



Mobil

Site Management Guide

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Reporting

CASHIER REPORTS

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

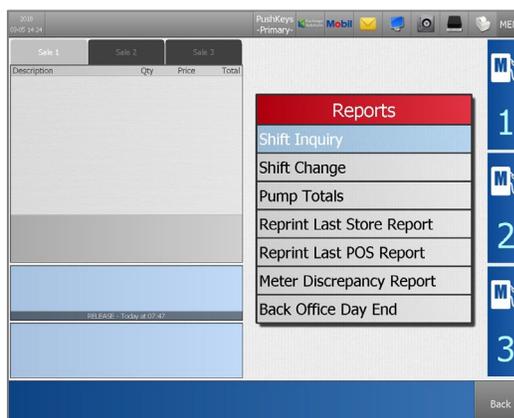
This section contains a list of reports that can be printed from cashier's mode and a sample of some of the reports.

REPORTS DESCRIPTION

REPORT	PURPOSE
Shift Inquiry	Reports the sales totals for the current shift.
Shift Change Report	Reports the sales totals for the current shift in two parts: <ol style="list-style-type: none"> 1 POS (company specific custom information) <ul style="list-style-type: none"> • Closes the current shift. • Starts a new shift. 2 Terminal (Standard sales information).
Pump Totals	Reports the pump meters.
Reprint Last Store Report	Reprints the store report that was printed last.  If the last report was the Shift Change report, the last POS Report must be reprinted.
Reprint Last POS Report	Reprints the company specific POS report.
Meter Discrepancy Report	Prints automatically at the end of the Shift Report. Checks for any differences between the metered sales and the reported sales.

PRINTING REPORTS IN CASHIER MODE

- 1 From Cashier screen, select REPORTS.
- 2 The Reports menu will be displayed on the screen.

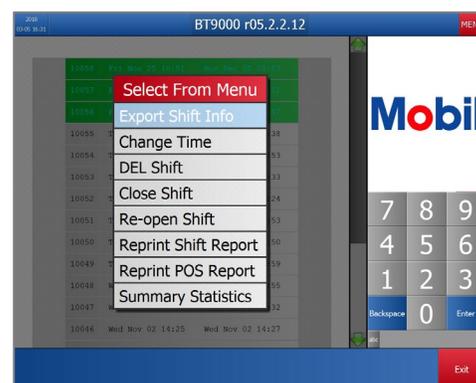
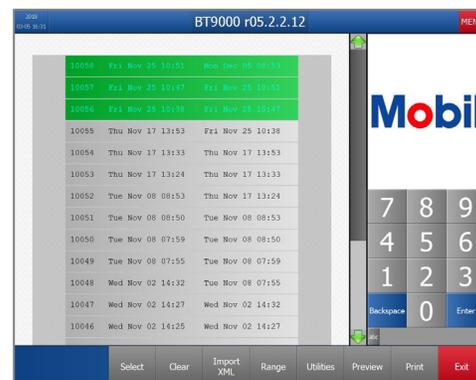
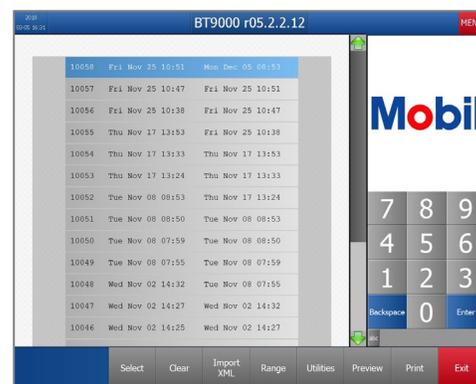
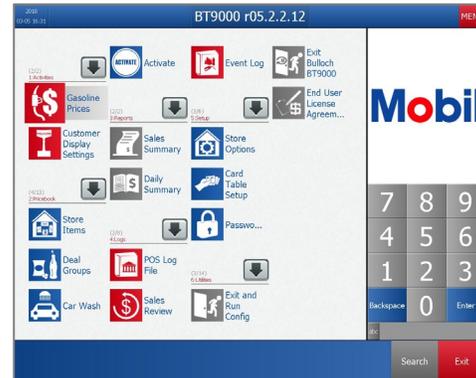


SHIFT CHANGE REPORT

What it is	<p>Summarizes sales in the following categories:</p> <ul style="list-style-type: none"> • Cash, debit card, credit card, fleet card and AFD sales • Items sold by category • Specials • Coupons Accepted • Discounts • Payouts • Safedrops • Self-serve and full-serve totals by litres and by dollars • Pump meter reads
Functionality	<p>When printed, the current shift is closed, a new shift is started and a report is printed. A running total of sales is kept until new shift is closed.</p>
Department details	<p>These can be turned off, configurable by Department.</p>
<p> Contact Help Desk to change this setting.</p>	
“Coupons Accepted” section	<p>Outlines redemptions and Fuel Savings. Fuel Savings includes standard PRICE PRIVILEGES cards and grocery paper tickets, which must be manually broken out (until future release).</p>

Obtain Electronic Version of Shift Change Report:

- 1 Ensure USB drive is plugged in to POS.
- 2 From Menu screen, select REPORTS. Select SALES SUMMARY and enter password.
- 3 Highlight shifts to be exported. To highlight more than one report, use the Range function.
- 4 Select UTILITIES.
- 5 Select EXPORT SHIFT INFO.
- 6 Files from the shifts selected will be exported as SEPARATE files on USB drive.
- 7 Access USB key on a PC.
- 8 On USB key, shift file will have naming convention *shift_num.SFT* (e.g. 10520.SFT).
- 9 To view content, right-click on file, open with Notepad.



SHIFT CHANGE REPORT - EXAMPLE

SHIFT REPORT

Bob's Mobil Station 123 Main Street, Toronto, Ontario L3T 1K7 416-555-5555 4 Nov 16 12:37 p.m. Shift Number 11664	← Typical heading
Fuel sales 15352.27 Item Sales 1918.55 Deposit Total 0.00 GST 66.48 HST 92.24 Penny Rounding -0.60 ----- Total Sales 17428.94	← First digit of Shift Number indicates the paypoint, in this case, paypoint 1. The remaining digits indicate the shift number. ← Sales for the shift include fuel that was paid for but not yet pumped. ← Other Items sold ← Taxes on Other Items sold
AFD Credit 5138.97 AFD Debit 1987.97 Kiosk Credit 3628.98 Kiosk Debit 2725.45 Total POS 13597.35 Kiosk Gift Card 115.98 Payouts 106.00 ----- Total 13703.35	← Outside credit ← Outside debit ← Inside credit ← Inside debit ← Payouts from the register balance to Payouts below

SHIFT CHANGE REPORT – EXAMPLE (CONT.)

Coupons Accepted	28.56	←	Can be balanced against Coupons Accepted section

Canadian Cash	3697.03	←	Total of Safedrops entered during shift
Safedrops 7	3300.00		

Cash On Hand	397.03	←	The amount of cash that should be left in your drawer

SELF SERVE FUEL SALES

FUEL TYPE	VOLUME	TOTAL	
	[L]	[\$]	
DIESEL	888.30	816.36	
EREG	12323.24	11785.82	
EEXTR	499.75	541.07	
SUPRM	1333.21	1507.67	
EPLUS	604.35	701.35	

Total	15648.85	\$15352.27	←

Review of self-serve sales

Note: Fuel that was redeemed, shown under "Coupons Accepted" section, are included here. Redemptions are Coupons and are accounted for in the tenders.

ITEM SALES

Item	net#	V	Total	
Department: 000041 15-CAR WASH				
0001101 LUXURY WSH	1	0	\$ 14.99	
0001102 FULL WASH	3	0	\$ 38.97	
0001103 QUICK WASH	2	0	\$ 21.98	

Grand Total	6	0	\$ 75.94	
			HST \$ 9.87	

V for number of voided items

Review of all non-gas items sold throughout the shift. Sales will be broken down by department. A few departments are shown in this example on this and the next page.

Note: Items that were redeemed, shown under "Coupons Accepted" section, are included here. Redemptions are Coupons and are accounted for in the tenders.

SHIFT CHANGE REPORT – EXAMPLE (CONT.)

Department: 000166 4M-CHOCOLATE BARS

0021437 Cffe Crsp 50g	2	0 \$	3.00
0022729 Twix 45g	2	0 \$	3.00
0022761 MMPntBtrChS	1	0 \$	5.19
0023735 Lncstr Cara	1	0 \$	3.69

Grand Total	6	0 \$	14.88
		HST \$	1.93

Department: 000609 GX-SOFT DRINKS

0011017 GlcVitWtr59	1	0 \$	2.59
0012721 Red Bull 47	1	0 \$	4.99
0014823 BrskIcedTea	1	0 \$	2.39
0014970 Pepsi Diet5	2	0 \$	4.78
0015027 Pepsi 591ml	3	0 \$	7.17
0015391 NestleWater	8	0 \$	8.00
0016216 Fanta Oran4	1	0 \$	1.75
0016219 Coke Clsc 1	2	0 \$	5.58
0016343 Dasani 591m	1	0 \$	1.79
0018808 Gingerale 5	1	0 \$	1.99
0019365 Evian 500ml	1	0 \$	1.99
0021472 MMd Crnbry4	2	0 \$	5.18
0021536 AW RtBr500m	1	0 \$	1.99
0024070 CrushGrape5	1	0 \$	2.39
0024583 Dr Pepper 5	1	0 \$	2.39
0025916 Coca Cola 2L	3	0 \$	7.50
0025990 Sprite 2L	1	0 \$	2.50

Grand Total	31	0 \$	64.97
		HST \$	8.45

SHIFT CHANGE REPORT – EXAMPLE (CONT.)

Loyalty Sales Totals
 Start: 2021-10-29 07:56
 End: 2021-10-29 23:39

Review of loyalty points earned during this shift.

PC Optimum

Total loyalty sales	20202.59
Number of loyalty sales	27
Total loyalty discounts	28.06

Points earned

base	204040
bonus	6200
Total	210240

PAYOUTS

Description	Amount
Lotto Payout	76.00
Maintenance Expense	30.00

Review of Payouts that occurred during this shift.

SELF SERVE PUMP READ SUMMARY

Review of Metre Reads for Self-Serve sales for this shift.

DIESL	L 2093072.930
REG	L 2991024.070
EEXTR	L 193850.100
SUPRM	L 385616.690
EPLUS	L 83940.550

Low feedstock	L 5087994.728
High feedstock	L 482550.274

Total Cash	\$ 4787251.00
------------	---------------

SHIFT CHANGE REPORT – EXAMPLE (CONT.)

SHIFT STATISTICS

Shift Statistics for this shift.

Total transactions..... 682
 \$ 17429.54
 Fuel only transactions..... 378
 \$ 14013.39
 Number of reboots..... 2
 Voided Transactions..... 1
 \$ 3.80
 AFD transactions..... 179
 \$ 7126.94
 Number of key entered credit..... 1
 # of Shift Inquiries run..... 3

*Undo Key Hits: 14
 *Clear Key Hits: 24
 *Negative Sales: 1
 *Void Transactions: 1

CARD STATISTICS

Outlines transactions where the card was used more than once on this shift, and transactions that were manual card entries.

Time	Trans#	Card	M	V	Sale	\$
14:44	003152	DEBIT			39.93	
14:48	003156	DEBIT			24.00	
16:56	003199	VISA			6.59	
17:07	003233	MC			16.79	
17:26	003266	VISA			10.16	

METER DISCREPANCY REPORT

Reports on any discrepancies between the metered sales and the Bulloch POS sales.

Bob's Mobil Station

123 Main Street, Toronto, Ontario

L3T 1K7 416-555-5555

4 Nov 16 11:22 p.m.

Terminal	Meter	Difference
Sales	Sales	
Regular		
L 1119.50	1125.60	6.190

PUMP TOTALS REPORT

PUMP TOTALS REPORT - EXAMPLE

PUMP VOLUMES		
SELF SERVE		
01 August 2014 10:01 a.m.		
Shift 14576 August 01 6:01		
DISPENSER 10		
EREGR	L	42398.20
	\$	195719.11
DISPENSER 11		
SUPRM	L	31768.28
	\$	28876.99
DISPENSER 12		
EEXTR	L	28982.48
	\$	25327.55
DISPENSER 13		
EREGR	L	56392.25
	\$	46192.26
DISPENSER 14		
EREGR	L	45809.63
	\$	158980.75
DISPENSER 15		
EREGR	L	63753.43
	\$	633692.08
GRAND TOTALS		
EREGR	L	435869.41
	\$	3617196.72

MANAGING SALES

The BT9000 keeps track of all transactions processed at your station. This section 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 Reports and Logs sections can be used 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.

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.

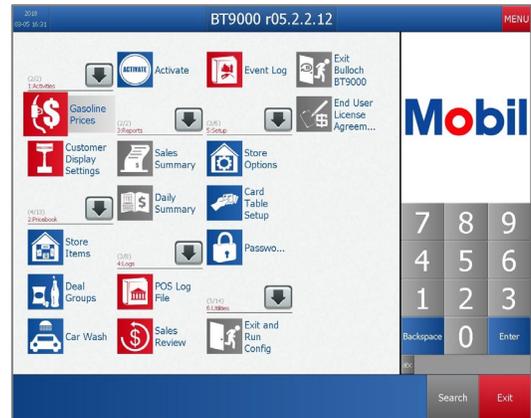
REPORTS

REPORT	PURPOSE
Sales Summary	<p>Provides an overview of all sales transactions for a defined time frame.</p> <p>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. It is probably the most common report used by management.</p>
End of Day	<p>Prints automatically upon executing End of Day.</p> <p>Provides an overview of all sales transactions in the shifts since the last End of Day.</p> <p>The End of Day Report is identical to the Shift Report with the exception that it summarizes the shifts that was part of the current End of Day.</p>
Daily Summary	<p>Provides an overview of all sales transactions for the timeframe of a previous End of Day.</p> <p>The Daily Summary Report is identical to the Shift Report with the exception that it summarizes the shifts that was part of the selected End of Day.</p>

PRINTING REPORTS

Print Sales Summary Report

1 From main Menu screen, select REPORTS.



2 Select SALES SUMMARY and the following screen will be displayed:



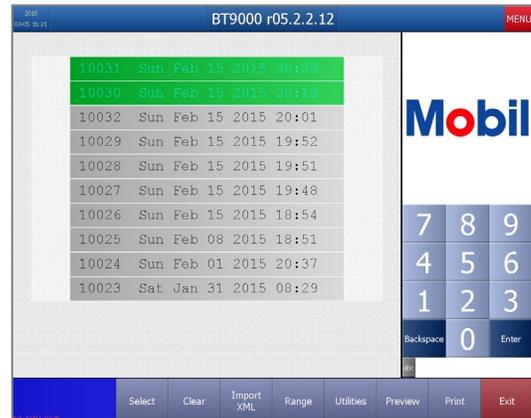
3 Select desired shifts using one of the two methods outlined below.

Selecting Shifts: Method One

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

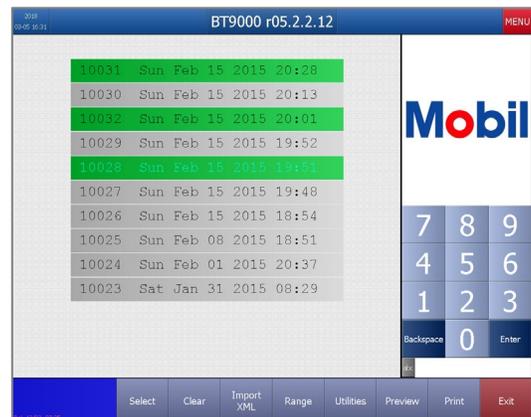


- 2 Select the RANGE key. Select the last report you wish to include in the range.



Selecting Shifts: Method Two

- 1 Select individual reports to highlight the reports you wish to print.



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

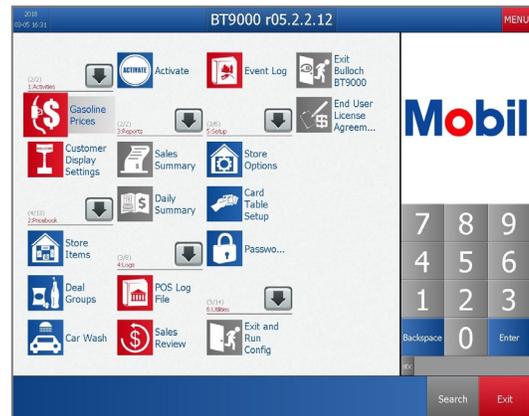
Reprint a Sales Summary Report

- 1 From main Menu screen, select REPORTS.
- 2 Highlight the summary (or summaries) required by selecting the reports.
- 3 Select PRINT key. The system processes the data and a report prints.

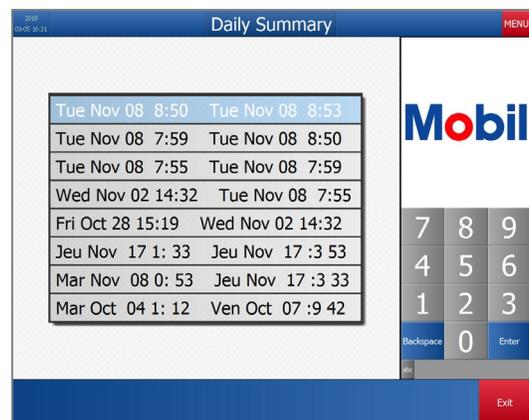


Print Daily Summary

- 1 From Main Menu screen, select REPORTS.



- 2 Select 'Daily Summary', the following screen will be displayed.
- 3 Select desired report to be displayed/printed.

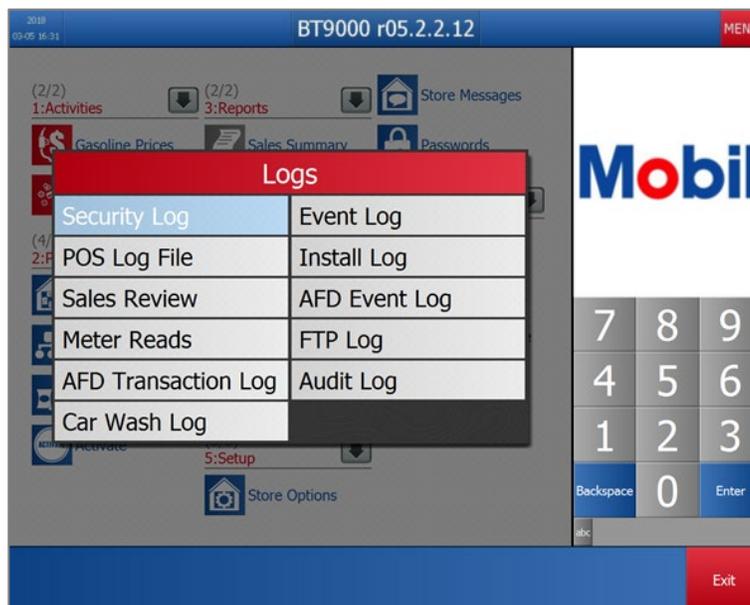


LOGS

Logs help you manage your store. They also serve as one of the BT9000 security features. There are several types of logs available. This section explains some common ones you may find useful.

ACCESSING THE LOGS

- 1 From main Menu select LOGS.
- 2 Logs menu will be displayed.



SECURITY LOG

What it is

Records all events of potentially incorrect system usage. Examples: System exits, attempts to secure areas of the system with invalid passwords, price and tax overrides.

Records cashier activity.

Examples: Items that were sold and then unsold by using the CLEAR key, voided transactions, the time shift offs were completed, etc.

Recording these transactions allows management to know when they occurred.

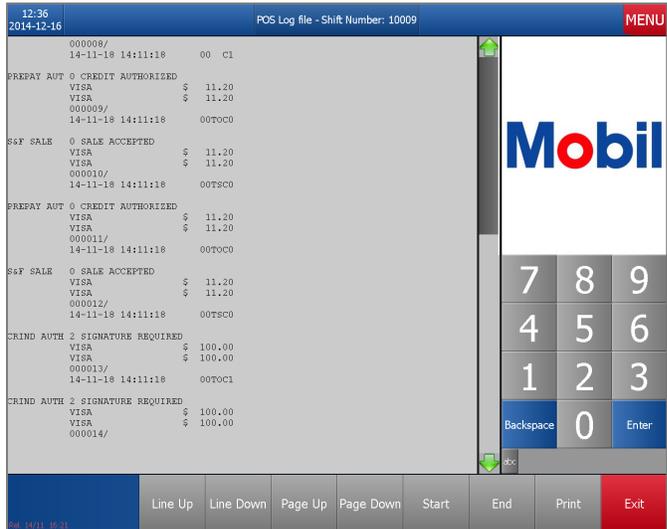
 **The use of the CLEAR key or voided transactions are not necessarily incorrect. Proper usage of these features is highly desirable and beneficial.**

Multi-paypoint POS systems

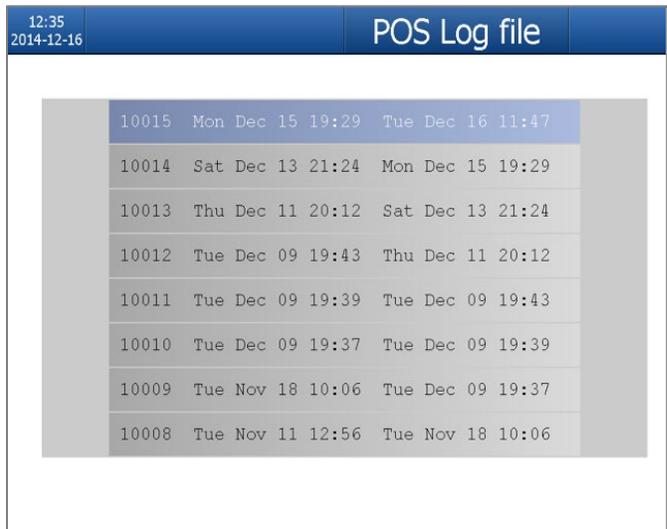
Information displayed in the security log is paypoint specific.

Print POS Log File

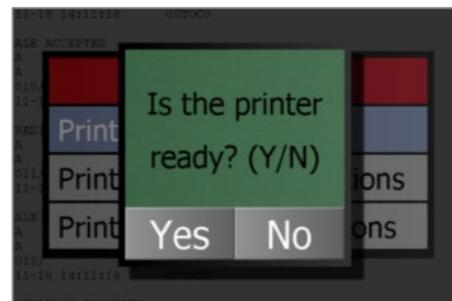
- To view bank transaction. from LOGS menu, select POS LOG FILE.
POS Log File screen is displayed.



- Tap on the desired shift. The POS log file for the shift is displayed on the screen.
- Select PRINT key.
Note: PRINT is not available in version 05.10.35 and older.



- Select YES key to print the report.

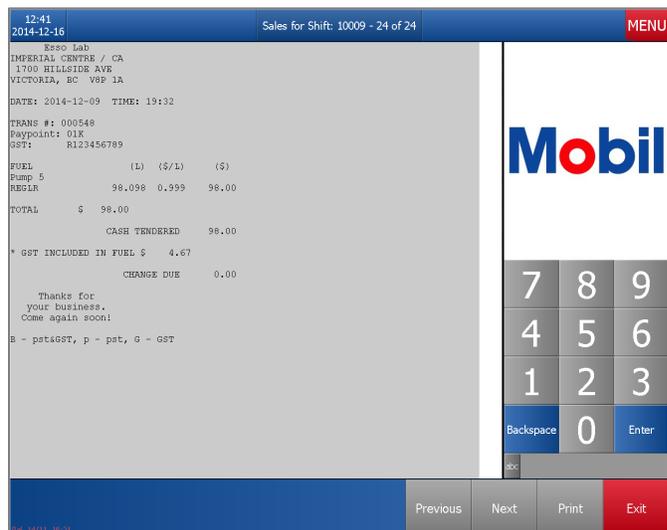


SALES REVIEW LOG

What it is	Allows you to review transactions for selected shifts.
Good to know	It works similar to the Review function while in Cashier mode. The difference is any shift kept on record can be displayed.

View Sales Review Log

- 1 To review transactions for specific shifts, select SALES REVIEW from the Logs menu. The Sales Review screen appears:
- 2 Select the SELECT key. Information from the last shift report will be displayed on the screen.
- 3 To review transactions for a specific shift, select the desired shift. The screen displays details of all transactions that occurred for the selected shift.
- 4 Follow the instructions on the screen to review more transactions.



METER READS

What it is	Detailed list of fuel volumes by pump meter.
How it is helpful	Allows you to reprint Pump Totals taken at shift-off time. Pump totals are normally obtained in the report at the end of a shift.
Good to know	Pump totals are printed one shift at a time and you can print any shift kept on record.

Print Meter Reads (Post Shift-Off Pump Totals)

- 1 Select METER READS from the Logs menu.

A list of valid shifts is displayed in a popup box.

12:42 2014-12-16		Meter Reads	
10015	Mon Dec 15 19:29	Tue Dec 16 11:47	
10014	Sat Dec 13 21:24	Mon Dec 15 19:29	
10013	Thu Dec 11 20:12	Sat Dec 13 21:24	
10012	Tue Dec 09 19:43	Thu Dec 11 20:12	
10011	Tue Dec 09 19:39	Tue Dec 09 19:43	
10010	Tue Dec 09 19:37	Tue Dec 09 19:39	
10009	Tue Nov 18 10:06	Tue Dec 09 19:37	
10008	Tue Nov 11 12:56	Tue Nov 18 10:06	
10007	Tue Nov 11 12:46	Tue Nov 11 12:56	

- 2 Select the desired shift. The Meter Reads will print.

Preparing Your Staff

As a Manager, your role is to assist your staff with getting ready to use the Bulloch POS, whether the POS system is being newly installed at a site(s), or a new hire is being trained.

A package of learning tools and support resources has been created to assist you in supporting your staff and in preparing yourself to begin using the Bulloch POS.

TOOLS AND RESOURCES

DESCRIPTION	FORMAT	HOW TO USE IT
<p>Bulloch Information Centre</p> <p>➡ Web page providing access to Bulloch POS Learning Tools and Support Resources described on these pages. Access it here: Bulloch Information Centre</p>	<p>Web page online - access it through a tablet or desktop computer. PC and Mac compatible.</p>	<ul style="list-style-type: none"> • During dedicated preparation time, employees should go to this web page to begin eLearning to use the Bulloch POS.
<p>Bulloch Basics - eLearning</p> <p>➡ This eLearning is intended as the first training for an employee.</p> <p>Interactive overview of Bulloch POS, Bulloch Information Centre, Simulator and Support Resources.</p>	<p>Online – access it through the Bulloch Information Centre on a tablet or desktop.</p>	<ul style="list-style-type: none"> • Time to complete: <ul style="list-style-type: none"> › Cashiers – 20 minutes › Store Managers – 30 minutes • When completed, employees should know how to access tools and resources and will process transactions through the Simulator.
<p>Simulator</p> <p>➡ A mock Bulloch POS system with over 15 Cashier and Store Manager transactions and functions.</p>	<p>Online – access it through the Bulloch Information Centre on a tablet or desktop.</p>	<ul style="list-style-type: none"> • Provides opportunity to practice transactions and functions exactly as they appear in the Bulloch POS. • After completing Bulloch Basics, employees should practice all transactions and functions in the Simulator relevant to their role. • Time to complete (first review): <ul style="list-style-type: none"> › Cashiers – 20 minutes › Store Managers – 30 minutes

TOOLS AND RESOURCES (CONT.)

Support Resources – Cashier

 Printable resources available on the Bulloch Information Centre web page.

DESCRIPTION	FORMAT	HOW TO USE IT
Customer-Facing Transactions Guide	<ul style="list-style-type: none"> • Quick-reference guide to critical customer-facing transactions for Cashiers and Store Managers • 3 pages front and back 	<ul style="list-style-type: none"> • Keep accessible for easy reference while assisting customers in first days and weeks (e.g., under till, with other support documents beside the till, etc.). • Print in colour and laminate.
Common Transactions and Functions Guide	<ul style="list-style-type: none"> • A concise step-by-step guide to over 40 common and critical transactions and functions for Cashiers and Store Managers. 	<ul style="list-style-type: none"> • Review before using Bulloch POS. • Keep readily accessible in back office or near till in first few days and weeks. • Print in colour.
Mobil-Specific Transactions Guide	<ul style="list-style-type: none"> • Detailed description of Redemption and other Mobil-Specific transactions with screenshots and additional notes. 	<ul style="list-style-type: none"> • Accessible via a link in the Common Transactions and Functions Guide • Review when needed for an in-depth walk-through of transactions. • Access online. Print if desired.
Bulloch Reference Manual	<ul style="list-style-type: none"> • Over 200 page in-depth guide to the Bulloch POS. 	<ul style="list-style-type: none"> • Review when needed for assistance with processing less common tasks in the POS. • All employees should have access but will mostly be used by Store Managers. • Access online. Print if desired.
How-To Videos	<ul style="list-style-type: none"> • Instructional step-by-step videos of some of the most common transactions. 	<ul style="list-style-type: none"> • Review before using Bulloch POS. • Access online.

Additional Support Resources for Site Management

Site Management Guide	<ul style="list-style-type: none"> • Detailed guide to reporting using Bulloch POS. • A guide to preparing your staff for success in using the Bulloch POS. 	<ul style="list-style-type: none"> • Review prior to using Bulloch POS. • Use the Road Map to Success to keep track of training. • Keep accessible in the first few days and weeks. • Access online. Print if desired.
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ROAD MAP TO SUCCESS

Employee Name:

Date:

A recommended timeline to prepare for using the Bulloch POS is provided below.

10 days

Complete Bulloch Basics (20-30 mins).

5 days

Complete all Simulator tasks for your role (20-30 mins).

1 day before

Final Review: Complete all Simulator tasks for your role.

1 week

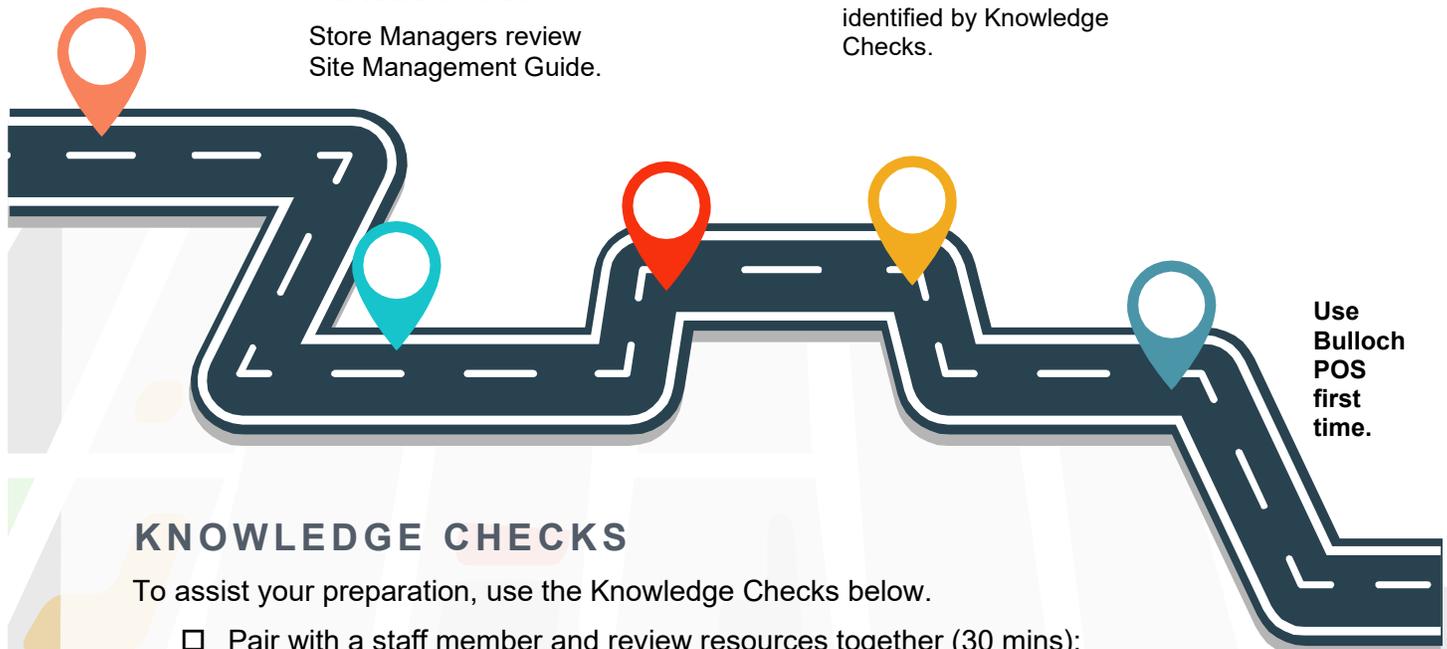
Cashiers review Common Transactions and Functions Guide and Customer-Facing Transactions Guide.

Store Managers review Site Management Guide.

5 days

Complete Knowledge Checks (below).

Review resources related to areas identified by Knowledge Checks.



KNOWLEDGE CHECKS

To assist your preparation, use the Knowledge Checks below.

- Pair with a staff member and review resources together (30 mins):
 - Quiz each other on the additional tips and notes in the Common Transactions and Functions Guide, as these are important items to keep in mind.
 - Identify differences between how you currently process transactions and how you will process them with the Bulloch POS (this doesn't apply to new hires).
 - Review the Mobil-Specific transactions in the Common Transactions and Functions Guide. Discuss differences between each process, focusing on Redemptions.
- Complete Simulator Knowledge Checks until you can process tasks without errors.
- Store Managers observe staff completing Simulator Knowledge Checks a second time.
- As a Store Manager, consider which reports you require and what information you need from each. Review the process to view and print each one.

TIPS FOR TABLET USE

It is recommended the Bulloch POS training is completed on a tablet, a desktop or a laptop. To help ensure you get the most benefit from the learning tools and resources, review the tips for tablet use below:

Screen Management	In the Display settings on your device, set the screen sleep settings to “Never”. This will avoid the screen going dark while reading or completing an activity.
Orientation	The learning materials can be viewed in both landscape or portrait orientation. Generally, landscape orientation is the preferred option to provide the best view. To change this setting, either turn the tablet around until it is in landscape position. The picture will also turn. If this option is not available, change the orientation setting in the Settings of the device.
Zoom Level	To best view and read some of the images and text, you may need to either zoom in or out on the screen. If you’re device is touchscreen, simply put your thumb and pointer finger on the screen. To zoom out, move them away from each other. To zoom in, move them together. If the overall zoom is consistently too large or too small, the zoom level can also be changed in the screen display settings on your device

SUPPORT

If you experience issues with your Bulloch system, there are a number tools and resources available to reduce the impact to your site. This section covers the support available to you and your staff:

FIRST-LINE SUPPORT FOR EMPLOYEES:

Bulloch information Center	<ul style="list-style-type: none"> › Support Resources › Simulator › How-To Videos
Manager & Assistant Manager	Ask for assistance when needed.
Call Help Desk	If the issue cannot be resolved, please call 1-800-268-7107 for assistance.