MDE-4852A Passport® Manager Top Tasks Shortcut Sheet

Set Up New Employee

1. From Manager Workstation Main menu, select **Set Up** > **Employee**.
2. Select **Add**.
3. Enter employee information.
   - **General**
   - **Security Group**
   - **Preference**. Click to √ "Override the Blind Balancing store option" to print Cashier Till Report if within variance. To setup variances, select **Set Up > Store > Accounting Options > Tender Options**.
4. Select **Save**.

Password Reset

1. From Manager Workstation Main menu, select **Set Up** > **Employee**. Select Employee from the list.
2. Select **Change**.
3. Click to √ Use Generic Password. From next sign on, the employee must enter the default password and enter their new password.
   Notes:
   - *Default Generic Password is 1234567. To change the Password, select **Set Up** > **Store** > **Store Options**.*
   - *The default count for Password retry before the system locks the Cashier is 3 (maximum is 9 times).*

Knowing Functions Employees can Perform

1. To verify the employees assigned Security Group, select **Set Up** > **Employee** > **Security**. If correct, verify the settings in Security Group Maintenance.
2. Select **Set Up** > **Store** > **Security Group Maintenance**.
3. Select the required Security Group (Cashier, Manager, Owner, and Supervisor).
4. Select **Change**.
5. Click on System Application name to see the available functions.
6. Click on the Point Of Sale name to see Cashier permissions.
7. Permission is only given to those applications and functions with a √.
8. Select **Save** to save any changes.

Gas Pricing

1. From Manager Workstation Main menu, select **Pricing** > **Fuel Price Change**.
2. Highlight the required Fuel Grade and change Day/Night and Cash/Credit prices. To select more than one line, press and hold **Ctrl** and select each line to highlight it.
3. Methods of changing prices:
   - To change selected prices, enter new price and then Update List.
   - To increase or decrease selected prices, enter number of Cents and then select that icon.
4. Send pending price change to the pumps
   - Immediately
   - After the next EOD (End Of Day)
   - Do not send (use this, if you want to pre-program and send later)
5. Select **Save**.

Programming Receipt Footers and Customer Display

1. From Manager Workstation Main menu, select **Set Up** > **Register** > **Register Group**.
   *Note: If more than one Register Group exists, select the required Register Group or select **Change**.*
2. Select **Change**.
3. Select **Receipt**.
   - Click in the field and type the new promo message in the receipt footer box.
   - Press **Enter** to place the text on the next line.
   - Select **Center** or **Left** to align the message.
4. Select **Customer Display**.
   - Click in the field and type the new promo message in the display box.
   - Press **Enter**.
5. Select **Save**.

Programming CRIND Receipt Footers, Promotional Display, and Coupon

1. From Manager Workstation Main menu, select **Fuel** > **Site Options**.
2. Select **CRIND Receipt**.
   - Click in the field and type the new promo message in the receipt footer box.
   - Press **Enter** to place the text on the next line.
   - Select **Center** or **Left** to align the message.
3. Select **CRIND General**.
   - Click in the field and type the new promo message in the display box.
   - After each line is entered, press **Enter**.
4. Select **CRIND Coupon**.
   - Click in the field and type the coupon message.
   - After each line is entered, press **Enter**.
   - Click to √ Print Coupon field to print coupons. Uncheck to stop coupon printing.
5. Select **Save**.

SPEED KEY Programming

1. From Manager Workstation Main menu, select **Set Up** > **Register** > **Speed Key Maintenance**.
2. Highlight the required menu name from the list.
3. Select **Change**.
4. To change an existing SPEED KEY:
   - Click on the required key.
   - Type the number in the code box, press **Enter**.
   - Type the new description in the caption box.
   - To select icon figure, select the gray icon box.
5. To add a SPEED KEY:
   - Click in the blue square key area (black outline box appears).
   - Select **Add Key**.
6. To add a Menu Page, select Add Menu Page.
7. To delete SPEED KEY:
   - Click on the key to be deleted.
   - Select **Delete Key**.
8. To delete Menu Page, select Delete Menu Page.

Setting Refund Limits for Paid Outs and Refunds

1. From Manager Workstation Main menu, select **Set Up** > **Register** > **Register Group Maintenance**.
2. Select **Register Group**.
3. Select **Change**.
4. Select **Sales and Refund**.
5. Type the required refund transaction maximum amount.
6. Select **Save**.
7. The refund tenders (that is Cash), "Maximum tender refund amount" must be equal or greater than the Refund Limit in **Set Up** > **Store** > **Tender Maintenance**.

What Feature Bundles do I have?

The Passport system features on your system depend on the bundles that are activated. To see the feature bundles on the system:

1. From Manager Workstation Main menu, select **Feature Activation**.
2. The bundles that appear in the list with a √ are the active bundles at your site.
3. To purchase additional bundles and the required functionality, contact your Distributor or ASC.

How to Set Up a Department

1. From Manager Workstation Main menu, select **Set Up** > **Store** > **Department Maintenance**.
2. Select **Add**.
3. Type the department number.
4. Type the department name.
5. Select **Tax Group** from the list of options (all items assigned to this department will assume this tax).
6. Select **Restriction Group**, if any restrictions apply.
7. Click to √ if department is Food Stampable. If you select √, all items assigned to this department can be tendered with food stamps.
8. Click to √ if department is Discountable. If you select √, all items assigned to this department are discountable.
9. Click to √ if department is a negative department. If checked, all items assigned to this department rings as negative items. Negative items decrease amount due (that is winning lottery payout).
10. Type the Network Product Code number. Usually a network host defined number.
11. √ if department appears as a Department key/button.
12. √ if department appears as a POS Coupon key/button (not selectable if Negative Department is selected).
13. √ if department sales totals prints on the stream of Till Close Reports.
14. Select **Save**.

How to Determine if the Store has been Closed

1. From the Cashier Workstation, select **More** > **Stats**.
2. View the Business Date field. This is the date/time the new business day was started.
3. Or, read the Store Close receipt. The date/time the business date was started and ended is printed.

How to Perform a Store Close

1. From Manager Workstation Main menu, select **Period Close** > **Store Close** > **Start**.
2. Select **Yes**, to continue. Select **No**, if you want to stop closing.
3. If Yes is selected, and if there is a software upgrade, select an upgrade choice. (Install software after the Store Close is completed. Defer the upgrade to a later time or exit Store Close.) The Till status screen appears.
4. All Tills must be closed at this point.
5. After the Store Close receipt prints, Cashiers can open their Tills.
6. Wait for the OK status and Store Close Batch Completed message. If there is an error, contact your manager.

How to Set Up a Forced Store Close Time

1. From Manager Workstation Main menu, select **Set Up** > **Store** > **Period Maintenance**.
2. Select **Store Close Options**.
3. Click to √ the Force Store Close option.
4. Type the start time to allow closes from the registers in HH:MM AM/PM format.
5. Type the time, the Store must be forced to close (if the Store is not closed manually by a Cashier).
6. Type the time to start reminding Cashiers that it is time to close the Store.
7. Type the time to start sending out reminder messages to Cashiers.
8. Type the message that must be displayed to the Cashiers.
9. Select **Save**.

   Note: Deselect the Forced Store Close option to stop forced close of the store and save the previous settings.

How to Search/Add/Change Items (Stock)

1. From Manager Workstation Main menu, select **Pricing** > **Item**.
2. If the PLU/UPC is not known, select **Search** to display all items on the file.
3. To search for a specific item, type the PLU/UPC number in the PLU/UPC field. Select **Search**. If the item exists, item will be displayed in the PLU list.
4. To search for a specific Scan Code, type the Scan Code in the Scan Code field. Select **Search**. If the item exists, item will be displayed in the PLU list.
5. To search for items in a Department, select and highlight the Department number from the list of options. Select **Search**. If the item(s) exists, items will be displayed in the PLU list.
6. To search for items by Description, type the partial or complete description in the Description field. Select **Search**. If the item(s) exists, items will be displayed in the PLU list.
7. To search by Item Type, select from the list of options to display the Item Types. Select the required Item Type. Select **Search**. If the item(s) exists, items will be displayed in the PLU list.
8. Changes or additions can only be started from the General tab.
   - **To Change an Item**: From the PLU list, click on the item name to highlight, and then select **Change**.
   - **To Add an Item**: From the General tab, select **Add**. Type the Item information.
9. Select **Save**.

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