



# Wizard Plugin

## User Guide

iZone POS Integration v1.27.0 April 2019

Version	Date	Notes	Author
1.0	07-03-19	User 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
Site Operation .....	5
Identifying the customer .....	5
Making a Cash Sale .....	9
Viewing Open Ledgers .....	11
Rent Ledgers .....	12
Account Payments .....	15
Sales Ledgers .....	16
Completing Payments .....	17
Cancelling a payment transaction .....	18
Payment Processing Rules .....	19
Adhoc button disabled.....	19
Rent Ledger button disabled .....	20
Sales Ledger button disabled.....	20
Only one Wizard product allowed on POS account .....	21

## 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

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

### Associated Documentation

	<b>Wizard Software: Setup Guide</b> - 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.
---	--

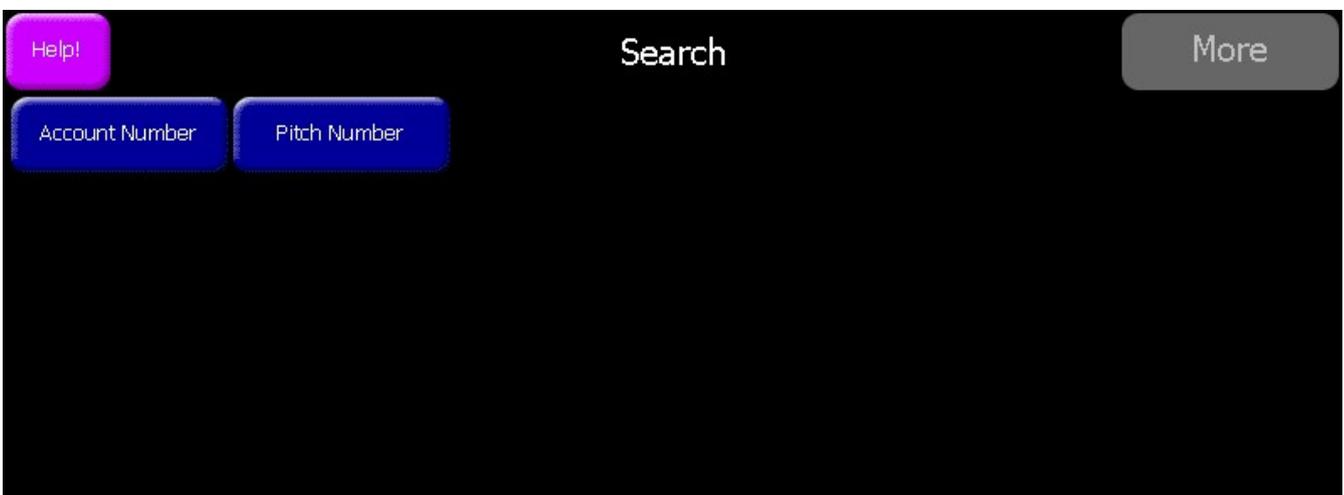
## Site Operation

### Identifying the customer

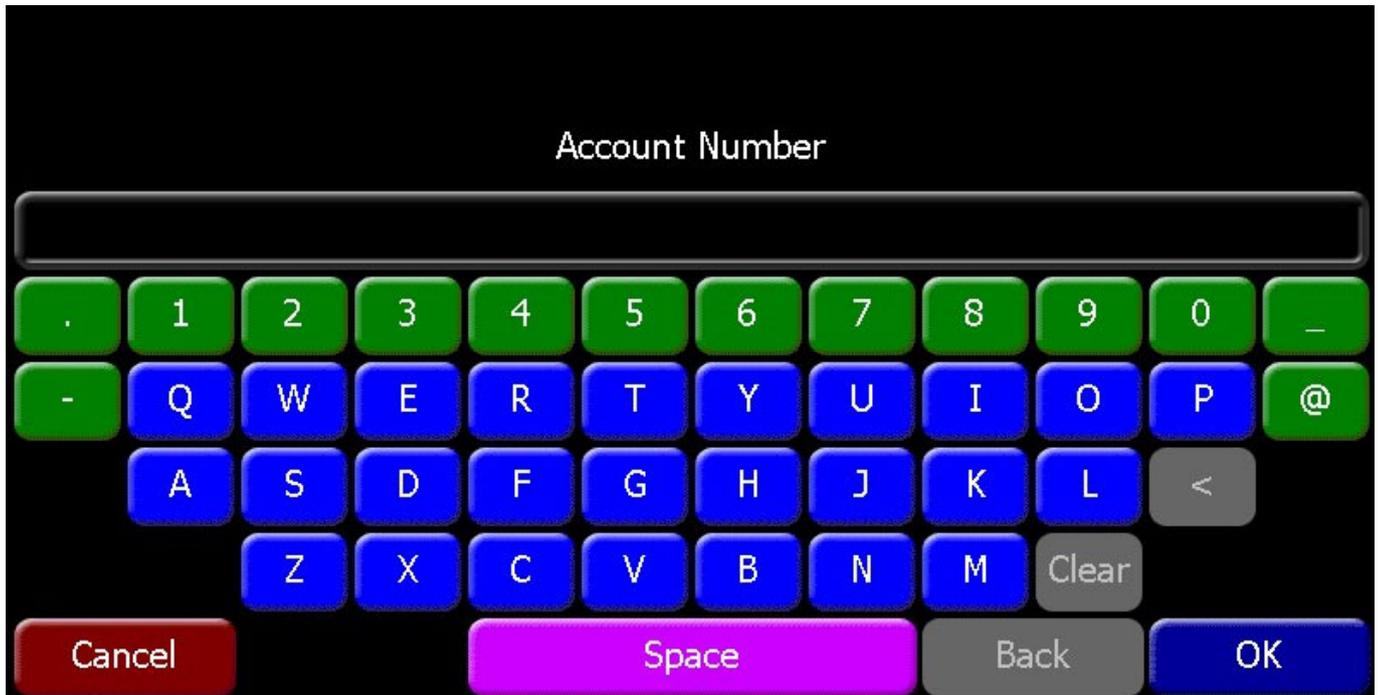
When the Wizard button on the POS is first pressed, the system then initiates a process where the POS user can identify the customer.



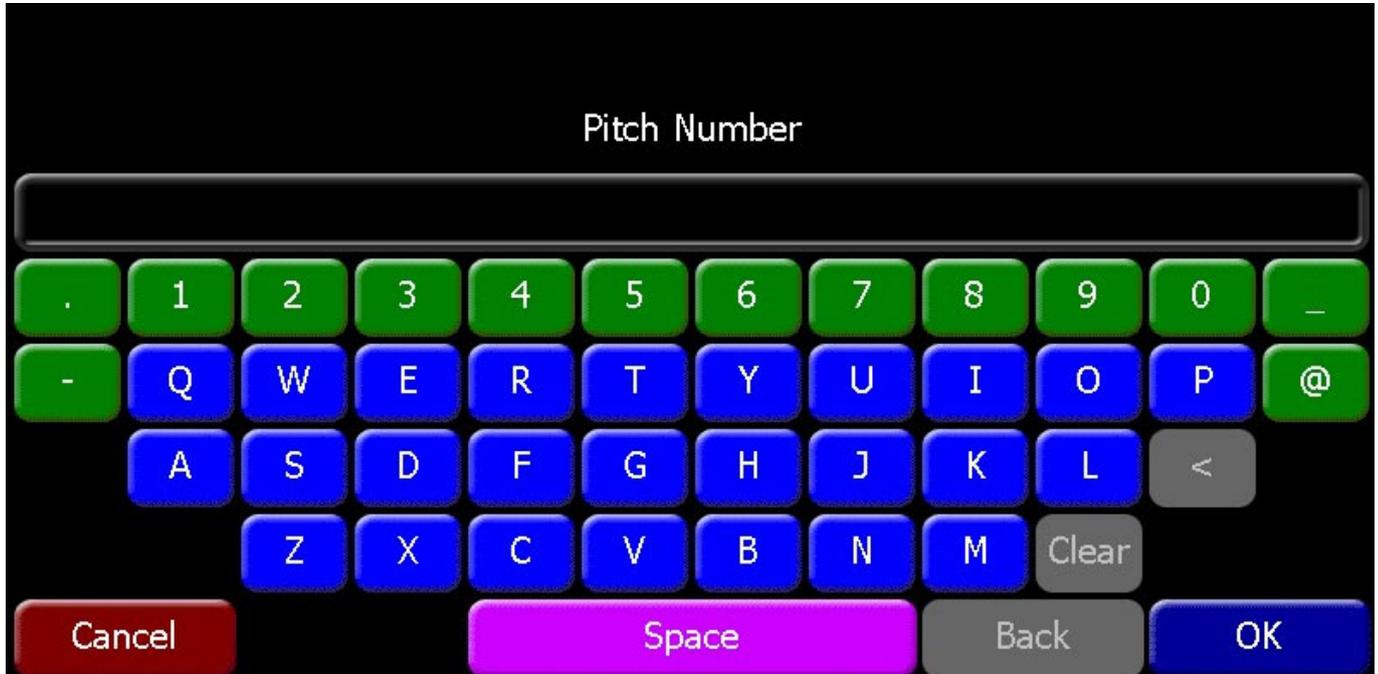
The POS user is prompted to enter the customer's account number or pitch number:



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



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:



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.



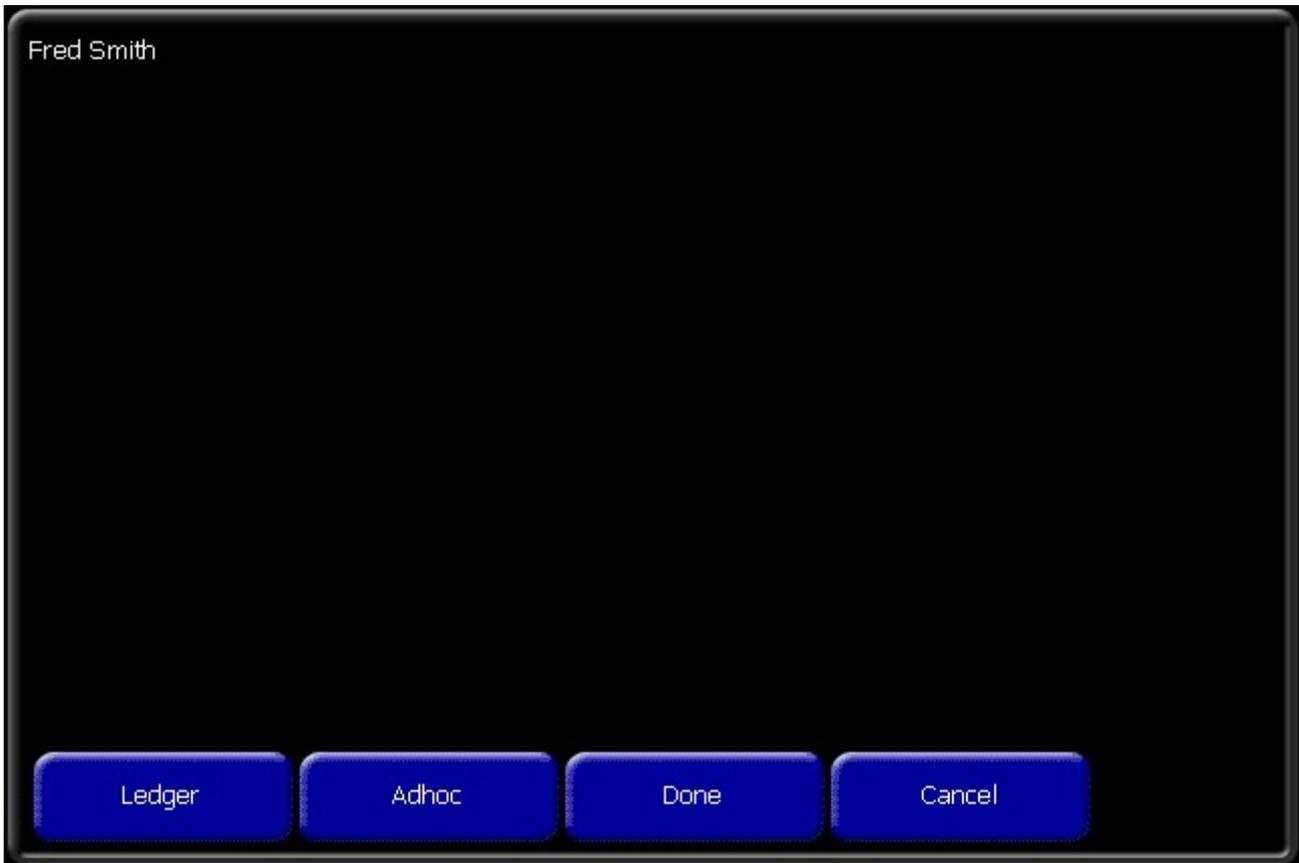
If the customer tells the POS operator the incorrect Postcode, the system then provides a different confirmation question – in the example below, Email is requested.



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

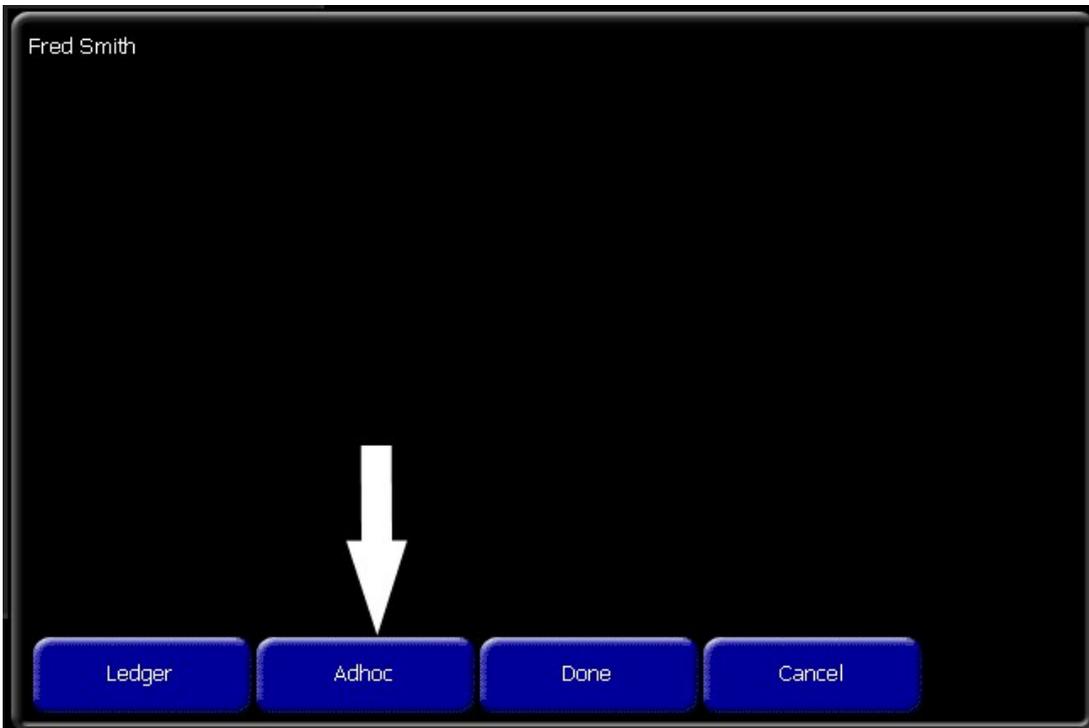


When two correct responses are given to the POS operator, the system displays the Summary screen with the customer name displayed at the top left-hand side.



## 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:



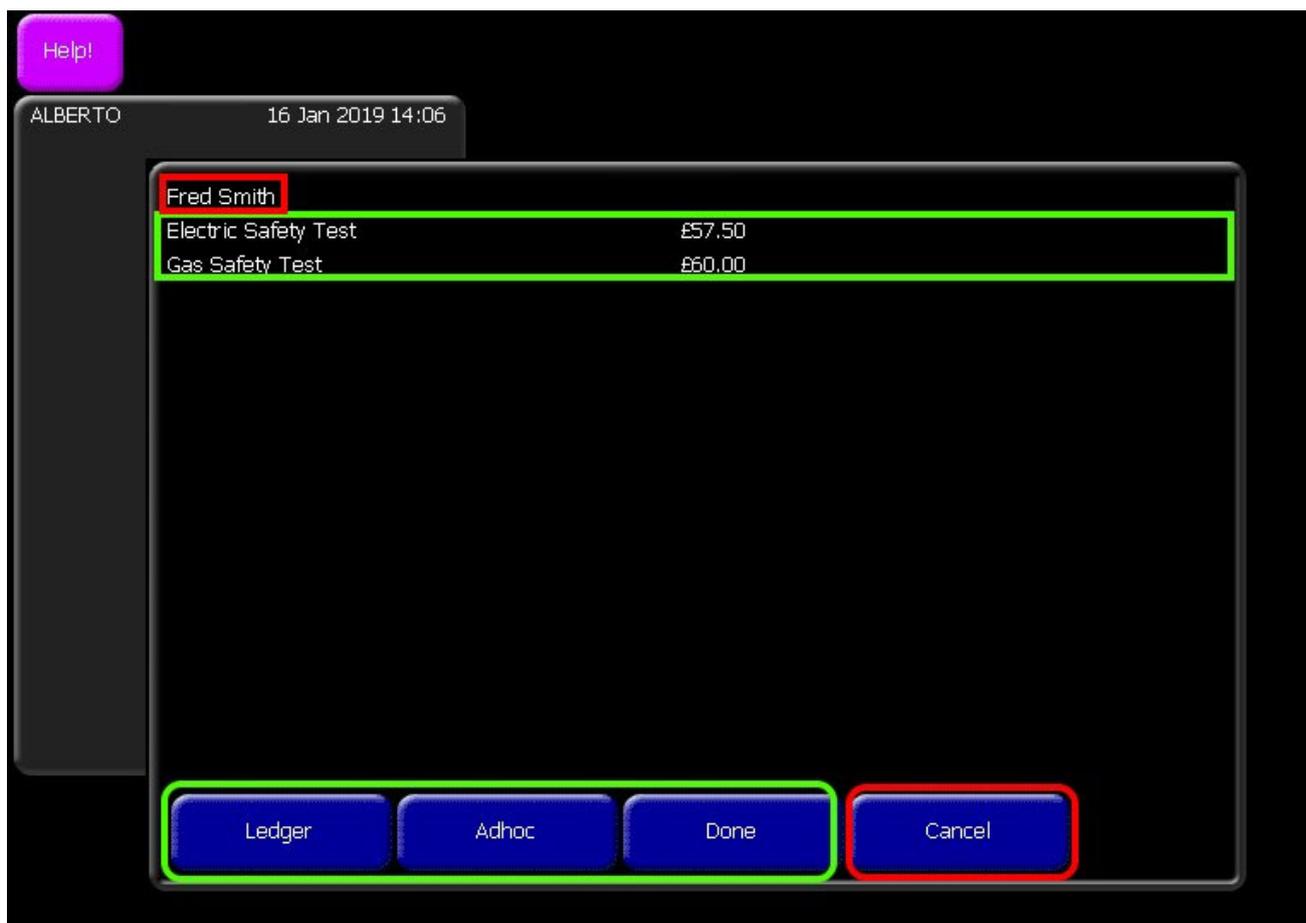
The product grid is displayed. This can vary depending on the type of POS and the available products for sale at that site. **Note:** These are not Aztec products.



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:

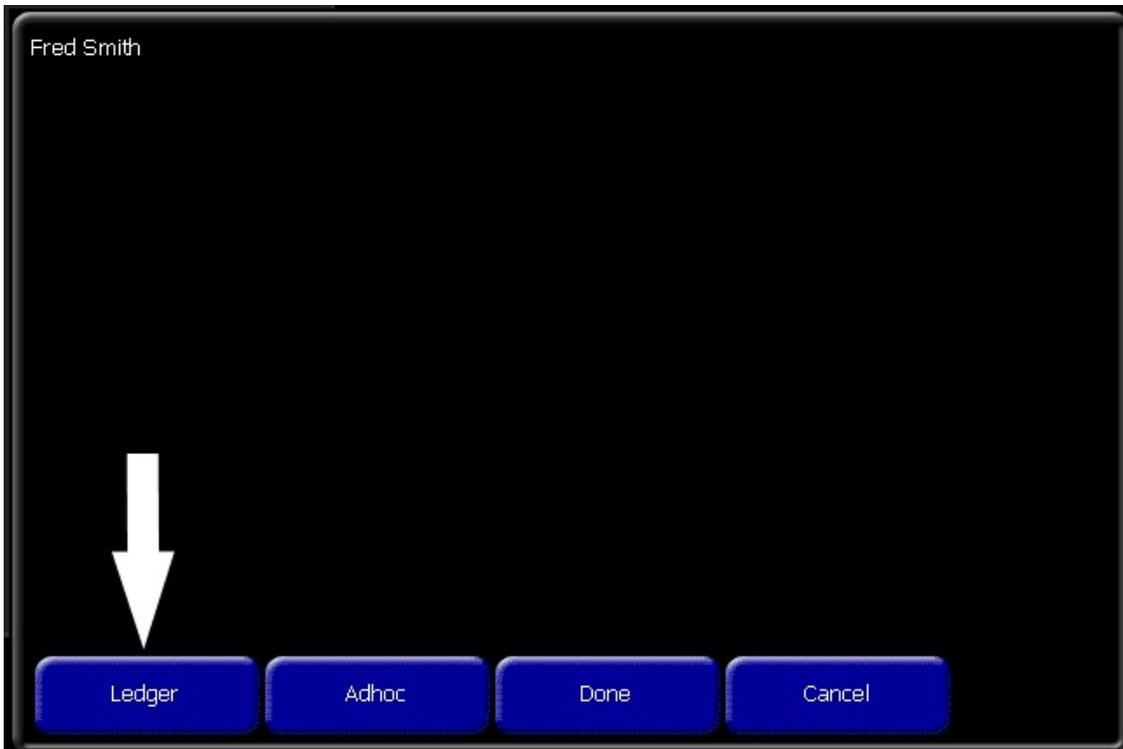


From the Payment Summary screen (shown above), the POS operator can:

- 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:



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



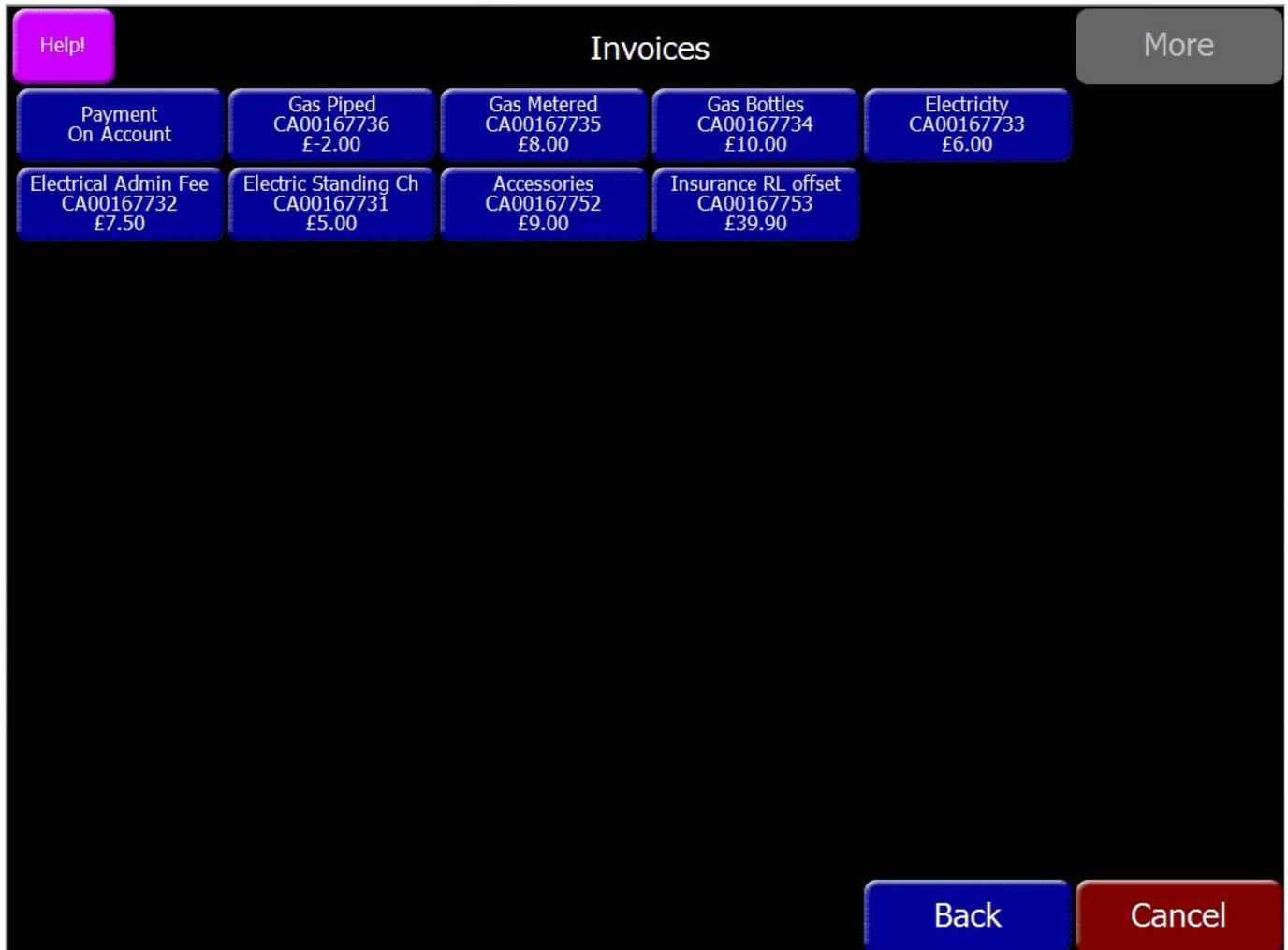
The POS operator can choose the Sales Ledger or Rent Ledger button, each following a different process.

## 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

Electric Standing Charge	Description
CA00167731	InvoiceNo
21/02/2019 00:00:00	InvoiceDate
21/01/2019 00:00:00	DueDate
78419	AccountId
18659889	PostingDetailId
£10.00	TotalAmount
£10.00	Outstanding

Back Pay

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

Help!

6666 15 Feb 2019 10:16

1 Wizard\* Acc No: 84 0.00

Total

**Enter Payment Amount**

£1436.43

1	2	3	.
4	5	6	
7	8	9	Clear
Cancel	0	00	<

Enter

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**

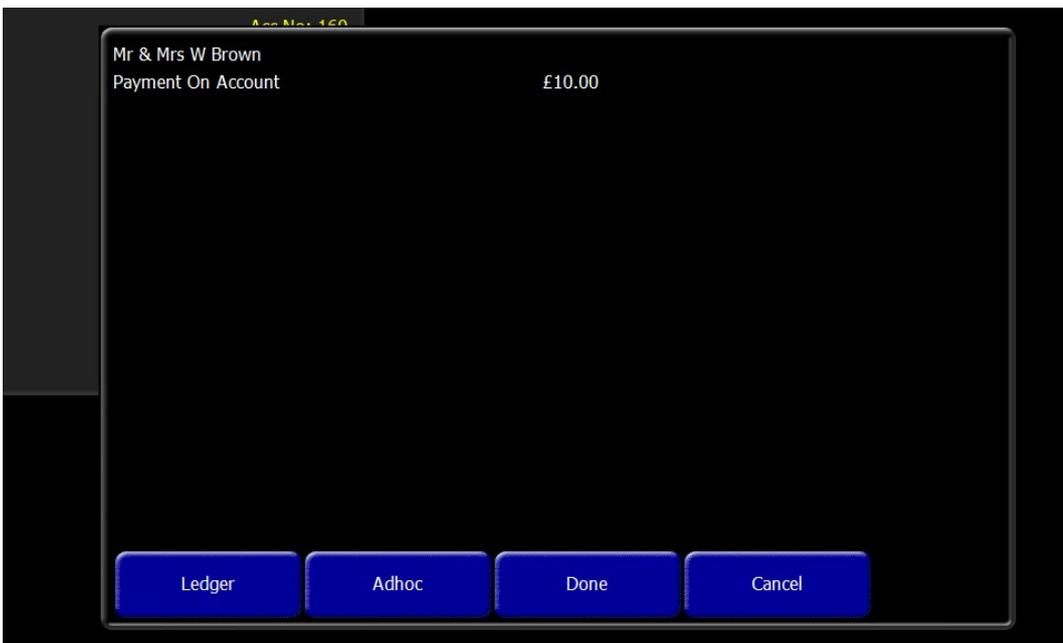
Customers can make advance payments to their account by selecting the **Payment on Account** button. This may be a direct payment in advance or it could be the surplus (change) from another payment.



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.



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**

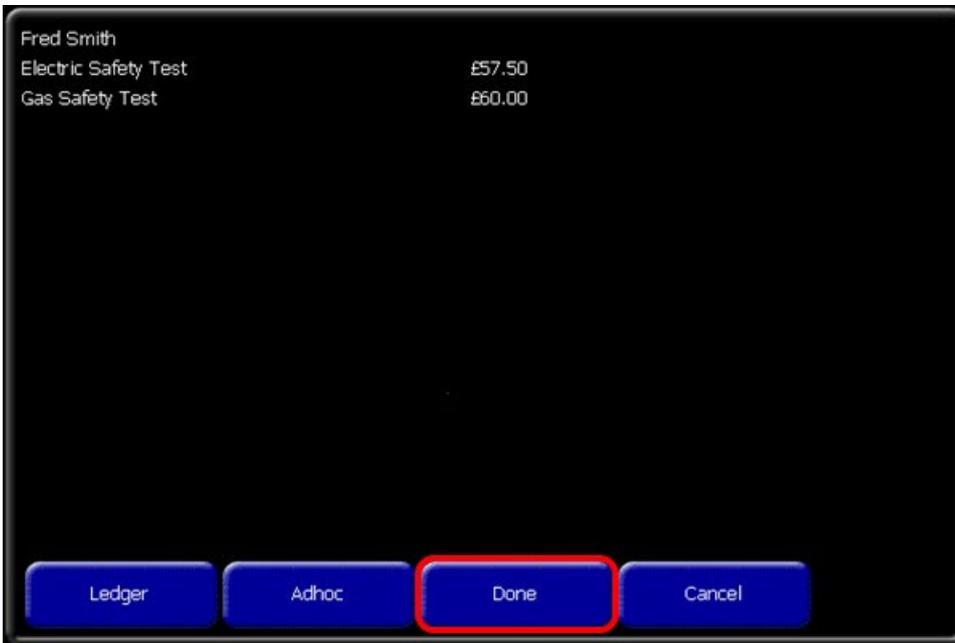
The sales ledger process is very similar to the rent ledger process and shares some of the screens.

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)

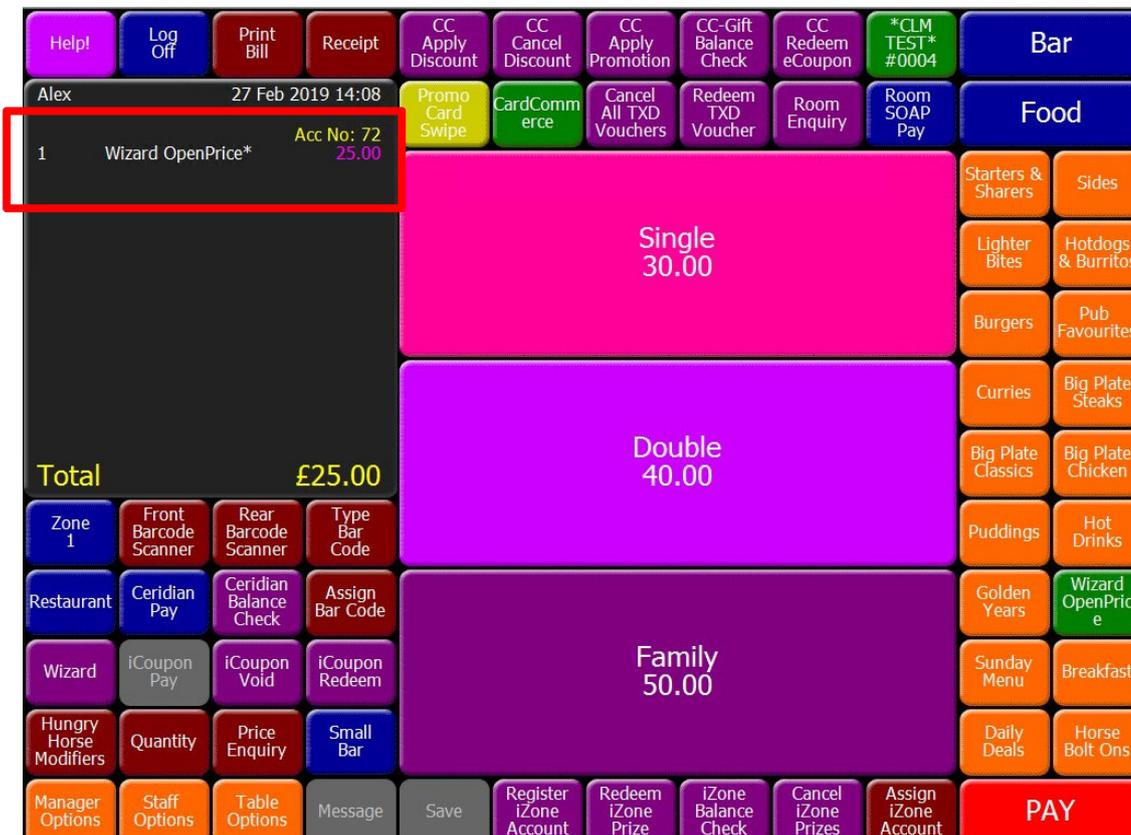
## Completing Payments

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.



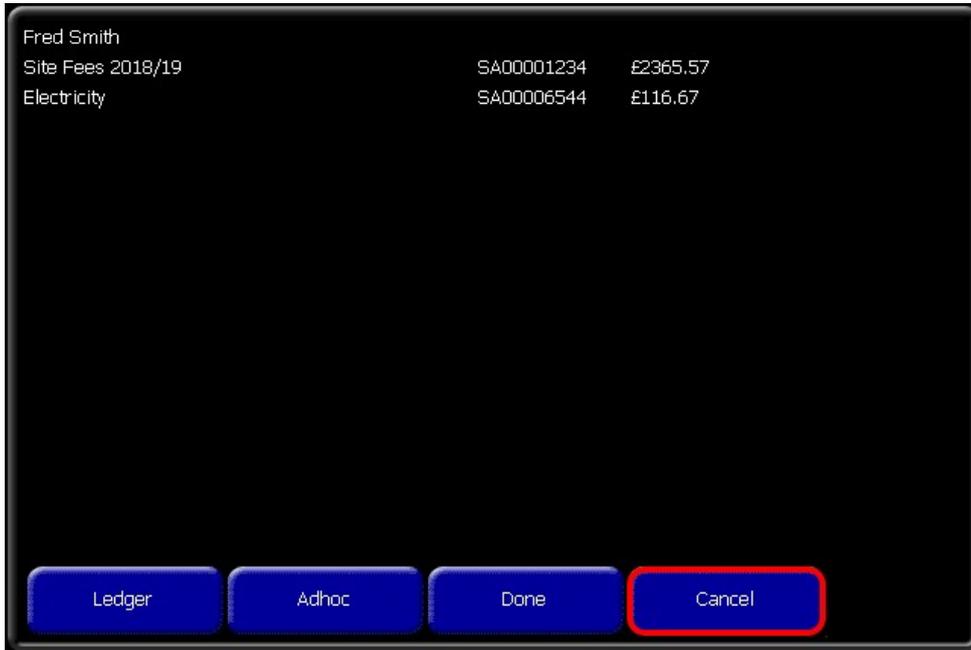
If there are no pending payments then selecting **Done** will simply prompt the POS operator that no payments have been made and return them to the main POS home screen.

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.



## Cancelling a payment transaction

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



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

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



## 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:



### 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:



### 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:



### Sales Ledger button disabled

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



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:



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:



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:



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.