



Assyst POS
Basics & Navigation
User Guide
Version 4.10

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INTRODUCTION TO ASSYST POS VERSION 4	
THE ASSYST POINT OF SALE WINDOW	5
Customizing Assyst Point of Sale	6
Screen Layout	
Background Selection	
Color Options	7
Busy Icon	7
Printer Selection	
Date Options	
Window Layout	
Quick Access Toolbar	8
Navigating Assyst Point of Sale	
Tab Switching	
Standard Icons and Keyboard Shortcuts	
Enabling Alt Keyboard Shortcuts	
Using Grids and Tables	
Right-Click Menus	
Using Lookup Functions	
Saving when Exiting	
Using Session Locks	
Closing Assyst Point of Sale	13
USING THE INFORMATION PANEL	14
Reminders	14
Adding Reminders	
Reviewing Reminders	
Information	
Adding a Note	
Modifying a Note	
Resolving a Note	
Show Map	17
Graphs	17
APPENDIX – GETTING HELP WITH ASSYST POINT	OF SALE19
Support Centre Hours of Operation	
After Hours Emergencies	

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Introduction to Assyst POS version 4

Assyst Point of Sale Version 4 features the new graphical user interface (GUI). This interface differs greatly from the Assyst Point of Sale version 3.x which was more character or text-driven.

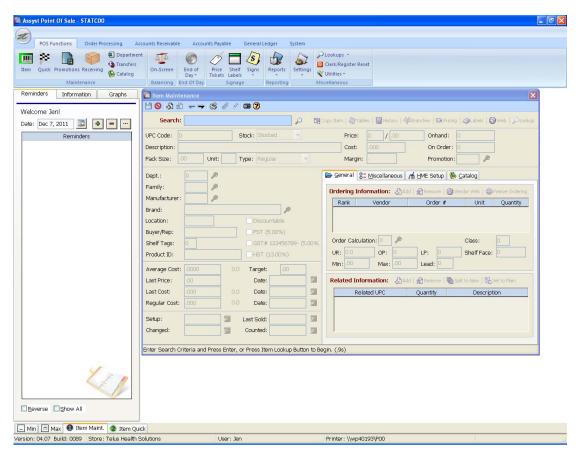
This guide is to be used as an aid to navigating the graphical interface, customizing the application, and using general functions within the system.



NOTE: The character or text-driven version of Assyst Point of Sale may remain available to some users after the release of Assyst Point of Sale version 4. Some enhancements discussed in this guide will not be available in the character-based version of Assyst Point of Sale through all releases of version 3.

The Assyst Point of Sale Window

The Assyst Point of Sale Window is divided into sections.



The Assyst button allows for customization of the application in appearance and functionality. This includes settings such as Style Preferences (Background, Busy Dialog, Ribbon Style and Form Colouring), Date Format (Display Full Dates, YYYY/MM/DD, MM/DD/YYYY and DD/MM/YYYY) and the ability to hide the Information Panel.

The Screen Print option of the reports within the application has been enhanced; previously this option was not available as widely. This has been taken a step further with the ability to export



these reports to Excel.

We have also included a Report button Report in the top right corner of many windows so that exiting the window to print the report is not longer necessary. Some examples of windows with this enhancement are Promotions, Receiving, Shelf Labels, Price Tickets and Signs.



Along the top of the window is the **ribbon**, which contains the main categories of system functions such as POS Functions, Order Processing, Accounts Receivable, etc. displayed on individual tabs.

Within the ribbon are panels which contain individual functions within the selected category. In some cases, a **drop down menu** contains more specific program selections.



At the left is the **Information Panel**, which may be used to review Reminders, Information (such as customer/item notes, attachments, and mapping functions) and Graphing functions.

The remainder of the screen is the **application background**. This section may be configured to display a specific image and is conceptually similar to the Windows desktop image.

NOTE: If the pixel size of the image does not approximately match the pixel size available for the background image, it will be stretched to fill the space.

To the right of the Assyst Button, above the ribbon, is the **Quick Access Toolbar**. This area may be used to access commonly used functions independently of the ribbon.

At the very bottom is the **Assyst Taskbar**, illustrated using tabs, which may be used to switch between open task windows within the Assyst workspace.

Customizing Assyst Point of Sale

The screen layout and appearance in Assyst Point of Sale version 4 may be customized by users.

Most such functions are available from within the **Assyst Button**.

Screen Layout

Using the Assyst Button, it is possible to adjust the general appearance of the Assyst Point of Sale screen.

It is possible to hide the Information Panel by selecting **Hide Information Panel** within the **Preferences** menu. The information panel may be displayed again by selecting **Show Information Panel** within the Preferences menu.

Background Selection

To select a new **Background Image**, select **Preferences** → **Style Preferences** → **Select Background**. The system will display a file browser window from which the desired image may be selected. Click on the file once when found and then click Open to use the file as the Assyst background image.



NOTE: Background images must be in JPEG (JPG) or Bitmap (BMP) file format.

Color Options

The colors of Assyst Point of Sale may be modified by users.

Ribbon color options are available in **Preferences** \rightarrow **Style Preferences** \rightarrow **Ribbon Style**. Click on the desired option to change the color of the ribbon.

Field Color may be adjusted by selecting a color from the Preferences \rightarrow Style Preferences \rightarrow Form Coloring \rightarrow Field Color menu. The selected field color will highlight the field or option selected in system records, report generators, or search windows.

Heading Color may also be adjusted. The Heading is a label placed on any segment of information or search option. To change the heading color, select **Preferences** → **Style Preferences** → **Form Coloring** → Heading Color and select the desired heading color.

Busy Icon



The Busy Icon, displayed when the system is working to complete an activity, may be adjusted to use one of four images.

Select Preferences \rightarrow Style Preferences \rightarrow Select Busy Icon to review the available busy icon choices.

Select the desired icon to preview the animation. Once satisfied with the selection, click **Ok** to save the setting and continue.

Printer Selection

Printer selection may be performed anywhere in Assyst POS by clicking on the Assyst Button and pressing **Select Printer**. The **F9** key may also be used to launch the Printer Selection window.

Date Options

In previous versions of Assyst Point of Sale, dates were always displayed in YY/MM/DD sequence.

To adjust date formats in Assyst Point of Sale version 4, select **Preferences** \rightarrow **Date Format** from within the Assyst menu.

Date formats may be set as YY/MM/DD, MM/DD/YY, and DD/MM/YY.

A further option may be used to **Display Full Dates**. When this option is checked off, the system displays months using abbreviated non-numeric designations and years will display as four digit numbers. For example, 10/11/12 representing MM/DD/YY would display as Oct 11, 2012.

2

Window Layout

Assyst Point of Sale also offers the ability to simultaneously open up to five task windows within the Assyst workspace using a single session license.

An option to **Auto Minimize Windows** is available within the **Preferences** menu. If enabled, the system will minimize all functions not presently selected as active.

Open functions in the Assyst Task Bar are displayed using a number on a circle. When minimized, the number is purple and appears against a green background. When maximized, the number is green against a purple background.



NOTE: It is possible to switch tabs using either the mouse or **Alt-#** command on the keyboard. In the illustrated example, Alt-1 would switch to Item Maintenance.

When **Auto Minimize Windows** is **unchecked** (turned off), it is possible to click and drag windows to their desired location within the Assyst workspace. This allows multiple functions to be displayed in whole or part to facilitate easy switching.

Window orientation may also be adjusted using the **Window** options within the Assyst Button. Select **Cascade** to cascade open task windows in the Assyst workspace.

All open task windows may be Minimized or Maximized by selecting **Minimize All** or **Maximize All** from within the **Window** options or clicking on the **Min** or **Max** buttons at the far left of the **Assyst Task Bar**. The keyboard shortcut to Minimize All is Alt-F11, and the keyboard shortcut to Maximize All is Alt-F12.

Any open task window may be brought to the foreground by selecting it in the Assyst Task Bar.

If the Assyst Task Bar does not appear, there are no open Assyst task windows.

Quick Access Toolbar

The Quick Access Toolbar is used to store copies of icons for commonly used Assyst Point of Sale features and functions.

To add any function to the toolbar, locate it in the appropriate function panel on the ribbon. Rather than left clicking on the function to launch it, right click on the option to show the Quick Access Toolbar menu.

Then left click on **Add to Quick Access Toolbar** to add a shortcut to the function at the top left of the Assyst Point of Sale window.



Alternatively, icons for specific functions may be added to the Quick Access Toolbar by clicking on the icon and dragging it onto the Toolbar space.

The **Customize Quick Access Toolbar** option may be used as an alternative method of selecting functions for inclusion on the Quick Access Toolbar.



The **Choose commands from** option may be used to select functions from specific sections of the application such as POS or AR functions.

Once a category has been selected, individual functions may be selected and added or removed from the quick launch using the Add and Remove buttons.

The position of the Quick Access Toolbar may be adjusted. By default, the toolbar appears above the ribbon. It may instead be displayed below the ribbon by selecting the **Show Quick Access Toolbar below the Ribbon** option.

Navigating Assyst Point of Sale

Assyst Point of Sale version 4 has a fully functional graphical user interface.

For users accessing Assyst Point of Sale using the Windows thin client or on a Windows based server, options may accessed using a mouse.



NOTE: Users may continue to use the text or character driven version of Assyst Point of Sale in Telnet clients and locally on UNIX servers. Some functionality available in Assyst Point of Sale version 4 will not be available in the character driven interface.

Tab Switching

If multiple Assyst task windows are open, it is possible to switch between them by clicking with the mouse on the desired tab in the **Assyst Task Bar**.



<- You can have upto 5 different screens open

Alternatively, the active tab may be selected using **Alt-#**, where # refers to a number between 1 and 5. The appropriate number is displayed on the tab in the Assyst Task Bar.

All open tabs may be minimized or maximized by clicking on either the **Min** or **Max** button in the **Assyst Task Bar**. Functions to minimize or maximize all open tasks may also be found in the **Assyst Button** menu among **Window** options.

Open functions in the Assyst Task Bar are displayed using a number on a circle. When minimized, the number is purple and appears against a green background. When maximized, the number is green against a purple background.

Standard Icons and Keyboard Shortcuts

The following section lists icons and keyboard shortcuts broadly available in the Assyst Point of Sale application.

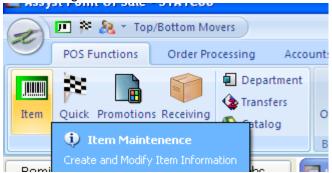
Icon	Function	Keyboard Shortcut
	Save	Ctrl-S
0	Cancel	Ctrl-Q or Esc
Ð	Add a new record	Ctrl-N
*	Delete the selected record	Ctrl-D
8	Select a printer	F9
	Email	
0	View/Add Attachments	Ctrl-T
£	View/Add Notes	Shift-F8
	Capture a Screen Image	Ctrl-Shift-P
②	Help	F1
P	Lookup/Search	F12
7	Modify the selected record	Ctrl-M
8	Zoom into the selected record	F7
×	Export to Excel	Ctrl-O
ij.	View/Select Dates from Calendar	(none)

Page 10 of 19

Icon	Function	Keyboard Shortcut
4	Show the previous record	(none)
\rightarrow	Show the next record	(none)
4	Show the first record	(none)
I	Show the last record	(none)

In accordance with Windows standards, the following additional navigation activities are also available in Assyst Point of Sale:

- Left click on any icon to execute the associated function, select a field to be modified or select a record for review/modification
- **Double click** on any record to open it for modification
- Tab or Down Arrow advances to the next option
- Shift-Tab or Up Arrow goes back to the previous option
- Alt-F4 closes the current active Assyst task window
- Alt-__ displays a specific function. In the graphic □ General, the General tab would be displayed after clicking Alt-G.



When the mouse is held over any function in Assyst Point of Sale without clicking on it, the application will display a context window offering details about the highlighted function.

Additional information about icons and keyboard shortcuts used in specific sections of the application will be described in the user guide applicable to that functionality.

Enabling Alt-___ Keyboard Shortcuts

If your system is not configured to show Alt keyboard shortcuts at all times, this may be due to a setting in Windows.

In **Windows XP**, within **Display Properties**, the setting may be toggled by clicking on the **Effects** button located on the **Appearance** tab. Ensure that the option is unchecked as in the following screen image.

Hide underlined letters for keyboard navigation until I press the Alt key

In **Windows Vista/7**, the setting may be found among **Ease of Access** options in the **Control Panel**. Press **Ctrl-U** anywhere in Windows Vista or Windows 7 to launch the Ease of Access Center. Click on **Make the keyboard easier to use**, and within options to "Make it easier to use keyboard shortcuts", select the option **Underline keyboard shortcuts and access keys**.

If the settings are in place to show the keyboard shortcuts, shortcuts will appear in several locations in Assyst Point of Sale such as the tabs available in Item Maintenance.

9

Using Grids and Tables

In many cases, multiple records may be displayed in either a grid or table.

A **grid** refers to a table which may be sorted on demand using one of the displayed fields. For example, the on-screen review of an Item Quick Maintenance listing or even an Item Maintenance search which shows multiple items may be sorted.



In the example above, the search for items with a description starting with "KIT" returned 8 results. By clicking on the **Price** heading, the list was re-sorted in ascending price order. The order is known to be ascending due to the appearance of an arrow to the right of the Price column heading, and may be changed to descending order by clicking on the column heading again.

To navigate quickly to the first entry in a grid, press **Ctrl-Page Up**. To navigate to the last entry in a grid, press **Ctrl-Page Down**.

Right-Click Menus

Additional menus are available in Assyst Point of Sale such as Promotion Maintenance and Item Quick Maintenance by right-clicking on a record.

The Right-Click Menus may be used to access certain commonly used functions more quickly than finding and clicking the associated icon.

The specific content of Right-Click Menus will vary by the section of the application in which they are invoked.

Using Lookup Functions

Lookup functions in Assyst Point of Sale are available on the Miscellaneous panel of any tab on the ribbon. Click the arrow to the right of the **Lookups** button to show a list of lookups relevant to that section of the application.

These lookups may be used to search for information independent of the various maintenance sections of the application.

In the POS Functions ribbon group, clicking on the **Lookups** button will show a menu of available lookups. This menu is specific to Assyst POS and shows more options than those available from the drop-down due to the considerable crossover of information applicable to Point of Sale activities.

In many cases, modifications may be performed from the lookup by clicking on the T modify button.

Saving when Exiting

Assyst Point of Sale will not always prompt to save changes if changes are made.

As such, ensure that if changes are made that they are saved before exiting the function in question.

Using Session Locks

If a user is logged into Assyst Point of Sale and is intending to leave their terminal, it may be advisable to lock their session.

A session may be locked by pressing Ctrl-Home on the keyboard or clicking on Lock Session in the Assyst Button menu.

The Assyst Point of Sale session will be locked such that only the user who locked it may reopen the session.

For another user to login on the terminal with a locked session, a new session of Assyst Point of Sale must be launched. Additional sessions may be subject to license restrictions.

Closing Assyst Point of Sale

In Assyst Point of Sale version 3, the term "Tab Out" was used to refer to exiting the software using the Tab key.

In Assyst Point of Sale version 4, the application may be exited by selecting Exit from the Assyst Button menu OR clicking on the X icon at the top right of the Assyst Point of Sale window.

Page 13 of 19

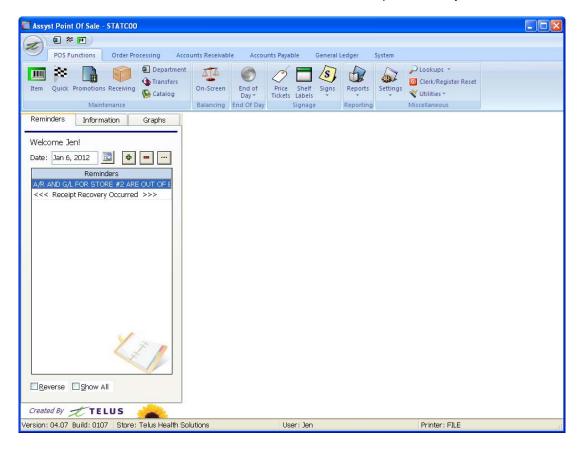
Using the Information Panel

At the left of the Assyst Point of Sale window is a panel which may be used in conjunction with other system functions. This area is referred to as the **Information Panel** or **The Panel**. The Information Panel is a new feature that incorporates three tabs: Reminders, Information and Graphs.

Reminders

The reminders tab displays reminders as well as any system messages, such as receipt/recovery messages, electronic journal backoff warnings, and subledger balancing messages.

Reminders can be added deleted and/or modified by clicking on the appropriate icon button. Reminders can also be added by double clicking on the blank area of the reminders window. A "Print All" checkbox has been added, so that all reminders can be printed easily at one time.



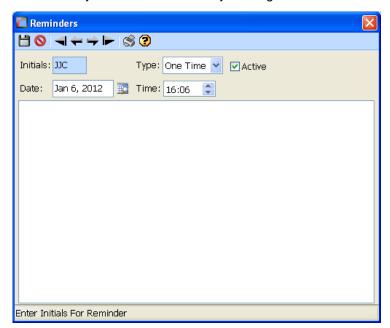
Any outstanding messages created by the system for users may be accessed from the panel. This may include items which require examination by a manager or senior staff member such as:

- Electronic journal backoff warnings indicates that the Electronic Journal requires maintenance. For more information, consult the Journal Backoff User Guide or contact the TELUS Health Solutions Support Team. This message will regenerate daily if the journal is not backed off.
- A Receipt/Recovery message indicates that a problem occurred with a transaction. This may impact on balancing, and should only be marked resolved once cash balancing and verification tasks for the date in question have been completed.

- Subledger balancing messages these messages are applicable to sites using Assyst AP and Assyst AR for the purpose of automating subledger balance verification. These messages may indicate a subledger is in balance or is not in balance. Messages indicating that a subledger is not in balance should not be marked resolved until the underlying cause has been identified and corrected
- Other messages configured by users.

Adding Reminders

A reminder may be added to the list by clicking on the ficon.



The system automatically assumes the reminder will be for a specific user. As such, your **Initials** or login ID will be filled in for you.

This may be adjusted if the reminder is being created for another staff member. If the initials are deleted, the reminder will appear for all staff.

Set the **Type** to indicate whether the reminder is to occur One Time only, Weekly, Monthly or Yearly.

Set the **Date** and **Time** to indicate the date and time that the reminder is to appear in the list.

If the **Active** option is selected, the reminder will appear in the default list. If this option is unchecked, the reminder will remain on file and will not appear in the list.

The large box may be used to type in the content of the reminder. This field is unconstrained by format requirements, and may be set to contain any details expected to appear in the reminder.

Reviewing Reminders

To review the full details of any displayed Reminder, double click on the desired reminder or click on the icon to scroll through the reminders on file.

If a reminder's full details are displayed, the reminder's content may be modified.

From the list of reminders in the panel, any highlighted reminder may be marked **resolved** by clicking on the icon. A resolved reminder is removed from the system and does not appear in any list.

To view reminders which will appear up to a specific date, click on the **Date** option. By default, Assyst Point of Sale displays reminders with a date up to the current date. Future reminders may be displayed by setting this date to a specific future date.

The order in which reminders appear is, by default, reverse chronological order. The most recent entries appear at the top. This order may be reversed by selecting the **Reverse** option.

To show all reminders in the list, including those not marked as Active, select the **Show All** option at the bottom of the panel. Future reminders will also appear if the Show All option is selected.

Information

The Information tab displays details specific to a displayed record. Notes and Attachments for the currently displayed record will display here, if available.

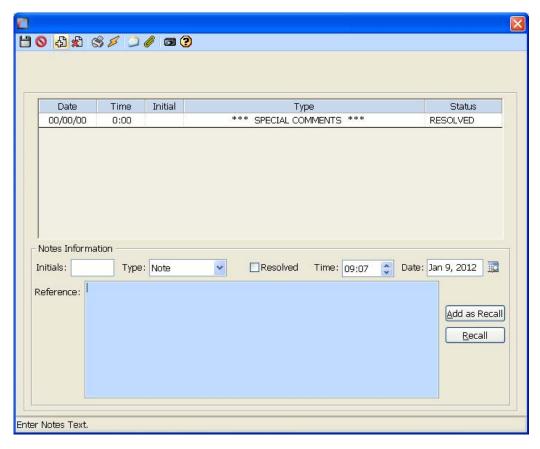
If an attachment is present, double-click on an attachment to open it. (NOTE: for more information about the attachment module, please see the attachment user guide).

Adding a Note

To add a note to a customer, vendor, or other record, double-click on the blank area in the Notes section of the Information Panel.

When the Notes popup appears, click on the 🗗 icon to create a new note.

This will open up the lower section of the screen for the creation of the note.



Assyst Point of Sale will automatically fill in the date and time at which the Note was first created. The default note **Type** will also be selected as Note.

Depending on the type of record to which the note is being added, special note types may be available. Generally, **Note** and **Warning** type notes are available. A Warning type note behaves like a regular note with the exception that it will pop up in the Assyst Point of Sale window when the record to which the note is attached is accessed.

In the Reference section, key in the full details of the note. A note may be saved directly to the file using the Save icon.

Alternatively, if the note added is sufficiently standard that it might be used again for another record, it is possible to save the note for recall using the Add as Recall button. This function effectively saves the new note in such a way that it may be recalled on demand for inclusion in another note. Titles may be set on such notes to identify the note from the list of saved notes.

A note that has been previously saved for recall may be accessed by clicking the Recall button.

Modifying a Note

A note may either be modified by double-clicking on either the note itself or the blank space in the Notes section of the Information Panel.

When the Notes popup appears, highlight the note in the upper portion of the screen and perform the necessary modifications in the lower part of the screen. Click on the Save button to save the changes before exiting.

Resolving a Note

The **Resolved** checkbox on a note indicates whether the note is presently active. If unchecked, the note is currently active.

If a note is marked Resolved, it will no longer appear in the panel but will remain on file. Such notes may be reviewed from the list of notes attached to a record. If a warning is marked Resolved, it will no longer pop up.

Show Map

The map feature can be used when customer information is displayed on the screen. Click on the

Show Map icon to access the integration with GoogleTM Maps website and search for driving directions from the store address configures in Settings and the Customer's address configured in AR **Customer Maintenance**

Assyst Point of Sale offers the ability to create a map to a customer's address of record. This function refers to the address on a customer file.

These maps may be printed from the web page containing the map using the **Print** button.

Graphs

The graphs tab displays sales or profitability information graphically.

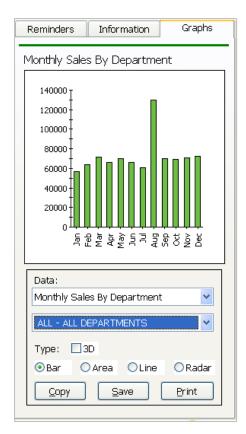
The **Data** option in the Graphs tab may be set to display:

- Monthly Sales by Department
- Monthly Sales by Family
- Monthly Margin by Department
 - Monthly Margin by Family

The graph may be limited to a single department or family, or to include sales or margins of products in all categories

At the bottom of the Graphs tabs are options for displaying the graph in 3D, in Bar, Area, Line or Radar format.

Page 17 of 19



The Copy button will copy the displayed graph to the Windows Clipboard. The image can then be pasted into a documents from the clipboard. The save button will save the displayed graph as a file with a JPG extension. The Print button will print the graph in portrait orientation to the selected printer.

Use the **Copy** button to copy the displayed graph to the Windows Clipboard. An image on the clipboard may be pasted into documents such as emails using the Paste command.

Use the **Save** button to save the displayed graph as a file in Windows. The file will be saved as a JPEG image.

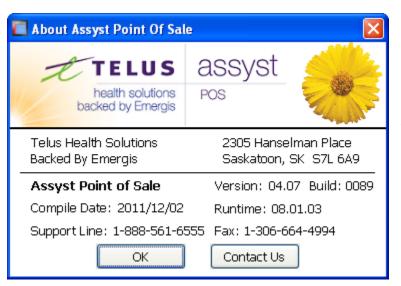
Use the **Print** button to print the displayed graph. Graphs are printed in portrait orientation on a full letter-size page on the printer selected in the application.

Appendix – Getting Help with Assyst Point of Sale

If at any time you require assistance with Assyst Point of Sale, information about contacting the Assyst Point of Sale Support team may be accessed from within the application.

Click on the **Assyst Button** and select the **About** option. The application will then display certain critical details of your application along with the support telephone number and fax number applicable to your region.

If possible, have these details available when calling support, along with any other pertinent details.



Do NOT use the Contact Us button to submit critical requests for assistance. If you have an immediate need for assistance, please call the support telephone number.

Support Centre Hours of

Operation

The Assyst Point of Sale Support Centre is open Monday through Saturday for regular inquiries between the following hours:

 $\begin{array}{ll} \mbox{Monday} - \mbox{Friday} & 7:00\mbox{am} - 7:00\mbox{pm} \\ \mbox{Saturday} & 9:00\mbox{am} - 5:00\mbox{pm} \end{array}$

NOTE: The following is subject to change without notice.

After Hours Emergencies

Emergency support is available from 5am to 11pm Saskatchewan Time throughout the year.

Saskatchewan is in the Mountain Daylight time zone (same time as Central Standard) throughout the year and does not observe bi-annual time changes for daylight savings time.

Emergency support is available every day of the year with the exception of Christmas Day (December 25).

If you experience an emergency with your application and/or equipment after hours, call the regular support number and follow the prompts for after hours support. You will then be connected to the on-call support agent(s).

If the on-call agent(s) are serving other clients, we urge you to take advantage of the voicemail option. The high priority voicemail will notify the agent(s) at the conclusion of their call if a voicemail is left on the afterhours emergency line.