

Serf's Up

Sales and Information System Users Manual

by
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Second **W**ave **C**omputing, Inc.

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Explanation for Help Text/PDF Manual/Imaginary System

I discovered that some people, particularly those who access one of these pages (either the help text or the pdf manual) without going through the “introductory” page, actually believe the page they see is real (and complete) documentation for a real system. They thus draw an erroneous conclusion about the documents. So here is an explanation:

1. Things have changed since 1980. On-demand printing is now a reality rather than a catchphrase, so the manual writer no longer needs to saddle every user with the complete 10-pound manual when one specific user needs—and wants—only 10 pages.
2. The concept of chapters is now fully workable, so that the writer can set up as many master pages as necessary to pull together the individual chapters for individual customers.
3. If this system were real, the user for the fake screen/user manual would have a stand-up workstation: he or she would be a cashier. This cashier would not want to use a 10-pound manual in order to look up 10 pages scattered throughout the other 500.
4. Management, who would make the buying decision, would not want the cashier (or by extension, the public) to know that detailed customer information is being bought and/or sold.
5. The system, if the developers were smart, would be sold in modules. The check reader, for example, may or may not be included with the cashier screen.
6. The help text and the software (also in modules) could be set up with a user access filter, which I couldn't do. In addition, the help text, being hypertext, does not need to be isolated for each function, since the users access only the function/instructions/information in which they are interested.

Therefore, the manual contains just the information the users (cashiers) need to know in order to operate the sales screen and active function keys they see. The help text, on the other hand, contains more system-wide information, as it would in real life. The modules that the cashier would not access have the barest overview in order to show what they were intended for. These, in a real system, would be accessible only if the user sign-on contained permission to access the modules to which the explanation applies.



Serf's Up Sales and Information System

This screen is used for sales, payments, returns, and refunds. It is also used at the higher security levels for information display and transmission of customer/sales information. (Refer to Systems Management Manual.)

Register: 0025
Clerk: 043

Serf's Up Sales and Information System May 6, 1998

Telephone - - Trans. Type Account #

Name

Address

City State Zip

Item #	Description	Price	Quantity	Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Net Total Tax Total Due

Payment Type Amount Paid Check No. Card

Change Due Account No. Bank No. Number

License No. Approval

F2/Submit F3/Save Esc/Can. F4/State Info. F5/Fin. Info. F6/Med. Info. F7/Pur. Profile F9/Send F1/Help

Information entered on this screen:

- relieves inventory
- generates adjustments for A/R
- debits A/R for purchases
- updates customer and purchase information already on file, or adds a new customer and purchase information to the database

- accesses basic information from the outside databases provided with the *Serf's Up* Sales Information System
 - One screen (of the customer's selection) is standard with each system
 - Information supplied from the various databases may be displayed on two or more extra screens by users with security clearance
 - The information provided can be added to your internal customer database in order to make your own data more valuable for resale
- provides daily sales and inventory reports and ad-hoc managerial reports on sales trends

Note: For refunds and returns, the customer's telephone number will allow you to cycle through the customer's sales with the most recent sale listed first. When the correct sale is displayed, delete the item returned. The "Total Due" difference will be computed and credited to the account, credit card, or indicated as "Change Due" depending on the original payment method.

Keyboard Use

Users who are accustomed to using Graphical User Interface systems may skip this section.

Key	Use
	The Enter Key advances the cursor from one field to the next during data entry. You can also use the Tab Key.
	These keys are used to scroll up and down in the drop-down lists. They are also used to scroll up and down in the list of purchases.
	Tab can be used to advance from one field to the next during data entry.
	Shift + Tab returns the cursor to the previous field within the same screen section.
	The Insert Key is a toggle key. When you access the system, this key is off so that you can type over any errors you make. If you wish to turn it on so you can insert characters into any data you have already entered, you may just press it. A right arrow symbol will be displayed on the bottom left corner of the screen when Insert is on.
	The page keys are active only in the purchases area to help you scroll up and down in the list of purchases faster.
	The Delete Key deletes the character in front of the cursor, and the Backspace Key deletes the character behind the cursor.

Screen Contents








There are three sections for this screen:

- The top is for customer identification
- The middle is for purchase entries
- The bottom is for payment information

The items you enter will depend on the type of sale/payment being done for a particular customer. Some items will be displayed from files or from scanned or transmitted information. Several items can be selected from drop-down lists, which open when the cursor is advanced to the field and close after the selection is made with the Enter or Tab key.

Function Keys/Security

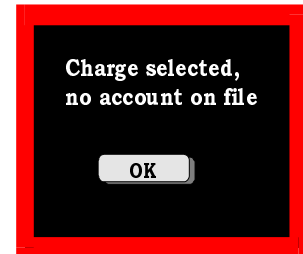
The function keys that can be used with this *Serf's Up* screen are on the buttons at the bottom.

- Active function keys/buttons for this screen/user are in black text.
- You can click on the button or press the appropriate function key.
- Buttons shown in grey text are for a higher security level and may be active depending on:
 - which add-on modules were purchased by the company
 - which screens may be accessed by each user's security level
- Press  to submit check or credit/debit card information for approval through *Serf's Up* Databases. Press  if the customer is paying cash to allow the programs to compute **Change Due**.
- Press  to save the information, complete the sale, print the receipt, and access our databases to retrieve information on this customer.
- Press  for help with any field or error message.
- Press  at any point to erase all information from that section of the screen and begin again. If you press  from the Customer area, the cursor will return to the **Telephone** field. Press  again to sign off.

Error Messages

If you make an error anywhere on the screen, an error message is displayed in a red-bordered window:

- black background for “fatal errors,” which must be corrected before you can proceed

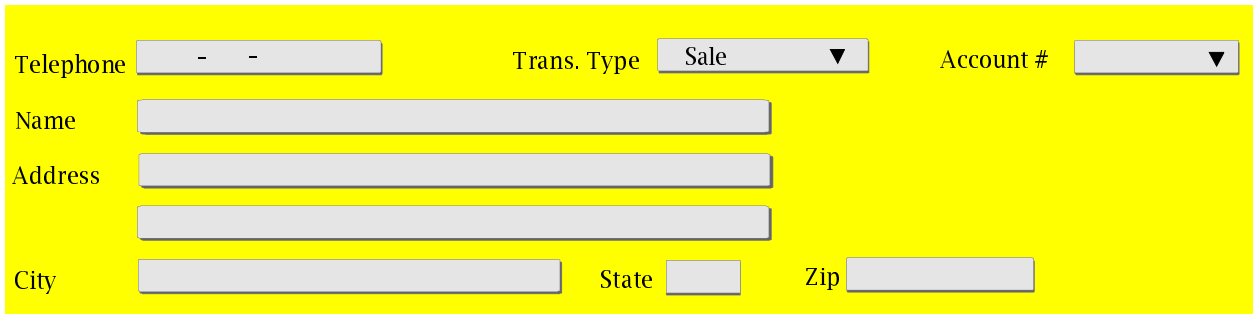


- white background for “non-fatal” errors or warnings, which indicate a problem with the data or a delay in processing



The middle portion of the screen is used to enter sales information. If more items are purchased than the screen will accommodate, the older item(s) will scroll up off the display. You can access them with the Page Up/Down keys and the arrow keys.

The top portion of the screen is for customer information



Telephone Trans. Type Account #

Name

Address

City State Zip

Field	Contents	Information
Telephone	Telephone number including area code.	This returns the name and address for any customer already on file, and accesses account information if that customer has an account.
Trans. Type	Drop-down list of possible transaction types.	The default is Sale. You may use the cursor to select another one from the active types on the list: Sale Will call Prepaid Return Exchange Payment
Account #		<ul style="list-style-type: none"> • If the customer has an account with the establishment, the account number(s) for that customer will be displayed. • If multiple accounts are available for that customer, they will be displayed in a drop-down list. • If the customer is charging the purchase or paying on an account, ask the customer which account to use and select it.
Name-Zip		<ul style="list-style-type: none"> • If the customer is not on file, enter the name and address. • The zip code must be valid for the state and city entered. • The default state code is displayed, but can be changed.

When all items have been entered, press to return the cursor to **Item #**, press again to advance the cursor to **Description** and then once again to indicate there are no more items to be entered. The last three total and tax fields will then be computed by the programs and displayed.

Item #	Description	Price	Quantity	Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Net Total		<input type="text"/>	Tax	<input type="text"/>
			Total Due	<input type="text"/>

Field	Contents	Information
Item #	Inventory number from the item price label.	This may be entered through a scanner if that interface is available and included in the <i>Serf's Up</i> system as purchased.
Description	Item Description.	If no price label is available, or if the scanner won't read it, enter the item description. One or more items from the inventory database that fit the description entered will be displayed in a window. Select one by highlighting it with the cursor and pressing <input type="button" value="Enter"/> .
Price	Price (/per quantity) is displayed.	
Quantity	Quantity using the per quantity count displayed under Price .	This may be a number, a box, a gross or other quantity identifier. For example, if the price/per quantity is \$5.95/12, and the customer is buying 24, enter 24. However, if the price is \$5.95/box, and there are 12 in each box, and the customer is buying 2 boxes, enter 2. (If the item is listed as per box, then it is not sold in smaller quantities.)
Total	Total price for item/quantity.	
Net Total	Total for all items.	
Tax	Tax from tax tables.	
Total Due	Total for all items purchased.	

The bottom portion of the screen is where payment information is entered.

Payment Type	Amount Paid	Check No.	<input type="text"/>	Card	Slave Card <input type="button" value="v"/>
<input type="button" value="Cash"/>	<input type="text"/>	Account No.	<input type="text"/>		
	Change Due	Bank No.	<input type="text"/>	Number	<input type="text"/>
	<input type="text"/>	License No.	<input type="text"/>	Approval	<input type="text"/>

Field	Contents	Information
Payment Type	Default is Cash .	<p>The payment type you select determines the next field you will enter:</p> <ul style="list-style-type: none"> • Cash: This will advance the cursor to the Amount Paid field. • Check: This will advance the cursor to the Check No. field. • Charge: This will add the purchases to the customer's balance for the Account # displayed after you press <input type="button" value="F2"/> or click on the button. (An Account # must be displayed at the top of the screen.) • Credit/Debit Card: The cursor will advance to the Card field.
Amount Paid	Cash tendered.	
Change Due	Change due customer.	This is displayed after you press <input type="button" value="F2"/> (or click on the button)
Check No. Account No. Bank No.	From check.	These fields may be entered manually from the check or may be read by the check scanner if one is installed. The check will be written by the software after you insert it in the check slot.
License No.	Enter the State Code followed by the driver's license number. (ex: HS3600000)	After you press <input type="button" value="F2"/> (or click on the button) and the license number/check is approved by our service, this field will turn green.

Field	Contents	Information										
Credit Card	Select the customer's credit or debit card from the list.	<p>The list currently includes:</p> <table border="0"> <tr> <td>Slave Card</td> <td>Slave Debit Card</td> </tr> <tr> <td>Nigerian Local</td> <td>Deadend Card</td> </tr> <tr> <td>Deadend Debit Card</td> <td>Lostsoul Card</td> </tr> <tr> <td>Munchies Card</td> <td>OOMMM Card</td> </tr> <tr> <td>Elan Card</td> <td>Boo Card</td> </tr> </table> <p>Any of the cards on the list that are not accepted by your establishment will be displayed in grey text.</p> <p>If the credit or debit card is scanned, the card type will be displayed.</p>	Slave Card	Slave Debit Card	Nigerian Local	Deadend Card	Deadend Debit Card	Lostsoul Card	Munchies Card	OOMMM Card	Elan Card	Boo Card
Slave Card	Slave Debit Card											
Nigerian Local	Deadend Card											
Deadend Debit Card	Lostsoul Card											
Munchies Card	OOMMM Card											
Elan Card	Boo Card											
Number	Credit or debit card number.	If the credit or debit card is scanned, the Number field will be displayed.										
Approval	Approval Number.	After you press <input type="button" value="F2"/> or click on the button, and the card is approved by our service, the approval number is displayed.										