

Wizard Plugin User Guide

iZone POS Integration v1.27.0 April 2019





Version	Date	Notes	Author
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1.1	01-04-19	Updated to document system changes introduced by v1.26.0.	P. Buchanan
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Introduction

Document Scope

This guide is aimed at site staff and describes how to take Wizard payments and provides an explanation for certain system states and error messages.

Overview

Wizard is an iZone POS Integration Engine plugin that integrates with Aztec to facilitate the processing of sales ledger, rental and goods payments on the Aztec POS.

Prerequisites

The following applications/versions and services are required to support Wizard operation within Aztec:

- iZone POS Integration Engine v1.27.0 or later at site
- Wizard Plugin Software
- Aztec 3.12.2 (see note below) or later at head office and site



All Aztec v3.12.2 PCs (Head Office and Site) must have had a specific SQL script run (detailed in *Wizard Software: Setup Guide*). Systems of a higher version than v3.12.2 already include this configuration and do not need to run the script.

Associated Documentation



Wizard Software: Setup Guide - This guide is aimed at strategic head office staff that are responsible for installing the main system (and components) and configuring all areas of the system.



Site Operation

Identifying the customer

When the Wizard button on the POS is first pressed, the system then initiates a process where the POS user can identify the customer.



The POS user is prompted to enter the customer's account number or pitch number:

Help!		Search	More
Account Number	Pitch Number		



Selecting **Account Number** displays the alphanumeric keyboard screen to allow the Account Number to be entered:

	Account Number										
•	1	2	3	4	5	6	7	8	9	0	_
-	Q	W	E	R	Т	Y	U	I	0	Р	@
	Α	S	D	F	G	Н	L	K	L	<	
		Z	X	С	V	В	N	М	Clear		
Can	Cancel Space			Ba	ick	0	K				

Selecting **Pitch Number** displays the alphanumeric keyboard screen to allow the Pitch Number to be entered:





When an Account or Pitch Number has been entered successfully and it is recognised by the system, the POS operator is then prompted for two further confirmation questions. These two questions could be two items from the following four: Surname; Postcode; Phone; Email.

In the example below, Surname and Postcode have been requested from the customer:

Co	onfirm Customer I	dentity
Surname	Postcode Post	trode
Smith	EH3 5DA EH3	SDA
Incorrect	Correct Inco	rrrect

If the customer tells the POS operator the correct surname, and they select the **Surname Smith Correct** button, the system removes this button leaving just the final confirmation question - Postcode.

Help!		Confirm Customer Identity	More
Postcode EH3 5DA Correct	Postcode EH3 5DA Incorrect		

If the customer tells the POS operator the incorrect Postcode, the system then provides a different confirmation question – in the example below, Email is requested.



Failure to answer any two questions results in the Transaction declined dialog and the transaction is ended at that point.





When two correct responses are given to the POS operator, the system displays the Summary screen with the customer name displayed at the top left-hand side.

Fred Smith				
Ledger	Adhoc	Done	Cancel	



Making a Cash Sale

When a customer has been identified and confirmed successfully, the POS operator can make a cash sale by selecting the **Adhoc** button on the customer's summary screen:



The product grid is displayed. This can vary depending on the type of POS and the available products for sale at that site. **Note:** These are not Aztec products.

Help!	Available Cash Sale Products					
Breakfast Basket	Cuddly Character	Donkey Ride	External Van Valet	Outside Clean Only	Park T-Shirt	
£20.00	£9.99	£20.00	£50.00	£20.00	£15.00	
Washing Token	Wi-Fi Income	Wi-Fi Token	Woggles	Woodlore income	Wash Powder	
£3.50	£0.01	£0.01	£3.95	£0.01	£1.00	
Wash Token	Wash Token	Wash Tokens	Washing Powder	Washing Powder	Touring and Camping	
£3.50	£0.01	£3.60	£1.00	£0.01	£0.01	
Vending Confectioner	Vending Drink	Vending Machine Coff	Vending Machine Swee	Vouchers Issued and	Swimming Lesson	
£0.10	£0.01	£0.01	£0.01	£50.00	£0.01	
Swimming Pool/Water	Table Tennis / Darts	Telephone Call Boxes	Thursday Family Spec	Ticket Sales	Staff Tips	
£0.01	£0.01	£0.01	£5.00	£0.01	£0.01	
Sun - Service Charge	Sun Bookings	Sun Commission	Sundry Income Std	Sundry Income Zero	Shop cash	
£0.01	£0.01	£0.01	£0.01	£0.01	£0.01	
SMALL MENS SHORTS	SMALL MENS SHORTS	Snooker	Spectator	Staff Accommodation	Refunds Suspense	
£11.99	£11.99	£0.01	£0.50	£0.01	£0.01	
Retail Sales Std	Sammy Armbands	Sammy Goggles	Sammy Merchandise	Senior Swim	POOL NOSE CLIPS	
£0.01	£4.50	£4.50	£0.01	£3.50	£2.99	
POOL STARTER FLOAT	POOL STARTER FLOAT	Postage	Postcards	Private Pool Hire	Paultons Tickets	
£4.99	£4.99	£0.01	£0.01	£70.00	£0.01	
Petty cash	POOL DIVE RINGS	POOL DIVE STICKS	POOL EAR PLUGS	POOL NEPTUNE NAUTIO	Ocean Explorer (Owne	
£0.01	£9.99	£9.99	£2.99	£4.99	£1.50	
				Back	Cancel	



From the Available Cash Sale Products screen, the POS operator can:

- Select More to view more products
- Select Cancel to abort any pending payments and return to the main POS home screen
- Select Back to return to the customer's summary screen
- Select a product button (see directly below)

When a product button is pressed, the POS operator is returned to the Payment Summary screen (shown below), showing the customer name and the product description and price:

ALBERTO 16 Jan 2019 14:06 Fred Smith Electric Safety Test £57.50 Gas Safety Test £60.00 Ledger Adhoc Done Cancel	Help!					
Fred Smith Electric Safety Test Gas Safety Test £60.00	ALBERTO	16 Jan 2019 1-	4:06			
Electric Safety Test £57.50 Gas Safety Test £60.00		Fred Smith				
Gas Safety Test £60.00		Electric Safety Test		£57.50		
Ledger Adhoc Done Cancel		Gas Safety Test		£60.00		
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
Ledger Adhoc Done Cancel						
		Ledger	Adhoc	Done	Cancel	

From the Payment Summary screen (shown above), the POS operator can:

- Select Ledger to view or add ledger payments (see Viewing Open Ledgers on Page 11)
- Select Adhoc to view or add cash sales
- Select Done to return to the main POS home screen
- Select **Cancel** to quit any current process, disregarding anything that is being processed (see Cancelling a payment transaction on Page 18)



Viewing Open Ledgers

When a customer has been identified and confirmed successfully, the POS operator can view the list of open ledgers for a customer by selecting the **Ledger** button on the customer's summary screen:

Fred Smith				
		-		
Ledger	Adhoc	Done	Cancel	

The Available Ledgers screen is displayed showing buttons with the outstanding amount for each ledger:

Helpl		Available Ledgers		More
Sales Ledger £-19184.51	Rent Ledger £154.00			
			Back	Cancel



The POS operator can choose the Sales Ledger or Rent Ledger button, each following a different process.

Rent Ledgers

The POS operator can:

- 1. Select the Rent Ledger button to display the Invoice List, then
- 2. Select an invoice button to view individual Invoice Detail, then
- 3. Enter a payment amount, then
- 4. View the Payment Summary (to verify the payment was process successfully)

The Rent Ledger Invoice List shows each outstanding rent Ledger entry.



Each button shows:

- Rent Ledger name
- Account Number
- Outstanding amount



When a Rent Ledger button is selected, the detailed ledger view is shown for that item.

- Left-hand column lists all data associated with the invoice
- Right-hand column is the key for each of these invoice details



Selecting the Pay button allows the POS operator to process the amount the customer wishes to pay:







Once an amount is entered, and the **Enter** button selected, the Payment Summary screen for the customer is displayed.

As can be seen in the example below, the Payment Summary now details

- The ledger/invoice description
- The amount entered against the ledger

Mr. E. Wood				
Metered Gas		£10.00		
Metered Gas		£25.00		
Ledger	Adhoc	Done	Cancel	

At this point, the user can then repeat the process (of taking another rent ledger payment) starting at the Payment Summary screen, or complete the action by selecting the **Done** button.



Account Payments

Customers can make advance payments to their account by selecting the **Payment on Account** button. This may be a direct payment in advance or it could be the surplus (change) from another payment.



When the button is selected, the POS operator is prompted to enter the amount the customer would like to pay.



In the example below, a payment of £10 has been taken towards the account.

A se Me	. 160			
Mr & Mrs W Brown				
Payment On Account		£10.00		
		_	_	
Ledger	Adhoc	Done	Cancel	

Payments on Account are made against the Rent Ledger and the restrictions on the selection of the Sales Ledger applies (as described in *Sales Ledger button disabled* on Page 20).



Sales Ledgers

The sales ledger process is very similar to the rent ledger process and shares some of the screens.

The POS operator can:

- 1. Select the Sales Ledger button the detailed sales ledger, then
- 2. Enter a payment amount, then
- 3. View the Payment Summary (to verify the payment was processed successfully)





Completing Payments

When the POS operator has accumulated payments on the Payment Summary screen, selecting the **Done** button is the final step required to process any pending payments.

Fred Smith				
Electric Safety Test		£57.50		
Gas Safety Test		£60.00		
Lodace	Adhar	Dama	Concol	
Leuger	Aunoc	Done	Cancel	

If there are no pending payments then selecting **Done** will simply prompt the POS operator that no payments have been made and return them to the main POS home screen.

The payment is added to the POS account in the form of a single Wizard product, showing only the aggregated total price of all the payments being processed.

Help!	Log Off	Print Bill	Receipt	CC Apply Discount	CC Cancel Discount	CC Apply Promotion	CC-Gift Balance Check	CC Redeem eCoupon	*CLM TEST* #0004	B	ar
Alex		27 Feb 2	019 14:08	Promo Card Swipe	CardComm erce	Cancel All TXD Vouchers	Redeem TXD Voucher	Room Enquiry	Room SOAP Pay	Fo	od
1 Wizard OpenPrice* 25.00							Starters & Sharers	Sides			
						Sin 30.	gle .00			Lighter Bites	Hotdogs & Burritos
										Burgers	Pub Favourites
						Curries	Big Plate Steaks				
Total		ł	25.00			Dou 40.	ıble .00			Big Plate Classics	Big Plate Chicken
Zone 1	Front Barcode Scanner	Rear Barcode Scanner	Type Bar Code							Puddings	Hot Drinks
Restaurant	Ceridian Pay	Ceridian Balance Check	Assign Bar Code		n olanan anan ang kana		nionskinnenskinnens	oloomano kuningen fiku		Golden Years	Wizard OpenPric e
Wizard	iCoupon Pay	iCoupon Void	iCoupon Redeem		Family 50.00					Sunday Menu	Breakfast
Hungry Horse Modifiers	Quantity	Price Enquiry	Small Bar							Daily Deals	Horse Bolt Ons
Manager Options	Staff Options	Table Options	Message	Save	Register iZone Account	Redeem iZone Prize	iZone Balance Check	Cancel iZone Prizes	Assign iZone Account	P/	٩Y



Cancelling a payment transaction

If the POS operator selects **Cancel** from the Payment Summary screen, a warning dialog is displayed:

Fred Smith				
Site Fees 2018/19		SA00001234	£2365.57	
Electricity		SA00006544	£116.67	
Ledger	Adhor	Done	Cancel	



Selecting **No** will return to the Payment Summary screen.

Selecting **Yes** will decline the transaction and return to the POS home screen.

Transaction Declined
No payments made.
ОК



Payment Processing Rules

To ensure that Sales Ledger payments are completely segregated from Rent Ledger and Cash Sale payments within the Wizard/Aztec integration process, there are restrictions on button selection if any pending payments exist.

In the example screenshot below, no pending payments exist so all buttons are selectable in the Payment Summary Screen:

Help!					
6666	13 Feb 2019 :	12:12			
	Mr E Wood				
	Ledger	Adhac	Done	Cancel	
	Leuger	Adhoc	Dune	Cancer	

Adhoc button disabled

In the example screen below a Sales Ledger has been added as a pending payment, which is highlighted in the Payment Summary screen. The Adhoc button is now unavailable:

Mr E Wood Sales Ledger		£10.00		
Ledger	Adhoc	Done	Cancel	



Rent Ledger button disabled

Following on from the example on the previous page, the POS operator can select the Ledger button but because a Sales Ledger has been added as a pending payment, the Rent Ledger button is now unavailable. The POS operator can still make additional payments against the sales ledger:

Help!	Available Ledgers	More
Sales Ledger £-8.00 £24.87		

Sales Ledger button disabled

With an Adhoc cash sale item displayed in the Payment Summary, the Ledger button is still available:

Mr E Wood				
Breakfast Basket		£20.00		
-				
Ledger	Adhoc	Done	Cancel	
	2			

If a payment is made against the Rent Ledger, or Adhoc, the POS operator cannot access the Sales Ledger as this button is now unavailable:





Only one Wizard product allowed on POS account

To ensure that Sales and Rent Ledger payments are not taken together on a single Aztec account, the system restricts the POS operator to adding only a single Wizard product to the account.

If a Wizard product has been successfully added, a further attempt to select Wizard from the POS results in the POS operator being prompted to ask if they wish to remove the existing transaction:

6666	lalia and *	04 Apr 2019 15:42 Acc No: 228	
	wizaru		
			Void Wizard item?
			Yes No
Tota	il -	£2482.24	

If the POS user selects **No** to the prompt in the example screen above, the POS returns to the main POS screen with no changes to product selection on the account.

If the POS user selects **Yes** to the prompt in the example screen above, the Wizard product is removed from the account, as shown in the example image below:

Help!	Staff Options	Manager Options	Quantity	Рау					B,	BAR	
6666		01 Apr 2 A(:019 16:29 .c No: 197	Pr B	int ill	Op Dra	en wer	Receipt		Dra	ught
1 W -1 W	/izard* /izard*		2482.24 -2482.24	Cash		£5 **	£10	£20	£50	Bottled Beer & Cider	Ready to Drink
				Wizard	Wizard	Assign iZone Account	Split Account	Ceridian Balance Check	iZone Balance Check	Sp	irits
				IC Cash	IC Timeplay	Greg Excl	Service Charge	Bowling Voucher	Tesco Voucher	Lique For	urs & tified
				IC Cash Bonus	IC Token Bonus	Cre Live Boo	ate Res king	Intercard Balance Inquiry	Intercard Credit Account	W	ine
				IC Points	IC Token	iZone Balance Check	Carling	Intercard Refund Card	Intercard Void Credit	Min	erals
				EFT	Keyed EFT	Room Enquiry	Room		Price Enquiry	Cockt Sho	ails & oters
Total			£0.00	Dollars	Yen	Deposit Redeem	Ledger Post	Ledgr Settle	Ledger Balance	Sna	acks
Message	Instruc- tions	Print Bill	REFUSALS		Redeem iZone Prize	Visual Split Bill	Pick up Account	IC Pay	Next Seat	Promotions	
Pick up Account	Recall Account	Receipt	Voucher	iCoupon £5	iCoupon Discount	Next Separate Bill	Edit Cover Count	Clo	ose	Hot Drinks	
Log Off	SAVE	TAE	BLES	CC Pay	Redeem TXD Voucher	iCoupon Redeem	iCoupon Void	20% Discount	EsVelte Balance Check	Pay	



With the previous Wizard product voided on the account, the POS user can then continue and add a new Wizard transaction to the same account, as shown in the example image below:

Help!	Staff Options	Manager Options	Quantity	Pay					В	BAR	
66666 01 Apr 2019 16:32		2019 16:32 cc No: 197	Print Bill		Open Drawer		Receipt		Draught		
1 W -1 W 1 W	/izard* / izard* /izard*		2482.24 -2482.24 200.00	Ca	sh	£5 **	£10	£20	£50	Bottled Beer & Cider	Ready to Drink
				Wizard	Wizard	Assign iZone Account	Split Account	Ceridian Balance Check	iZone Balance Check	Sp	oirits
				IC Cash	IC Timeplay	Greg Excl	Service Charge	Bowling Voucher	Tesco Voucher	Lique For	eurs & tified
				IC Cash Bonus	IC IC Creat Cash Token LiveRe Bonus Bonus Bookin		ate Intercard Inte Res Balance Ci king Inquiry Ac		Intercard Credit Account	Wine	
				IC Points	IC Token	iZone Balance Check	Carling	Intercard Refund Card	Intercard Void Credit	Mir	erals
				EFT	Keyed EFT	Room Enquiry	Room		Price Enquiry	Cock Sho	tails & oters
Total		£	200.00	Dollars	Yen	Deposit Redeem	Ledger Post	Ledgr Settle	Ledger Balance	Sn	acks
Message	Instruc- tions	Print Bill	REFUSALS		Redeem iZone Prize	Visual Split Bill	Pick up Account	IC Pay	Next Seat	Promotions	
Pick up Account	Recall Account	Receipt	Voucher	iCoupon £5	iCoupon Discount	Next Separate Bill	Edit Cover Count	Clo	ose	Hot Drinks	
Log Off	SAVE	TAE	BLES	CC Pay	Redeem TXD Voucher	iCoupon Redeem	iCoupon Void	20% Discount	EsVelte Balance Check	Pay	

 \bigcirc

The above scenarios do not prevent a POS operator from adding another (non-Wizard) product, for example a pint of Lager, to the same account, as long as the account remains open.