General Release Notes [PILOT4.1-201709xx]

PILOT4.1 is a general release, covering:

- Bug Fixes
- Report Improvements
- Stability Fixes
- Production Manager
- Campaign Manager
- Celbux Integration
- MasterPass and SnapScan Integration

Production Module

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Campaign Manager

Celbux Integration

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YOCO Card Integration

MasterPass / SnapScan / TABBS payment integration

IMPORTANT NOTES

Upgrading

- You can only upgrade to this release from Pilot 20161206 SQL3-P2 and later versions
- Ensure that PilotLive is not running during the upgrade
- Upgrade needs to be done before or after trade
- Ensure a full backup is done before the upgrade takes place
- Pilot offers an automated backup and upgrade procedure – contact your key account manager
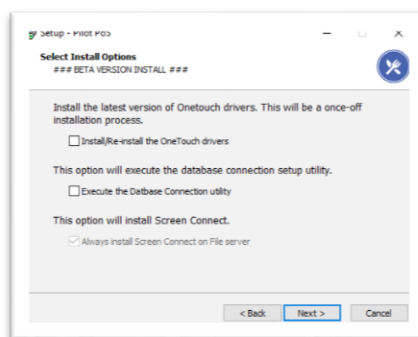
Required Programs

- Validate.dll V3.00
- Datatools v4.02
- Print Server PPSrve.exe v4.8.18
- PilotAPI V4.01.12
- Pilot Gateway client (minimum .NET 4.5)
- SystemUpdate v4
- New install:
  - Modified the install process to use a newer installation engine (Inno Script Studio)
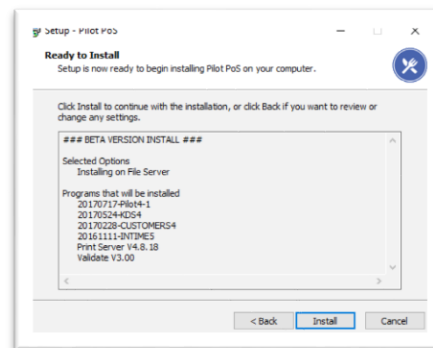 - ScreenConnect installed by default

Screen 1
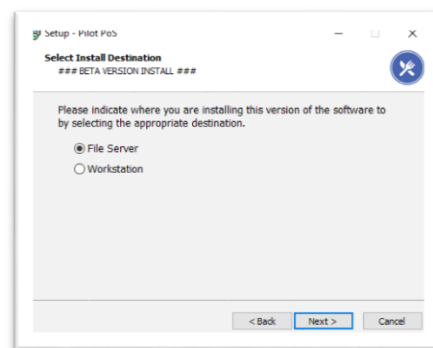

Screen 2

Screen 3

Screen 4

PILOT ADMIN

Bug Fixes/Additions

- Admin; Add authorizations to campaign manager and new reports
- Admin Cashup
  - Change the cashup display to list vendors for Approved payments
    - Vendors are added to the list depending on contracts
  - Allow approved payments to be auto-banked
    - Set up - Allow the operator to select which vendor payments may be auto-banked
  - Change banking report to list the approved payments per vendor
- Bulksheet
  - Cannot edit some fields - fixed
  - Not all Bulksheet items are shown – fixed
  - Bulksheet issues not saving – fixed
  - After period selections when trying to do a bulk issue, gives exception cannot focus on an invisible window – fixed
  - Bulk sheet history fails with field missing - fixed
  - Fixed updating of the cost of portioned items
  - Doing bulk to bulk portioning caused the costings to be lost - fixed
  - Selecting history data can show duplicate records when the cost amounts differ - fixed
  - Printing Bulk costing for a period range shows multiple entries for the same item when the costs differ. Changed so that it now does average costing over the selected period
  - Added a Find button
  - Added a Produced column to Rcut & Dcut History tables
  - Changed the day end to copy the produced values
- Bulk variance report - change to include all variances greater or less than zero
- Changed all the Find buttons in Admin to have the same icon
- Day End:
  - Department sales fail with query timeout – fixed
  - Added a donations summary
  - bulk sheet copy to history: the quantity field is incorrectly set the to the item's weight for bulk items - fixed
  - Dayend - check for outstanding Online Orders
    - All tables must be closed before day-end can run
  - Dayend hangs when the operator selects to cancel on one of the message boxes - fixed
  - Department sales show the same value for both monthly and today sales – fixed
  - Day-end; fixed a bug that would cause bulk / back stock production totals from being excluded from the opening balance of the next day
- Delivery client info not printing on A4 – fixed
- Dynamic help menu - show menu items sorted by description

PILOT ADMIN

- Expired Tables
    - Add Expired entries to the system log
    - Add Table Expired Log UI & Report to both PoS and Admin
- F/Veg & Dry stock sometimes doesn't display items – fixed
- Fiscal printing - Invoice printing failed with missing columns – fixed
    - Admin -> System Setup -> Print setup
- Order print: Changed to handle long descriptions
    - Added Print Expanded;
        - Enabled: the item print as it does currently (default)
        - Disabled: the items print at normal size
    - Added Print wrapping
        - Enabled: When a description doesn't fit on one line, this option will wrap it across two lines
    - Disabled: The description is truncated to 20 characters so that it'll fit on one line
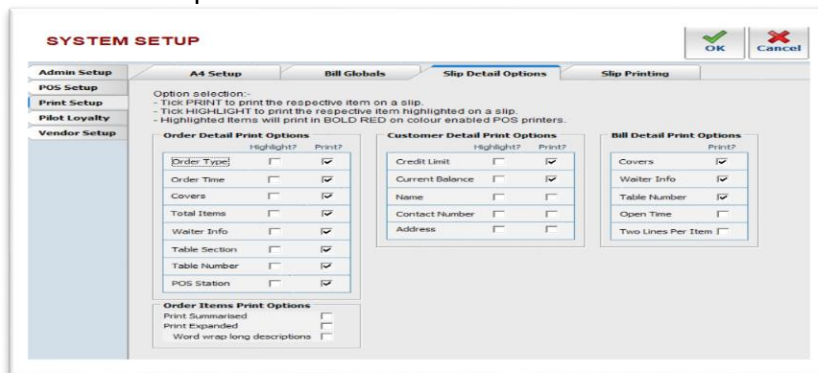
    - Admin -> System Setup -> Print setup

- Income statement doesn't allow selecting of cost centres – fixed
- Master File edit fails when you change the count sheet for an item – fixed
- PLU Costing copy failed with connection missing – fixed
- PLU Costing - make the Options QTY editable
- Prep Sheet:
    - Prepsheet - cannot enter fill values – fixed
    - When you enter a value and immediately click on a button the value is not posted - fixed
    - Prepsheet - on period selection gives error that fields do not exist - fixed
    - Prepsheet - failed when the selected date is greater than the trading date - fixed
    - Prep sheet history and period selection - added back
    - Added a ProducedB and ProducedF fields. This is to carry the production values depending on whether prep B/Stk or F/Stk was used
    - Changed the display and added a second production column to show F/Stk used
    - Prepsheet sales doesn't always show/update - fixed
        - Table dpt was correctly updated with the sales, it was the display that did not refresh correctly
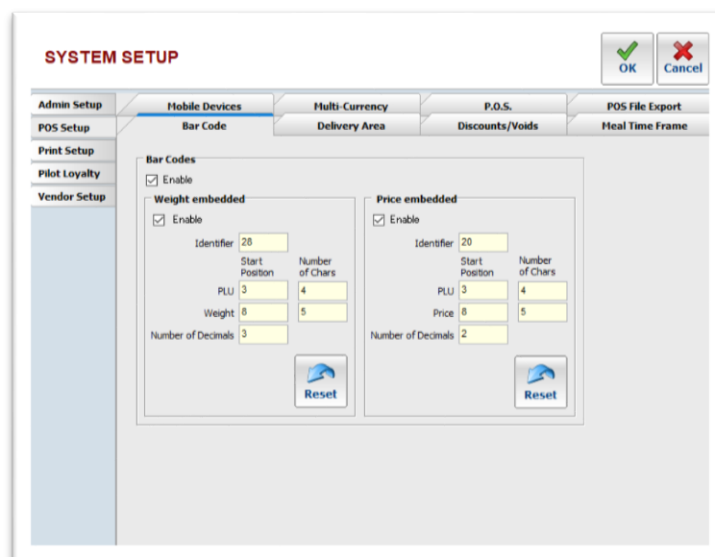
PILOT ADMIN

- Purchase Invoice payments totals are incorrect - fixed
  - Fixed the report to show the correct totals
  - Improved the transaction search screen
  - Add totals at the bottom of the transaction display
- Reports
  - Income statement gives a query time-out when the period when the period selection is large - fixed
  - Main Meal Comparatives report; it gave query timeouts when the period range is a full month
    - Split the SQL query into smaller chunks and run them separately
    - Add a progress bar to the status display so that the operator can see progress of the data extraction
  - Donations report
    - Added to the Admin - Sales menu
    - Added to the PoS - reports menu
  - Monetary Tender report headings doesn't show the proper tender descriptions - fixed
    - The grid and report headings are now the same
  - Multiple reports didn't show the correct company name - fixed
  - PLU costing report prints portrait instead of landscape – fixed
  - R/M Usage report
    - Changed to use dev-express grids
    - Change the look-and-feel of the summary at the bottom of the form
    - Added a Produced column for Production manager data
    - Fixed some of the progress messages that were blank
    - Fixed the reports so that they are all linked to their correct print buttons
    - On the summary at the bottom of the form, some of the values were displayed in the wrong row – fixed
    - Changed the summary to show correct values
  - New Franchise Fee Declaration
    - Replaces Royalty Report
    - Added to Admin - reports menu
  - Theoretical sales have a vertical bar running through the period display – fixed

PILOT ADMIN

- Setup -> Settings
  - o Admin: Add a setup page for YOCO initialization and to manage YOCO devices
  - o Bill printing
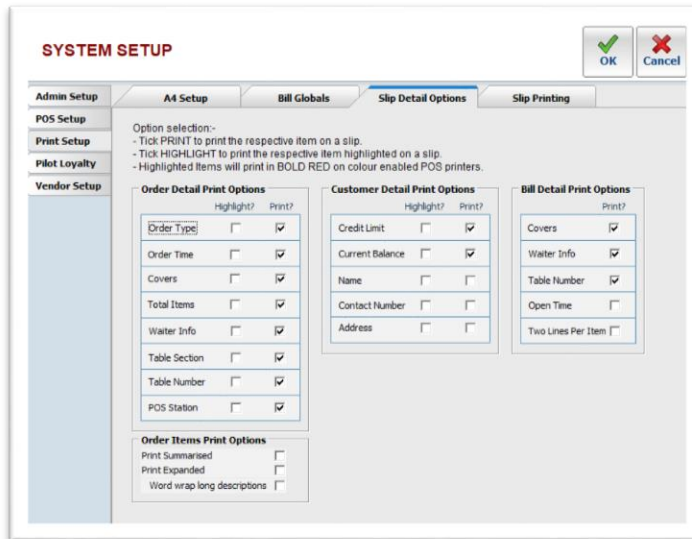
  - o Add option to enable/disable printing of table Open time on the slip
  - o Add option to enable/disable printing an item over two lines when the description is longer than 20 characters
  - o Invoice print; added print options to enable / disable table and waiter info on a bill (for retail environments)
  - o Multicurrency setup:
    - ▪ Change to use dev express grids
    - ▪ Included an add button to look-up and add currencies
- New - Price Embedded barcodes

PILOT ADMIN

- o The /BRCS switch has been removed and replaced with the bar code setup in Admin
- o The price on the barcode will be used as the actual price for the item and the qty will be one [1]
- Discount & Voids
  - o You cannot add reasons using Pilot Admin setup – fixed
- Stock file create does not update opening stock amount for some items - fixed
  - o This happens when the item incorrectly exists in multiple sheets
  - o Added a check to only update the items from the sheet they're assigned to

PILOT POS

PoS Enhancements

- SnapScan mobile payment solution added
- MasterPass mobile payment solution added
- Celbux mobile payment solution added
- TABBS payment solution added
- YOCO Pay@Counter and Pay@Table functionality added
- Zapper V2
  - o Changed to handle discounts

Bug Fixes/Additions

- Account payment printing gives an exception - fixed
- Billing - add checks to trap table close issues
- Billing - ticket claims giving problems
  - o Ticket reduction not properly disabled- fixed
- Billing - Add status message for requesting Zapper payment info
- Billing: Temporarily disable Voucher Reduction - caused MaxiClub vouchers to be reduced incorrectly
- Billing - remove polling for payment information
  - o Zapper changed to work via notification gateway
- Billing - EFT/Cards menu display changed
  - o Moved to overlay the keypad on the right
  - o Refresh payment button has been removed – no longer required

PILOT POS

- Billing - QR code showed incorrect values below MasterPass QR code - fixed
    - This happened when you switch between Zapper and MasterPass QR code displays

- Billing - multicurrency
    - Changed the Forex message to be more understandable
- Class not found error when opening tables – fixed
- Delivery Table
    - Add delivery table button to the form where the table number is entered
        - This allows a delivery table to be created from any waiter
        - This button will only be visible when Deliveries are enabled for a site
        - This button will only be visible when select Order Type is enabled in the Station Setup
- Delivery Re-order sometimes gives an exception - fixed
    - Also changed it to add item links to fix order print issues
- Order messages prints blank -fixed
- Debtor slip print - removed duplicate line
- Discount & Voids
    - When voiding using minus-minus the voids selection form sometimes doesn't display – fixed
    - When there is a Discount / Void reason but no sub-reason the discount/void isn't applied - fixed
- EFT/Cards selection: change to show QR Code and Pay@Counter vendor selection
- EFT screen changed to add YOCO integration (Pay@Counter)
- Invoice print - item names not showing when printing grouped with no group name – fixed
- Loyalty redeems - authorization code may not be blank - changed
- Menu screen allows an order message to be rung up before any other items are rung up - fixed
    - This caused the order message to have a blank OUTM code
- New take-away tables randomly give record has been changed exception – fixed

PILOT POS

- IOU's: when there are missing tables the sql query fails - fixed
- Open tables view sometimes give BookTB exception - fixed
- Order dispatch slip: wrong invoice number printed – fixed
- Order times - make sure that all the displays and reprints show "n/a" instead of 00:00 when an order was not printed (modifiers or items not actually printed)
- Order times - print in wrong sequence - fixed
  - o Fixed this both on the Table View and on the slip print
- Order times - Reprinting multiple order-times slips after each other, printed the same slip each time – fixed
- Order slip print - fixed truncating of the print line when expanded and no-wrapping is selected
- Order slip word wrapping of sub-items did not work, causing the description to incorrectly overflow to the 2nd print line - fixed
- Order slip print items out of sequence - fixed
  - o This happens when the order is printed summarized. After summarizing the bill, the list was sorted by PLU code and not by the time the item was rung up
- STOCK POS: sorting changed to work the same as the Prepsheet
  - o Items are shown sorted on Prepsheet Group field only
- Pay@Table sometimes fails with access violation – fixed
- Pro-forma print automatically sets order times to 00:00 for unordered items - changed
  - o Add the order print checks to the proforma
  - o When AutoPrint is enabled - print the outstanding orders
  - o When AsktoPrint option is enabled - prevent the pro-forma from printing when the operator declines to print the outstanding orders
  - o When both are disabled, in other words orders are not printed, continue and print the proforma and in this case set the order times to 00:00
  - o Sometimes the progress message doesn't go away – fixed
- Pro-Forma Printing
  - o bill messages are wrongly centered – fixed
  - o Status display doesn't always go away – fixed
- Quick table
  - o The reference for Take away tables disappears after the table was billed - fixed
  - o Delivery tables quick tables will show customer list for selection
  - o On creating a new delivery table
    - ▪ It will now also show the customer list for selection
  - o In Station setup, the Delivery reference can now be set as required
- Reservations / Bookings create duplicate tables - fixed
- Semper - not all room detail gets pulled into Pilot – fixed

PILOT POS

- TABBS
    - Allow pro-forma to be printed for zero bills
    - Changed Zapper captions to show Zapper / TABBS when TABBS contract exists
- When using TABLEVIEW the Table info screen pops up unnecessarily – fixed
- Waiter cash up;
    - Add full, detailed breakdown per each tender received
    - For approved payments, the breakdown is per vendor showing the vendor name
    - Waiter cashup - on the summary print some of the totals gets displayed truncated - fixed
    - Added two options:
        - Print Totals only; will only print the summary when selected
        - Print Invoice detail; will list all the tables
        - Both these options are off by default
    - Note: The summary together with the tender breakdown will from now on print by default
- Waiter menu:
    - Change Device allocation to handle both payment device, and iPad pairing to a waiter
        - This includes pairing of a YOCO device
- Zapper QR code print - changed as per Zapper's request
    - Zapper with a discount voucher gave an exception – fixed
    - Zapper payments not pulling into Pilot - fixed
    - Reverted to requesting payment detail from Zapper
    - Added a parameter to IntfParams (vendor parameters) to enable Zapper Notifications
- Changed the menu display to fix issue found with data, where PLU Field PS1 contain a zero instead of null
    - When PS1 equals zero the query contained duplicate items, with the effect that not all buttons are shown on the screen
- Menu screen - after proforma gives an exception when going to tables screen – fixed

PILOT KDS

- Item Order - prep time not saved for the kds entries - fixed

PRODUCTION MODULE

- Production Module is a new tool that allows you to setup items that are produced from other stock items; this is much like the bulk sheet but allows for additional weight, making production much easier
    - For example, when issuing 5kg Mince, the result cannot weigh more than 5kg using the Bulk Sheet, as this caters only for the weight being issued of the bulk item
    - With production, you can now include other ingredients ending up with the total weight of the produced item
- All items manufactured through the Production Module are deducted from the various control sheet they are assigned to, resulting in more accurate On-Hand Stock Levels
- Items that have been added to the Production Module that already have Raw Material Costings will have the ingredients/recipe items copied over automatically, resulting in less time duplicating work
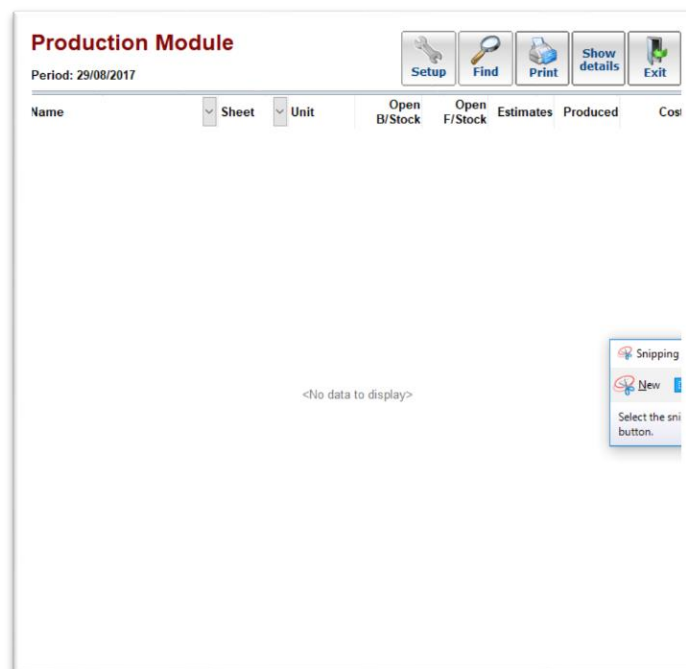
To setup a complete 150gr Burger Patty, please see steps below:

Production Module Setup

- Click on Setup
  This will take you to the Production Setup where you will add Items to be produced and link the ingredients

PRODUCTION MODULE
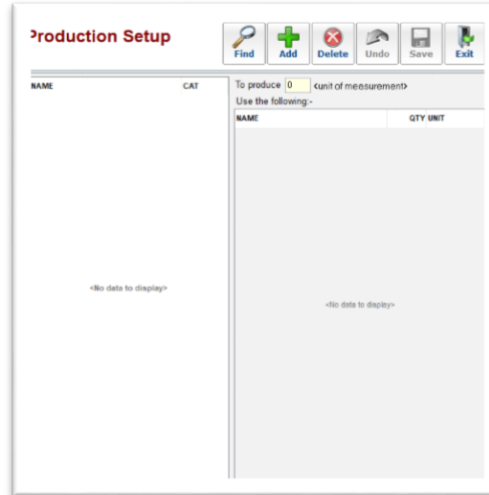
- Click on ADD to add the item you need to produce (screen will look as follows)
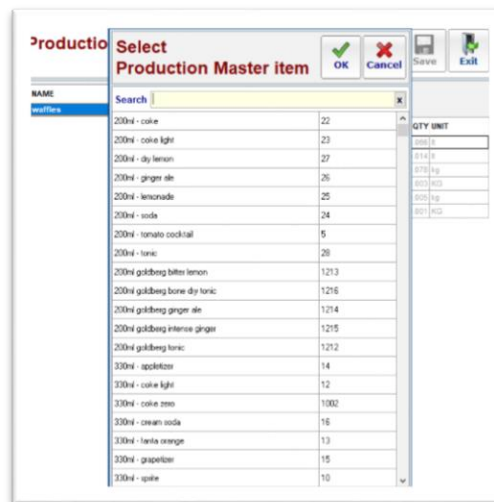
- Type in the Name of the item that you want to add to Production and click on OK
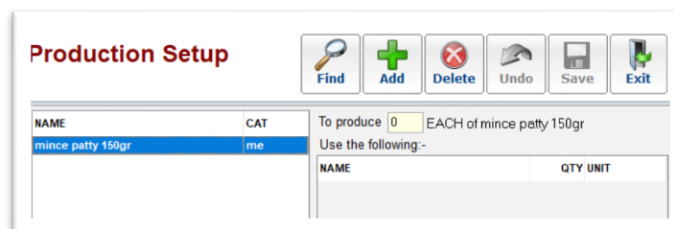
- The selected item will be added to the Production List
- Click on the window on the right and select Add to start adding in all the ingredients

PRODUCTION MODULE

- Add all items used in the production until complete
- Once all the ingredients are added, click in the TO PRODUCE Field and type in the amount of Portions/KG's/Liters the recipe makes and click on SAVE

- Once completed click on EXIT

- The Item will now be added to the Production Module

How to use the Production Module

- To start using the Production Module, enter in the required amount of stock in the ESTIMATE field for the item or items you will be manufacturing

- Click on Print

The following options are available;
- o Selected Item: This will print the estimated items for the item you have selected only
- o All Items: This will print the estimated items for all the items being produced
- o Ingredients Summary Only: This will give you a summary of the ingredients needed to produce all items
- o Item Costing: This will print the item costing for the manufactured item

- Click on All items

PRODUCTION MODULE

- This sheet will print out the Production list of items that will be required based on your initial setup and recipe for each item; this is calculated on the Estimated QTY required

- You will see the following columns on your sheet that need to be filled out:
    - QTY Issued: This is the amount that was used in the production
    - F/Stock Used: Should any of the ingredients used be part of your front stock, this should be ticked so that the stock adjusted is from Front Stock and not Back Stock
- Once the sheet has been filled out the information needs to be entered on the system
- In the Produced field enter in the QTY Produced and press Enter
- Press Enter again

- The system will take you into the Production Details

The following information will be displayed:

- NAME: This is the name of the master file item
- SHEET: This is the Control Sheet the item is currently assigned to
- UNIT: This is the unit of measure
- UNIT COST: This is the current cost price
- QTY USED: This is where you will enter the amount of stock used in the production
- COST: This will reflect the cost of the QTY used in the production
- F/STOCK USED?: Should the stock used come from you front stock this will deduct the stock from the relevant stock holding

PRODUCTION MODULE

- Enter in the quantity of ALL the items used in production

Production Details
mince patty 150gr
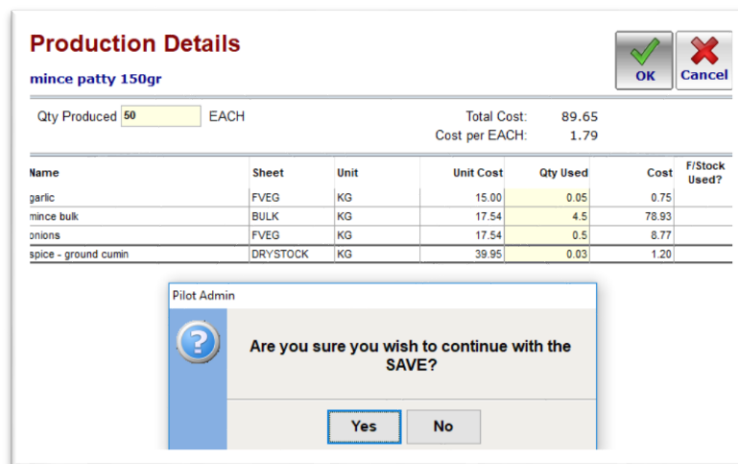
OK   Cancel

Qty Produced 50   EACH   Total Cost: 89.65
                                 Cost per EACH: 1.79

Name	Sheet	Unit	Unit Cost	Qty Used	Cost	F/Stock Used?
garlic	FVEG	KG	15.00	0.05	0.75	
mince bulk	BULK	KG	17.54	4.5	78.93	
onions	FVEG	KG	17.54	0.5	8.77	
spice - ground cumin	DRYSTOCK	KG	39.95	0.03	1.20	

As the quantities are entered, the system will update the COST of total production, and calculate a cost for each produced item

- Once all the information has been updated click on OK

Production Details
mince patty 150gr

OK   Cancel

Qty Produced 50   EACH   Total Cost: 89.65
                                 Cost per EACH: 1.79

Name	Sheet	Unit	Unit Cost	Qty Used	Cost	F/Stock Used?
garlic	FVEG	KG	15.00	0.05	0.75	
mince bulk	BULK	KG	17.54	4.5	78.93	
onions	FVEG	KG	17.54	0.5	8.77	
spice - ground cumin	DRYSTOCK	KG	39.95	0.03	1.20	

Pilot Admin

? Are you sure you wish to continue with the SAVE?

Yes   No

- The system will prompt you if you would like to save the changes, click on YES
- The next screen will prompt you if you wish to update the new unit cost for the produced item, click on YES to update the new unit cost

PRODUCTION MODULE
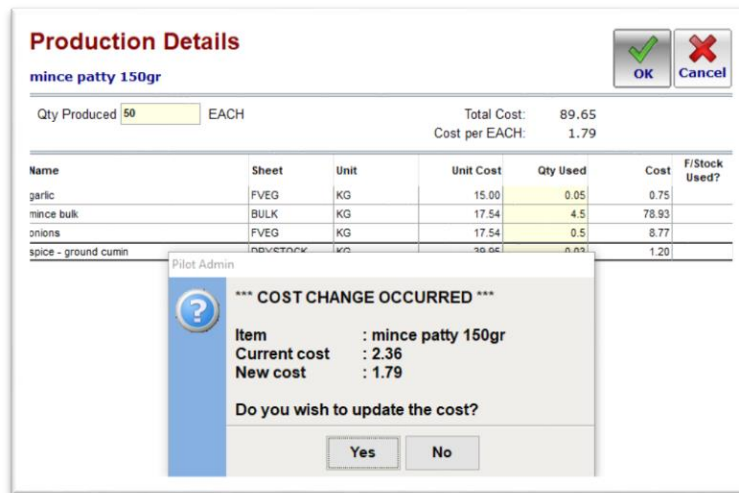
- Once the changes have been saved the system will return you to the Production sheet where you need to repeat the above steps for the rest of the items on the Production sheet.
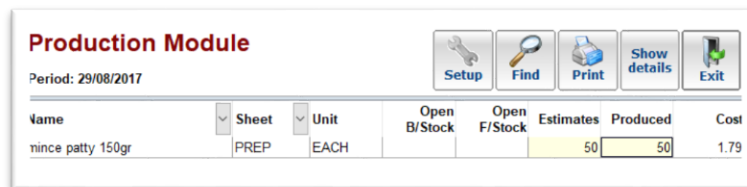
- Once all the information has been completed you need to print out an Item Costing

- Click on Print and select Item costing
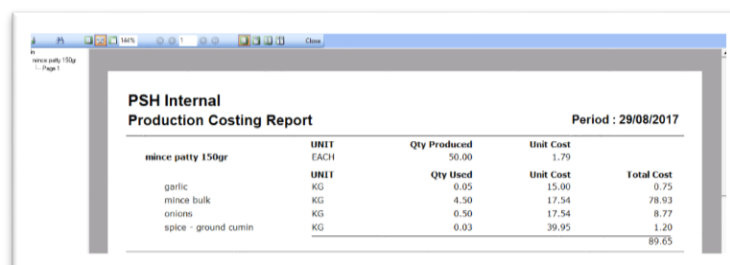
- The system will display a breakdown of the items used in the production, and costs per item making up the unit cost of the produced item
    - This can be printed out and filed for reporting purposes

PRODUCTION MODULE

- When going into the Prep Sheet, you will see the following effect on the stock item

- Me – beef patty 150g has been increased by 50 portions, this item has Back Stock so the relevant stock level has been updated

- If you look at the various Sheets that the Ingredients are assigned to, you will see the stock movement from the Production Module:
  - Bulk Sheet:

The Mince used in the production of the Burger Patty has been decreased by the stock used

  - Fruit and Veg and Dry Stock Sheets:

New FEATURE – CAMPAIGN MANAGER

- This is a solution for running specials/promos/set menus/Buy One Get One Free
  - Any number of specials, or campaigns, can be run at the same time, or at various times
- This is a solution for the previously complicated set menus (no need to create/duplicate PLU's, no new screens, and no extra time spent on touch design)
- The solution is transparent to waiters
  - Waiters simply ring up PLU items as per normal
    - The associated campaign will be applied at billing time, or can be viewed on-screen

- To create a new campaign, click ADD
  - Enter the campaign name and description (e.g. Happy Hour – Beers @ 50% off)
  - Choose available options
    - Print campaign detail on invoice
    - Campaign only valid for loyalty clients / choose loyalty vendor
    - Take away orders included / excluded
    - Delivery orders included / excluded
  - click SAVE

  PLEASE NOTE - to be able to make changes to a campaign, the campaign **CANNOT** be Active

CAMPAIGN MANAGER

- Once the Campaign has been named and saved, you can setup Order Rules
  - On the Order Rule Setup Tab, click ADD
    - Name the Order Rule (if unique, i.e. only required for one campaign, make it the same as the campaign name)
    - Choose the PLU's that will be part of the campaign
    - Choose your TAKE and GET options
  - click SAVE

CAMPAIGN MANAGER

- Once the Campaign has Order Rules set, you can setup Time Rules
    - On the Time Rule Setup Tab, click ADD
    - Name the Time Rule (if unique, i.e. Only required for one campaign, make it the same as the campaign name)
    - From & To dates, or days are selected
    - Choose times
        - Blank From/To dates = every day
        - Blank From date = every day until to date
        - Blank To date = every day starting on from date

CAMPAIGN MANAGER

- Once order and time rules have been created, they need to be linked to the campaign
    - They are not linked automatically, as they may apply to multiple campaigns
    - Click on selected campaign, and expand it
    - Choose the required Order Rule
        - Click on 'Link' button,
        - Then click 'Yes' to confirm
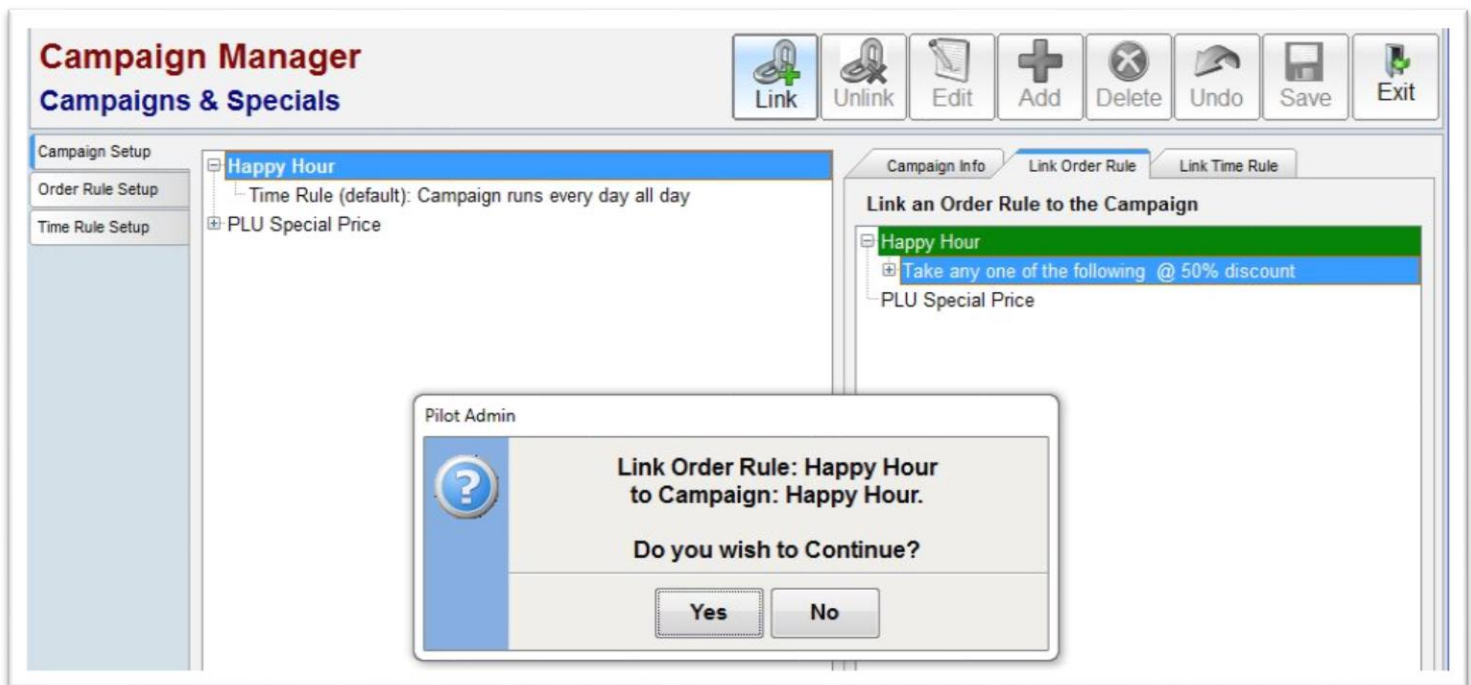
- Now, on the campaign tab, select 'Link time rule' tab (on right of window)
- Click on selected campaign, and expand it
- Choose the required Time Rule
    - Click on 'Link' button
    - Then click 'Yes' to confirm

CAMPAIGN MANAGER
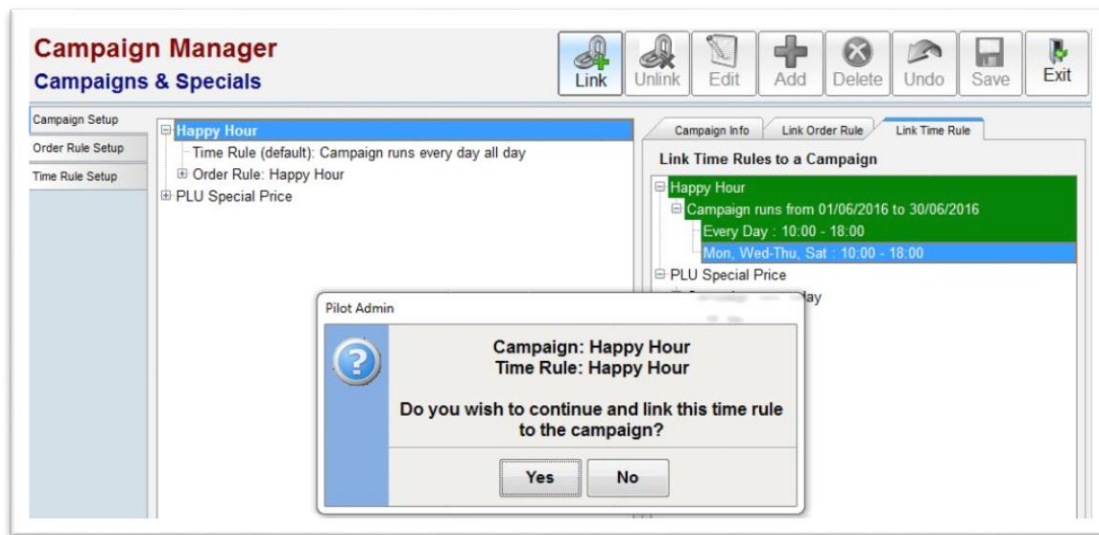
- o For this Campaign, named Happy Hour,
  - ▪ the selected PLU's will have 50% discount,
  - ▪ every day as from 1 June till 30 June
  - ▪ or every Mon, Wed, Thurs and Sat from 10:00 till 18:00
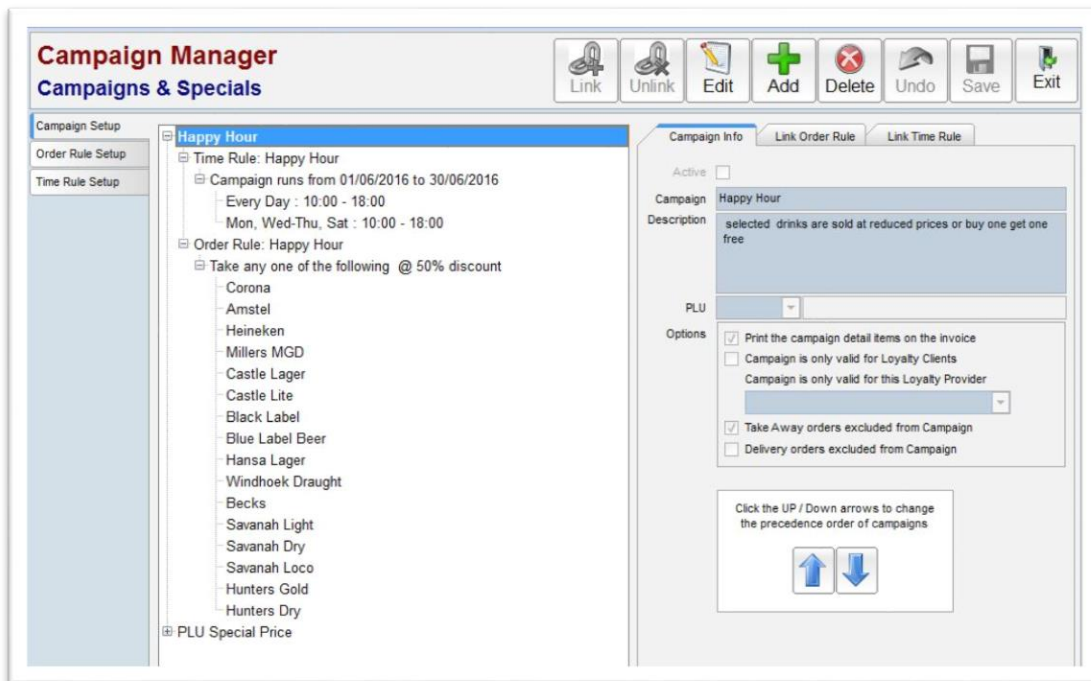
- You only need to create 1 campaign per specific Promo/Special/Set Menu
  - o But that campaign might have more than 1 order rule
  - o It might also have more than one time rule
  - o Remember to make the campaign 'ACTIVE'

CAMPAIGN MANAGER – SET MENUS

- Create a new PLU for the set menu item with a zero value (e.g., 3 Course Set Menu 1)
  - In campaign manager, create the Set Menu campaign

CAMPAIGN MANAGER

- o In the Order Rule, create rules for starters, mains, and desserts
  - ▪ In each of these rules, add the PLU's that make part of this set menu
  - ▪ All at 0.00 value, and 'Any 1'

CAMPAIGN MANAGER

- o Now, create the Order Rule '3 Course meal'
  - In the order rule, choose 'One of Each'
  - in the 'value' box, enter the price you'll be charging for the full 3 Course Set Menu
  - select the 'Rules' tab on the right
    - now, assign the 3 rules that are required for this 3 Course Meal Set Menu (starters, mains & dessert)

- Save the changes
- Choose or setup a Time Rule
- Link the Order and Time Rules to the campaign
- Remember to make the campaign 'ACTIVE'

CAMPAIGN MANAGER

Campaign Manager
Campaigns & Specials

Link | **Unlink** | **Edit** | **Add** | **Delete** | **Undo** | **Save** | **Exit**

Campaign Setup		
Order Rule Setup		
Time Rule Setup		

⊞ Happy Hour — ACTIVE
⊞ burger special — ACTIVE
⊟ **3 course set menu 1**
    Time Rule (default): Campaign runs every day all day
    ⊟ Order Rule: 3 course meal
      ⊟ Take one each of the following @ R300.00
        ⊟ starters
          ⊞ Take any one of the following
        ⊟ mains
          ⊞ Take any one of the following
        ⊟ dessert
          ⊞ Take any one of the following
⊞ PLU Special Price

Campaign Info	Link Order Rule	Link Time Rule

Link an Order Rule to the Campaign

⊟ 3 course meal
  ⊟ Take one each of the following @ R300.00
    ⊞ starters
    ⊞ mains
    ⊞ dessert
⊞ burger special
⊞ dessert
⊞ Happy Hour
⊞ mains
  PLU Special Price
⊞ starters

CAMPAIGN MANAGER – BUY ONE GET ONE FREE (BOGOF)

- Create the Campaign
  - Select PLU items that are part of the campaign (in Order Rule)
  - select 'ANY' (enter desired quantity)
  - Select 'Get The…' checkbox
  - Select desired option: (typically cheapest), and the quantity to be given for free,
  - Alternatively, select the 'AND get the following' tab
    - add the quantity of items,
    - and the desired discount/value