If you have started adding items or cashing out the sale (but have not completed it), press the [Clear] key to start over again.

Any typing mistake can be corrected, if you have not yet selected the [Enter] key. Simply press the [Backspace] key for each character in error. This is particularly useful when you are typing long entries such as credit card numbers. It would be time consuming to [Clear] and start all over again.

If the sale is complete and you realize that there is an error, you must VOID the sale and proceed with a new sale. Detailed information on voiding transactions is included later on in another section of this manual.

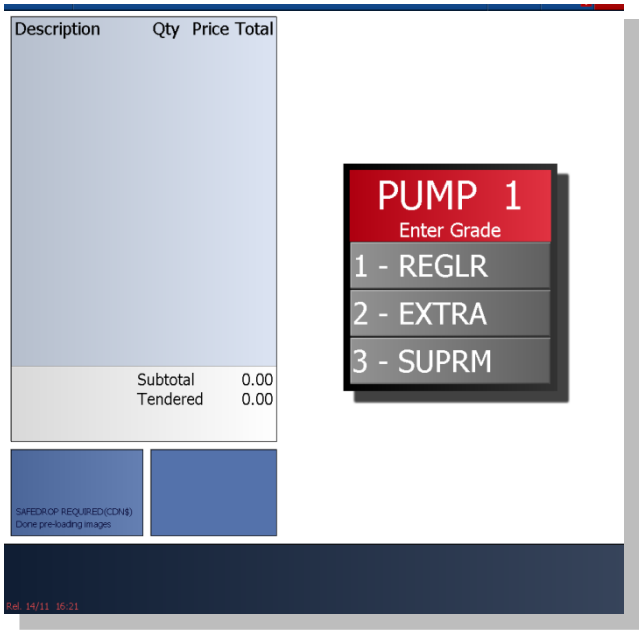
## Selling Gas on a Manual Pump

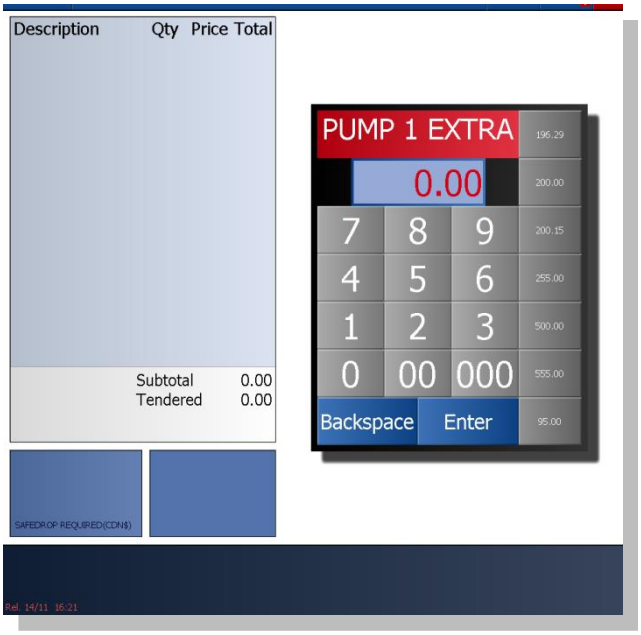
A manual pump is one that is not connected to the BT9000. Manual pumps are indicated by a blue square in the pump status box.

All cash register functions work with manual pumps. The following example shows gasoline sold on a manual pump and tendered with cash.

Tap on the appropriate pump key.

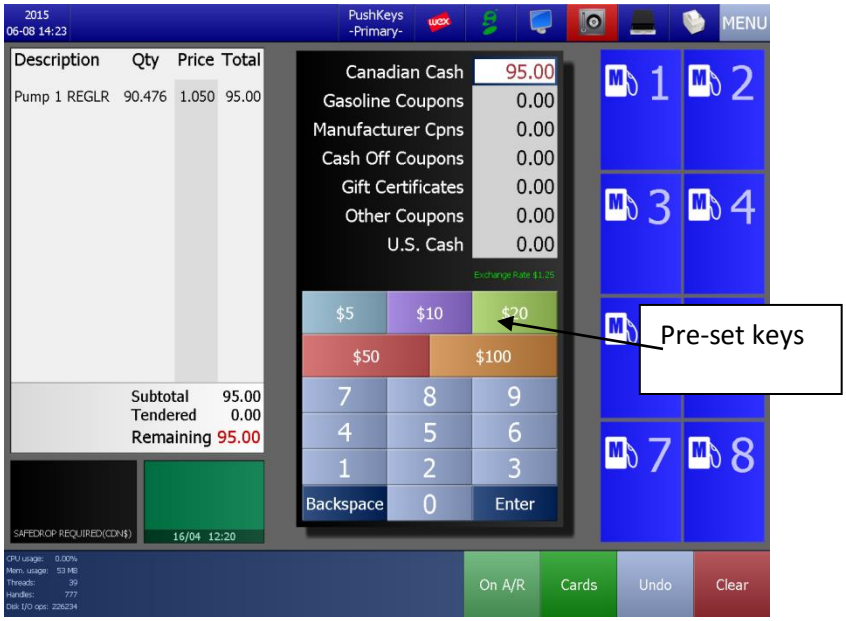
Select the type of fuel.






Enter the dollar amount of fuel sold and tap on the [Enter] key.

Tap on the [Cash Tenders] key.




Type in the amount of cash received and tap on the [Enter] key. The system calculates the change due, if any. You may also select one of the pre-set keys.

The cash drawer opens.

Give the customer any change due.

## Selling Gasoline on an AFD Pump

The Automated Fuel Dispenser (AFD) has become very popular at more and more stations. If your station is equipped with AFDs, it's important to understand how the BT9000 handles AFD transactions.
AFD pump purchases can be made from inside or outside. When the sale is inside, monitor the pump like any other sale.

When the sale is outside, the system informs you a sale is taking place and indicates the status of what the customer is doing.

Instructions are displayed on the pump to guide the customer.

No cashier intervention is required; that is, the cashier does not have to activate the pump for AFD customers.

AFD statuses are indicated to the right of the pump. There are many messages that the system uses to inform the operator what is happening at the AFD.

| AFD Messages | What it means |
|---|---|
| Card inserted | The customer has inserted a card in the AFD but has not pulled it out. |
| Payment card | The customer used a loyalty card and must now insert a payment card (AMEX, Visa, MC or debit). |
| Car Wash? | The customer is prompted for a car wash |
| Receipt? | The customer is prompted for a receipt. |
| Lift Nozzle | The customer is instructed to lift the nozzle. |
| Select grade | The customer is instructed to select a grade of fuel. |
| Completed | The customer has replaced the nozzle and the sale is complete. |
| ***Minor Errors*** | |
| Swipe again | The customer inserted the card incorrectly or the card is unreadable. |
| Use another | The customer is prompted for another card after three unsuccessful swipes. |
| Denied | The customer's card is denied. |
| Help | The customer pressed the Help button. |

| | |
|---|---|
| | The customer is instructed to select a grade. |
| | Indicates that the transaction is an AFD transaction. |
| | Invalid use of an AFD transaction. |
| | Indicates that the customer must put the handle down so that you can clear the Invalid state. |
| | Fuel was dispensed but the AFD transaction went into an Invalid state. |
| | AFD transaction is complete. The message displayed on the AFD is instructing the customer to press on the key to print a receipt. |

## Pay at Pump Process

The customer begins the transaction by inserting his credit/debit card into the card slot. Instructions are displayed on the pump to guide the customer. No cashier intervention is required. The message next to the pump will indicate 'Outside Sale'.

If a customer paying at the pump does not follow the proper AFD procedures, the pump will stop pumping and start to beep. The computer will display 'Invalid Use'. Outside, on the pump display, the words 'See Cashier' will be displayed. Use the intercom and ask the customer to hang up the nozzle.

**You must do the following before the customer can continue:**

On the BT9000, you must:

1. Bring up the sale by pressing the [PUMP] key.
2. Cash out the sale before the pump can be authorized again.

A message will be displayed on the cashier screen, indicating what the problem was.

The following events instruct the customer to 'See Cashier':

- The customer inserted card during pumping.
- The customer inserted card after pumping.
- The customer did not start dispensing fuel during the allotted time.
- The customer hung up the hose before the card authorization process finished.
- The customer inserted another card when the AFD did not expect it.
- The customer's card was rejected.
- The customer did nothing wrong but the authorization process was too slow.

If any gasoline was pumped when an error occurred, the pump is halted and the customer's sale is transferred inside.

**Note**. AFDs are automatically disable by the system during shift reports and when the POS network is down. The AFD instructs the customer to pay inside. If the computer restarts itself for any reason, the customer must be informed that his sale was transferred inside.

**Note**. AFDs do not issue a receipt unless the customer specifically requests one. Some AFDs have a button that issues a receipt any time up to 15 seconds after the sale. Some companies prompt a customer with a Yes/No question to request a receipt.

**Note.** Receipts for AFD sales are stored in paypoint 1.

**Note.** You cannot activate store data when a customer is paying at the pump. The following screen demonstrates the warning error that you will receive if you run into this scenario:

# Selling Store Items

## Selling Store Items

Gasoline and non-gas items can be combined into one transaction.

This section describes how to sell single and multiple items, cancel these sales, perform negative sales, and combine gasoline and non-gas items into one transaction.

Store items can be sold at any time in one of the following ways:

- Manually keying in the item number
- Scanning the item's barcode
- Pressing the appropriate Speed Key
- Manually entering the UPC (bar code)
- Pressing the appropriate Push key

## Identifying Product Codes

Each product in the store is identified by either an Item # assigned by your station manager or a Universal Product Code (UPC) identified on a UPC label.

You can either enter the Item # or the UPC number directly from your keypad or, if you have a UPC scanner, you can scan the UPC label by passing the UPC label over the UPC scanner.

If you manually key in the UPC number directly from your keypad, be sure to use the correct set of numbers as shown below:

**All examples in this section are using the UPC scanner.**

## Available function keys

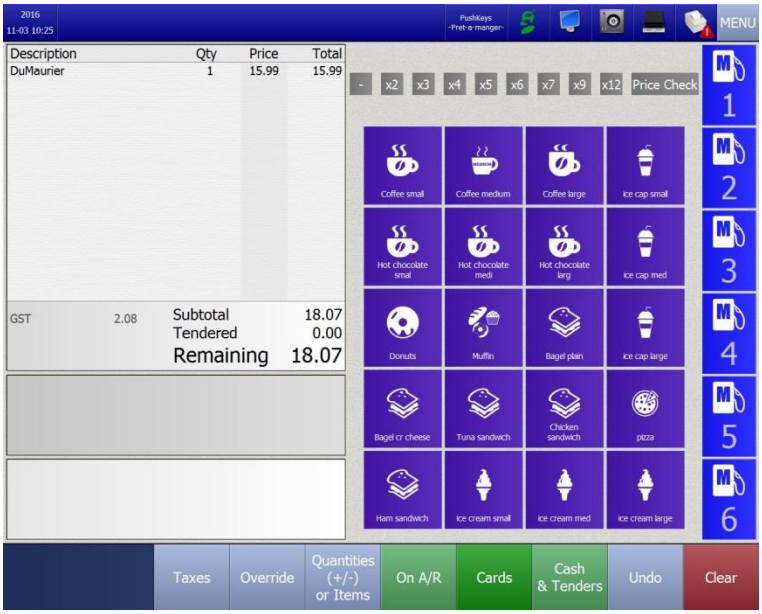
| | |
|---|---|
| Override | Allows you to modify the price of an item or apply a discount to a fuel transaction |
| On A/R | Processes an 'on account' sale |
| Quantities (+/-) or Items | Allows you to process a negative transaction or key in an item number |
| Cards | Proceeds with a credit payment |
| Cash Tenders | Proceeds with a cash payment |
| Undo | Erases the last action. For example, if an item sold is not desired, if payment mode has been selected but customer asks for more items, etc. |
| Clear | The clear key removes everything entered on the screen and cancels the transaction. There are some transactions, such as credit card requests that cannot be cancelled once they are in progress |

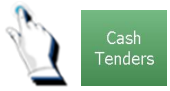
## Selling a Single Item

The following example shows how to sell a single item paid for with cash:

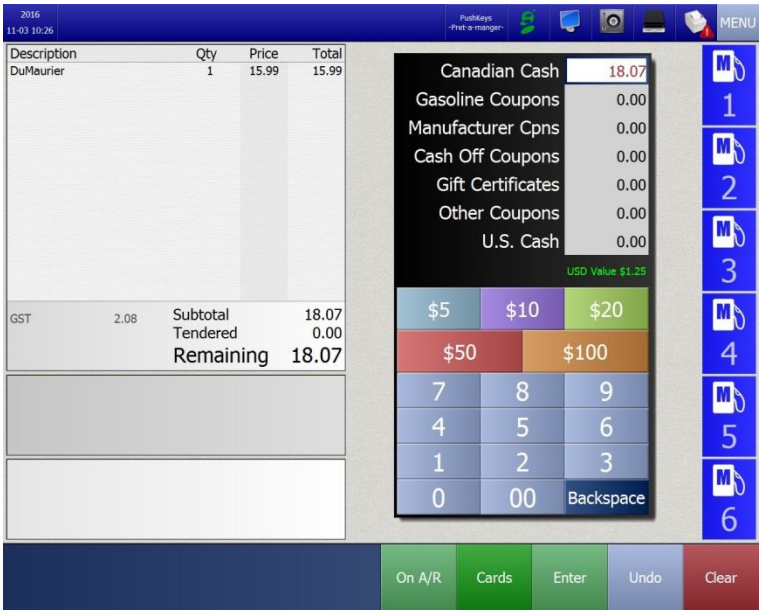
Scan the UPC label.

A cumulative total is displayed at the bottom of the screen. GST, HST or PST is automatically calculated.

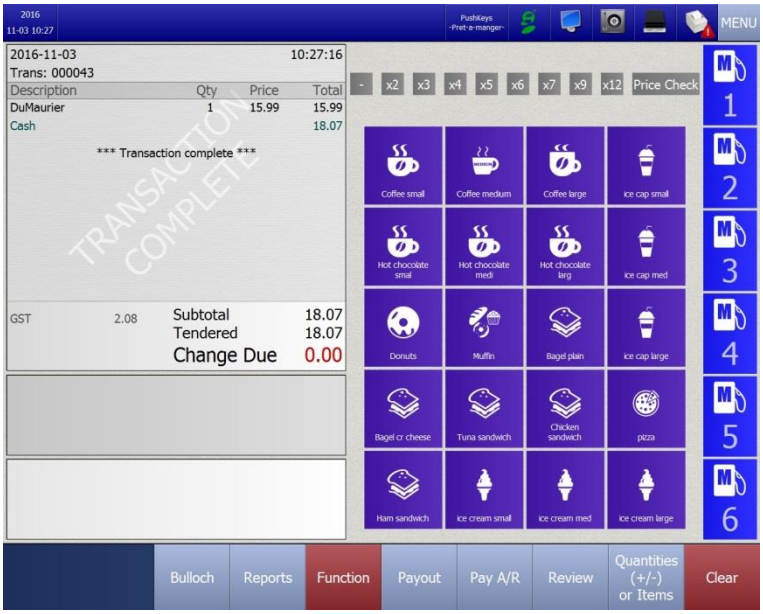



Tap on the [Cash Tenders] key to tell the system that the customer is paying by cash.



Tap in the amount of cash received and press the [Enter] key. The system calculates the change due, if any.



The cash drawer opens.

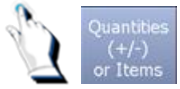
Give the customer any change due.

## Selling More than One of the Same Item

Tap on one of the [X] keys and scan the UPC label or select an item configured on a pushKey.

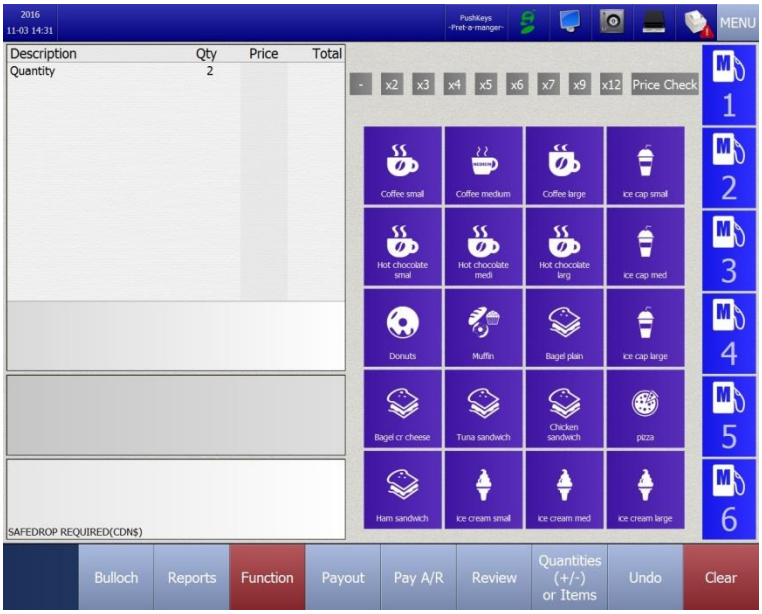
Tap on one of the [X] keys.

**Or**




Tap on the [Quantities (+/-) or Items] key.

Enter the number of units that you are selling and tap on the [Enter] key.

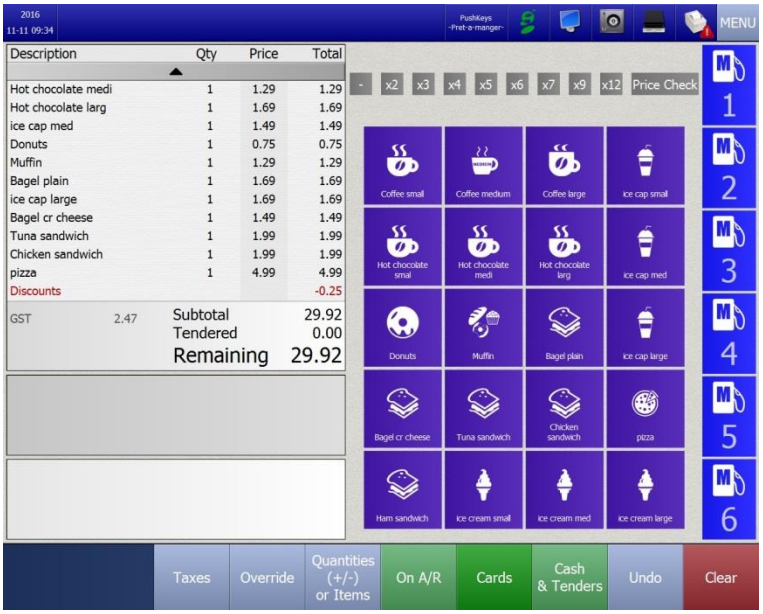


Scan the UPC label and complete the transaction.

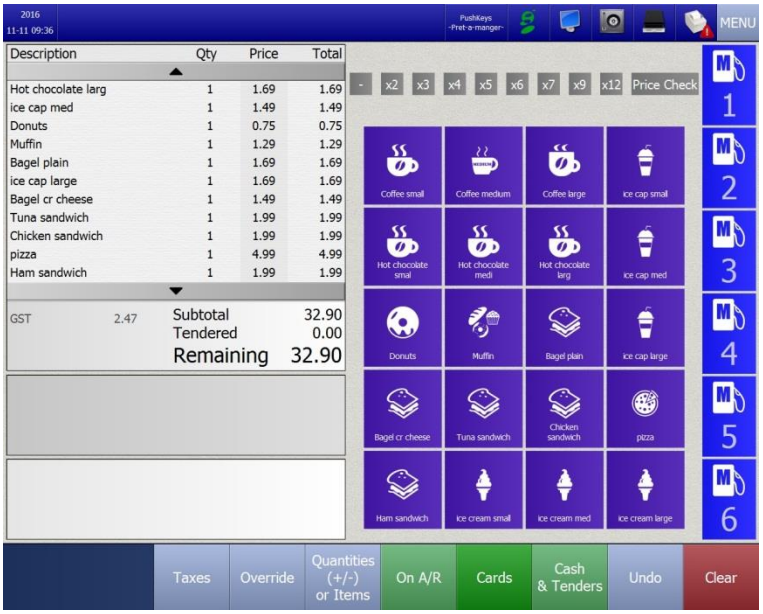
## Selling More than One Item

Scan each item one after another.

If you are selling many items, the list may be so long that it no longer fits on your screen. If this happens, the list simply scrolls. This means that as you keep adding items to the bottom of the list, the items at the top of the list are no longer displayed. They are not lost, just stored by the BT9000. A black triangle appears above the list reminding you that there are more items in the list that you can see.



When you tap on the *UP* black triangle, you will be directed to the beginning of the list.



When up tap on the DOWN black triangle, you will be directed to the end of the list.

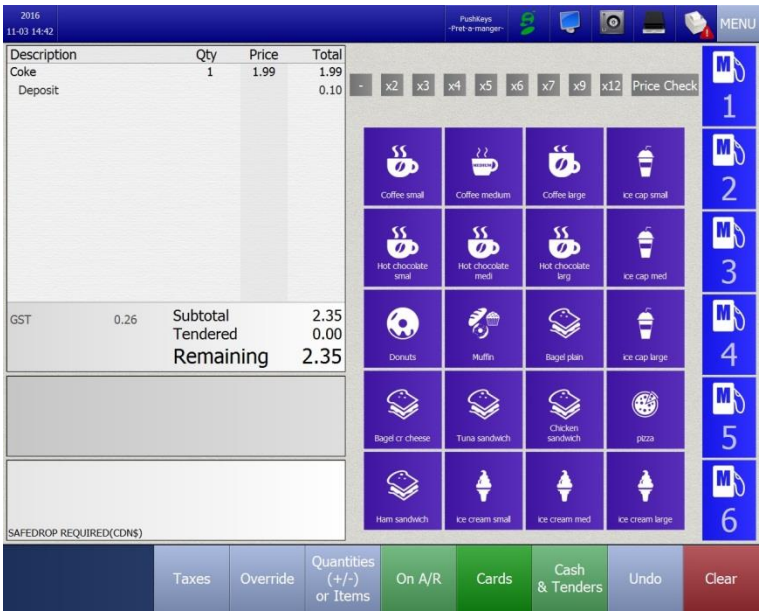
## Mixing Gasoline and Item Sales

The BT9000 allows you to combine gasoline and items sales into one transaction. The products can be entered in the BT9000 in any combination:

- A store item followed by a gasoline sale.
- A gasoline sale followed by a store item.
- Multiple sales intermixed with multiple gasoline sales.

## Deposits

Items that have a deposit configured automatically charge the appropriate amount. When you scan an item that is configured with a deposit amount, the deposit amount appears on a separate line beneath the product in question.




**Note**. If the bottle deposit is 10 cents and the number of items sold is 3, the BT9000 will automatically charge 30 cents for the deposits. Receipts will show individual deposits for each item.

**Note**. GST, HST and PST do not apply to bottle deposits.

## If a Customer Changes their Mind

If a customer changes their mind or if a mistake was made, there are four ways to correct the mistake:

1. Clear the last item that you entered.
2. Clear the entire sale and start over again.
3. Make a negative sale of an item.
4. Void the transaction.

## Clearing the last item

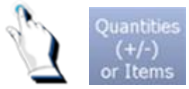
Tap on the [Undo] key.

## Clearing the entire sale

Tap on the [Clear] key to clear the entire screen and start over again.

## Making a negative sale

If you are selling many items in one transaction and the customer decides that he no longer wishes an item that is at the top of his list of purchases, instead of clearing the screen and starting over again, it is much faster to just make a negative sale for the item that the customer no longer wants.




Tap on the [Quantities (+/-) or Items] key **OR**

Tap on the [-] key.

Enter the number 1 and tap on the [-Negative Qty] key.

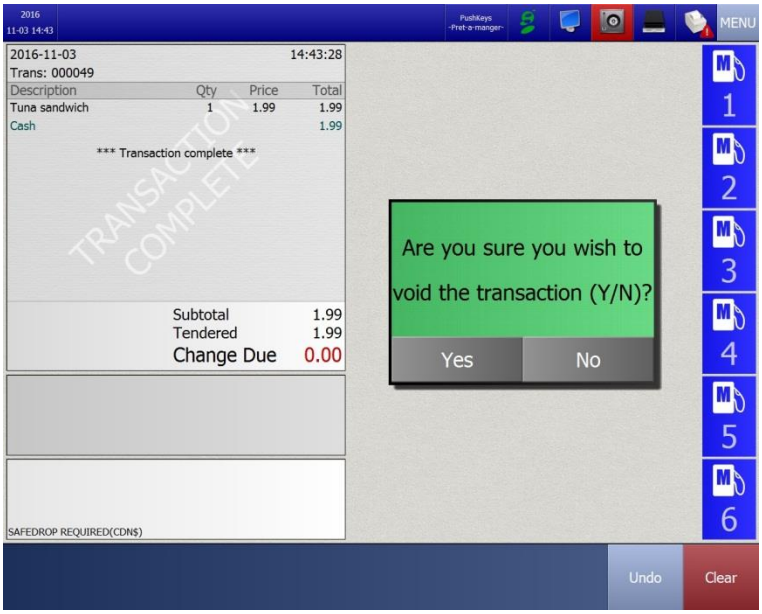
Scan the UPC label and complete the transaction.

**Note:** Negative items are only allowed if the site is configured to permit negative sales.

## Void the transaction

Tap on the [Review] key. The most recent sale will display on the screen. Locate the sale that you want to void.

Tap on the [VOID] key.



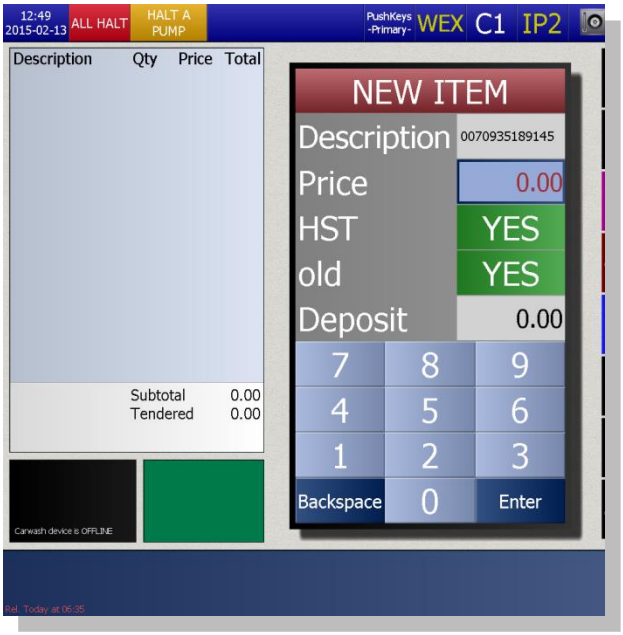
Tap on the [Yes] key.

## Scanning an Item that is not in the System

When you scan an item that has not been configured in the BT9000, the system will treat that item like the 999999 Slush item.

Scan the UPC.

The new item popup window appears on your screen, with the scanned UPC code near the top of the screen.



Type in the price of the item and press the [Enter] key.

GST, PST and/or HST will default to 'Y'.

Type in the deposit amount, if applicable.

Note. The New Item 'Description' field is not used by some petroleum companies. Enter a description for the item only if it is normal for you to do so.

## Price Overrides

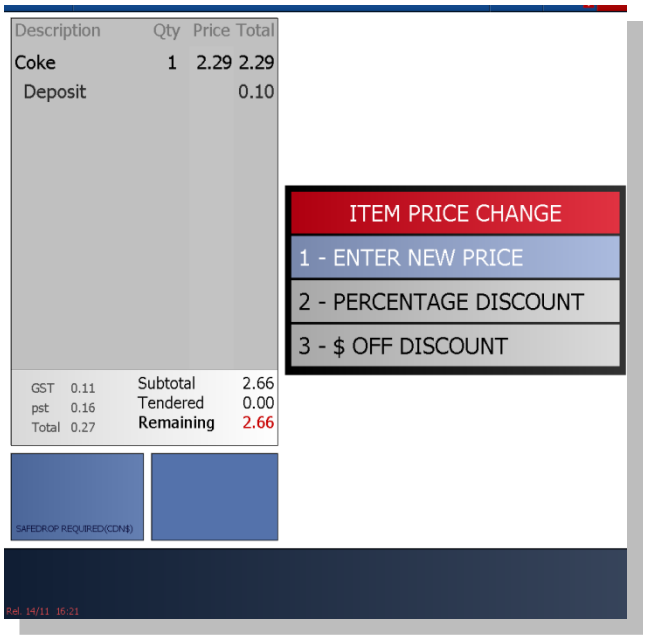
It may be necessary, from time to time, to override the price of an item. You can override the price of an item by pressing the [Override] key.
For non-gas items, or gas sales with a non-gas purchase, three options are available:

1. Enter new price
2. Percentage Discount
3. $ Off Discount

## To enter a new price

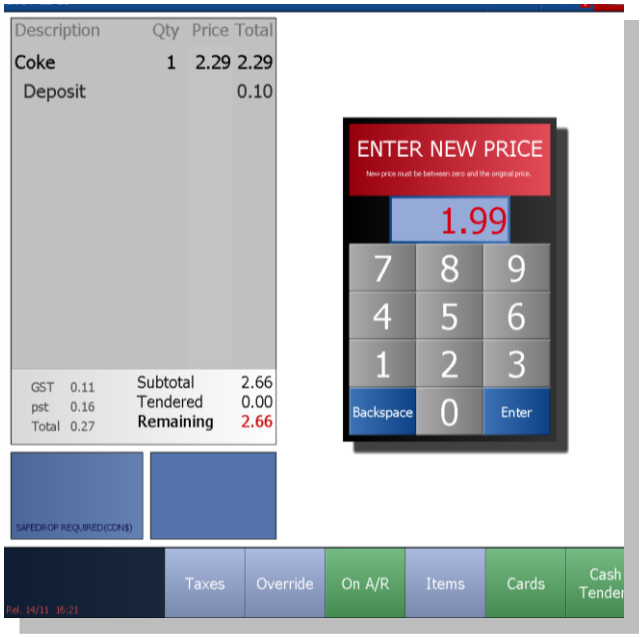
Scan the item.

Tap on the [Override] key. The [ITEM PRICE CHANGE] screen will be displayed:



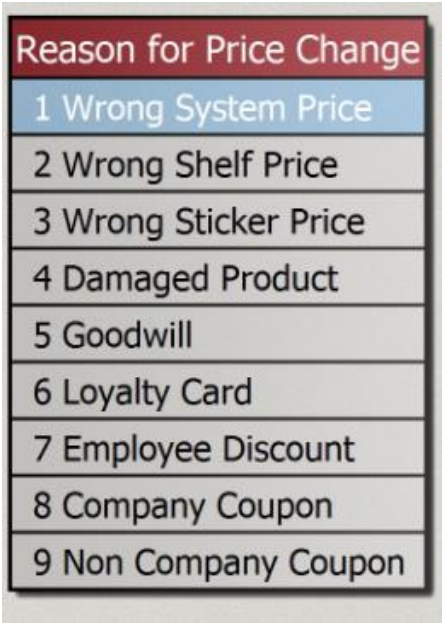
Tap on '[ENTER NEW PRICE]'. The [ENTER NEW PRICE] window appears.

Enter a new price.




**Note**. You can reduce the price of an item but you cannot increase it.

The Reason for Price Change window will be displayed:



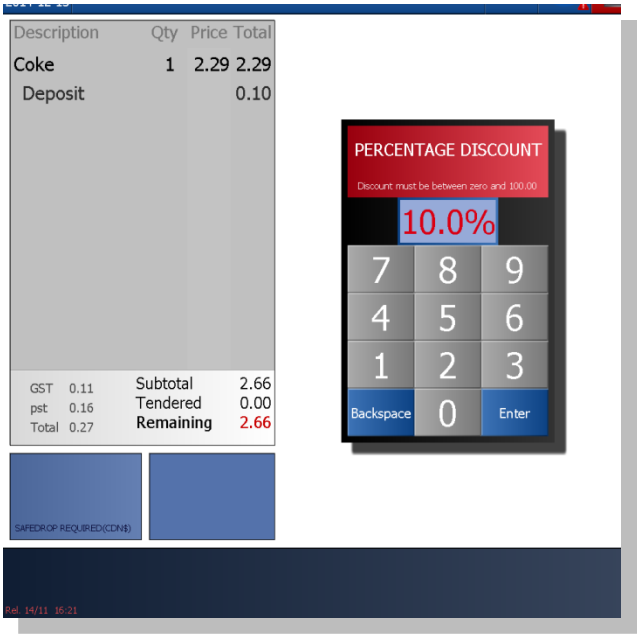

Select a reason for the price change.

## To enter a percentage discount

Scan the item.

Tap on the [Override] key. The [ITEM PRICE CHANGE] screen will be displayed.

Tap on option 2 – PERCENTAGE DISCOUNT. Enter a percentage discount.



**Note.** The percentage discount must be between 0 and 100%.

Tap on the [Enter] key. A 'Reason for Price Change' window will be displayed.

Select a reason for price change.

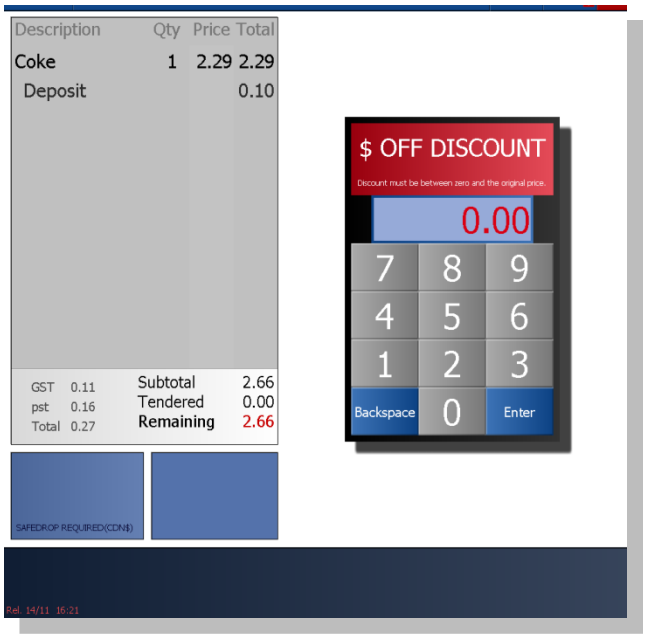
Select a method of payment and complete the sale.

## To enter a $ off discount

Scan the item.

Tap on the [Override] key. The [ITEM PRICE CHANGE] screen will be displayed.

Tap on option 3 - $ OFF DISCOUNT.



Enter a $ dollar off discount. Press the [CASH] key to accept the discount. A 'Reason for Price Change' window will be displayed.

**Note.** The $ dollar off discount must be between 0 and the original price.

Select a reason for price change and press the [Enter] key.

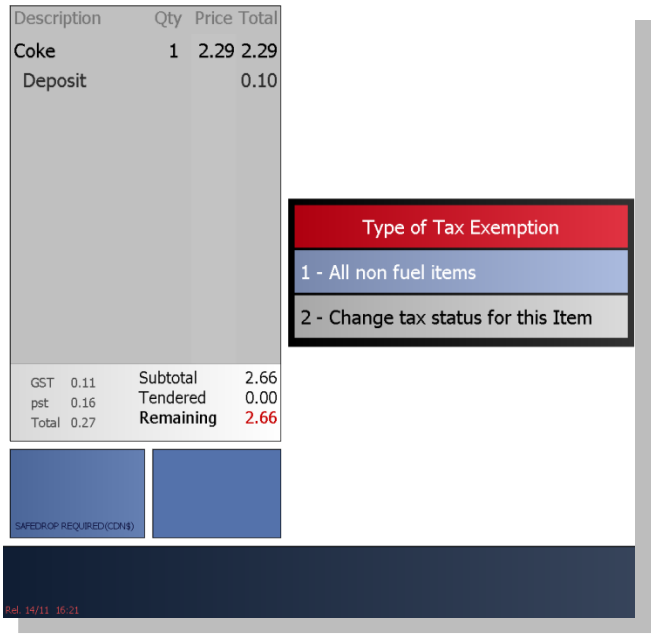
Select a method of payment and complete the sale.

## Tax Exemptions

There are two types of tax exemptions available in the BT9000. You can exempt the tax for the entire sale or for individual items only.

**Note.** To qualify for tax exemptions, the customer should have the appropriate documentation to support this.

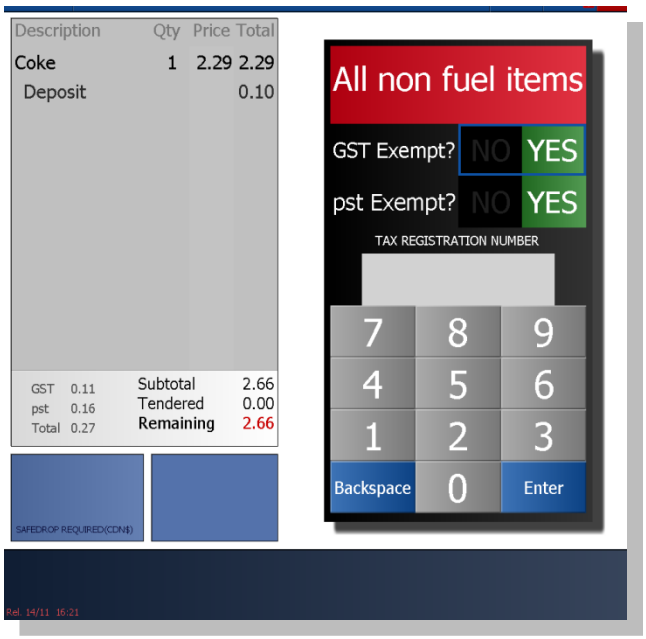
Tap on the [Taxes] key. The 'Type of Tax Exemption' screen will be displayed:




**Note.** You can exempt the entire sale, at any time of the sale, as long as it is before you press the [On A/R], [Cards] or [Cash Tenders] key.

## To tax-exempt the entire sale

Select option 1 from the 'Type of Tax Exemption' popup screen. The following screen will be displayed:




By default, the GST and pst exempt fields are set to YES.

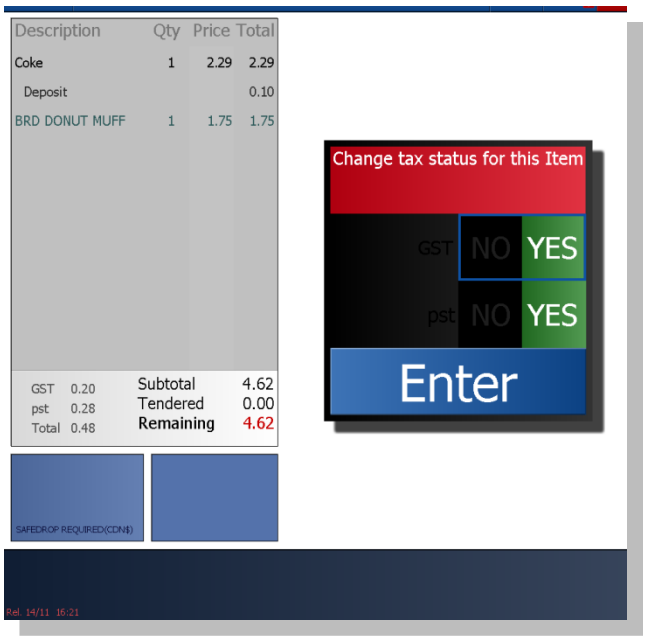
Tap on the appropriate fields (Yes or No) then tap on the [Enter] key.

Enter the reference number from the customer's tax exemption document.

The system will remove the selected taxes for all items for this sale.

## To exempt last item entered

To exempt the last item entered select option 2 'Change Tax Status for This Item' from the popup window.



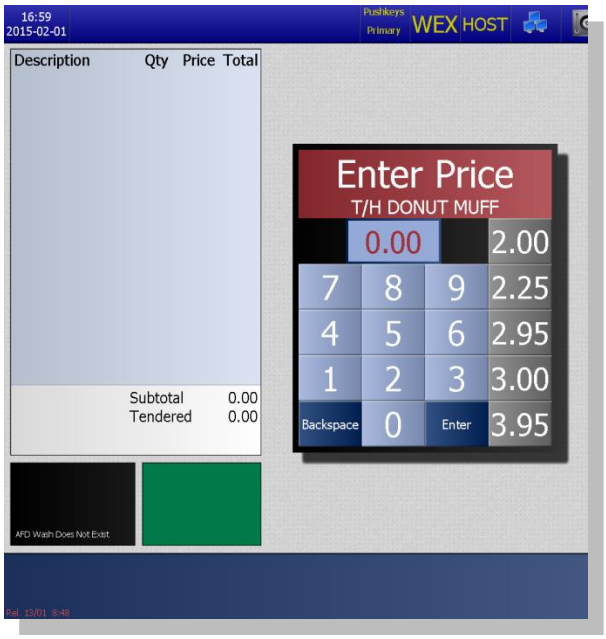

Next to GST, tap on the [NO] key if you do not want GST applied to this item.

Next to pst, tap on the [NO] key if you do not want pst applied to this item.

The system will remove the selected tax for this item.

## Prompt for price items

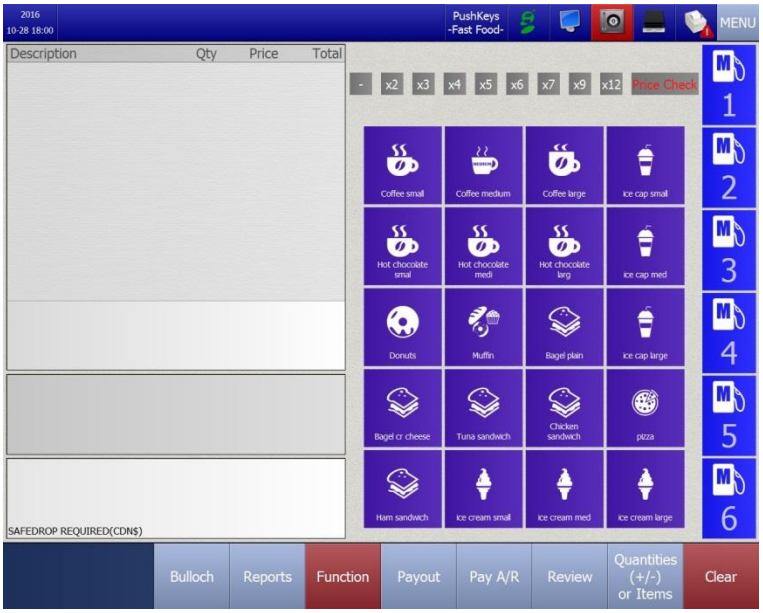
When an item is configured to prompt for price, the system displays the last 5 retail prices that were entered in the 'prompt for price' window. See screen below:



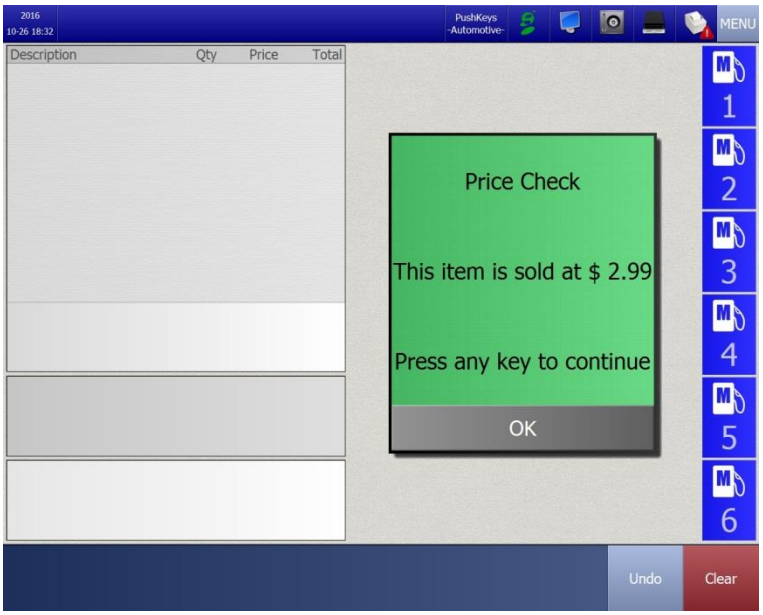
If the retail price of the item that you are selling is displayed on the screen, simply tap on the price point.

## Price checks

Tap on the [Price Check] tab. The letters are now displayed in red.




Scan an item or select one from the pushKey page. A screen will be displayed, indicating the price of the item. Press [OK] to continue.



# Accepting Payments

## Accepting Payments

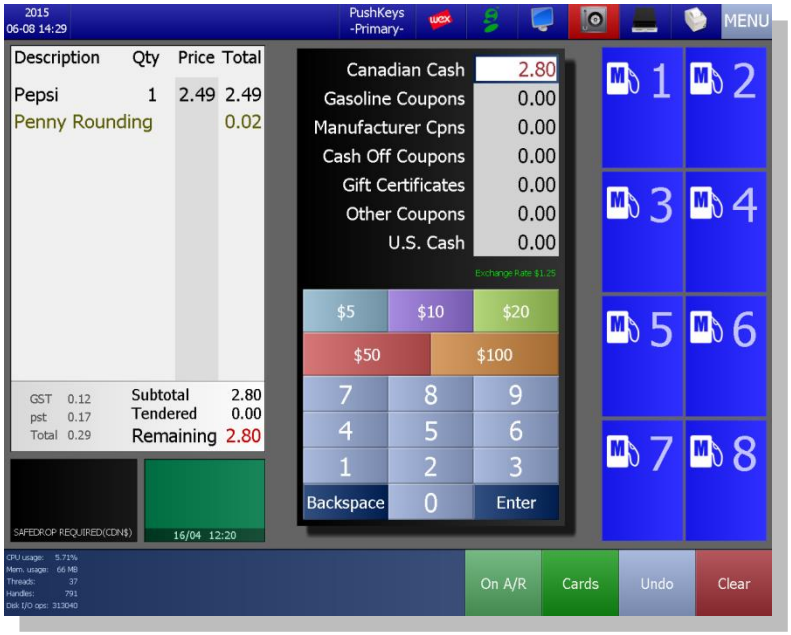
The BT9000 was designed to accept payments by cash (Canadian and American), debit cards, credit cards, gift cards and fleet cards. It can also split a sale between cash and credit or cash and debit or cash and gift cards.

This chapter describes how to accept payments, cancel or void transactions, and issue refunds. It also describes how to handle on account sales and payments, gasoline coupons, payouts and safe drops.

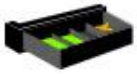
## Payment by Cash (Exact Change)

The following will describe how to accept a cash payment.

Press the [Cash Tenders] key to tell the system that the customer is paying cash.



Press the [Enter] key.  The transaction is completed automatically.



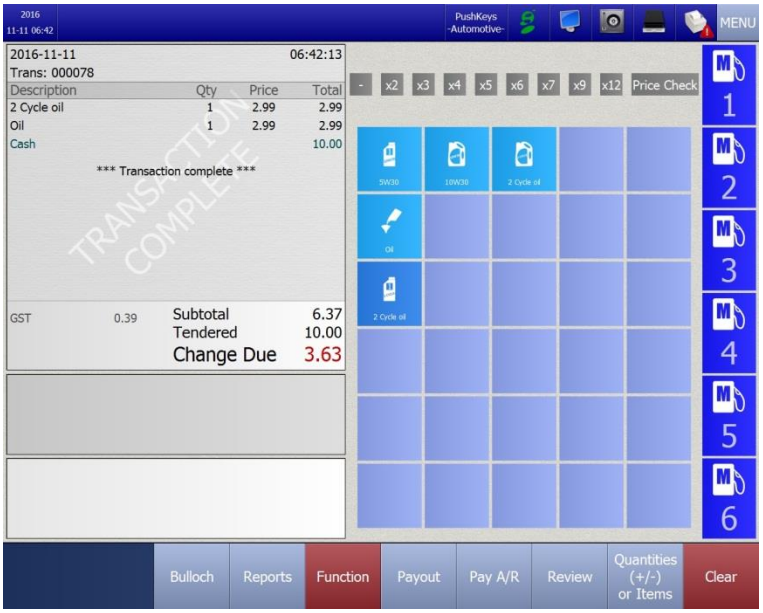
The cash drawer opens.  Put the money in the cash drawer.

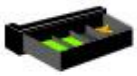
## Payment by Cash (Change Required)

The following example shows how to make change for a cash payment.

Tap on the [Cash Tenders] key to tell the system that the customer is paying cash.

Type in the amount of cash received and tap on the [Enter] key.  The system calculates the change due.



The cash drawer opens.

Give the customer the change due.

**Note.**  If the customer requires a receipt, press the printer icon.

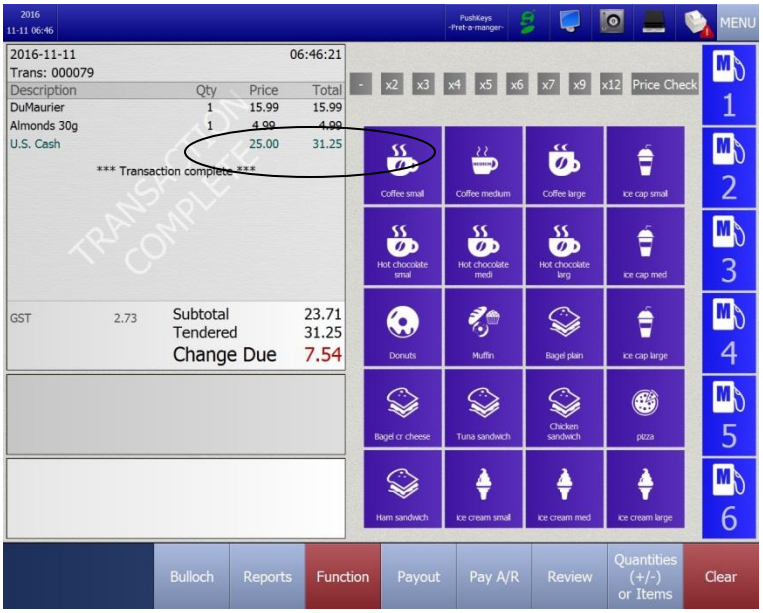
## Payment by U.S. Cash

The following will describe how to accept U.S. $ as method of payment:

Tap on the [Cash Tenders] key.

Tap on the field next to the words [U.S. Cash].

Tap in the amount of U.S. cash and tap on the [Enter] key. The system will automatically convert US to CND dollars using the exchange rate you have set up in your system. Change due is always in CND dollars.




## Payment with a Credit Card (in Store)

To process a sale with a credit card, tap on the [Cards] key.

Instruct the customer to follow the prompts on the pin pad.

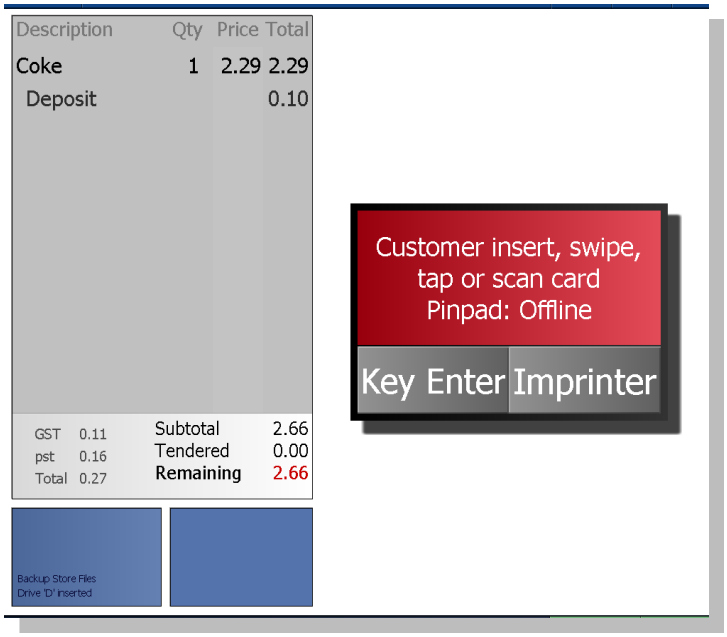
This tells the system that the sale is over and starts the request for authorization.

The BT9000 requests network authorization. If the network is down or the sale ‘timed out’, the BT9000 stores the transaction and forwards the request at a later time.

**Note.** If the system still does not respond, the magnetic stripe or the Chip on the credit card may be damaged. More details are provided in the next section.

## If the card won't swipe properly

If the card won't swipe properly, press the [Cards] key. The following screen will be displayed:




**Note.** Credit card rules are different for each petroleum company. They may also be different from station to station within the same company.

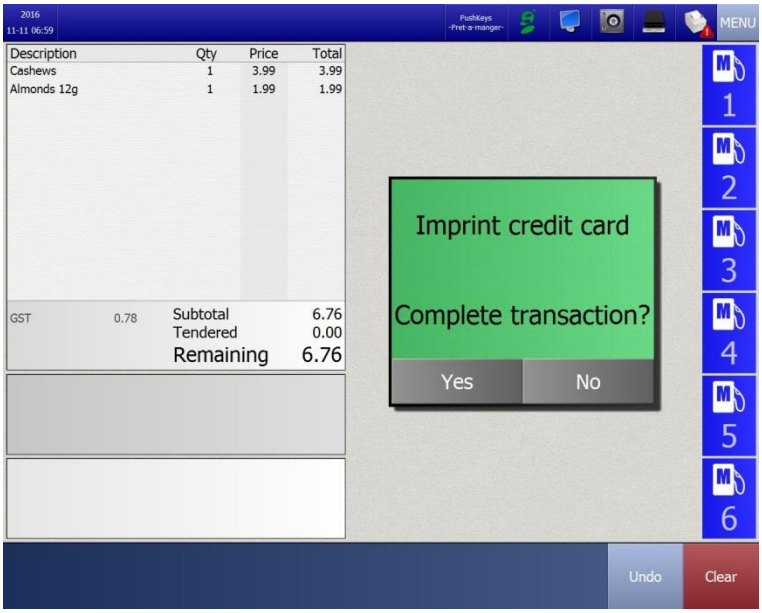
Press the [Key Enter] key.

Tap the customer's 16-digit credit card number and tap on the [Enter] key.

Tap the expiry date and press the [Enter] key.

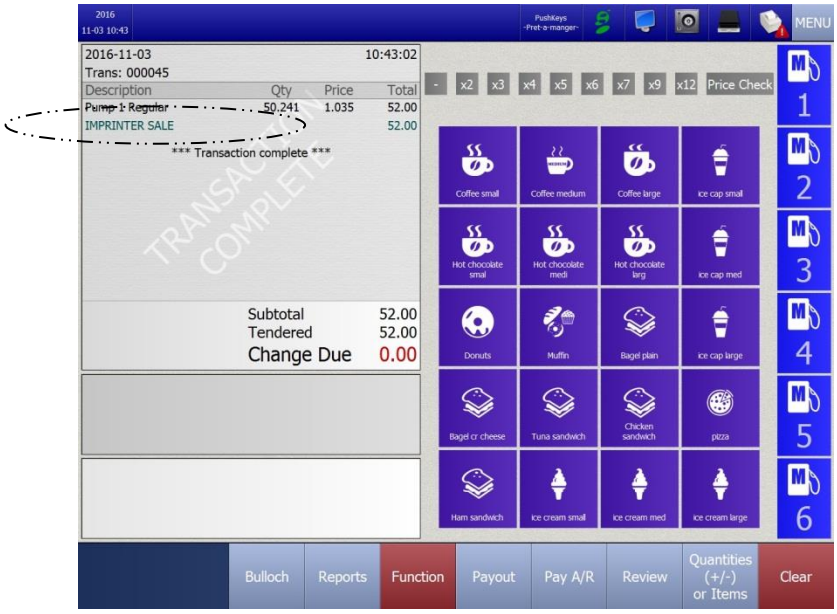
You may be asked to use an imprinter. If so, a message will be displayed on the screen, advising you to use an imprinter, followed by another message asking you to confirm that you want to complete the transaction.

Tap on the [CARDS Imprinter] key. The following screen will be displayed:




Tap on the [Yes] key to complete the transaction.

The words IMPRINTER SALE will be displayed on the screen and on the receipt.



## Payment with a Credit Card (at the Pump)

Sites equipped with AFDs (Automated Fuel Dispensers) have a portion of the screen allocated to AFD error and information messages.

When the system is running normally, the message displayed outside on the pump will tell the customer to ***'Insert Card to Begin'***.

If the network is down or you are in the process of doing a shift change, the AFDs are automatically disabled and the message on the pump screen will tell the customer to ***'Pay Inside'.***

## When the Network is down

Even if the POS authorization network goes down from time to time, you can still process credit cards inside. The transaction details are stored and transmitted when the network is active again. The network status indicators that are displayed along the top of the cashier screen will turn yellow however the messages remain the same.

## Payment with a Debit Card

To process a debit card sale, tap on the [Cards] key.

The system recognizes that the card is a debit 'bank' card. On the debit pin pad, instructions guide the customer to confirm the amount, select an account and enter a PIN number (Personal Identification Number).

Note. If your site is configured to allow Cash back, instructions guide the customer select an amount and verify cash back amount.

The system allows payment by debit *only* if the network is functioning properly. The transaction *must* be approved by the bank otherwise; the transaction *must* be re-tendered, using another form of payment.

For security reasons, you cannot manually enter the debit card number in the system. It must be swiped.

## Payment with a Fleet Card

Depending on the Petroleum Company, there **may** be certain rules specific to fleet card transactions:

1. You cannot combine 2 fuels sales. Each sale must be done separately.
2. The BT9000 will only accept fleet cards as tender for fleet card transactions – split tender is not allowed.
3. Fleet credit cards cannot be used outside in the AFDs.

To process a fleet card sale, instruct the customer to swipe the fleet card in the pin pad.

## Payment with a Chip Card

To accept payment with a Chip card, press the Guest Swipe key. The message on the pin pad will show 'Please insert or swipe your card'.

Instruct the customer to insert tap his chip card ***or*** insert it in the pin pad (if contactless transactions are not available at your site. The message on the pin pad will show the dollar amount of the sale and will instruct the customer to press the OK key.

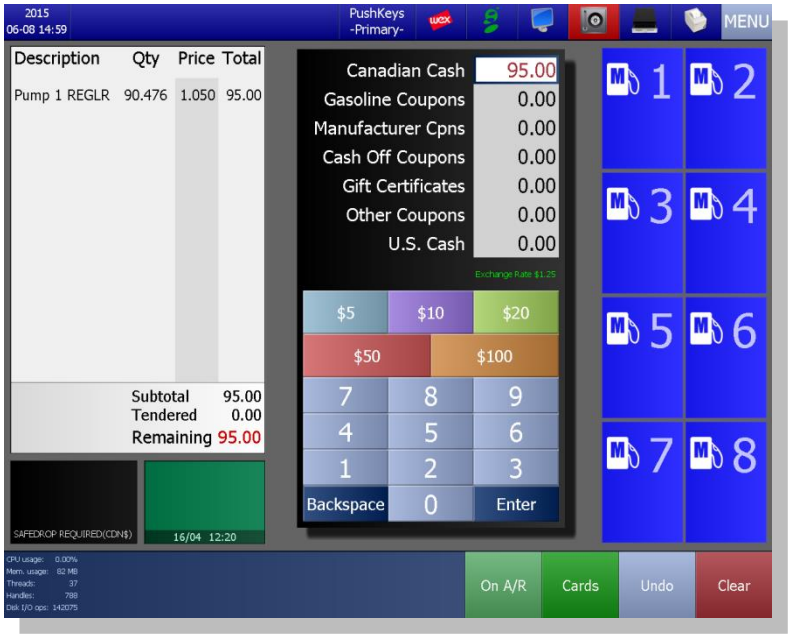
Once the customer presses the OK key, the message on the pin pad will ask him to enter his pin number then select an account.

The customer will select an account and the transaction will be processed. Two receipts will be printed.

Give the customer one copy of the receipt.

## Complex Tendering (Split Payment)

Press the [Cash Tenders] key to accept a combination payment of cash and credit/debit, US currency, gasoline coupons, gift certificates or manufacturer's coupons. The amount due automatically defaults to the 'Canadian Cash' field.

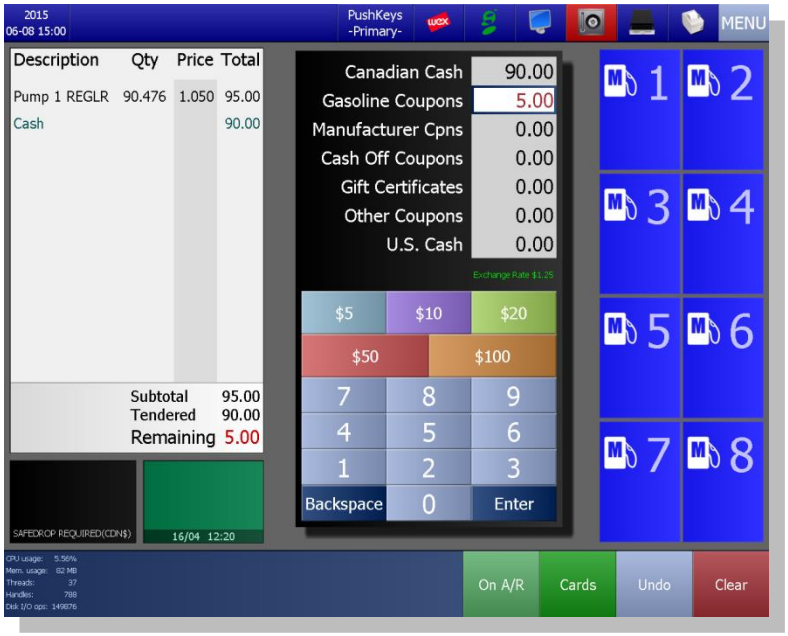



Enter the appropriate amount in each field. For U.S. cash, enter the amount in U.S. dollars. The system will automatically convert the U.S. cash to Canadian dollars. Change due is **always** in Canadian dollars.

As amounts are entered, TENDERED and REMAINING keep changing to reflect new totals. When TENDERED is greater than GRAND TOTAL, REMAINING becomes CHANGE DUE.

**Note.** If there is change due, you can only end the sale by pressing the [Cash] key.

If tendered amount is less than the sale amount, you can swipe a debit, gift or credit card and the remaining of the sale will be charged on the card.




## Cancellations

You can cancel a sale at any time before you accept payment by simply pressing the [Clear] key.

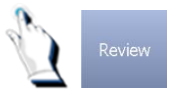
Once a payment has been accepted, the sale must either be voided or refunded.

## Voids

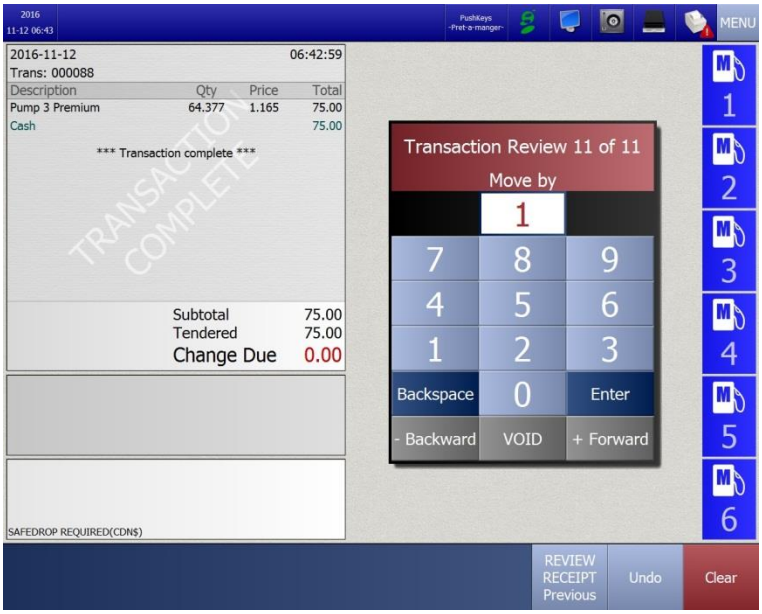
Voids are necessary when a customer changes their mind or you entered information incorrectly. It is not difficult to correct an error but keep in mind that you cannot void a sale that occurred on a different shift.

If you want to void part of a sale, a sale that occurred on a different shift or a sale from a previous batch you must issue a refund by making a negative sale. Refunds are described later on in this chapter.

Voids are used most often when an incorrect pump was cashed out and the mistake was noticed after the sale was completed or if a customer changes their mind and wants to use a different form of payment.

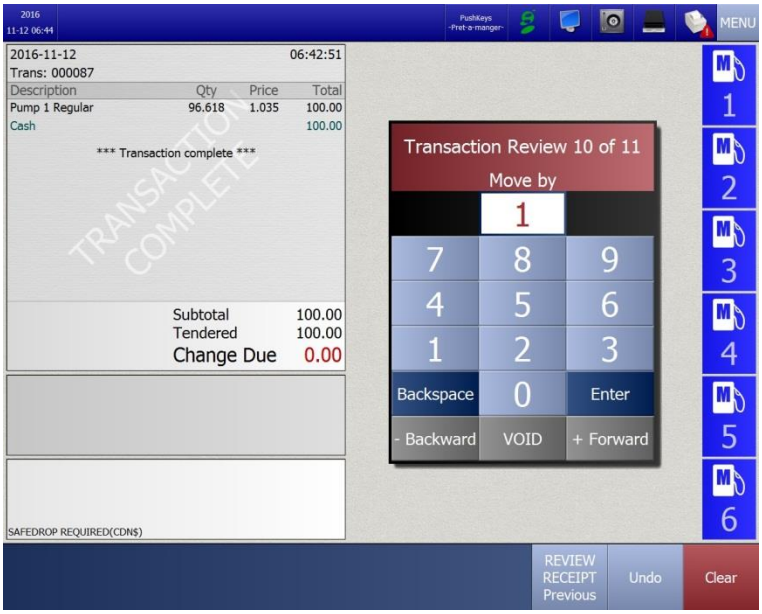



Tap on the [Review] key. The following screen will be displayed:

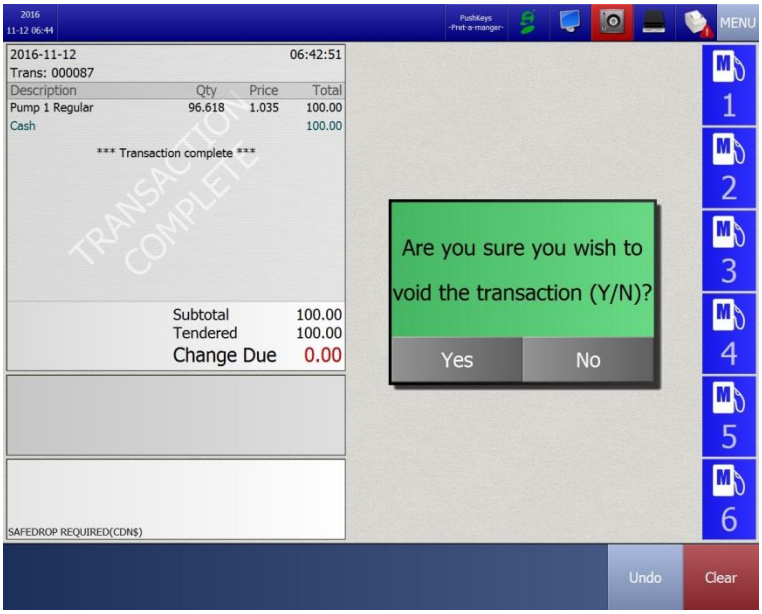



The last transaction completed will be displayed on the screen.

Tap on the [REVIEW RECEIPT Previous] key until you find the transaction that you want to void.



Tap on the [VOID] key. The following screen will be displayed:




Confirm the void by pressing the [Yes] key. If you want to cancel the void, press the [No] key.

Merchandise items are automatically reversed from total sales

**Note.** If the transaction to be voided was originally charged to a credit card, a fleet card or debit card, you must swipe that card to void the transaction. You will be prompted to swipe the card.

When authorization for the void is completed, a receipt will be generated. Give the customer a copy of the negative (void) transaction.

## Voiding a Gasoline Sale

The BT9000 cannot assign the gasoline sale to its original pump after it has been voided as another customer may be using that pump.

The BT9000 has a temporary spot located on the bottom row of the cashier screen to assign voided gasoline sales. Depending on your site's configuration, the temporary spot may be located on the top row of the cashier screen.

Tap on the [Review] key and locate the sale that you want to void.

Tap on the [VOID] key. The system will ask you to confirm that you wish to void the transaction.

Tap on the [Yes] key.

The void sale is now displayed in a green key on the bottom of the cashier screen, or in a green screen located on the top of the cashier screen, depending on your site's configuration. On the key, you will see information indicating the original pump number of the sale that you have voided and the dollar amount of that particular sale.

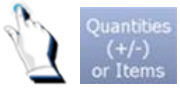
Press the green key. The details of the transaction appear on the screen.

The gasoline can now be sold to the correct customer.

**Multi Paypoint**. Whichever paypoint completed the transaction is the same one to void it.

## Refunds (Negative Sales)

You must sell the item negatively in order to process a refund.

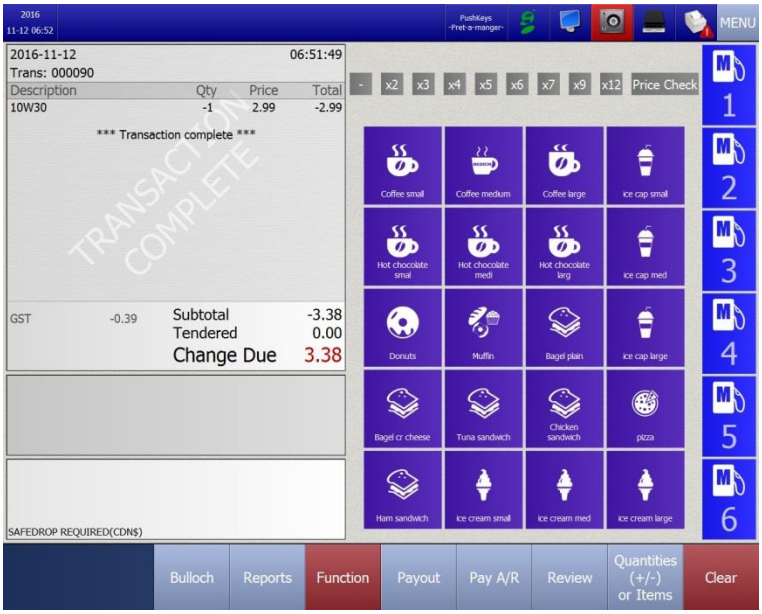



Tap on the [Quantities (+/-) or Items] key **OR**

Tap on the [Negative] key.

Tap in a number of units (e.g. 1) and then tap on the [-Negative Qty] key.

Scan the product.




Complete the transaction.

If the transaction was completed with cash, tap on the [Cash Tenders] key and tap on the [Enter] key.

If the transaction was completed with credit, tap on the [Cards] key and instruct the customer to follow the prompts on the pin pad.

**Note.** Refunds are only allowed if your site is configured to allow refunds.

## Making a negative sale

Tap on the [Quantities (+/-) or Items] key **OR**

Tap on the [Negative} key.

Enter the number 1 and tap on the [-Negative Qty] key.

Scan the UPC label and complete the transaction.

**Note.** Not all petroleum companies allow credit card refunds. However, most allow cash refunds.

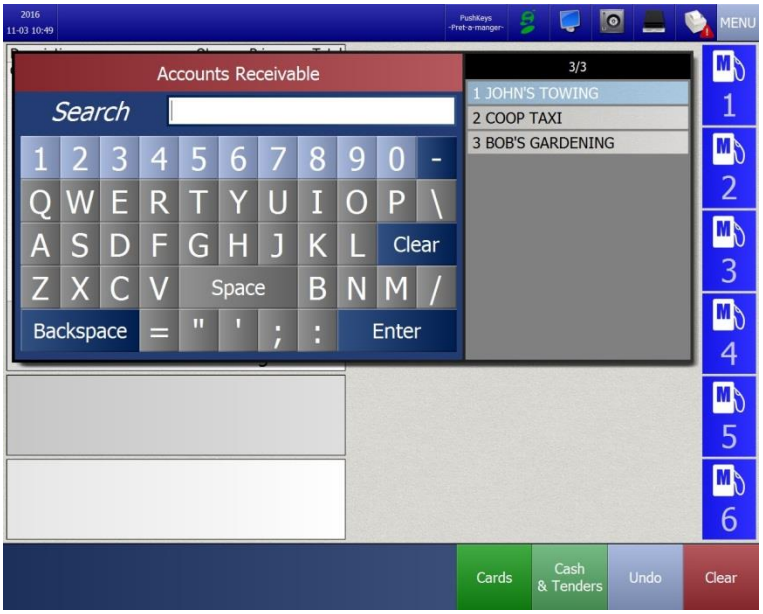
## On Account Sales

Certain customers do not pay at the time of their purchase. These Accounts Receivables customers make their payments on their account at a later date.

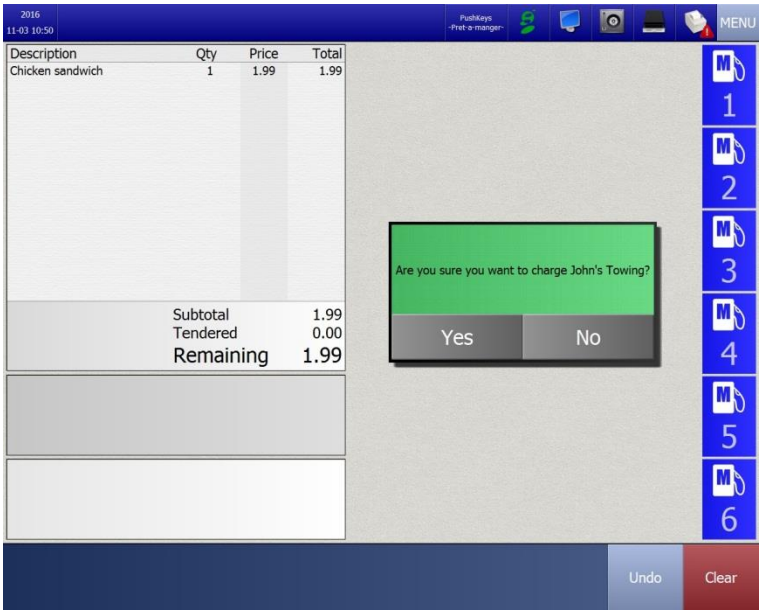
These payments can be processed at the cash register. However, it is important to note that the BT9000 system does not keep weekly/monthly totals of purchases that were tendered using the [ON A/R] function nor does it have functionality to produce weekly/monthly customer statements.

Scan a product.

Tap on the [On A/R] key. A list of customers who are set up in the Accounts Payable file will be displayed. Tap on the name of the customer.

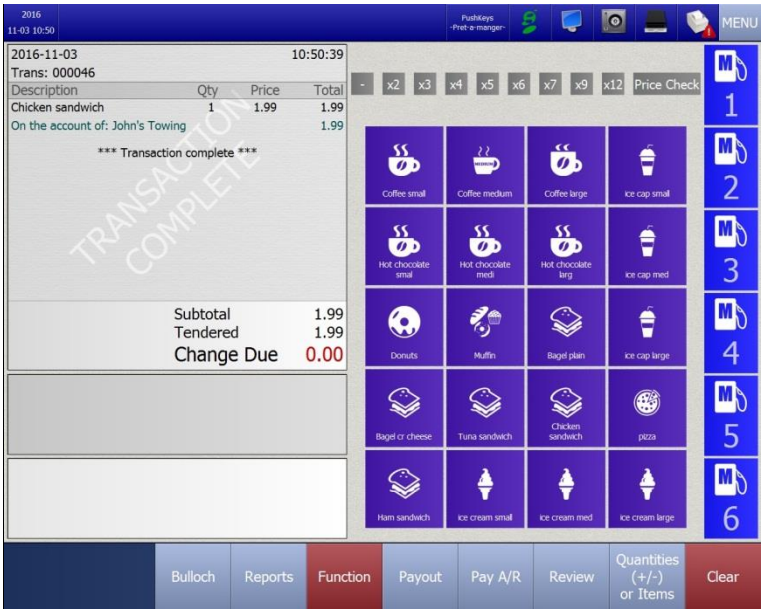


A message will be displayed on the screen:




Answer [Yes].

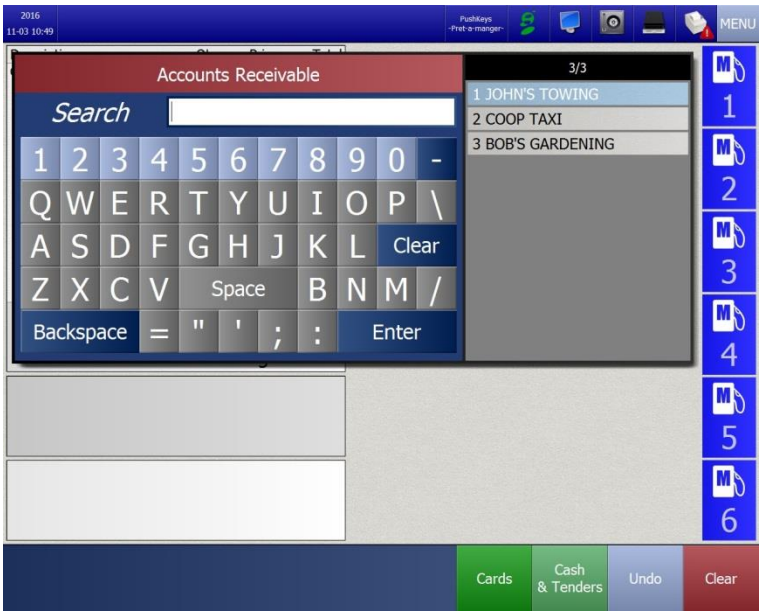
The transaction will complete. The message on the receipt will show 'On the account of: XX'.



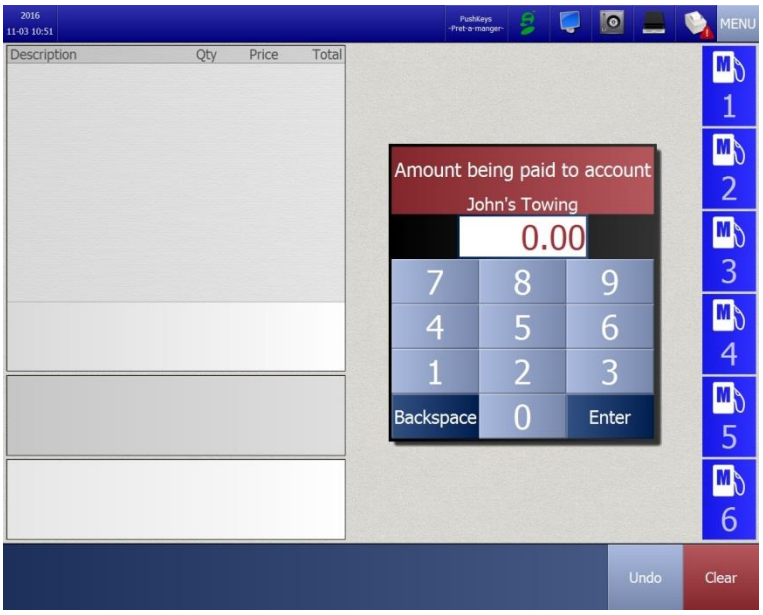

## On Account Payments

There may be times where a customer will want to make a payment towards their account balance.
To apply a payment to an A/R customer's account, follow the steps described on the next page.

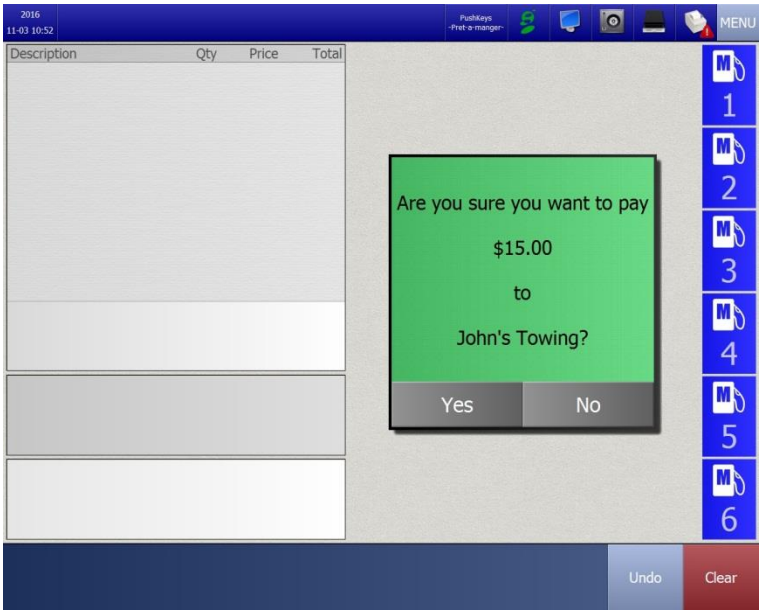
Tap on the [Pay A/R] key. A list of A/R customers set up in the system will be displayed on the screen.



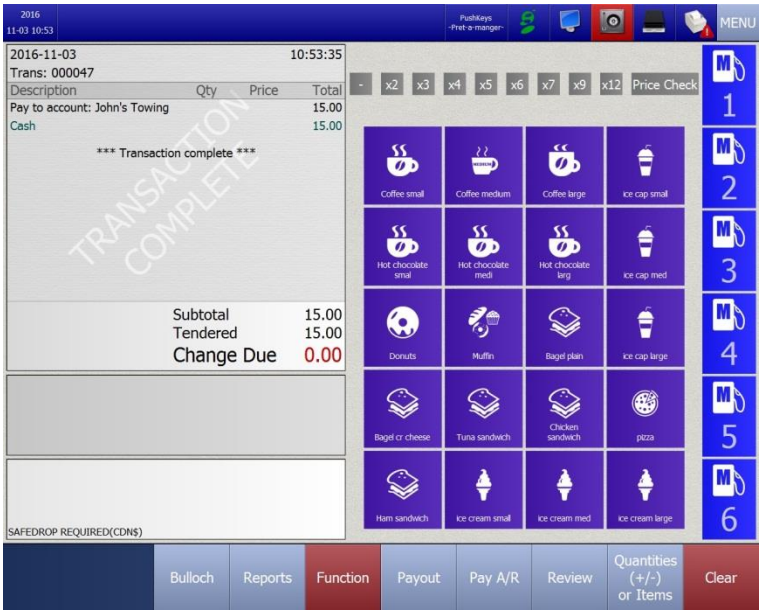
Tap on the name of a customer. The 'Amount being paid to account' screen will be displayed.



Enter the amount of the payment and press the [Enter] key.




Answer [Yes]. The payment can now be taken by taping on the [Cash Tenders] followed by the [Enter] key or by swiping a debit card or a credit card.




**Note.** Some petroleum companies only allow cash payments on a customer's account.

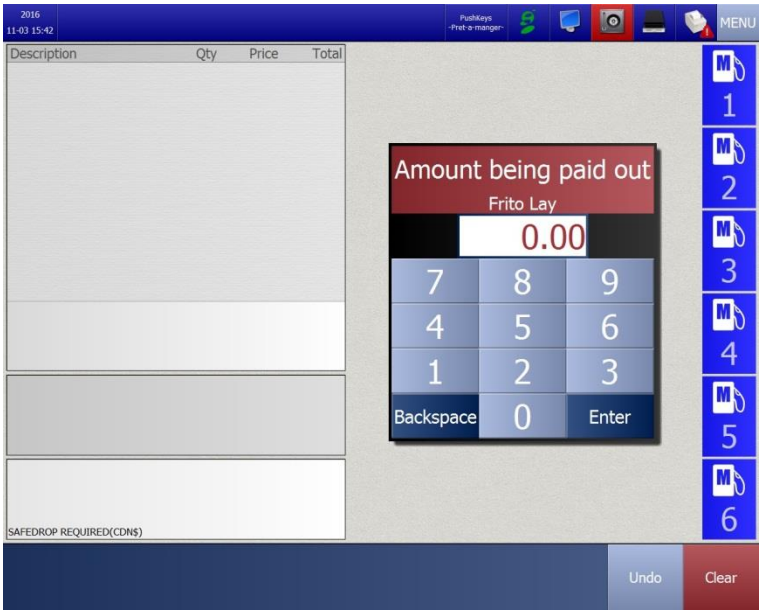
## Payouts

Expenses such as lottery winners and newspaper deliveries may be paid from your cash register. Each company determines what expenses are eligible 'payouts'.

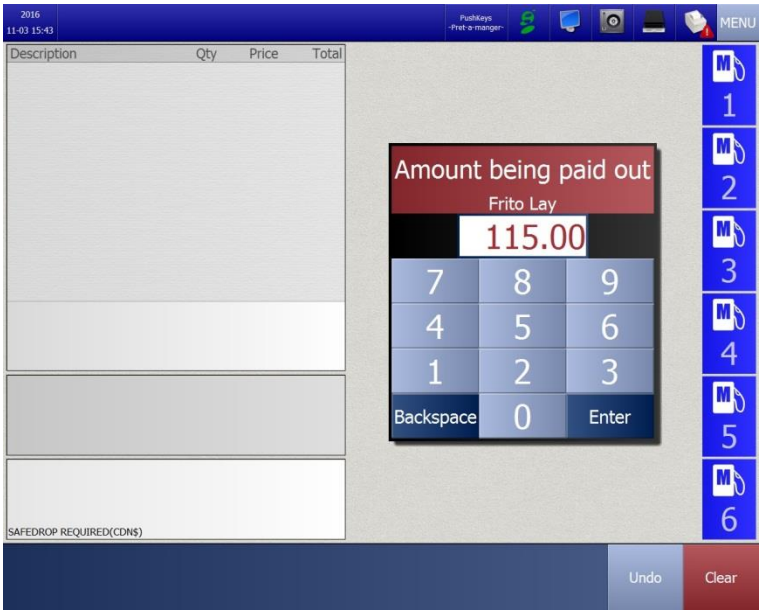
To pay for items from your cash register, tap on the [Payout] key.

The payout codes will be displayed on the screen:

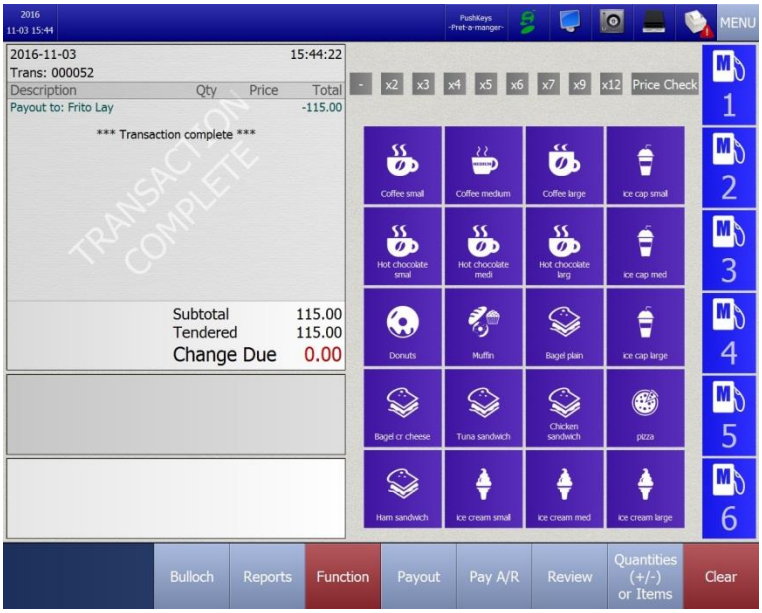
Tap on a payout code. The 'Amount being paid out' screen will be displayed:



Tap in a dollar amount.




Tap on the [Enter] key. The screen indicates the details of the payout.



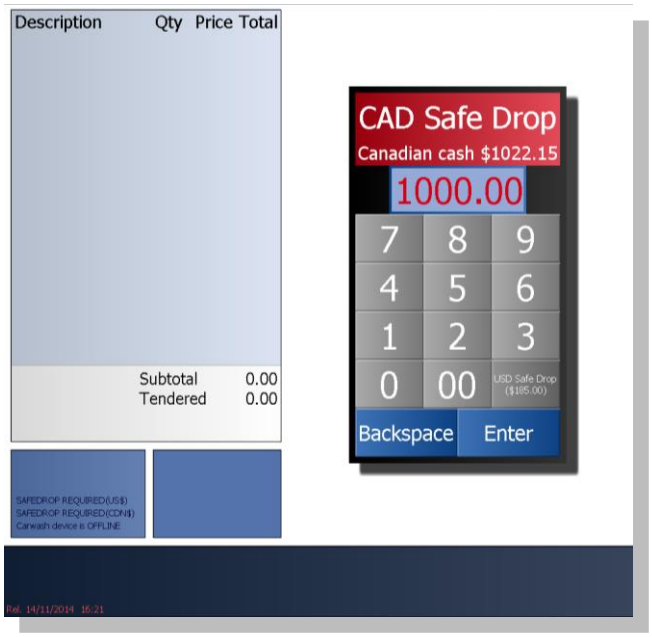

## Safe Drops

A safe drop is simply removing that amount of cash from the cash drawer and placing it in a secure place. You may perform a safe drop at any time if you feel that you have too much money in the cash drawer.

When you have accumulated a pre-determined amount of Canadian or American cash, the safedrop icon flashes red and the words ‘SAFEDROP REQUIRED’ are displayed on the screen.

Tap on the safe drop icon. The system defaults to the Canadian safe drop screen.

Key in the safe drop amount.




Tap on the [Enter] key.

Tap on the [Yes] key to complete the safe drop or the [No] key to cancel it. A receipt is printed automatically and should be attached to the money withdrawn from the cash drawer. A message on the screen indicates that the transaction is complete.

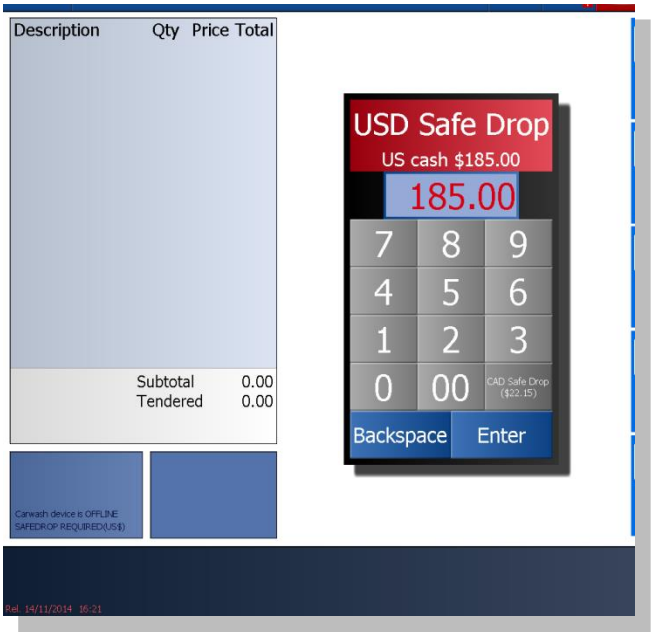
## Safe drops – American money

When you tap on the safe drop icon, the safe drop box contains a box entitled ‘USD Safe Drop’.

USD Safe drop box.

Tap on the [USD Safe drop] box.

Tap in the amount of the safe drop.




Tap on the [Enter] key. The following screen will be displayed:

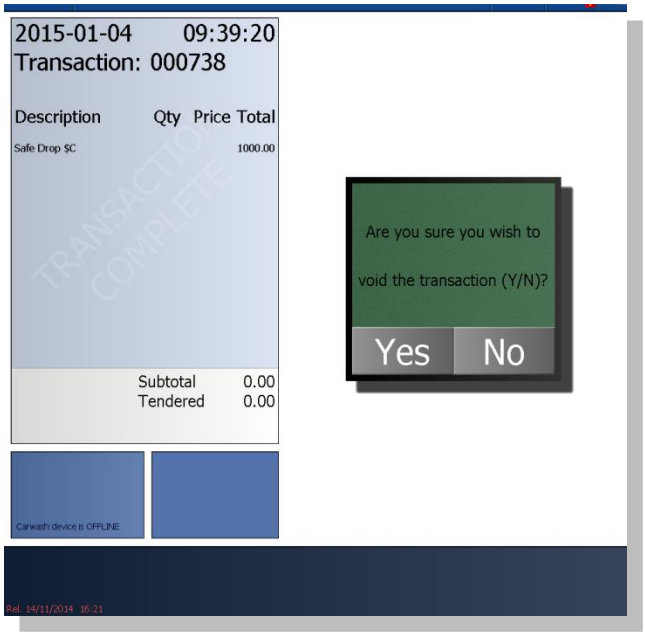
Tap on the [Yes] key to complete the safe drop or the [No] key to cancel it. A receipt is printed automatically and should be attached to the money withdrawn from the cash drawer. A message on the screen indicates that the transaction is complete.

## Voiding Safe Drops

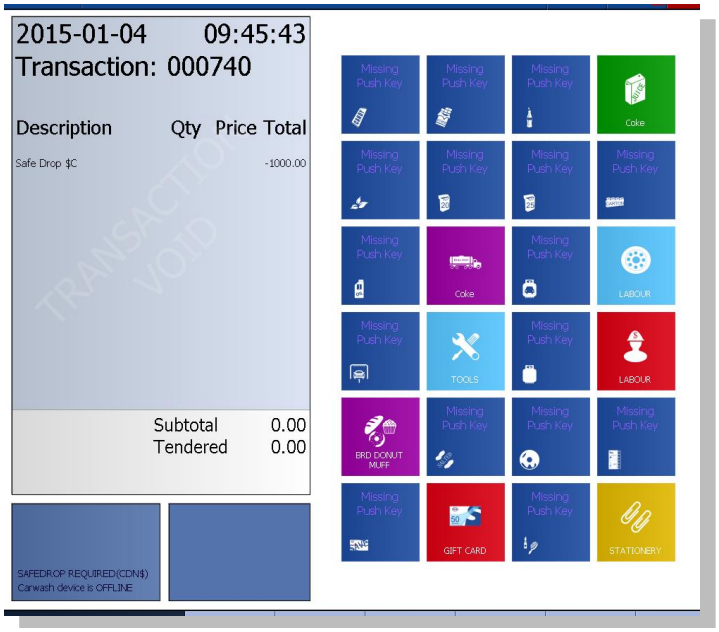
Functionality in the BT9000 allows you to void a safe drop if an incorrect amount was entered.

Tap on the [Review] key to locate the safe drop.

Tap on the [VOID] key. The message on the screen will ask you if you wish to void the transaction.



Tap on the [Yes] key to complete the transaction.



# Cashier Reports

## Cashier Reports

Each cashier begins their shift by running a Shift Change Report. The report records all transactions from the previous shift.

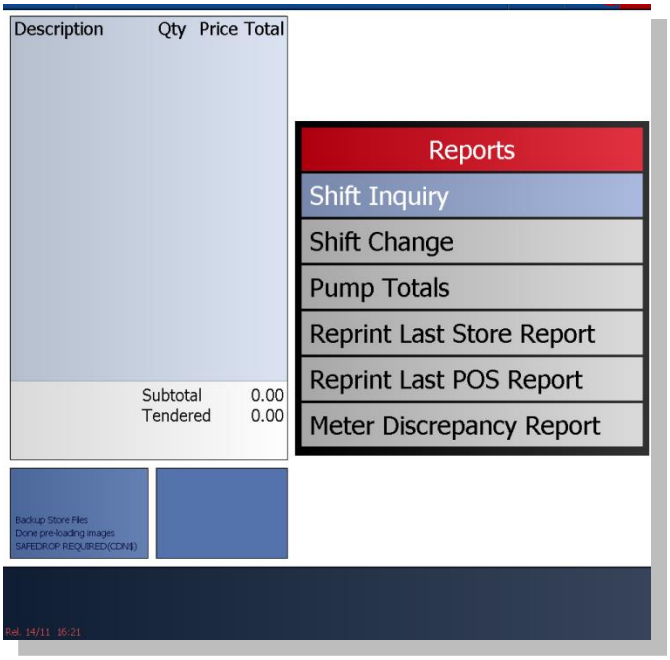
This chapter contains a list of reports that can be printed from cashier's mode and a sample of some of the reports.

## Printing Reports in Cashier Mode

Tap on the [Reports] key.

The Reports menu will be displayed on the screen.

This menu may differ from one Petroleum company to another. Here is a sample menu.



## Reports Description

| Reports | What it does |
|---|---|
| **Shift Inquiry** | Reports the sales totals for the current shift. |
| **Shift Report** | Reports the sales totals for the current shift in two parts:<br>1. POS (company specific custom information)<br>Closes the current shift.<br>Starts a new shift.<br>2. Terminal (Standard sales information). |
| **Pump Totals** | Reports the pump meters. |
| **Reprint Last Store Report** | Reprints the store report that was printed last.<br>**Note.** If the last report was the Shift Change report, you must also reprint the Last POS Report. |
| **Reprint Last POS Report** | Reprints the company specific POS report. |
| **Meter Discrepancy Report** | Prints automatically at the end of the Shift Report. Check for any differences between the metered sales and the reported sales. |

### What does the Shift Change Report do?

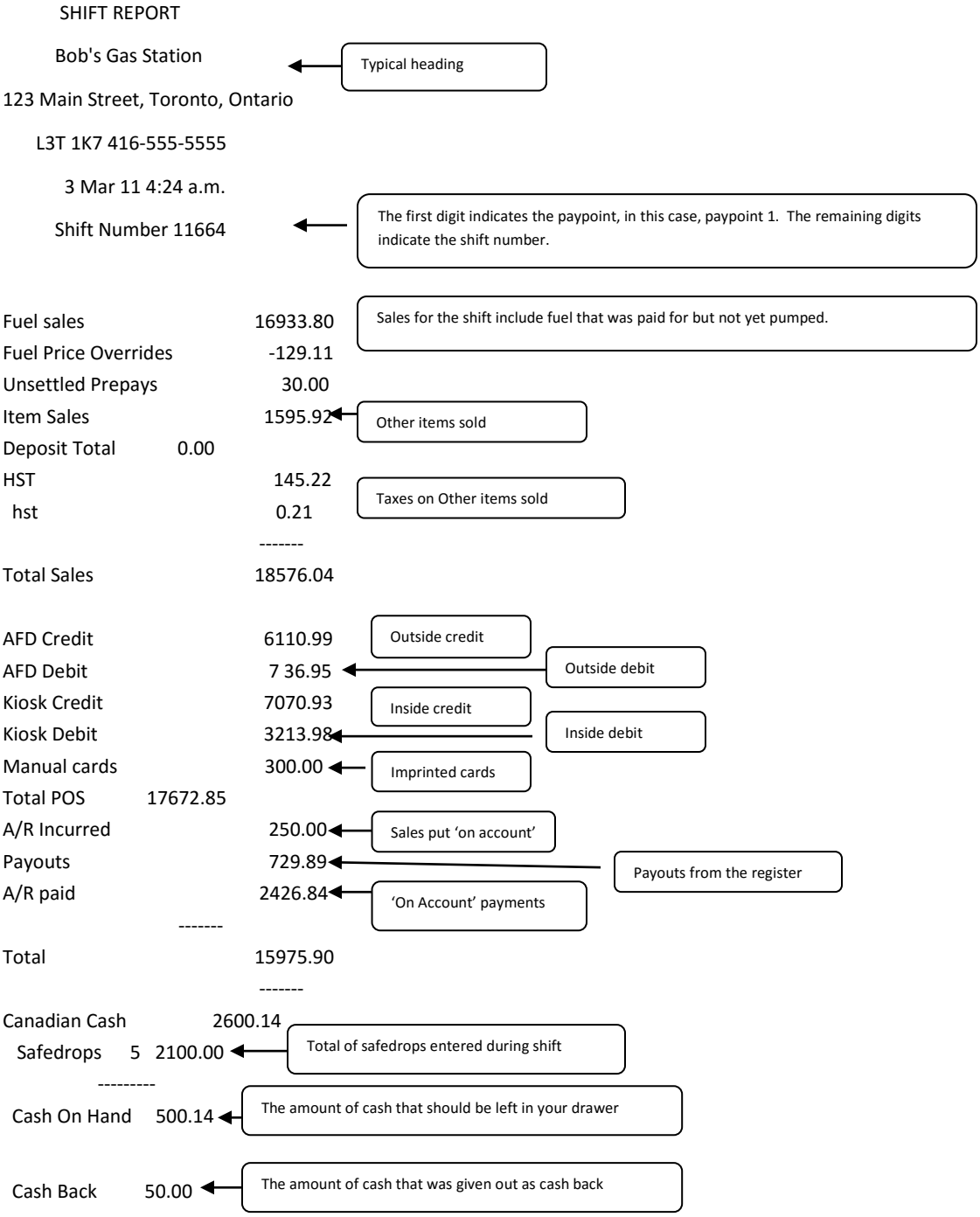
The Shift Change report is customized for every petroleum company. Generally, the shift report summarizes sales in the following categories:

- Cash, debit card, credit card, fleet card and AFD sales
- Items sold by category
- On account sales
- Payouts
- Safedrops
- Self-serve and full-serve totals by litres and by dollars
- Pump meter reads
- Customized reporting as specified by the Petroleum company

**When the Shift Change report is printed:**

- The current shift is closed and a report is printed
- A new shift is started
- A running total of sales is kept until the new shift is closed

## Sample Shift Report



SELF SERVE FUEL SALES

| FUEL TYPE | VOLUME [L] | TOTAL [$] |
|---|---|---|
| Regular | 8957.25 | 12300.08 |
| Mid-Grade | 258.29 | 411.32 |
| Premium | 456.25 | 599.89 |
| Diesel | 1868.63 | 2011.93 |
| Total | 11635.42 | $15323.32 |

Review of Self-serve sales

FULL SERVE FUEL SALES

| FUEL TYPE | VOLUME [L] | TOTAL [$] |
|---|---|---|
| Regular | 857.63 | 1078.48 |
| Mid-Grade | 68.29 | 80.16 |
| Premium | 299.14 | 398.76 |
| Diesel | 64.12 | 53.08 |
| Total | 1289.18 | $ 1610.48 |

Review of Fuel-serve sales

ITEM SALES

| Item | net# | V | Total |
|---|---|---|---|
| Department: 000001 Confectionary | | | |
| 1000001 Excel Pelle | 1 | 8 0 $ | 26.82 |
| 1000002 Excel Slab | 1 | 0 $ | 1.49 |
| 1000003 Mars reg. b | 2 | 0 $ | 2.78 |
| 1000004 Bic Reg Lig | 1 | 0 $ | 1.99 |
| 1000005 COFFEE Smal | 3 | 0 $ | 3.57 |
| 1000006 COFFEE Med. | 4 | 0 $ | 5.16 |
| 1000007 HOT CHOC SM | 1 | 0 $ | 1.49 |
| 1000008 COKE 591ml | 1 | 0 $ | 1.99 |
| 1000009 Hersh/reese | 1 | 0 $ | 1.39 |
| 1000010 KS REESE PB | 2 | 0 $ | 3.98 |
| 1000011 TRIDENT GUM | 1 | 0 $ | 1.69 |
| 1000012 Trident Lay | 1 | 0 $ | 1.69 |
| 1000013 HALLS | 3 | 0 $ | 4.47 |
| 1000014 FISHERMAN'S | 1 | 0 $ | 2.19 |
| 1000015 Chips $1.49 | 1 | 0 $ | 1.49 |
| 1000016 Rice Krispi | 1 | 0 $ | 1.29 |
| 1000017 J.L. Pepper | 1 | 0 $ | 0.99 |
| 1000018 J.L. Pepper | 1 | 0 $ | 2.29 |
| 1000019 M.MAID PURE | 1 | 0 $ | 2.29 |
| 1000020 AQUAFINA 59 | 1 | 0 $ | 1.69 |
| 1000021 Aquafina Pl | 1 | 0 $ | 2.49 |
| 1000022 NOS Energy | 1 | 0 $ | 3.99 |
| 1000023 GATORADE 59 | 1 | 0 $ | 1.99 |
| 1000024 HERSHEY MIL | 1 | 0 $ | 2.29 |
| Grand Total | 50 | 0 $ | 81.50 |
| | | HST $ | 10.51 |

Review of all non-gas items sold throughout the shift. The sales will be broken down by departments.

We will only show one department in this example.

A/R Customers

| Cust Name | Incurred | Paid |
|---|---|---|
| GM CANADA | 0.00 | 2426.84 |

This customer incurred $2426.84.

PAYOUTS

| Description | Amount |
|---|---|
| Lottery winners | 90.00 |
| Auto Trader | 8.50 |
| Maintenance Expense | 154.45 |
| Wholesaler | 476.94 |

Payouts that occurred during this shift

SELF SERVE

PUMP READ SUMMARY

| | | |
|---|---|---|
| Regular | L | 75388272.415 |
| Mid-Grade | L | 5101313.254 |
| Premium | L | 6649894.368 |
| Diesel | L | 3670969.102 |
| Low feedstock | L | 77876020.493 |
| High feedstock | L | 9263742.611 |
| Total Cash | $ | 88376608.10 |

Review of mete reads for self-serve sales

FULL SERVE

PUMP READ SUMMARY

PUMP READ SUMMARY

| | | |
|---|---|---|
| Regular | L | 54388272.414 |
| Mid-Grade | L | 6191313.278 |
| Premium | L | 3429894.456 |
| Diesel | L | 1920395.102 |
| Low feedstock | L | 76879088.985 |
| High feedstock | L | 8967453.456 |
| Total Cash | $ | 38697089.16 |

Review of meter reads for full-serve sales

SHIFT STATISTICS

Total transactions..... .....446
Total number of customers.....418
$ 18576.04
Total item transactions (84)..... ..... 99
Total fuel/item transactions (84).... ....68
Total fuel only transactions (84)... ...251
$ 13657.72
Number of reboots..... ..... 1
Voided Transactions..... .....1
$ 0.00

Afd transactions..... .....134
$ 6837.94
Number of key entered credit..... 1
# of Shift Inquiries run..... .....0

*Undo Key Hits: 2
*Clear Key Hits: 17
*Negative Sales: 1
*Void Transactions: 1

Shift statistics for this shift

CARD STATISTICS

| Time | Trans# | Card | M | V | Sale $ |
|---|---|---|---|---|---|
| 06:25 | 513897 | DEBIT | | | 26.18 |
| 06:25 | 513898 | DEBIT | | | 40.00 |
| 06:30 | 513908 | MC | | | 12.40 |
| 06:31 | 513910 | MC | | | 12.56 |
| 06:53 | 513922 | MC | | | 61.00 |
| 06:54 | 513924 | MC | | | 14.01 |
| 08:33 | 514004 | MC | | | 83.36 |
| 08:35 | 514005 | MC | | | 28.00 |
| 11:12 | 514145 | VISA | | | 48.19 |

Card statistics for this shift - How many cards were used more than once on this shift and what cards were entered manually

METER DISCREPANCY REPORT

Bob's Gas Station
123 Main Street, Toronto, Ontario
L3T 1K7 416-555-5555
03 Mar 11 02:22 p.m.

| | Terminal Sales | Meter Sales | Difference |
|---|---|---|---|
| Regular | L 1119.50 | 1125.60 | 6.190 |

There was a discrepancy of 6.190 litres between the metered sales and the BT9000 sales

## Pump Totals

**PUMP VOLUMES**
**SELF SERVE**
**01 August 2014 10:01 a.m.**
**Shift 14576 August 01 6:01**

| | | |
|---|---|---|
| DISPENSER 10 | | |
| Regular | L | 42398.20 |
| | $ | 195719.11 |
| DISPENSER 11 | | |
| Premium | L | 31768.28 |
| | $ | 28876.99 |
| DISPENSER 12 | | |
| Mid-Grade | L | 28982.48 |
| | $ | 25327.55 |
| DISPENSER 13 | | |
| Regular | L | 56392.25 |
| | $ | 46192.26 |
| DISPENSER 14 | | |
| Regular | L | 45809.63 |
| | $ | 158980.75 |
| DISPENSER 15 | | |
| Regular | L | 63753.43 |
| | $ | 633692.08 |
| GRAND TOTALS | | |
| Regular | L | 435869.41 |
| | $ | 3617196.72 |

# Managing Sales

## Managing Sales

The BT9000 keeps track of all transactions processed at your station.

This chapter describes the functions that managers can use to audit transactions and print standard reports. These functions are normally restricted to managers or shift supervisors.

### Options

The BT9000 uses screens from the Reports and Logs menus to audit all POS transactions.

Most functions can be viewed as well as printed. All information is grouped by shifts.

All of these reports are kept in the system for a pre-determined number of days.

## Reports

Select the *Reports* menu from the *Main Menu.* The following screen will be displayed:

### Sales Summary

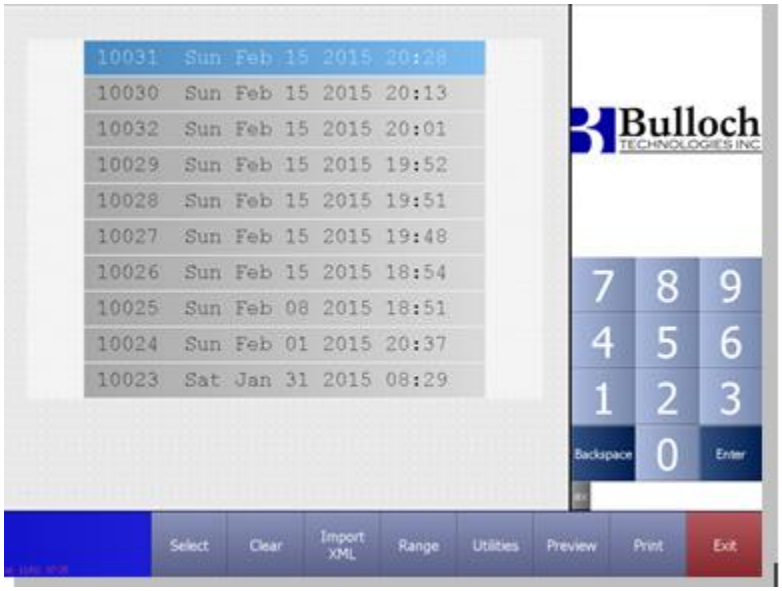
The Sales Summary provides an overview of all sales transactions for a defined time frame. It is probably the most common report used by management.

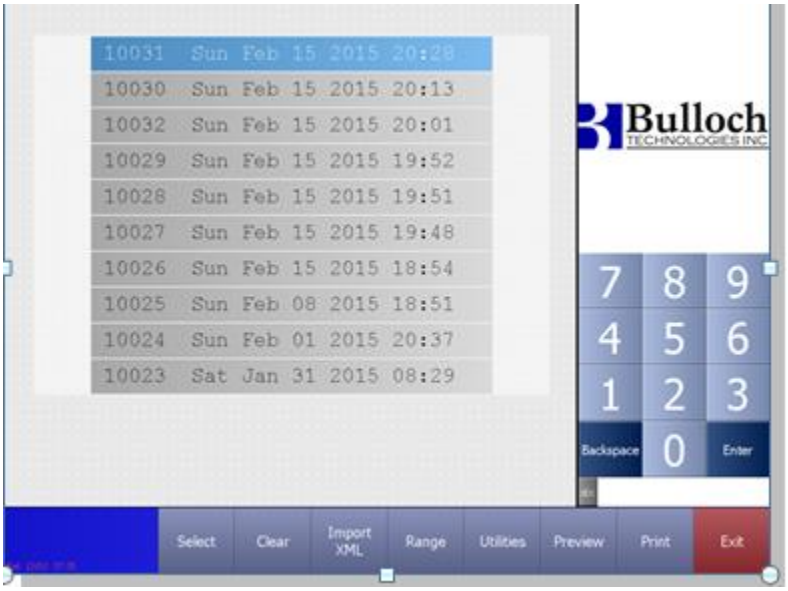
### POS Returns

The POS Returns reverses bank transactions accidently submitted twice. Returns are reported on the shift report.

### Selecting Shifts

When you press 'Sales Summary', the following screen will be displayed:

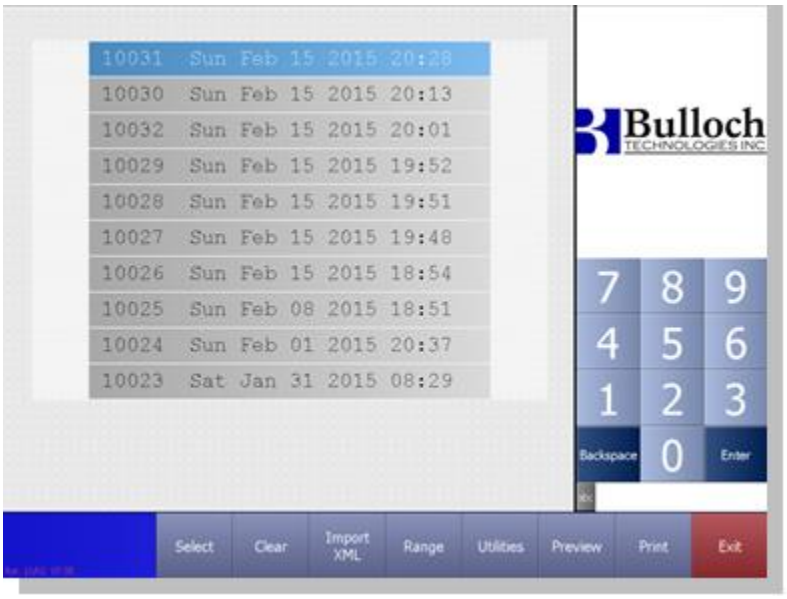


There are two methods for selecting shifts.

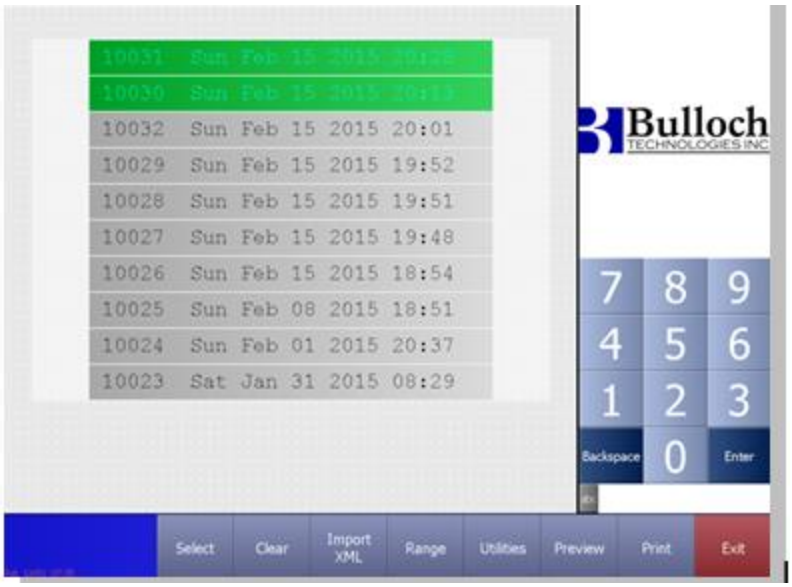
**Method One**

Tap on the first report that starts the range you want to print. The highlighted report changes color to indicate that it has been selected.



Tap on the [Range] key.

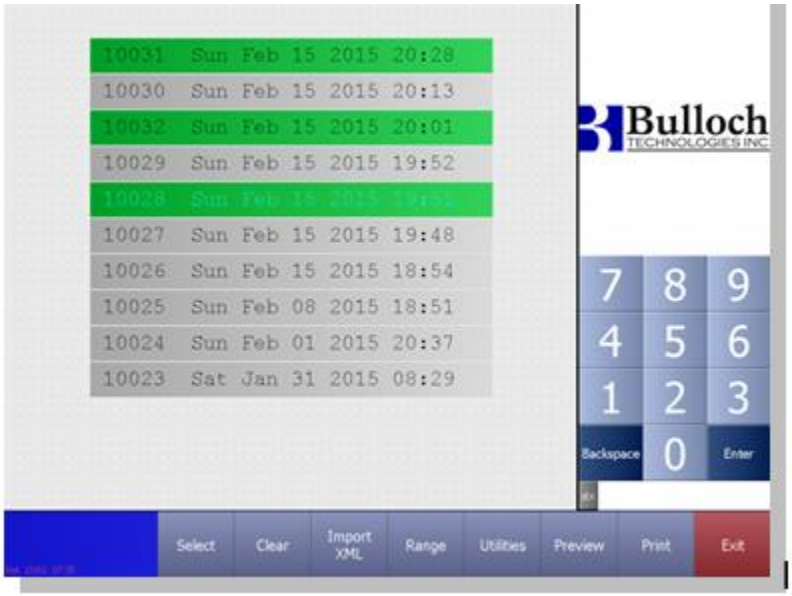
Tap on the last report that you want to include in your range.




**Note**. A single report is a range.

### Method Two

Tap on the individual reports to highlight the reports that you want.




Repeat the process until all of the desired reports have been highlighted.

## Sales Summary Report

The Sales Summary Report is identical to the Shift Report with the exception that it can summarize one or more shifts depending on the range selected.

## Reprint a Sales Summary Report

If you need to reprint a Sales Summary Report, select *Sales Summary* from the *Reports menu*.

Highlight the summary (or summaries) in question by tapping on the reports.

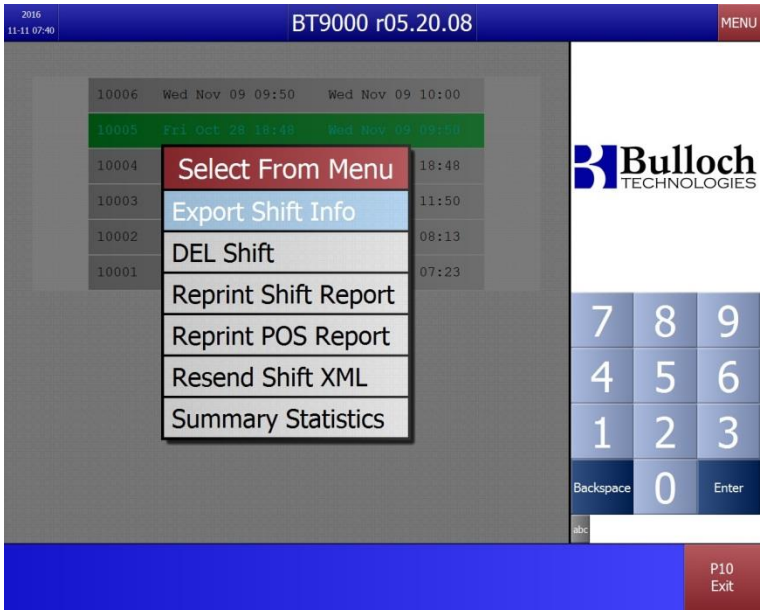
Tap on the [Print] key. The system processes the data and a report prints.

**Note.** The number of shifts kept at a site varies from site to site. The number of days retained at each site may vary, but typically it is kept for 40 days. During the 40 days the site may have an unlimited number of shifts. On the 41st day, all shifts pertaining to the 1st day will be deleted. You will always have the latest 40 days of shifts.

## Sales Summary Utilities Menu

The Sales Summary Utilities menu provides you with 4 options. They are:

1. Export Shift Info
2. DEL Shift
3. Reprint Shift Report
4. Reprint POS Report
5. Resend Shift XML
6. Summary Statistics



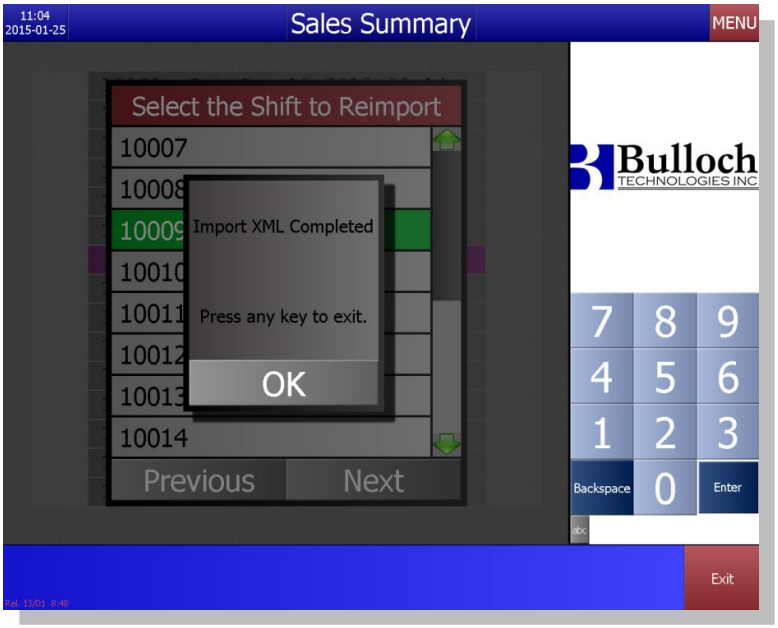

## Import XML

The Import XML function allows you to re-import XML data.

If you need to import XML data, select *Sales Summary* from the *Reports menu*. A pop up menu will be displayed.

Tap on the [Import XML] key. A list of shifts will be displayed on the screen.

Tap on the desired shift. The system will re-import the XML data. When the import is complete, the following screen will be displayed:




## Available function keys

**Keys on the Cashier screen:**

| | | | |
|---|---|---|---|
| Select | Begins the selection process | Utilities | Displays a popup screen |
| Clear | Clears the screen | Preview | Displays a preview of the report |
| Import XML | Allows you to import XML data | Print | Prints the report |
| Range | Used to select a range of reports | Exit | Exits and returns to the Reports Menu |

**Keys on the Cary keyboard:**

| | | | |
|---|---|---|---|
| Enter Select | Begins the selection process | P6 Utilities | Displays a popup screen |

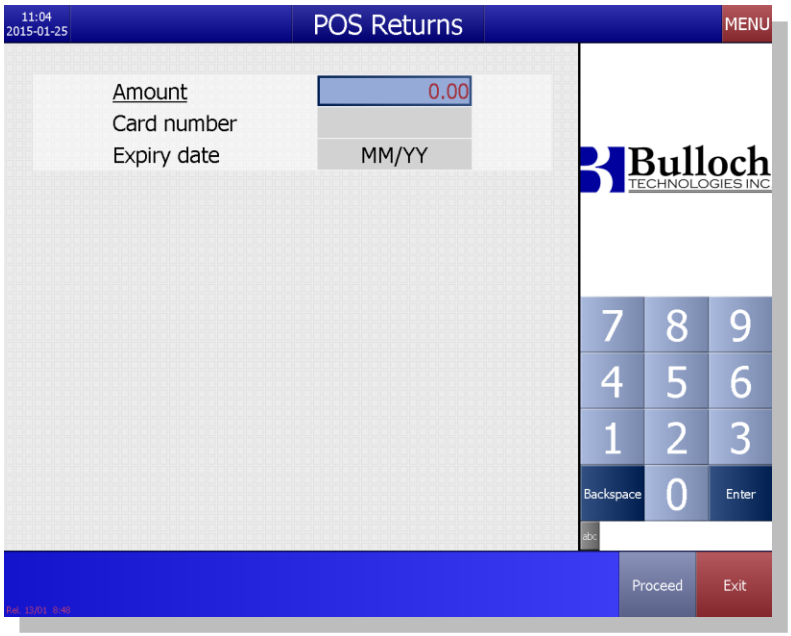
| | | | |
|---|---|---|---|
| P2 Clear | Clears the screen | P8 Preview | Displays a preview of the report |
| P3 Import XML | Allows you to import XML data | P9 Print | Prints the report |
| P5 Range | Used to select a range of reports | P10 Exit | Exits and returns to the Reports Menu |

## POS Returns

Occasionally a network error can cause some transactions to go through twice. This knocks the sales summary and bank reconciliation out of balance. The duplicate charge has to be reversed. This is called a 'POS Return'.

To correct a duplicate charge, select *POS Returns* from the Management Reports menu.

The POS Returns menu is displayed.




| Field Name | What it means |
|---|---|
| **Amount** | Enter the dollar value of the sale. |
| **Card Number** | Enter the card number. |

| | |
|---|---|
| **Expiry Date** | Enter the expiry date. |

Key in the dollar amount, the credit card number and the expiry date.

Tap on the [Proceed] key.

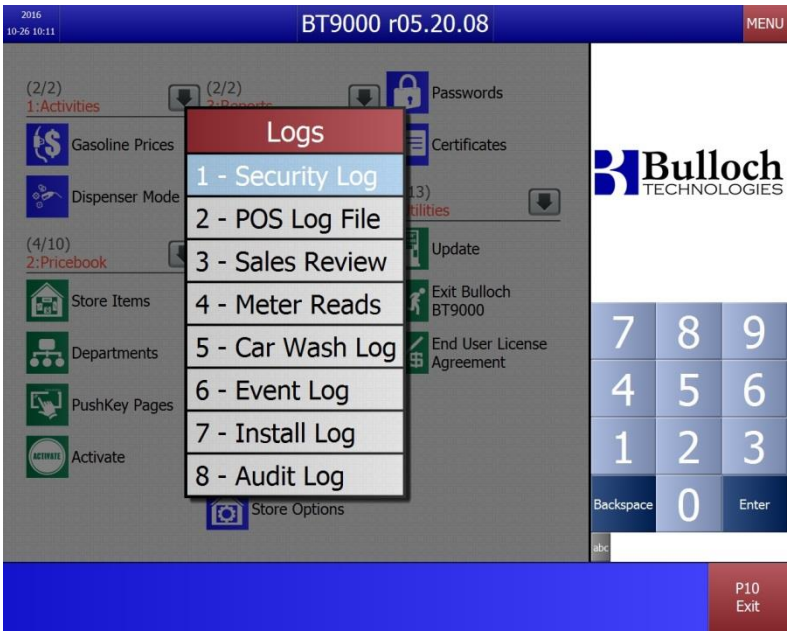
Tap on the [Exit] key to exit and save the changes.

# Logs

## Logs

Logs will help you manage your store. They also serve as one of the BT9000 security features. There are several types of logs available and are specific to the fuel companies. This chapter explains each type of log.

When you select *Logs* from the *Main menu*, a screen similar to this one will be displayed:




**Note:** If your site is equipped with AFDs, you will have an additional menu option entitled AFD Transaction Log.

## Security Log

The Security Log records all events of potentially incorrect system usage such as system starts, system exits, attempts to secure areas of the system with invalid passwords, price and tax overrides.

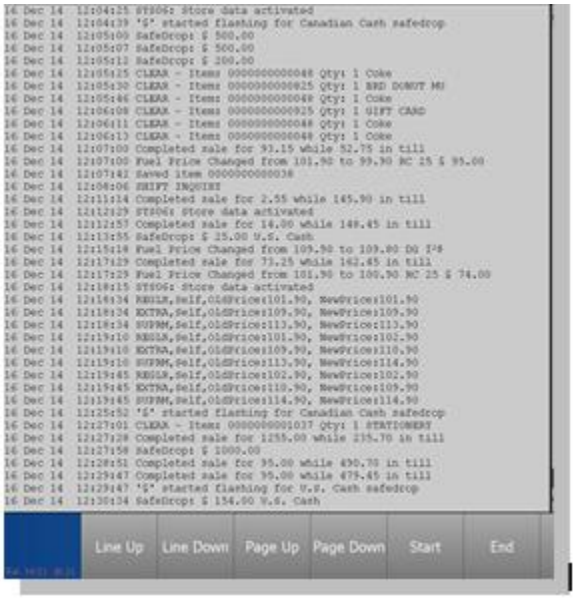
It also records cashier activity if items were sold and then unsold by using the [Clear], transactions that were voided, when a shift off was completed, etc.

**Note.** The use of [Clear] or voided transactions are not necessarily incorrect. Proper usage of these features is highly desirable and beneficial.

Recording these transactions allows management to know when they occurred.

**Multi Paypoint.** Security logs – the information displayed in the security log is paypoint specific.

**Example of a Security Log:**



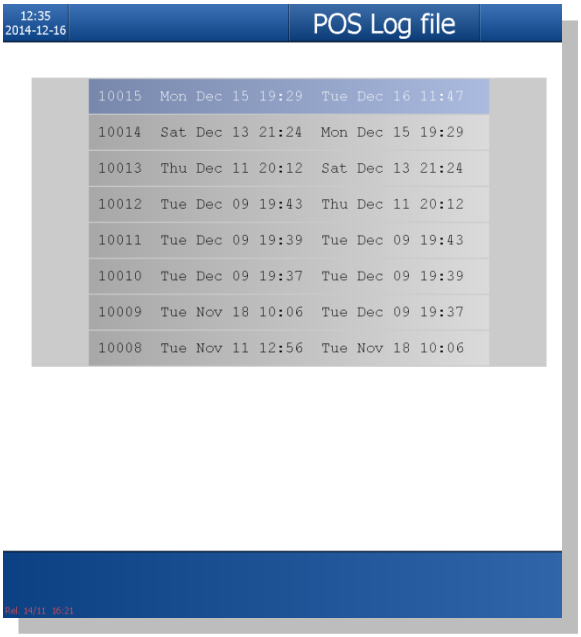

## POS Log File

The POS Log File displays every transaction submitted for bank approval. The log displays information regarding credit, gift card and debit transactions – time that a card was swiped, if it was denied, the type of card, number and dollar amount.

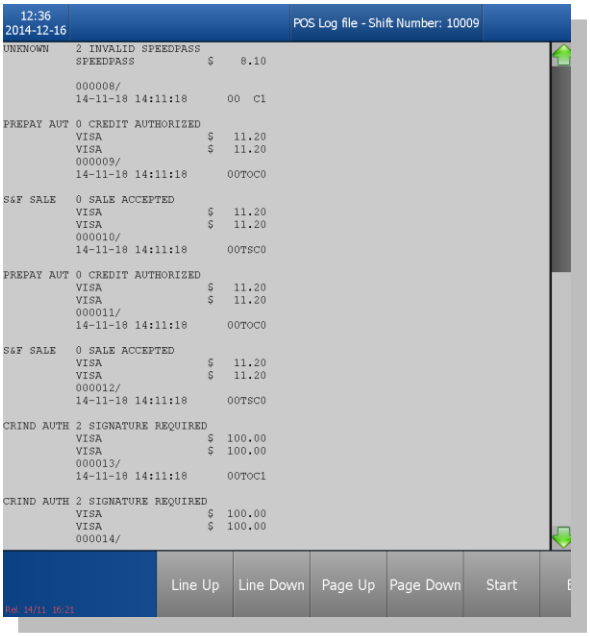
All credit, debit and gift card numbers are masked. You do not have access to the full card number.

Transactions are displayed one shift at a time. You can display any shift kept on record.

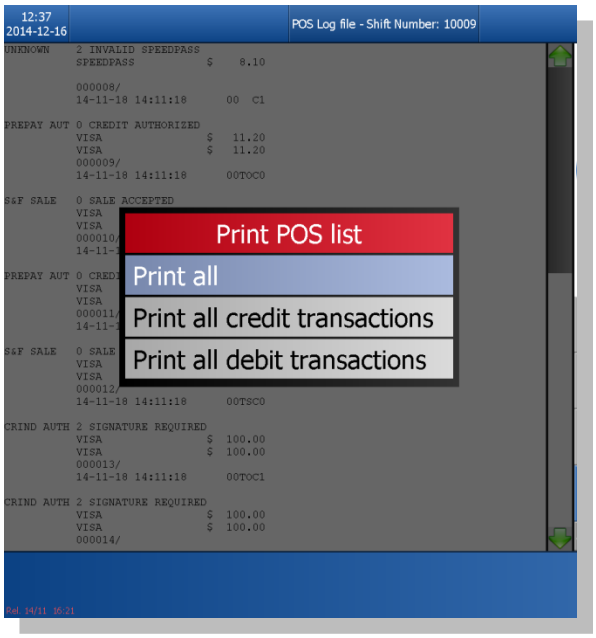
To view the bank transactions, select *POS Log File* from the *Logs menu*. The *POS Log file* screen is displayed:



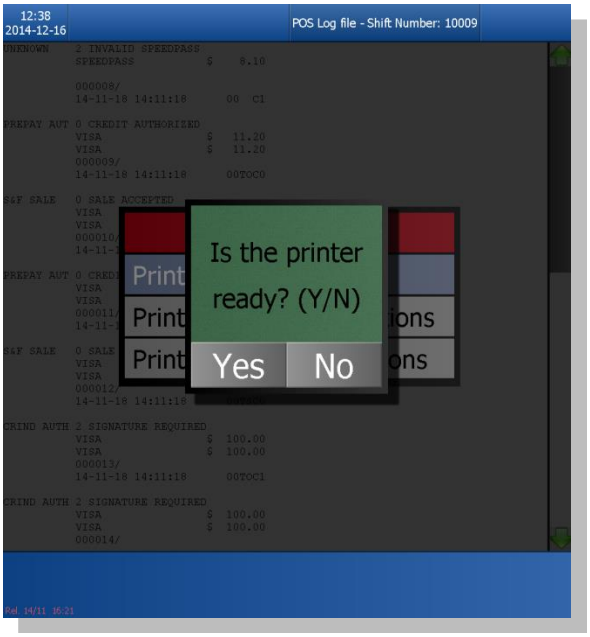
Tap on the desired shift. The POS log file for the shift is displayed on the screen.



Tap on the [Print] key.



Tap on one of the options displayed in the pop-up screen. The message on the screen will ask you to confirm if the printer is ready.



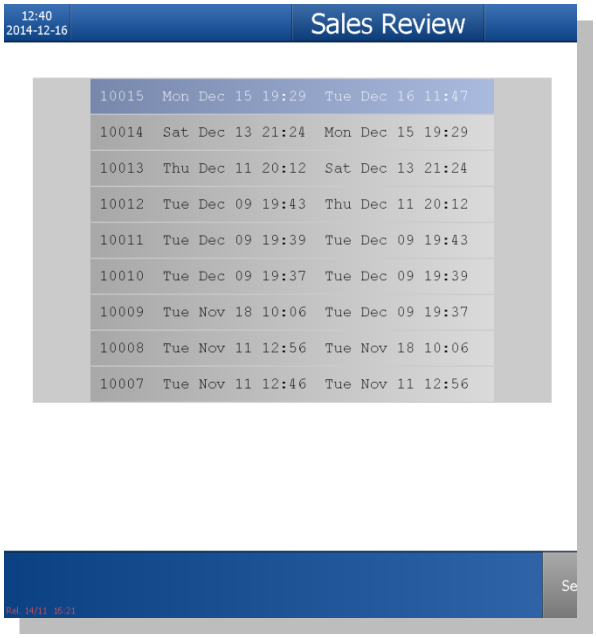
Tap on the [Yes] key to print the report.

**Multi Paypoint.** POS Log File – all POS log information can be viewed from either paypoint.

## Sales Review

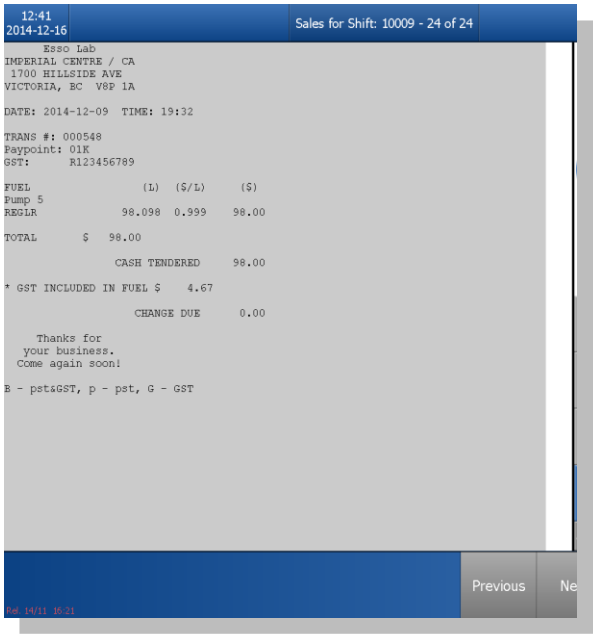
The Sales Review log allows you to review transactions for selected shifts. It works like the Review function while in the cashier mode. The difference is that you can display any shift kept on record.

To review transactions for specific shifts, select *Sales Review* from the *Logs menu*. The Sales Review screen appears:




If you tap on the [Select] key, information from the last shift report will be displayed on the screen.

To review transactions for a specific shift, tap on the shift.




The screen displays details of all of the transactions that occurred for the selected shift. Follow the instructions on the screen to review more transactions.

## Available function keys

**Keys on the Cashier screen:**

| | | | |
|---|---|---|---|
| Previous | Displays the previous transaction | Print | Prints a receipt for the transaction |
| Next | Displays the next transaction | Exit | Exits this screen and returns to the Sales Review menu |

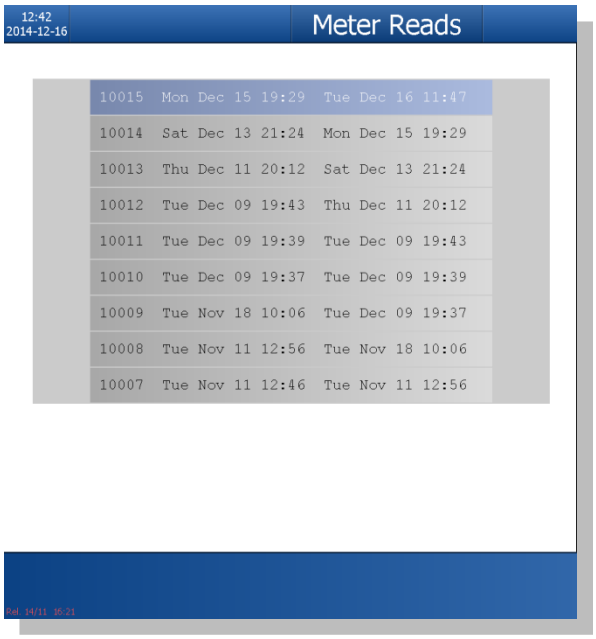
**Keys on the Cary keyboard:**

| | | | |
|---|---|---|---|
| P5 Previous | Displays the previous transaction | P9 Print | Prints a receipt for the transaction |
| P6 Next | Displays the next transaction | P10 Exit | Exits this screen and returns to the Sales Review menu |

## Meter Reads

This option allows you to reprint Pump Totals that were taken at shift-off time. The Meter Reads report prints out a detailed list of fuel volumes by pump meter. Meter reads (Pump Totals) are normally obtained in the report at the end a shift. If you do not have meter reads for a specific shift, this option allows you to go back and reprint them. Pump totals are printed one shift at a time. You can print any shift kept on record.

To print off meter reads (pump totals) select *Meter Reads* from the *Logs menu*. A list of valid shifts is displayed in a popup box:



Tap on the desired shift. The meter reads will print.

## AFD Transaction Log

The AFD transaction log lists all of the credit and debit activity that took place at the AFDs. Information such as ‘Invalid Use’ & ‘denied credit card’ is recorded in the log as well. All account information with the exception of the last 4 digits of the card is masked.
You will notice the words ‘Receipt’ and ‘No Receipt’ displayed on the screen. If the customer pressed the receipt button on the AFD keypad, the log will display the word ‘receipt’ to the left of the card number.

CR:01 refers to the card reader in pump no. 1.
CR:02 refers to the card reader in pump no. 2...and so on.

Note. This menu option will appear under the Logs menu if the site is equipped with AFDs.

## Car- Wash Log

A car wash log is available for sites that are equipped with a car wash. The car wash log will list information such as ‘Car wash offline’ and ‘Car wash online’. Some of the messages in the log are useful to isolate problems with the car wash controller.

## Event Log

The Event log contains messages about the BT9000 program operation. Some of the messages are useful to isolate problems in the software.

## AFD Event Log

The AFD Event log contains messages about the AFDs. Some of the messages are useful to isolate problems in the software.

## FTP Log

The FTP functionality is enabled with this version of software.

## Audit Log

The Audit log records information such as when passwords were modified or deleted.

# Setup

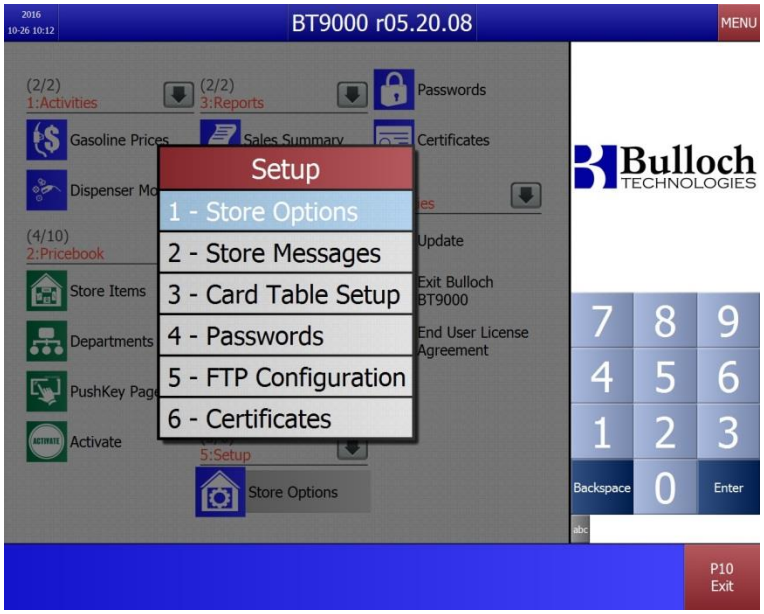
## Setup

The Setup menus allow you to configure messages that will be displayed on the 'Customer Display', outside at the AFDs, messages on the bottom of sales receipts and messages on car wash tickets.  It also allows you to configure safe drop signals and the exchange rate for US currency.
This chapter explains how to configure messages, passwords and store options.

When you select the *Setup menu* from the *Main Menu*, the following functions are available:

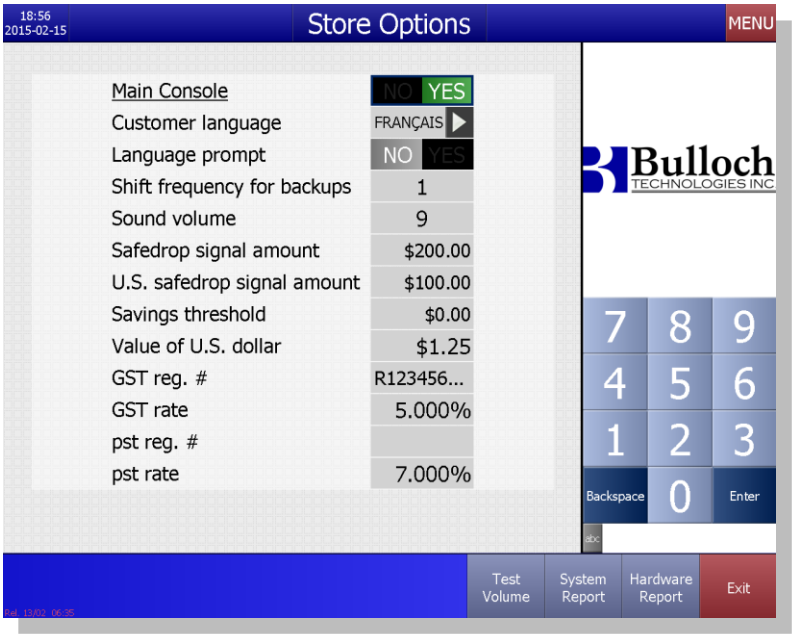
1. Store Options
2. Store Messages
3. Card Table Setup
4. Passwords
5. FTP Configuration
6. Certificates

**<u>As well, AFD Messages (if site is equipped with AFDs).</u>**



## Store Options

When you select *Store Options* from the *Setup menu*, the following screen will be displayed:



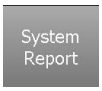

| Field Name | What it means |
|---|---|
| **Main Console** | 'Y' or 'N' confirms if the paypoint is talking to the pumps directly or through another paypoint. |
| **Customer Language** | English or French, depending on where your site is located. |
| **Language Prompt** | If the flag is set to 'Y', when you select the [Printer] icon, a popup box will be displayed, asking you to select English or French. |
| **Shift Frequency for backups** | A reminder to 'Backup Store Files' will be displayed on the cashier screen after a certain amount of shift changes have been performed. |
| **Sound Volume** | Used to increase or decrease the volume. |
| **Safedrop Signal Amount** | Enter the amount of Canadian cash you want to accumulate in your till to activate the 'Safedrop Required' message on your cashier screen. |
| **U.S. Safedrop Signal Amount** | Enter the amount of U.S. cash you want to accumulate in your till to activate the 'Safedrop Required' message on your cashier screen. |
| **Savings Threshold** | Not used at this time. |
| **Value of U.S. Dollar** | Enter the U.S. exchange rate. |
| **GST reg. #** | Enter the GST registration number. |
| **GST rate** | Enter the GST tax rate. |
| **Pst reg. #** | Enter the pst registration number. |
| **Pst rate** | Enter the pst tax rate. |

## Available function keys

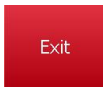
**Keys on the Cashier screen:**

Used to test the sound volume

Prints a hardware report




Prints a system report




Exits this screen and returns to the Store Options menu

**Keys on the Cary keyboard:**

Used to test the sound volume

Prints a hardware report

Prints a system report

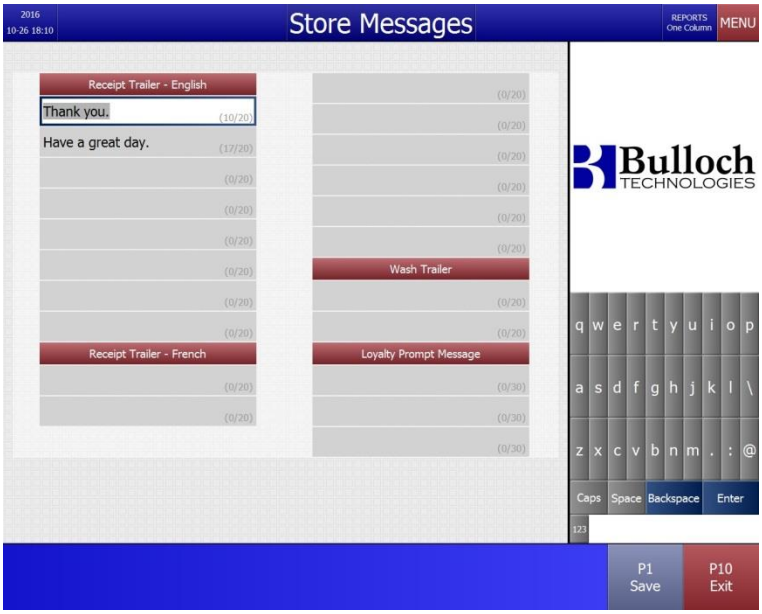
Exits this screen and returns to the Store Options menu

**Multi Paypoint**. Most of the functionality in Store Options is paypoint specific. However, if the site operates with multiple paypoints, one must be designated as the main console. Paypoint # 1 will be designated as the main console. Next to the heading of 'Main Console', the default will be set as 'Y' (YES). Paypoint # 2 will be designated as the secondary console and the default will be set to 'N' (NO).

## Store Messages

You can customize the messages that print on sales receipts and car wash tickets and messages on customer displays according to special or seasonal events that your station promotes.

When you select the *Store Messages* option from the *Setup menu* and enter your password, the following screen will be displayed:




**Note:** If your site is equipped with AFDs, you will have a menu option entitled AFD Messages.

| Field Name | What it means |
|---|---|
| **Receipt Trailer English** | Eight lines of text, each up to 20 characters in length. All lines are automatically centered at the bottom of each sales receipt. |
| **Receipt Trailer French** | Eight lines of text, each up to 20 characters in length. All lines are automatically centered at the bottom of each sales receipt. |
| **Wash Trailer** | Two lines of text, each up to 20 characters in length. This is the proof of purchase, which provides the code into the car wash. |
| **Loyalty Prompt Message** | Three lines of text, each up to 20 characters in length. Allows you to configure a loyalty prompt message that will be displayed on the cashier screen. |

**Multi Paypoint**. This function is paypoint specific and should be customized the day of the installation.

## AFD Messages

AFD messages can be promotional messages that are displayed on the panel of the in-pump card readers. When you select *AFD Messages* from the *Setup menu*, the following screen is displayed:

You can define up to five different messages, one per screen. However, only one message can be used at a time. When a new message is selected, the previously active message is automatically set to N, making it inactive.

**Note.** The number of characters you enter in the message varies based on the manufacturer of the in-pump card readers.

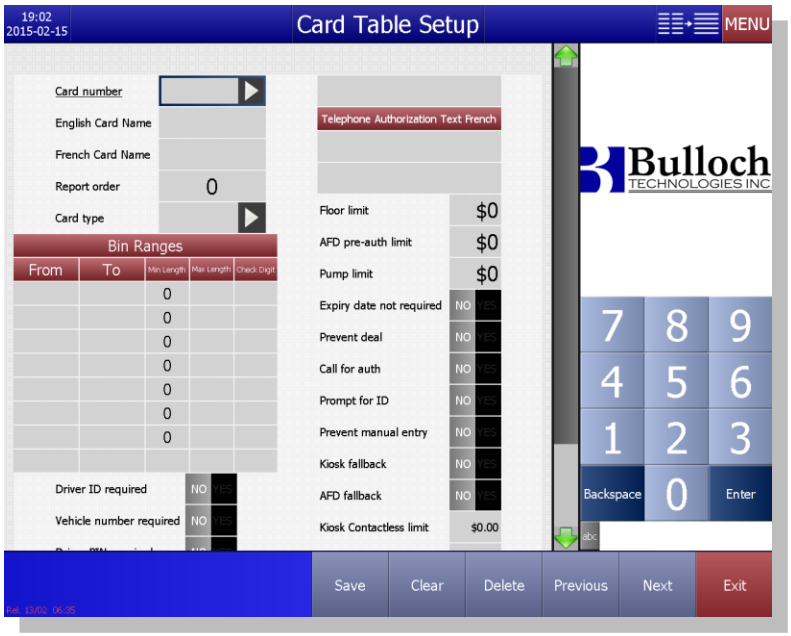
Type the AFD message.

Save the message and exit from the screen.

## Card Table Setup

When you select *Card Table Setup* from the *Setup menu*, the following screen will be displayed:

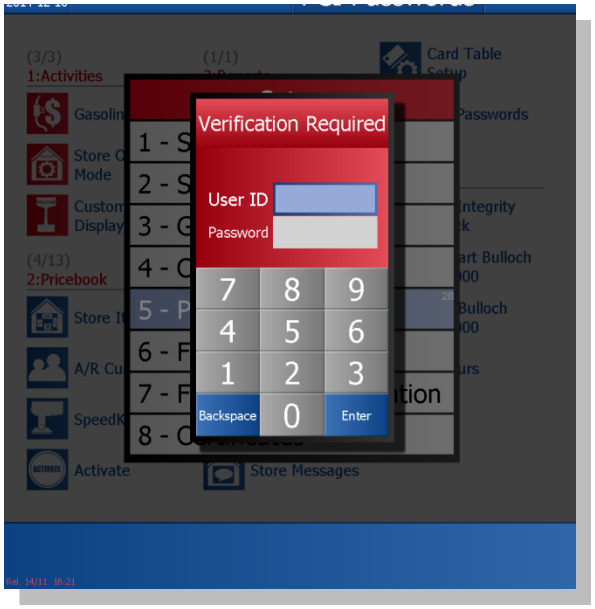
The system will request a password.



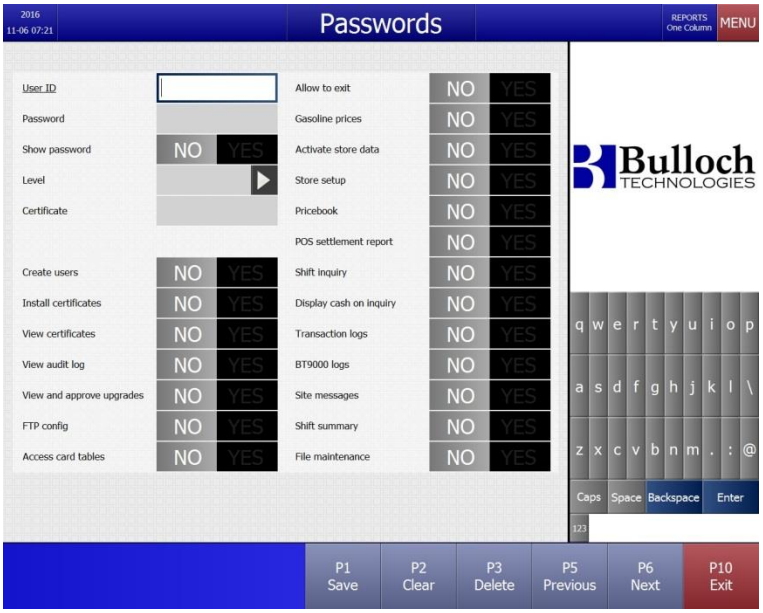

**Note.** This function is password protected. If changes are required, please contact Bulloch to ensure that the correct data is inputted as incorrect data entry can cause loss of transaction data.

## Passwords

Passwords ensure that access to the system is limited to authorized personnel.
When you select *Passwords* from the *Setup menu*, the following screen is displayed:




Enter your User ID and Password and tap on the [Enter] key. The following screen will be displayed:



Tap 2 times on the arrow located next to the word ‘Level’. The ‘*Pick a password level’* screen will be displayed

Tap on a level.

Depending on the petroleum company, there can be several areas of user access available:

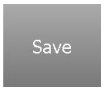
1. Create users
2. Install certificates
3. View certificates
4. View audit log
5. View and approve upgrades
6. FTP config
7. Access card tables
8. Allow to exit
9. Gasoline prices
10. Activate store data
11. Store setup
12. Pricebook
13. POS settlement report
14. Shift inquiry
15. Display cash on inquiry
16. Transaction logs
17. BT9000 logs
18. Site messages
19. Shift summary
20. File maintenance

In order to give the user access to the displayed areas, ensure that the word ‘YES’ is configured beside the description of the functionality. To deny access to certain areas, enter ‘NO’.

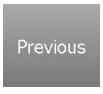
Tap on the [Exit] key to exit and save the changes.

## Available function keys

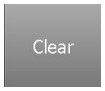
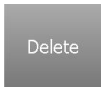
**Keys on the Cashier screen:**




Saves the changes




Displays the previous password configured in the system

| | | | |
|---|---|---|---|
|   | Clears the entries from the screen | | Displays the next password configured in the system |
|   | Deletes the information | | Exits out of the PCI Password screen and returns to Setup menu |

**Keys on the Cary keyboard:**

| | | | |
|---|---|---|---|
| | Saves the changes | | Displays the previous password configured in the system |
| | Clears the entries from the screen | | Displays the next password configured in the system |
| | Deletes the information | | Exits out of the PCI Password screen and returns to Setup menu |

### FTP Configuration

This screen will be configured when your system is installed.

### Certificates

This screen will be configured when your system is installed.

# Managing Store Info

## Managing Store Info

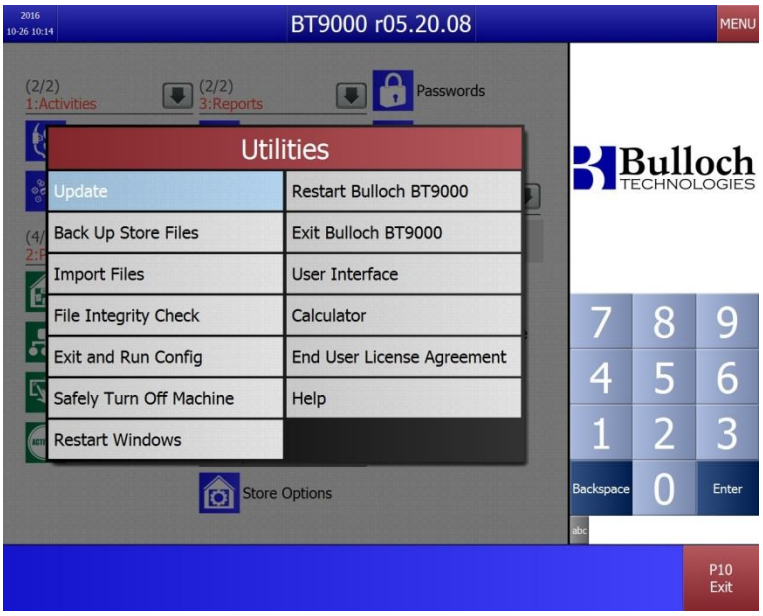
The BT9000 provides several functions to protect store information. As information is a company's most valuable resource, access to information must be managed and protected.

This chapter explains how to perform daily backups, import files, run a File Integrity Check as well as several other functions.

## The Utilities Menu

After sales transactions and other store information are entered into the BT9000, there are tasks that should be performed on a daily basis as well as on a periodic basis to maintain your system and your data.

When you select the *Utilities Menu* from the *Main Menu*, the following screen will be displayed:

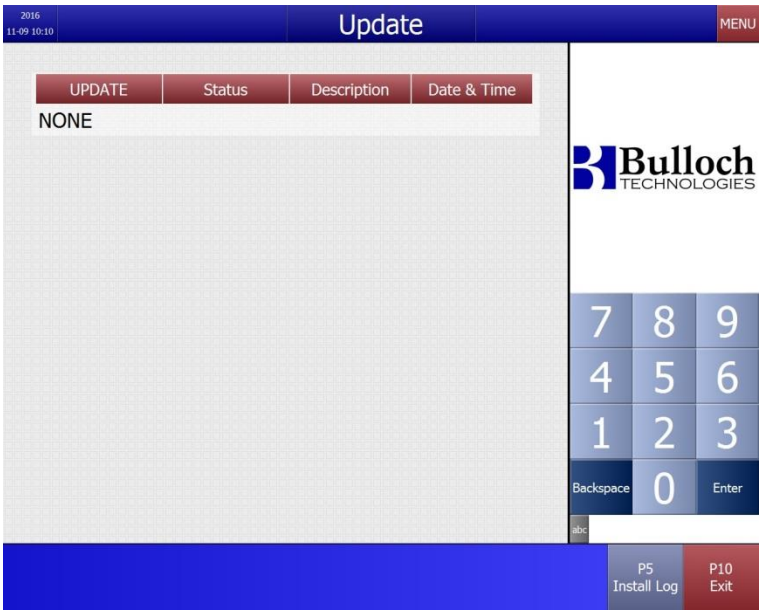


The following functions are available:

1. Update
2. Backup Store Files
3. Import Files
4. File Integrity Check
5. Exit and Run Config
6. Safely Turn Off Machine
7. Restart Windows
8. Restart Bulloch BT9000
9. Exit Bulloch BT9000
10. User Interface
11. Calculator
12. End User Licence Agreement
13. Help

## Update

This function is used to update the system's software.

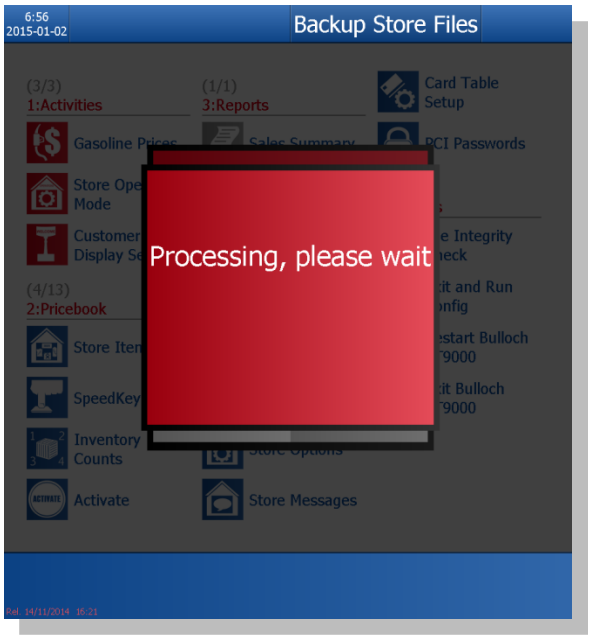



## Back Up Store Files

This procedure copies all store files from your system onto a USB memory key. Performing a backup saves all critical files required by the system. It is important to back up the store files on a daily basis. You may be required to restore these files if data is lost or the system goes down unexpectedly.

The system allows you to set reminders on the screen to remind you when to perform a backup. As highlighted in a previous chapter, this is called 'Shift Frequency for Backups' and is set up through the *Setup*/*Store Options* menu.

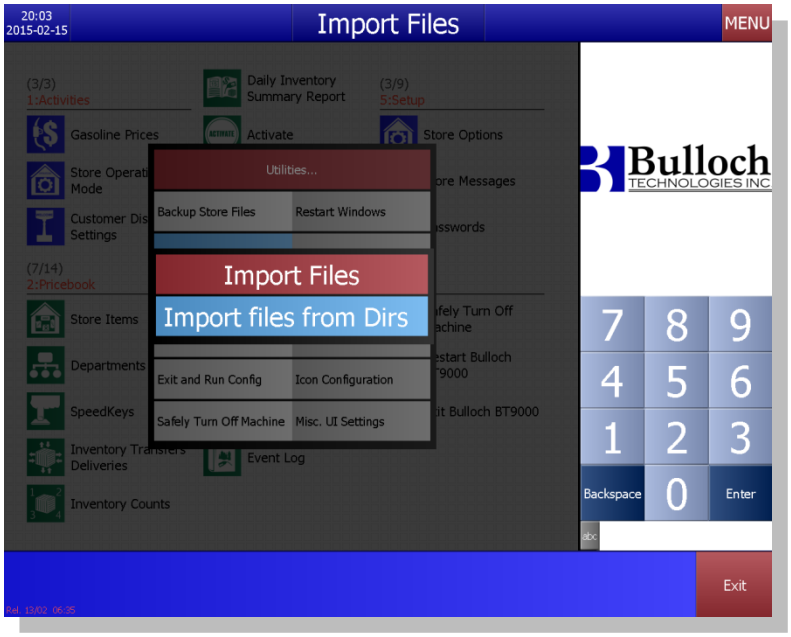
Select *Backup Store files* from the *Utilities Menu*. The information will be backed up onto the USB memory key. Information on the screen will display the progress.




## Import Files

This function allows you to import files from a USB memory key or from directories stored in your system into your computer. **This is usually done by support personnel.**

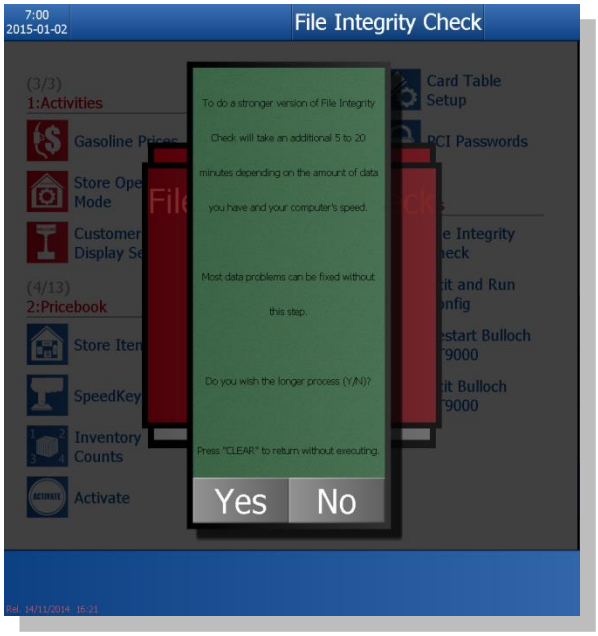
When you select *Import files* from the *Utilities Menu*, the following screen will be displayed:



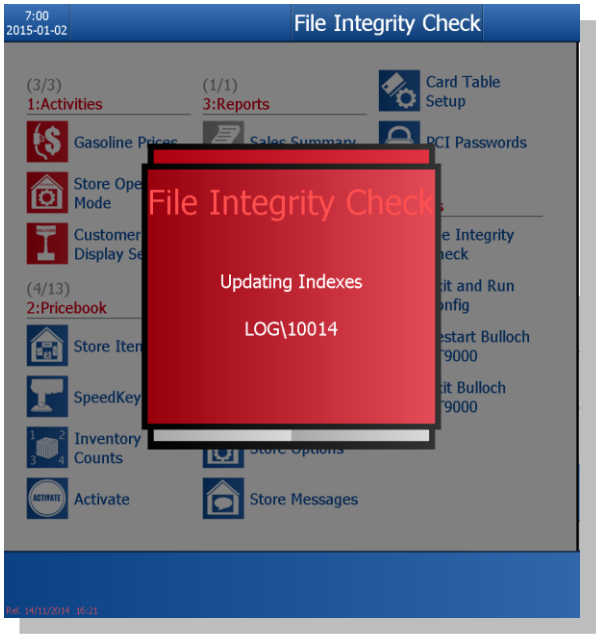

## File Integrity Check

This utility should only be performed when instructed by your Help Desk. A File Integrity Check detects known data inconsistencies and attempts to repair them. Running a long version of the File Integrity check looks at shifts as well as item files.

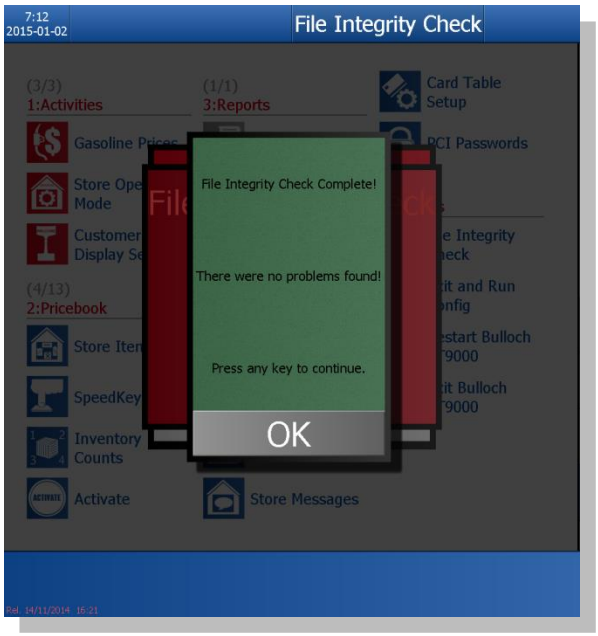
When you select *File Integrity Check* for the *Utilities Menu*, the following screen is displayed:



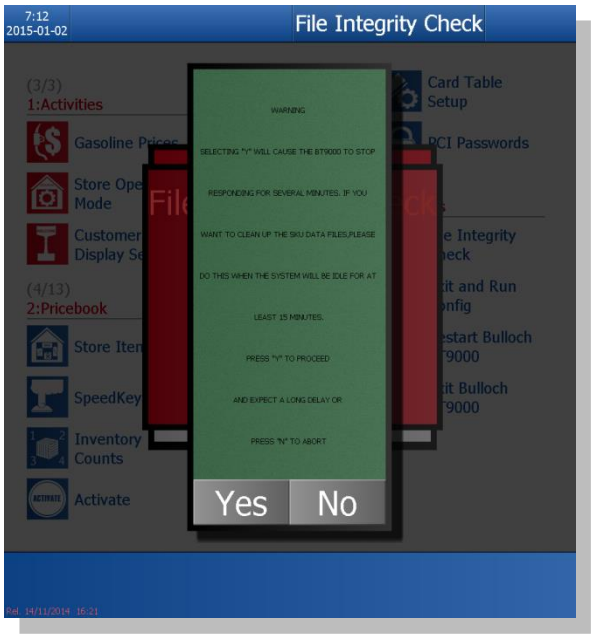
Tap on the [Yes] key. The file integrity check begins. Messages appear on the screen during the file integrity check.




When the File Integrity Check has completed, a message will display, indicating that the File Integrity Check is complete. If no problems were found, the message displayed on the screen will advise that there were no problems found. If problems were found, this information will be displayed on another screen, indicating the cause of the problem.



Tap on the [OK] key. The following screen will be displayed:




Tap on the [Yes] key to run a long version of the File integrity check or the [No] key to exit the screen.

**Multi Paypoint.** File integrity check – it is strongly recommended by Bulloch Technologies that the file integrity check be run from Paypoint # 1. In addition, if you attempt to run the file integrity check while someone is using the AFDS, the system will display a message, indicating the operation is invalid at present time because an outside sale is in progress. You will be advised to press any key to exit.

### Exit and Run Config

When you select this function, a popup window is displayed, requesting you to enter a password. You will need assistance from the Help Desk to execute this function.

### Safely Turn Off Machine

This function shuts down the system.

### Restart Windows

This function restarts Windows and the BT9000 machine.

### Restart Bulloch BT9000

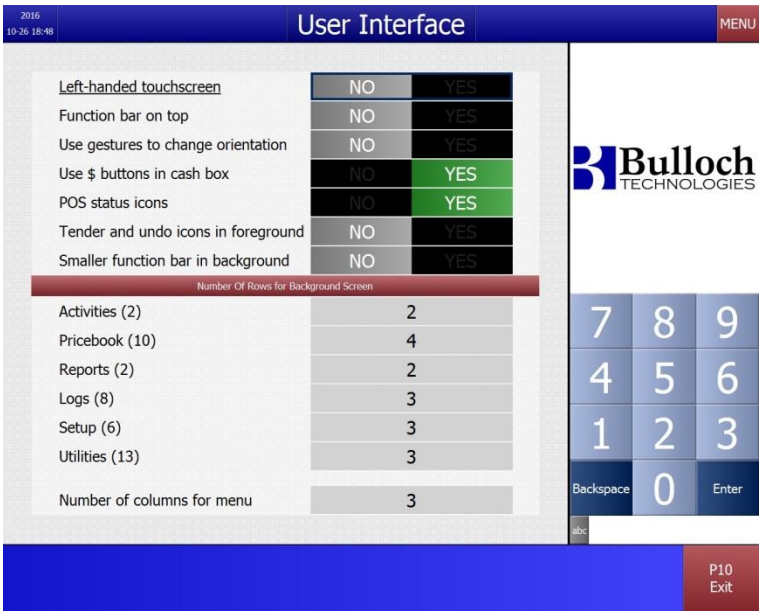
This function restarts the Bulloch application.

### Exit Bulloch BT9000

This function exits the Bulloch BT9000.

## User Interface

This function is used to configure various user interfaces.

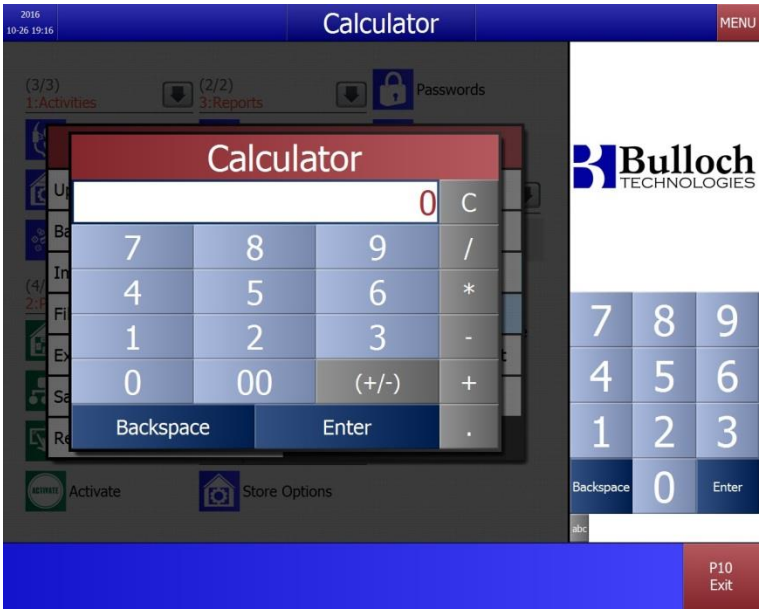



| Field Name | What it means |
|---|---|
| **Left-handed touchscreen** | Allows you to configure the screen for left-handed employees. |
| **Fonction bar on top** | Allows you to re-locate the function bar to the top of the cashier screen. |
| **Use gestures to change orientation** | Allows you to use gestures to change the orientation of the cashier screen. |
| **Use $ buttons in cash box** | Allows you to display pre-set keys while in the cash screen. |
| **POS status icons** | Allows you to display the POS status as an image or as letters (e.g. C1, IP1). |
| **Tender and undo icons in foreground** | Allows you to display the A/R, Credit Card, Cash and Undo buttons as icons rather than words. |
| **Smaller function bar in** | Allows you to display a smaller function bar in the background. |

| background | |
|---|---|
| **Number of rows for background screen** | Allows you to select the number of rows for the background screens. |

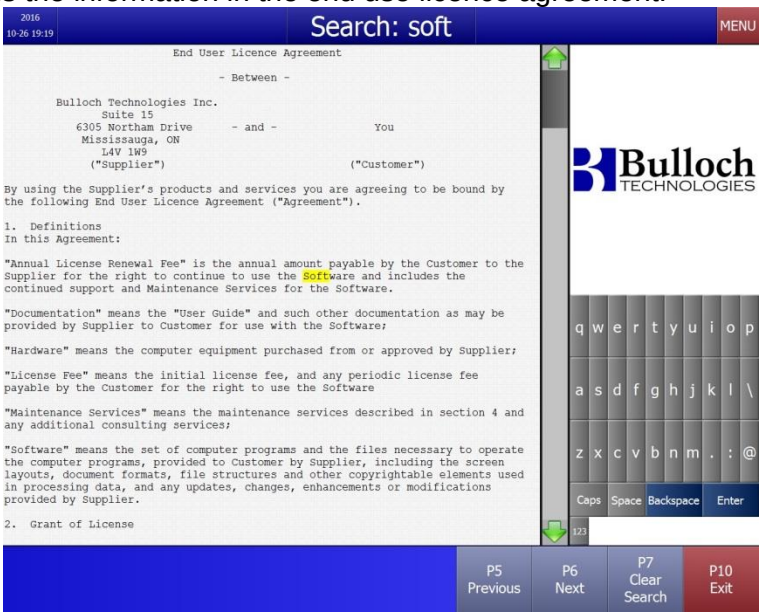
## Calculator

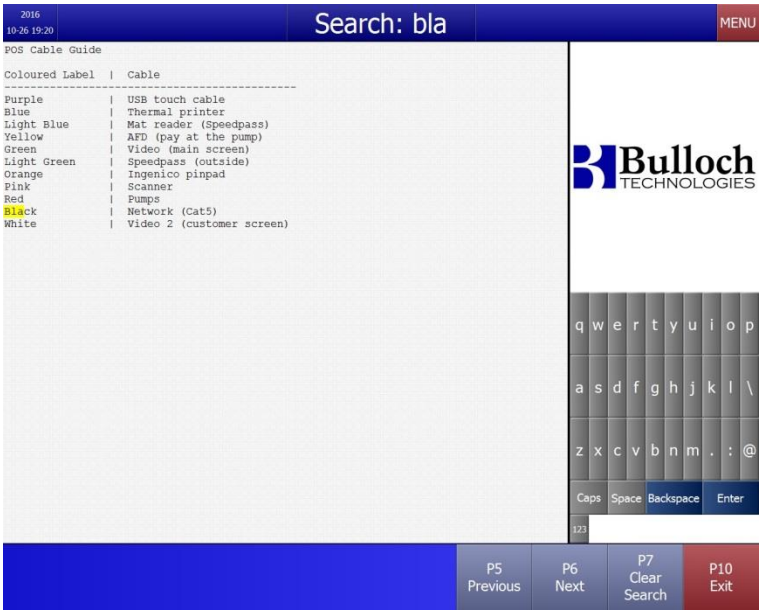
A calculator is available for your convenience.




## End User Licence Agreement

This function details the information in the end use licence agreement.



**Help**

This function identifies the cables and the color of each cable.