



# Wizard Plugin

## Setup Guide

iZone POS Integration v1.27.0 April 2019

Version	Date	Notes	Author
1.0	07-03-19	Setup guide to support the initial launch of the Wizard Plugin.	P. Buchanan
1.1	01-04-19	Updated to document system changes introduced by v1.26.0.	P. Buchanan
1.2	16-04-19	Updated to document system changes introduced by v1.27.0.	P. Buchanan

# Contents

Introduction.....	4
Document Scope.....	4
Overview .....	4
Prerequisites .....	4
Associated Documentation .....	4
Installation .....	5
Aztec Configuration.....	6
Create Wizard Product Structure .....	6
Create Wizard Product.....	7
CLM Configuration .....	8
Add Wizard Product to Theme .....	9
Assign Wizard function to Theme .....	10
Send changes to site.....	10
Head Office and Site PC Configuration.....	11

## Introduction

### Document Scope

This guide is aimed at Zonal and client staff that are responsible for installing the necessary system components and configuring all areas of Aztec as required.

### 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 run a specific SQL script (detailed in *Head Office and Site PC Configuration* on Page 11). Systems of a higher version than v3.12.2 already include this configuration and do not need to run the script.**

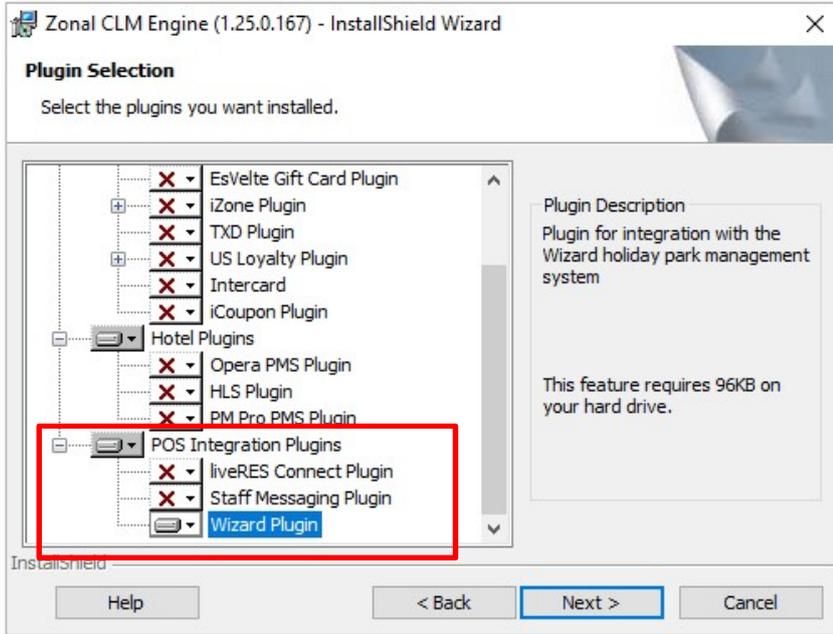
### Associated Documentation



**Wizard: Site User Guide** - This guide is aimed at site staff and describes how to carry out Wizard tasks on site POS terminals.

## Installation

The Wizard Plugin is installed via the iZone installer, included in a separate section reserved for POS Integration Plugins. This task is carried out by Zonal Technical Support staff.



## Aztec Configuration

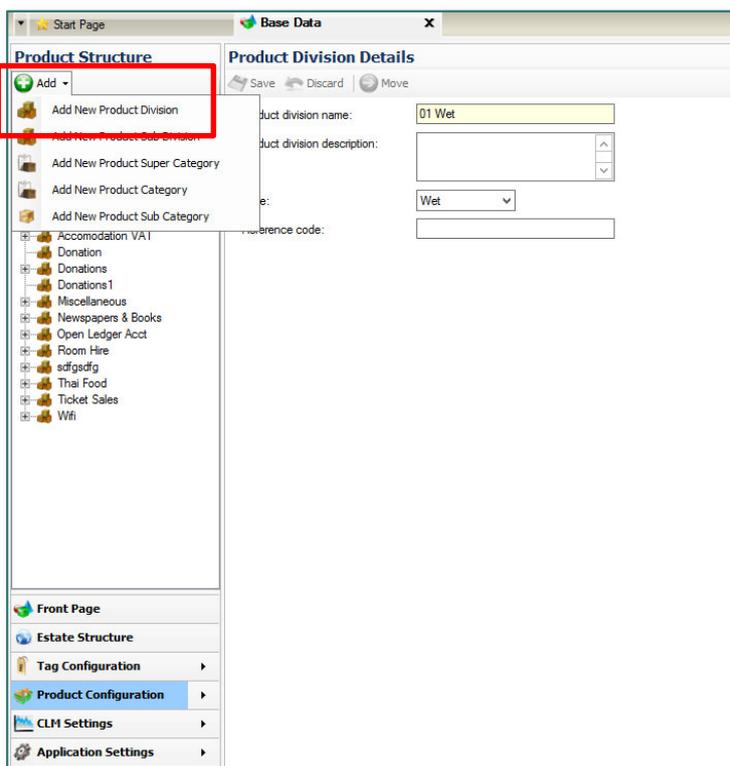
Aztec must be configured at Head Office, before the Wizard Plugin can be used to process Wizard payments.

- Create the Wizard product structure down to sub category - see Create Wizard Product Structure on Page 6
- Create the Wizard open-priced product - see Create Wizard Product on Page 7
- Configure CLM for the Wizard plugin - see CLM Configuration on Page 8
- Add the Wizard function button to the theme - see Add Wizard Product to Theme on Page 9
- Add the Wizard product button to the theme(s) - see Assign Wizard function to Theme on Page 10
- Send all changes to site - see Send changes to site on Page 10.

## Create Wizard Product Structure

You must create a Wizard product structure (Division, Category, Sub-category, etc.) for the open-priced Wizard product to use.

1. On the Aztec Base Data main menu.
2. Select **Product Configuration | Product Structure** and click **Add**.
3. Select **Add New Product Division**.



4. In the Add New Product Division wizard, enter a new Division name of **wizard** and click **Next >**.
5. Click **Add New Product Sub Division**, enter a new Sub Division name of **wizard** and click **Next >**.
6. Click **Add New Product Super Category**, enter a new Super Category name of **wizard** and click **Next >**.
7. Click **Add New Product Category**, enter a new Category name of **wizard** and click **Next >**.
8. Click **Add New Product Sub Category**, enter a new Sub Category name of **wizard** and click **Finish**.
9. Select **Save** when complete and exit Aztec Base Data.

## Create Wizard Product

A new open-priced product must be set up in Aztec Product Modelling for all Wizard payments to use,



1. Select the Aztec Product Modelling module icon on the Aztec Start page.
2. Click **New** and create a new Standard Line product with a retail name of **wizard**. Ensure that you select the Wizard sub category defined on the previous page.
3. Ensure the pricing radio button is set to Open Pricing.
4. Take note of the entity code that the system automatically creates for this new Wizard product.

The screenshot shows the 'Product Modelling - Global' window. On the left, a list of products is displayed with columns for 'Retail Name', 'Type', and 'Retail Description'. The 'Wizard' product is selected. The main form area contains the following fields:

- Retail Name:** Wizard
- Description:** (empty)
- Subcategory:** WizardSC
- Import/Export Ref:** (empty)
- Entity Code:** 10000040993
- Sold by Weight:**
- Touch Screen Name:** Wizard
- Product Type:** Strd.Line
- Date Created:** 23/04/2014 09:05:09
- Print Stream:** No Printing
- KDS Item ID:** 24040993

Below these fields are tabs for 'Standard', 'Barcodes', 'Portions', 'Supplier Details', and 'Tags'. The 'Standard' tab is active, showing 'Tax Rules' (1: Zero Rated, 2: (empty), 3: (empty), 4: (empty)), 'Course' (empty), 'Pricing' (Open Pricing selected, Fixed Pricing unselected), 'Is Gift Card' (unselected), and 'Behaviour when product is part of a choice' (Rollup Price: unselected, Print Stream: (empty), Follow Parent Course: unselected). A '% Alcohol' field is also present.

At the bottom left, there is a 'Find Item (F3)' search box and a 'Filter (Ctrl-F)' section. The 'New' button is highlighted with a red box.

## CLM Configuration

CLM configuration for the Wizard plugin must be set up in Aztec Base Data.



**Only Zonal technical Support staff can enter the required URLs and security details for this section of plugin configuration.**

1. Log into Aztec using your username and password.
2. Select the Aztec Base Data module icon on the Aztec Start page.
3. Select **Estate Structure | [Site Tree Node] | CLM Tab**.
4. Select **Wizard** from the CLM Plugin Settings drop-down list.

Cim Plugin Settings	
Plugin:	Wizard
* Url:	https://p...
* Username:	TESTUSER
* Password:	Pass1wor
* Wizard Product Id:	1000000000
* ParkId:	123

5. Enter all URL, security and IDs as necessary.
6. The Wizard Product ID must match exactly the entity code noted on the previous page.
7. Select **Save** when complete and return to the Aztec Base Data main menu.

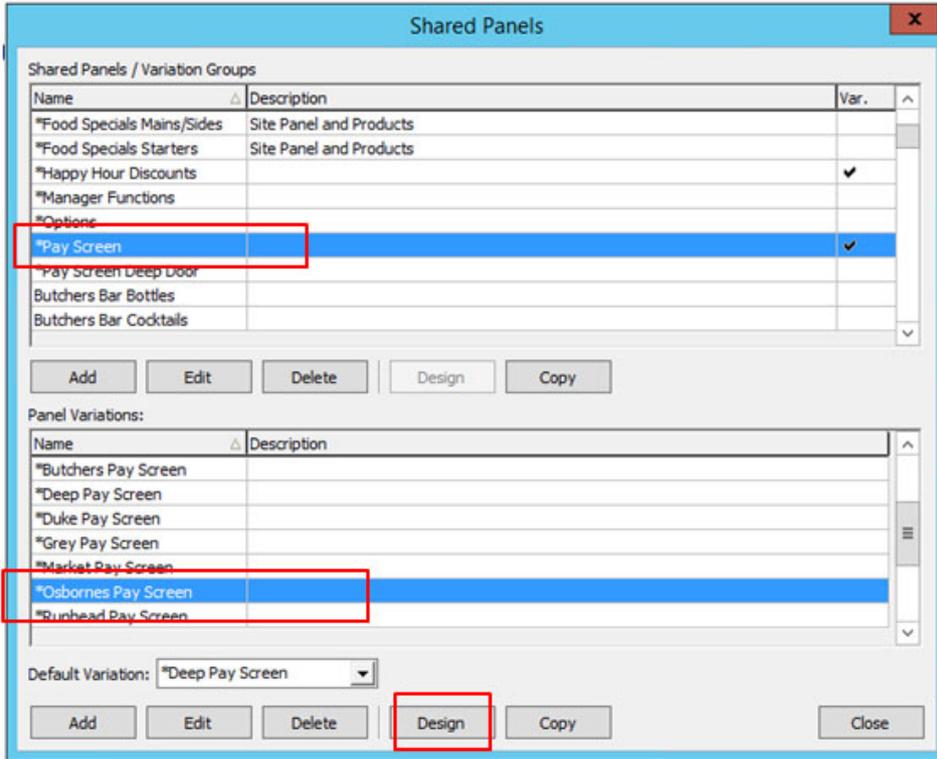


**The head office configuration instructions described above must be completed and these settings sent to site (as described in Send changes to site on Page 10) prior to installing this version of iZone POS Integration at a site that uses the Wizard plugin.**

## Add Wizard Product to Theme

The Wizard product button must be included on a restricted access or 'hidden' theme panel in Aztec Theme Modelling to allow Wizard payments to be processed at site.

1. From the Head Office Aztec Start Page, open Aztec Theme Modelling and select **Shared Panels** from the main menu.

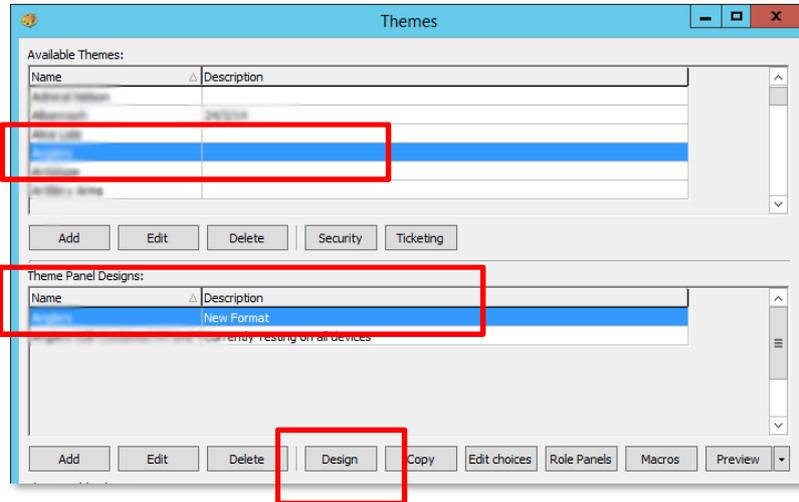


2. Select to highlight the required panel in the top pane and the Panel Variation (if applicable) to be changed in the middle pane, and click **Design**.
3. Select the panel to which the new button is to be added. Open the button picker ( , locate the new button in the **Products** folder and add to the panel.
4. Click **Close** and **Close** again to return to the Aztec Theme Modelling main menu.

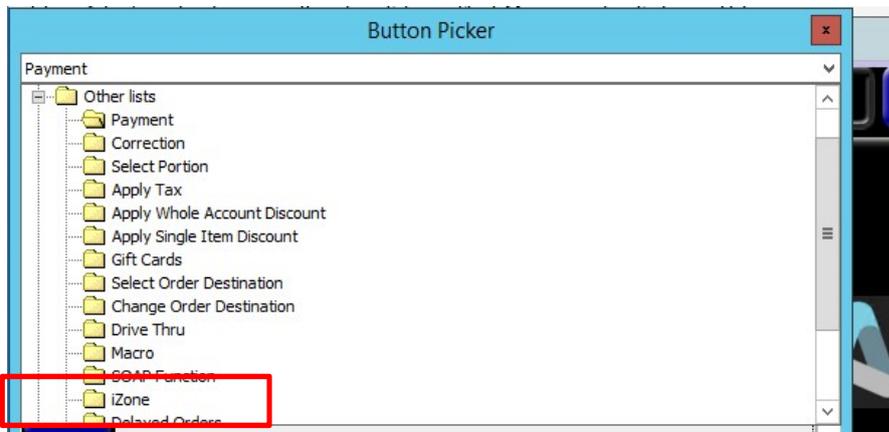
## Assign Wizard function to Theme

To enable POS operators to process a Wizard payment, the Wizard function button must be included on the required theme panels in Aztec Theme Modelling.

1. From the HO Aztec Start Page, open Aztec Theme Modelling and select **Themes** from the main menu.



2. Select to highlight the Available Theme in the top pane and the theme panel design to be changed in the middle pane, and click **Design**.
3. Open the button picker (  ), locate the new Wizard button in the **Other Lists | iZone** folder and add to the panel.



4. Click **Close** and **Close** again to return to the Aztec Theme Modelling main menu.

## Send changes to site

For any new Theme and Base Data settings made at Head Office to take effect at site, you must perform a comms as follows:

1. Select **Communications** from the Aztec Start Page.
2. Click **Create Job**.
3. Select the required site(s) and click **Next**.
4. Select the appropriate job options and click **Next**.
5. Enter a suitable timeout and click **Finish**.

## Head Office and Site PC Configuration

All Aztec v3.12.2 Head Office and Site systems must run a script to ensure correct operation of the Wizard plugin.

The new SQL script is called WizardPluginSettingsHOAndSite.sql and is located in the normal installation folder.

Systems of a higher version than Aztec v3.12.2 already include this configuration and do not need to run the script.