

Using the Log as Exception Feature

The screenshot displays the 'Employee Maintenance' software interface. At the top, it shows 'Options General Information For: PCA Employee' with a 'Keyboard' button. Below this are various input fields: Department (dropdown), Card Swipe ID, Employee ID (100102), Customer, Password (**), Hourly Wage (\$8.00), and Display Name (PCA Employee). There are also checkboxes for 'Take CC Tips in Cash at End of Shift', 'Disable this Employee', 'Require Clock-In Before Login', and 'Administrative Card Access'. A 'Click to Select Picture' button is also present.

The main area is divided into tabs: 'Permissions', 'Personal Info', 'Job Codes & Wages', and 'Store Associations'. The 'Permissions' tab is active, showing a grid of permissions with dropdown menus for each. The 'Log as Exception' checkbox is checked. Below the permissions grid, there is a search bar for 'Employee ID' with the value '100102' and a description 'The ability to do invoice and line discounts'. At the bottom, there are several action buttons: 'Add Employee', 'Save Changes', 'Job Code Setup', 'Time Clock Management', 'Previous', 'Next', 'Help', 'Duplicate', 'Delete', and 'Exit'.

Tracking employee permissions can be helpful in determining where problems are occurring in your business. By tracking employee permissions you can view reports that show when the specified permission was used and which employee. Follow the instructions below to use the Log as Exception where you can view reports displaying what your employees are doing.

Note: You must be licensed to use this feature please contact the pcAmerica sales department at 1-800-722-6374 for licensing options.

Using Exception Logging with Employee Permissions

Exception Logging with Employee Permissions allows you track which permissions are used or attempted and view them in the Operational Exceptions Report

Select **Manager** from the login screen, provide the requested credentials, and follow these steps.

1 Cashier
2 Invoice Properties
3 Tools
4 Setup
5 Administrative

A Inventory Maintenance
B Department Maintenance
C Styles Matrix
D Vendor Maintenance
E Customer Maintenance
F Employee Maintenance
G Vendor Maintenance
H Purchase Orders
I Back Orders
J Time Clock Management
K Credit Card Settlement
L Reporting
M Customer Item Prices
N Global Price Changes
O Mix 'N Match Pricing

Exit

1. Select **Administrative** then **Employee Maintenance**.

Employee Maintenance
Options: General Information For: PCA Employee Keyboard

Department: [Dropdown] Card Swipe ID: [Text]
Employee ID: 100102 Customer: [Text]
Password: ** Hourly Wage: \$8.00
Display Name: PCA Employee Take CC Tips in Cash at End of Shift Administrative Card Access

Disable this Employee Require Clock-In Before Login Administrative Card Access

Permissions Personal Info Job Codes & Wages Store Associations

Functionality Page 1 Page 2 Page 3

Inventory	Invoice Discounts	Prompt	End Transactions	Prompt	Redeem Gift Cards	Prompt
Customers	Invoice Price Changes	Prompt	Hold & Print	Prompt	Sell Special Items	Prompt
Reports	Delete Items	Prompt	Open Cash Drawer	Prompt	Vendor Payouts	Prompt
Setup	Void Invoices	Prompt	Sell Non-Inventory	Prompt	Buybacks	Prompt
Restaurant	Allow Exit	Prompt	Tax Exempt Invoice	Prompt	Force Credit Cards	Prompt
Handheld	Returns	Prompt	Sell Gift Cards	Prompt	Charge Below Floor	Prompt

Log as Exception

Search by Employee ID: 100102 The ability to do invoice and line discounts

Buttons: Previous, Next, Add Employee, Save Changes, Job Code Setup, Time Clock Management, Help, Duplicate, Delete, Exit

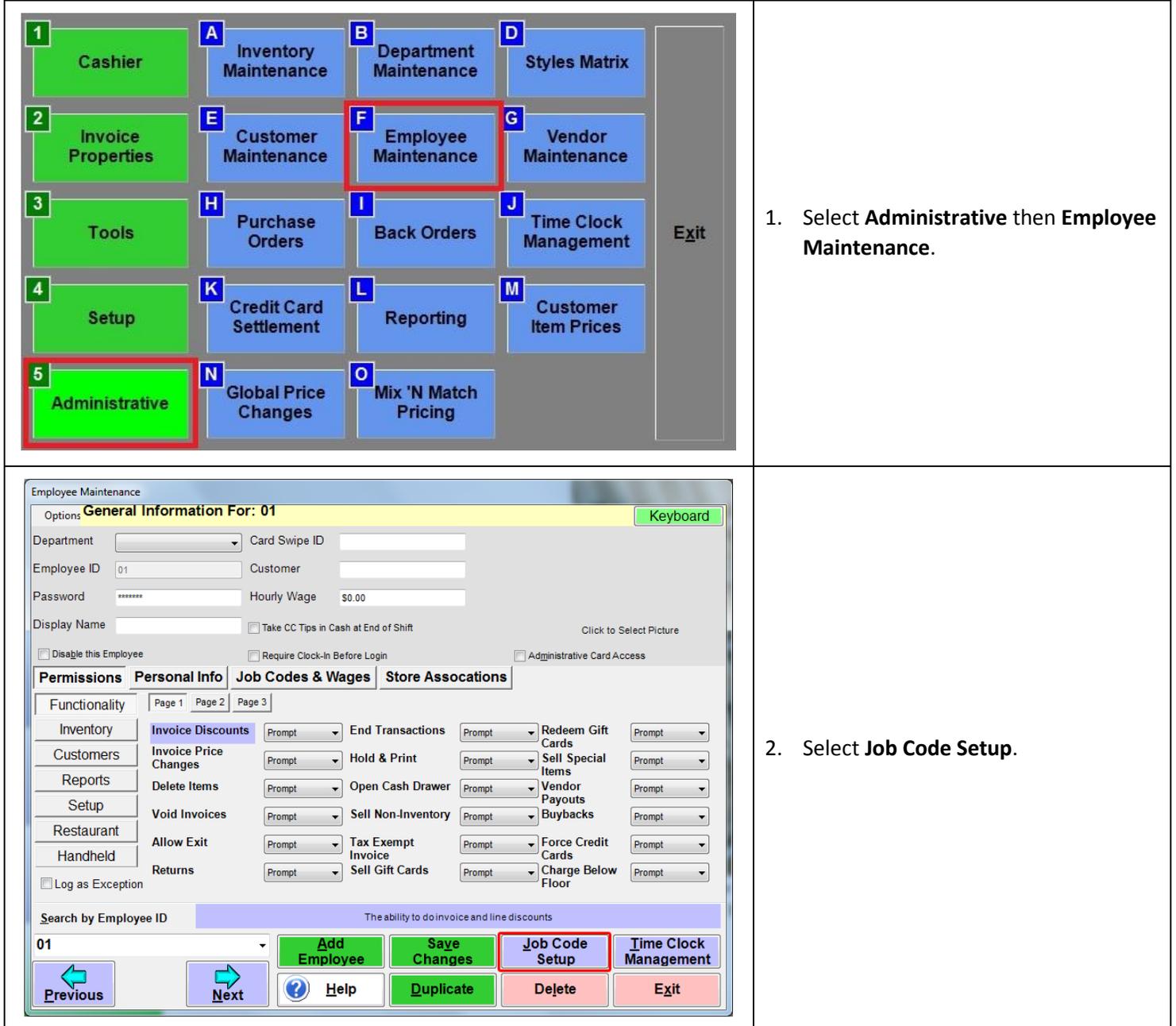
2. Select the **permission** you would like to monitor. It will highlight in blue when selected.
3. Select the **Log as Exception** check box.
4. Select the green **Save Changes** button.

Note: You will want to check **Log as Exception** for each permission you would like to monitor.

Using Exception Logging with Job Code Permissions

You can also enable Log as exceptions for permissions in the Job Code Setup Screen.

Select **Manager** from the login screen, provide the requested credentials, and follow these steps.



1. Select **Administrative** then **Employee Maintenance**.

2. Select **Job Code Setup**.

Job Code Setup

Job Code Name: Default Wage: **Keyboard**

Picture for Button: Default Overtime Wage:

Access to POS

Shift Report

of Copies:

Record Cash Tips Include Department Totals

Cash Bank Itemize CC Transactions

Require Cash Drawer Selection Assignable by admin only **Permissions**

Require Cash Count Screen on Clockout

Enable with Delivery Tracking

Previous **Next**

Add **Update** **Delete** **Exit**

3. Select the Job Code you would like to edit the permissions for and select **Permissions**.

Modify Permissions

Current Job Code ID:

Functionality Reports Setup Inventory Customers Restaurant Handheld

Page 1 Page 2 Page 3

Invoice Discounts Yes End Transactions Yes Redeem Gift Cards Yes

Invoice Price Changes Yes Hold & Print Yes Sell Special Items Yes

Delete Items Yes Open Cash Drawer Yes Vendor Payouts Yes

Void Invoices Yes Sell Non-Inventory Yes Trades & Buybacks Yes

Allow Exit Yes Tax Exempt Invoice Yes Force Credit Cards Yes

Returns Yes Sell Gift Cards Yes Charge Below Floor Yes

The ability to do invoice and line discounts

Log as Exception **Update** **Exit**

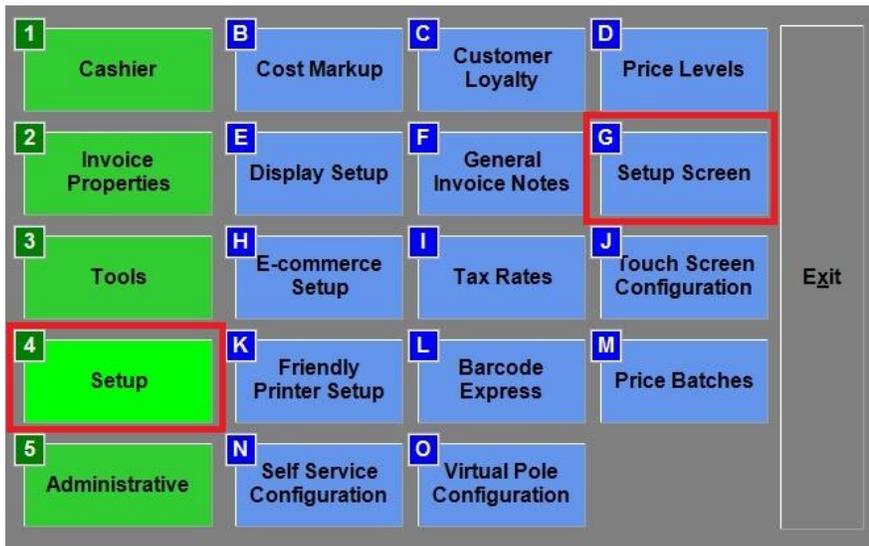
4. Select the **permission** you would like to monitor. It will highlight in blue when selected.
5. Select the **Log as Exception** check box.
6. Select **Update** at the **Modify Permissions** window.
7. Select **Update** at the **Job Code Setup** window.

Note: You will want to check **Log as Exception** for each permission you would like to monitor.

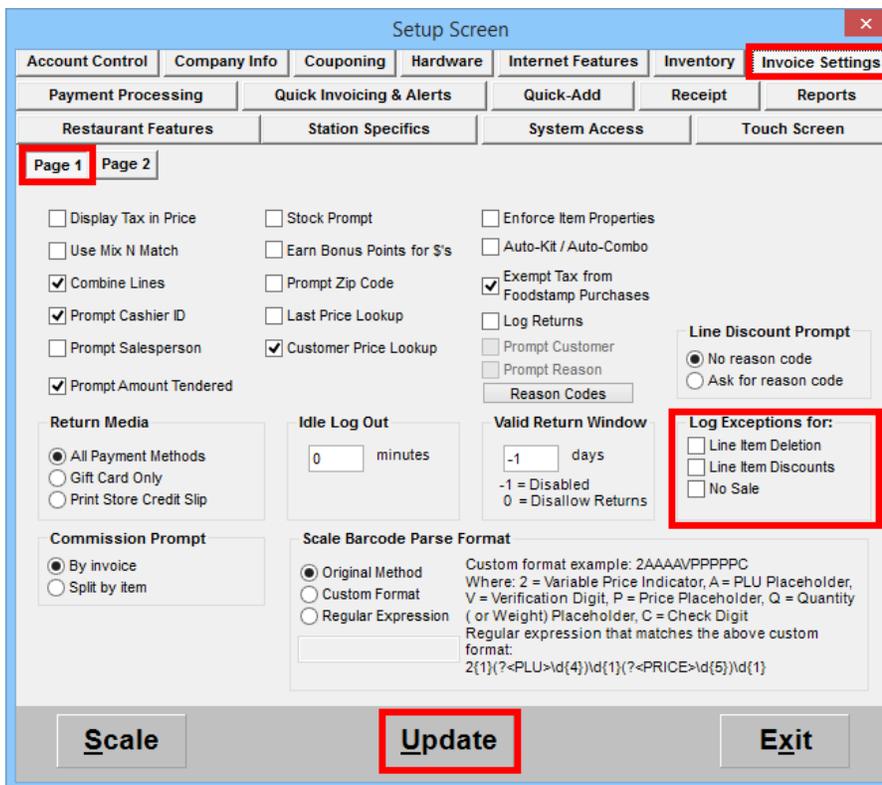
Using Invoice Exception Logging

Invoice exception logging allows you to track

Select **Manager** from the login screen, provide the requested credentials, and follow these steps.



1. Select **Setup** then **Setup Screen**.



2. Select the **Invoice Settings** tab
3. Select **Page 1**
4. In the **Log Exception For** section, put a check in the function you would like to track, these are:

Line Item Deletion
Line Item Discounts
No Sale
5. Select **Update**

Viewing Exception Reports



1. Select **Administrative** then **Reporting**.

Reporting

Category

Sales
Inventory
Customer
Employee
Restaurant
Rentals

Report

Invoice Exceptions
Operational Exceptions
Flash Report
Vendor Sales Report
CreditCard Detail Report

Date/Time Range

Start Date: 6/24/2010 Start Time: 12:00:00 AM
End Date: 6/24/2010 End Time: 11:59:59 PM

Advanced Reporting

Criteria

Green = ALL in list selected
Red = One or more selected

Select Cashier: ALL
01
100101
100102

Select Department: ALL
NONE
Soda

Select Station: ALL
01

Select Store ID: ALL
1001

Select Vendor: ALL

Select Category: ALL
NONE

Select Matrix Group: ALL

Print Format
 Full-Size
 Receipt

No inventory item selected
No customer selected

Select Item Clear Select Customer Clear

Display
Print
Exit

2. Select the report you would like to view.
3. Select the **Date/Time Range**.
4. Select a cashier (if applicable).
5. Select **Display**.

Below is an example of the **Invoice Exceptions** report. This report will typically display when any of the functionality permissions have been used.

Invoice Exceptions Between 2/22/2017 10:00:00 AM and 2/23/2017

2/22/2017

Invoice #	Item # Cashier	Amount	Quantity Reason Code
Store ID: 1001			
2/22/2017			
Line Item Void			
7	8807616444 100102 John D.	\$32.99	1.00 Line Item Deletion
Line Item Discount			
7	2105922750 100102 John D.	\$16.00	1.00 Sale
2/22/2017			
Store ID: 1001			

Below is an example of the **Operational Exceptions** report. This report will typically display when permissions related to setup of the software have been used. If the permission is configured to prompt for a reason code to be associated with the permissible action, it will display the reason code in the exceptions report.

Operational Exceptions Between 9/1/2017 and 9/1/2017 11:59:59 PM

9/1/2017

Date/Time	Cashier Override Cashier	Reason Code
Store ID: 1001		
09/01/2017		
Invoice Discounts		
9/1/2017 12:20:48PM	100102 02 100102	
Void Invoices		
9/1/2017 12:11:26PM	100102 02	
Allow Exit		
9/1/2017 12:16:25PM	100102 02	
9/1/2017 12:21:23PM	100102 02 100102	
Returns		
9/1/2017 12:21:06PM	100102 02 100102	
9/1/2017 12:21:13PM	100102 02 100102	
09/01/2017		
Store ID: 1001		