System Manager Computer Options

BisTrack uses the System Manager Computers Option to allow control of cash drawers, printing, and additional settings based on the physical layout of your location. In this session, we introduce you to the Default Computer. Then we'll show you how to add a new Computer and set the related options for it.

The settings for the Default Computer were included with your initial system installation. To view the settings, open the System Manager application. From the General navigation pane, select Computers. The Default Computer and any others that have been added are shown in the results area. With the Default highlighted, double-click to open the properties.

Computer properties are set using options from a number of different tabs. The settings have been configured to support BisTrack best practices. The top section of the General tab contains the Computer specifications and area for adding cash drawers. The lower portion of the window contains the Option settings. These allow you to set up devices such as PIN Pads and establish specific workflow processes.

The system uses Document Control settings for printing transaction documents. You should confirm these for the Default Computer first, as they will be used as the basis when adding new Computers and allows you to reuse many of the Default settings. Setting Document Controls is a complex process. For more information, refer to the Training on Demand course, Document Controls.

You should set your Default Computer settings to function with the majority of your users that work within the same physical environment. You can make changes as needed. Users must log out of BisTrack and then back in before the changes take effect. To save the changes, click OK. To close the window without saving, click Cancel.

You add New Computers when you want to make allowance for physical areas within your business that have different requirements not provided by the Default computer. These could include special POS equipment such cash drawers, PIN pads, and display poles. It could also comprise document formats for printing transactions or options affecting work flow processes. With the Computers window displayed, right-click anywhere in the white space.

Select New. From the Type drop down, choose Terminal Services Client. Enter the Client name that describes the physical area or function of this computer. This name is shown on the Terminal Services Client window when you log into BisTrack. Leave the Server field set at the default: (Any Server). You can enter a description for the type of computer in the Description field.

If this Computer will use a cash drawer, select the Add button. The Cash drawer currency is set to the system Default. If you are adding a Computer in an area that uses a different currency, select it from the drop down. Find a Cash Drawer by clicking the button. Choose it from the list of cash drawers previously set up.

The remaining options require setting when you are using a Serial Cash drawer connected to a Serial-To-Ethernet Adapter. Otherwise leave them as shown. Click Add to finish the entry. The Cash Drawer is added and the fields are cleared and ready for entry of another. If finished, click the Close button. You can also edit the Properties of the cash drawer or Remove one no longer needed for this Computer.

Now let's set the options for the Computer beginning with those on the General tab. The Miscellaneous group is a random selection of options. Those within Orders affect sales order entry behavior. The Product Find options determine how Specials and Non Stocked products are handled in a product search. For some, you can choose from a drop down list.

For example, to set the Default order sale type all types are listed.   A Computer with a cash drawer and display pole may be best set to have Quick Sale as the default order type instead of Delivered. Others may use a search ellipsis that pops up a new window for making a selection. For many options you can keep the

existing System or Computer Defaults. Set the Pole Display options when one is being used with this Computer. The Type selected determines which other settings are available on this tab.

Identify the device being used when Signature Capture equipment is connected to this Computer. You will also need to set the System Options to enable Signature Capture for the sale types that require signatures. For example, you can enable a Will Call sale to require the customer to sign for their order when they pick it up. The System Options for Signature Capture are found in the Operational > Orders > General group.

Use Client Mapping to default a workstation to a specific BisTrack Computer when logging in. This eliminates the Terminal Services Client window from displaying and the user having to select one. A best practice is to set this on Computers that are in a fixed location like a desktop PC at a service counter or on a User's desk that will remain in the same spot.

The PC or thin client name found in System settings of the PC or thin client is the value you enter in the Client Mapping field. Use the Remove option to delete Clients or Computers from the list. When you have entered all settings for the new Computer, click the Add button at the bottom of the window. The new Computer is now in the list.

Using BisTrack's Computers Option you can customize the system to operate based on the physical location of a workstation and the equipment connected to it. This course introduced you to the Default Computer settings and then instructed you on how to add a new one, configure a cash drawer and set the various options.

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