Using POS Favorites

Overview

Point of Sale (POS) Favorites is a feature of the Café module in Anthology. With this feature it is possible to assign the more commonly sold items to groups that you or your staff can easily find and access with your touch screen monitor. Note: If you do not have inventory items created that will become part of the POS Favorites, you'll need to create at least a few of them for this exercise.
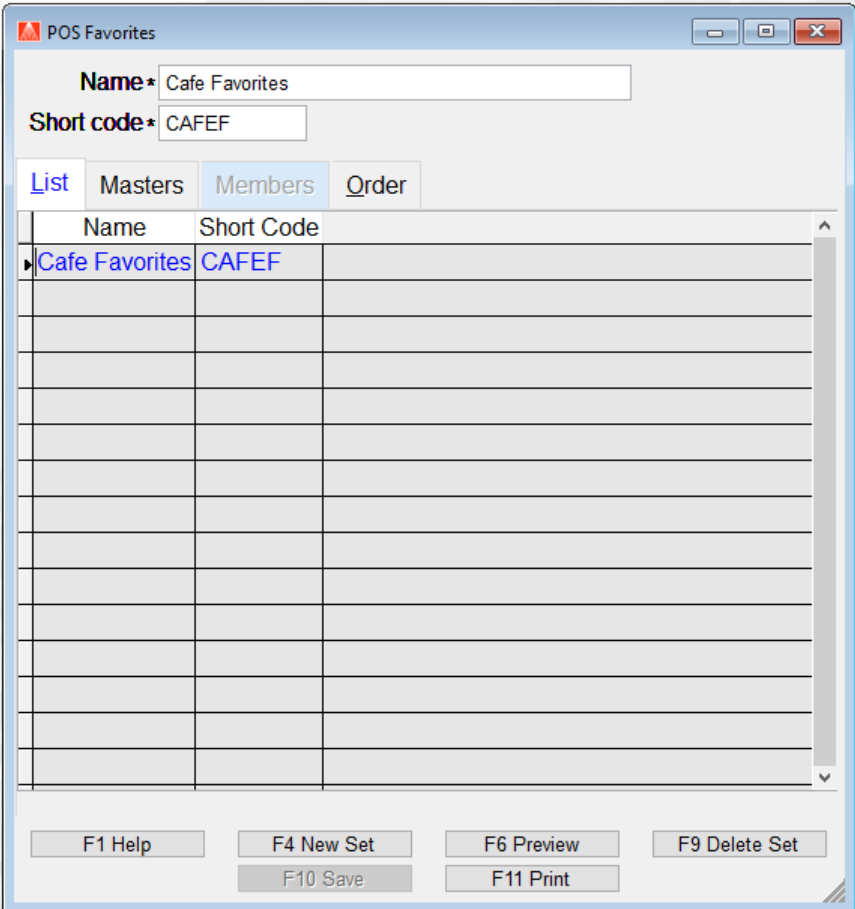
Creating your POS Favorites

To locate the POS Favorite screen, choose Master Files | POS Favorites from the menu at the top of the Anthology screen. You may create multiple POS Favorite "Lists" and these are created and saved on the Main screen. The most common use is for café and this is what we'll be discussing in this document.

Our first step is to create "List". A list is a collection of Groups and Members that you have chosen to be part of the list. This is also the name you'll use to refer to this POS Favorite collection.

Simply choose F4 New Set and enter the name you want to assign. Press the enter key to auto-fill the short code field.

Next choose F10 Save and you're done. If you need to create additional sets just repeat the steps above.

The screen will automatically change to the Masters tab where you'll define your groups or "master records".

TIP: It is best to have an idea of what you want to create before you start. It doesn't need to be a professional flowchart but simply an idea on paper. For example, you may want the main screen to show groups for FOOD, DRINKS, and BAKERY. These are our top-level groups and will contain items and/or groups of their own. In addition, you may want to break up FOOD into some sub groups SANDWICH, SOUP, SALADS and maybe hot sandwiches separate from cold. You can see that it is very easy to get very complicated, *very* quickly. Having a plan on paper can really help.

Let's start at the top and add a few Master Records.

Adding a Master Record

1. Choose F8 New Master and enter FOOD.
2. Press F10 Save
3. Leave the Belongs to field set to Top.
4. Choose Enter Line
5. Repeat these steps for DRINKS & BAKERY.
6. Choose F10 Save
7. Choose F6 Preview to see the results of what you've done. (this is a great tool for checking your progress as you go, remember to save often).

Adding Groups to a Master Record

As I mentioned, you can assign both Inventory Items and sub-groups to a Master Record. Let's start by adding a sub group to our DRINK record for coffee. Note, it is easier to layout all the groups first then go back and add the inventory items.

1. With DRINK selected in the list, as shown, choose F8 New Master.
2. Enter COFFEE and choose F10 Save.
3. In the "Belongs to" field select DRINKS
4. Choose Enter Line
5. F10 Save
6. Now when you press F6 Preview you can select the DRINKS option and you'll see COFFEE listed as one of its sub groups.

Adding Members to a Master Record

Adding members to either a master record or one of the sub groups is the exact same process. To demonstrate how to add member to both sub groups and master record let's leave our master record assigned to COFFEE and add some inventory items to the sub group.

1. With COFFEE selected in the Master Records move to the Members tab.
2. Choose F5 New Member – the SKU field is now active.
3. Click the ellipsis button to the right to launch the Inventory screen. From here we need to search for and select the item to add. I have an item called "Latte – Med" and will choose this.
4. Choose Enter Line
5. F10 Save

Now let's preview our changes. F6 Preview and choose DRINKS, you should see COFFEE. Now choose COFFEE and you see you item (Latte – Medium). Now let's add an item directly to the master record DRINKS.

1. With DRINKS selected in the Master Records move to the Members tab.
2. Choose F5 New Member – the SKU field is now active.
3. Click the ellipsis button to the right to launch the Inventory screen. From here we need to search for and select the item to add. I have an item called "Fountain Drink – Med" and will choose this.
4. Choose Enter Line
5. F10 Save

Now let's preview our changes. F6 Preview and choose DRINKS, you should see both the sub group COFFEE and the newly added "Fountain Drink - Medium. Now choose COFFEE and you see Latte – Medium.

Setting the Display Order for Masters, Sub Groups, and Members

Leaving your Favorites displayed in entry order may be perfectly acceptable to you, if not, you can use the Order tab to set the display in whatever order you want.

Using the examples in this page I have created a Master (DRINKS) and added to it a Fountain Drink and a Sub Group (COFFEE). I would prefer that all the groups be stacked next to each other for ease of use. To do this we need to set the Order.

1. Open Master Files | POS Favorites, if not already.
2. Move to the Order tab
3. For this example, choose DRINKS in the drop-down field "Items to show" below.
4. Using your mouse, click and hold the small square to the left of the item to move. Now drag the item to its new position and release the mouse.
5. Repeat these steps for other items, groups, and master records.
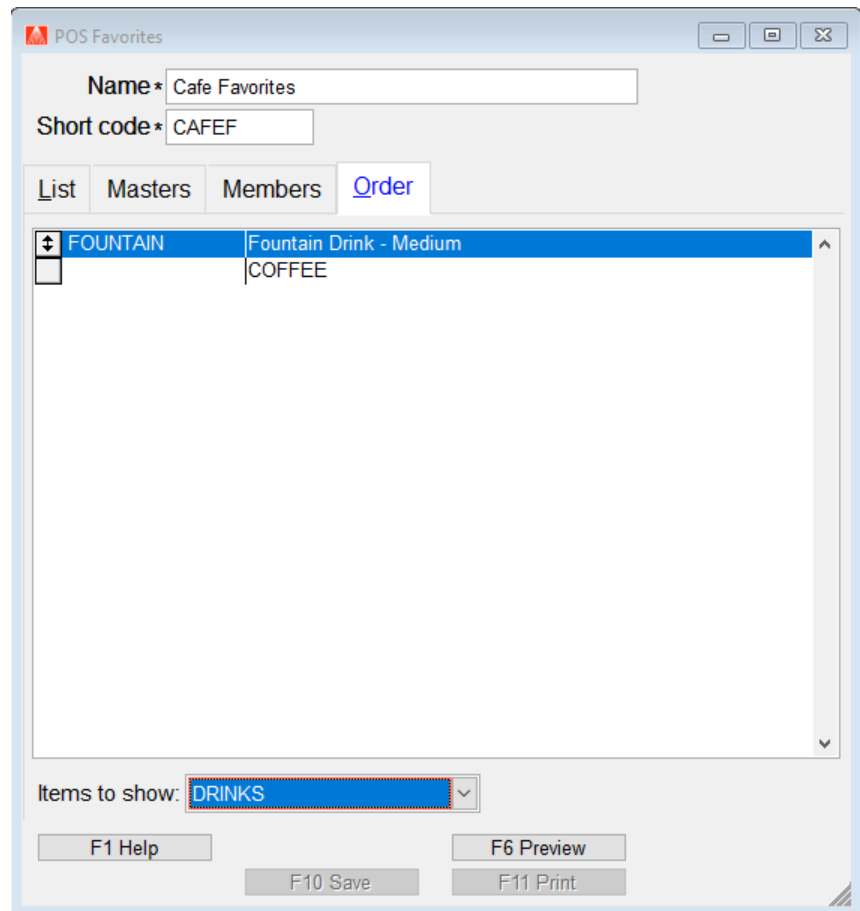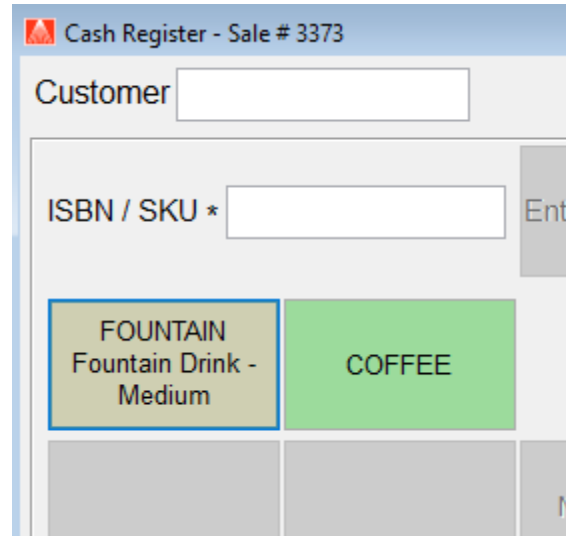
Additional Information

Multi-level Sub Groups

Sub groups can be added to existing sub groups creating something like

- DRINKS - master
  - HOT – sub group, level 1
    - COFFEE – sub group, level 2
      - Latte – Lg
      - Latte – Md
      - Expresso – Lg
      - Etc.
    - TEA – sub group, level 2
      - Green
      - Black
      - Etc.
  - COLD – sub group, level 1
    - Fountain Drink – Lg
    - Fountain Drink – Md
    - Lemonade
    - Etc.

Deleting Masters, Sub Groups, and Members

Using the example above let's talk about what happens when these different elements are deleted. The simplest explanation is: **If you delete an element that has children – the children will be orphaned**. This means deleting sub group "HOT" also removes COFFEE & TEA, along with all the items listed in them.

** **We encourage you to do a Quick Backup before you make any edits to your existing POS Favorites. Deleting elements cannot be "undone" – you will have to create them again from scratch**.