AIMsi Touchscreen Setup

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Menu Choices Overview

Modules -> Daily Posting -> Touchscreen POS - This is the touchscreen point of sale program, it is used to create sales invoices. It is also where you save and recall tabs and check people into and out of stations.

Modules -> Daily Posting -> T-Scheduler - This is the program that is used for all the reservation / check in / booking functionality. This is where you schedule appointments / reserve time slots, and check people in. You can also access the touchscreen invoice program and issue rain checks from here.

Maintenance -> General Maintenance -> Touchscreen Menus - This is the program that you use to design all of your touchscreen menus.

Maintenance -> General Maintenance -> Stations - This is the program you will use to create your stations.

Maintenance -> General Maintenance -> Station Rates - This is the program you will use to create rates for your stations.

Maintenance -> T-Scheduler Maintenance - This is a new submenu, you can access the create time slots, entity maintenance and rain check programs from here.

Maintenance -> T-Scheduler Maintenance -> Create Time Slots - This program is used to create the time slot file that the T-Scheduler uses to show the time slots available to be assigned to customers.

Maintenance -> T-Scheduler Maintenance -> Entity Maintenance - This is where you go to create the entities that you are going to be scheduling in the T-Scheduler.

New System Variables

We have added a new system variable filter for the following items. It is called Touchscreen. If you select that from the filter drop down box in the system variable maintenance program it will isolate these variables.

EntityCat - This variable is used when checking people in from the T-Scheduler. When this category is rung up in the invoice screen during the T-Scheduler check in process, this will trigger the invoice program to assign credit for a round of golf played to an account and will let the T-scheduler know that that slot has been paid for.

EntityCatPick - This variable determines if when you ring up a category in the EntityCat list you will be prompted to chose who is getting credit for a round of golf, or if the person paying gets all the credit.

EntityName - This is the name of the 'Entity' in the T-Scheduling system. This will affect some of the text of the different programs throughout the system. Some examples may be 'Course' if you are scheduling

tee times for golf courses, chair if you are scheduling haircut appointments, or area if you are renting out areas for lessons.

ExceptionCatSA - When an exception is sold in the touchscreen invoice program a window will pop up with some buttons. One of them will be a button to apply the default serialized / accessory category to an item. This is the category that will be applied if that button is hit.

ExceptionCatTT - When an exception is sold in the touchscreen invoice program a window will pop up with some buttons. One of them will be a button to apply the default title category to an item. This is the category that will be applied.

HoldMenuDelay - There are various places in the system where holding down on the touchscreen then lifting your pointer off the screen simulates a right click, and causes additional functionality. This variable controls how long in seconds you need to have the control pressed down on before letting up triggers the right click simulation.

PayCatOrder - This controls the ordering of which payment categories should go on the first nine payment category buttons. This should be a pipe delimited listing of your payment categories.

SaleQtyDelay - This controls how long you have to enter a quantity in the touchscreen invoice program before the next button press will no longer add to the current quantity and instead will overwrite it. For instance, if this is set to 2 and you want to enter a quantity of 32, you have 2 seconds between the pressing of the 3 and 2 keys before the system will interpret that as a 3 and a 2 instead of 32.

StnBoxHeight - This variable controls the height of the boxes on the screen that shows up after you click a 'station' type button in the touchscreen invoice program. A good value to use for this will be something that divides 525 up into fairly even pieces.

StnBoxWidth - This variable controls the width of the boxes on the screen that shows up after you click a 'station' type button in the touchscreen invoice program. A good value to use for this will be something that divides 900 up into fairly even pieces.

TSchedHeight - This variable controls the minimum and maximum height of a time slot box in the T-Scheduler program. The T-Scheduler will dynamically create and size the time slot boxes based on how many it needs, however it's a good idea to set these values to keep them from getting too big or too small. This number is in pixels, and the total number of vertical pixels that is available to that program is 528.

TSchedRowCfg - If this variable is set to Y the T-scheduler program will start a new row every time it reaches a new hour. This variable is best set to Y only if your time slot increments breaks down in such a way that you are pretty close to having 1 row to an hour anyway, or else there is the possibility for many empty time slots. For instance if your TSchedWidth is 125 - 150, you should be getting 6 to 7 boxes per row, so if your time slot increments would result in 5 to 6 boxes per hour, you could consider setting this to 'Y', otherwise if your increments would result in 7 or 8 boxes per hour I would disable this or else every other row will be completely empty except for one or two boxes.

TSchedWidth - This variable controls the minimum and maximum width of a time slot box in the T-Scheduler program. The T-Scheduler will dynamically create and size the time slot boxes based on how many it needs, however it's a good idea to set these values to keep them from getting too big or too small. This number is in pixels, and the total number of horizontal pixels that is available to that program is 904.

TSPayDefToZero - If this is set to Y the touchscreen payment window will default to 0 dollars, forcing the cashier to type in the amount of money to be collected, otherwise it will default to the amount to be collected.

TouchScreen Setup

If you are planning on using the touchscreen setup program there are some things that must be setup before hand. The first things you should look at are setup are the system variables ExceptionCatSA, ExceptionCatTT, HoldMenuDelay, PayCatOrder, SaleQtyDelay, and TSPayDefToZero. For the most part they will have default values that should be ok for most people.

After that is done you will need setup some menus. This is done via the touchscreen menus program that can be found by going to Maintenance -> General Maintenance -> Touchscreen Menus. This is the program you will use to create your own menu system. When you first come in here you should either hit the New button to create a new menu from scratch, or the Change button to load up an existing menu to change it.

The first tab is used to add new buttons and to set the properties of a single button. You can use this tab to change everything about a button and add or delete buttons. The first thing you have to select is what type of button you want to have. There are nine button types: jump back, jump home, jump to menu, no sale, sell e-card, sell nic, sell sku, station, and tab.
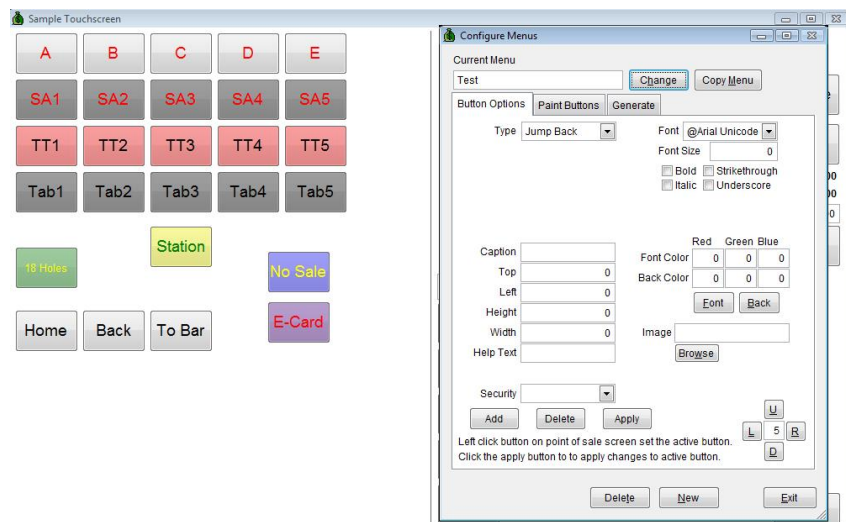
The Jump buttons take you to a different menu. Jump home takes you to that workstations home menu, jump back takes you back a menu and jump to menu takes you to whatever menu that button is setup to take you to. The no sale button activates the nosale feature and is the same as hitting F7. Sell e-card, nic and sku are used to sell an e-card, non-inventory category or a sku. Station buttons activate the station check in / checkout screen. Tab buttons are holding spaces where you can run a tab for a customer.

To add a button to a menu, make sure all of the button's attributes are filled in and hit the add button. The Button Options tab will look a little different based on what type of button you are adding. If you are adding a jump button you will then have to pick the menu you want to jump to. If you are adding a non inventory category button you will then have to select the non-inventory category, and if

that non-inventory category has any subcategories, you will need to select one of those also. If you are adding a sku button, you must enter a sku.

If you are setting up a button where you are selling something such as a non-inventory category or a sku you must enter a nonzero, positive quantity. Optionally you can enter a price each. If you do not enter a price each for sku the system will pull the proper price based on the typical way AIMsi figures out pricing. If the item is a non inventory category that does not have a price attached to it and you do not enter a price the item will ring up for zero. Typically you would only leave the price at zero for a non inventory item would be when adding a membership check non-inventory category or a value pack redemption non-inventory button.

The top and left fields represent the button's placement, and they are the number of pixels from the top left corner of the button will be placed from the top and left side of the screen. The height and width fields controls the buttons size, and represent the number of pixels tall and wide a button will be. The help text is the text that appears in a pop up window that shows up when you hover the mouse pointer over a button. The description will be the sold description that will be placed in the sold file when this item is rung up. If this is left blank it will be the category description for NI Cats, or the item's normal description if it is a sku.

The controls in the next right side of the Button options tab are used to control the button's visual look. The font, font size, and the four checkboxes under the font size box control the font that will be used on the button's caption. The block of controls under that control the buttons font color and background color, and the image control can be used to add an image to a button.

There are two ways to control a button's placement. The first was is to make sure a button is set as active by left clicking it then click the U, D, L, or R buttons. The value in the middle of that set of controls is the value that the button will be moved in pixels, and clicking each button will move the button that many pixels in the indicated direction. The second way to move a button is trickier but faster. If you left click a button you can use the arrow keys plus the shift and control keys to move a button. the arrow keys alone move a button 5 pixels, CTRL + arrows moves the button in bigger increments and SHIFT + arrows moves the button a pixel at a time. This however only works if the button actually has focus, so if you click anything else after you left click the button the arrows will work normally and not move the button.

To modify or remove an existing button you should be on the button options tab. To modify a button left click the button, that will load it's properties into the program. Then to remove it simply click delete, or to modify it, change any properties you want to alter then click apply.
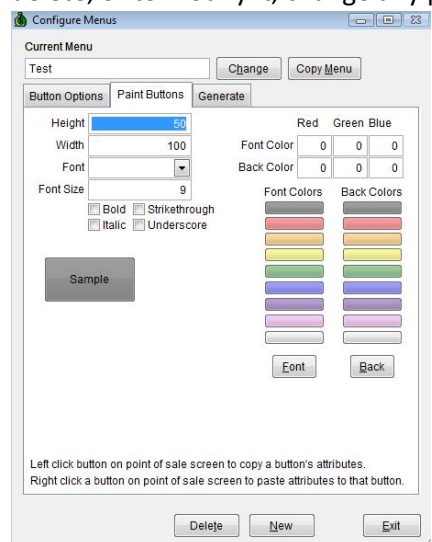

The second tab is used to 'paint' a set of attributes to certain buttons. This can be used to quickly change the sizing and coloration of a group of buttons. Left clicking a button will copy it's attributes to the program and set the sample button up. You can then change any of the coloring and font options. The changes will be reflected in the sample button so you can see what it will look like. When you are done, simply right click any button that has already been places in the sample PoS screen to apply the changes.

The third tab is the generate menu tab. You can use this tab to quickly generate a menu template that you can then fine tune. It will create a menu full of jump home buttons that you can then modify to your needs. To use the generate tab fill out the top portion of the screen. That stuff determines the button's coloring and font options. The bottom part of the screen is where you setup the buttons sizing and layout. The number of buttons will be

the maximum number of buttons the program will create. If you set that to a too high number any buttons that don't fit will not be created. The button width and height control the button's dimensions. The starting top and left represent the upper left hand corner positioning of the first button generated. Buttons will be created from left to right, top to bottom until the number of buttons is reached or until there is no more room onscreen. The space between buttons value is the number of pixels between rows and columns of buttons. The new rows starts at lets you indent the starting position of the first column of buttons.

The left half of the sample POS screen is yours to place buttons in. You should not attempt to place buttons on the right half of that screen because that is where the standard point of sale information is displayed. One note of caution, if you are creating a menu on one computer you should use fonts that you know every computer will have. If you create a menu button using a font that doesn't exist on the computer the menu will be used on it will display as a very plain looking font.
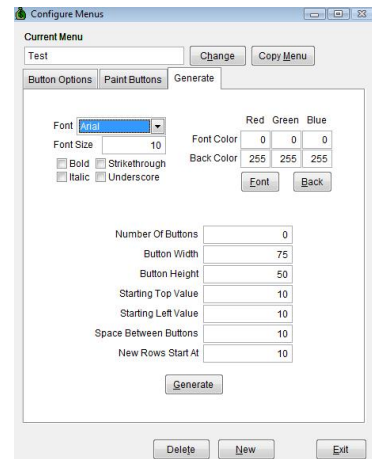
After you have your menus setup you will need to assign each workstation in AIMsi a home menu. This is done in workstation maintenance which can be found in Maintenance -> General Maintenance -> Workstations. Select the second tab and on the right hand side of the screen a little more than halfway down is the home menu drop down box. You should select the menu you want to be that workstations home menu.

T-Scheduler Setup

If you are planning on using the t-scheduler there are a few things you will need to setup first. You should take a look at the three system variables that start with TSched. They will allow you to fine tune the sizes of the boxes that your time slots will occupy. You should also take a look at the EntityCat, EntityCatPick, and EntityName variables to make sure you are able to check in people from the t-scheduler properly.

The first setup program you will need to open up is the entity maintenance program. This is where you setup your scheduling 'entities', be they golf courses, chairs, areas, or even people. The names must be unique and you must select a location for each entity. These will show up as selectable items in the create time slots and T-scheduler programs.
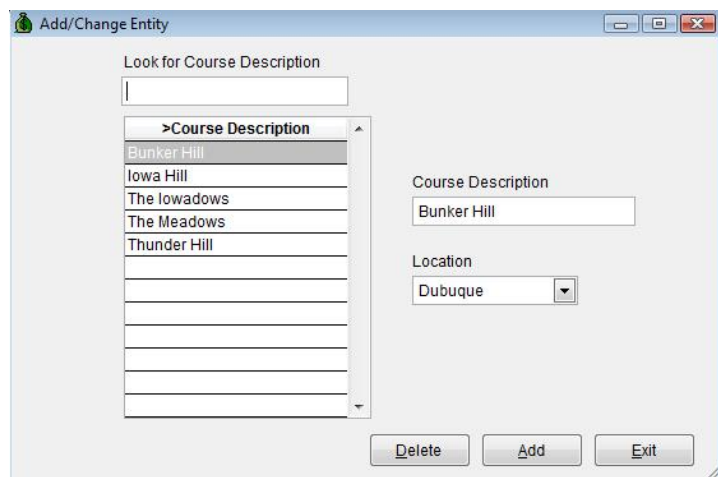
The second setup program will be the create time slots program. This is the program you use to create individual time slots for entities to be assigned schedule records too. First select a location and an entity, then fill in a date range. Then pick a time range that you want to create slots for, a time increment and a min / max number of people that can be scheduled in that time slot.

The setup as shown in the picture to the right will create time slots for the location Dubuque for the entity, in this case a golf course, bunker hill for February 16, 2009. It will create slots from 8 AM to 5 PM, one slot every seven minutes, for a minimum of two people and a maximum of four people. If you attempt to create slots for a day that already has slots but has no one scheduled that day will be cleared and new slots will be created with the new settings.   If there are people scheduled for that day already, the program will not create slots and you will be informed of any conflicts in the box towards the top of the screen.
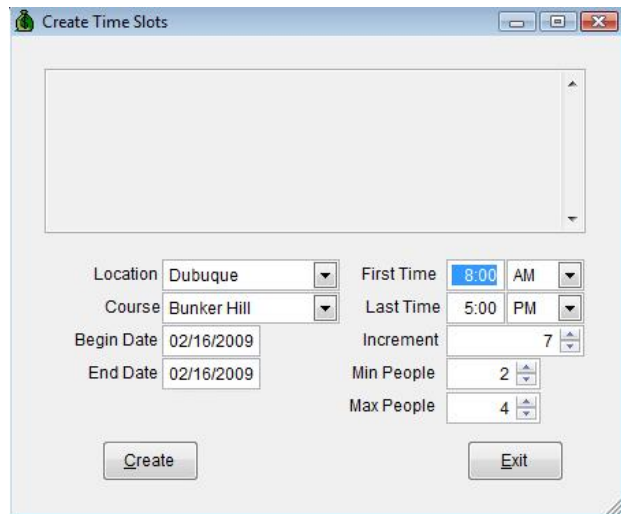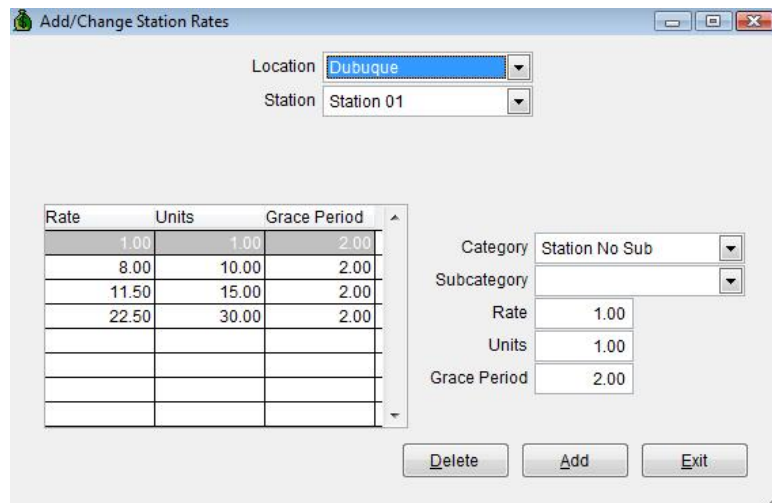
Station Setup

If you have any menus with a station button on it or if you are planning on using the station functionality you will have to set a couple of things up first. There are only two system variables you should look at, they are StnBoxHeight and StnBoxWidth They control the height and width of the boxes that stations will be assigned to.

After that go into Maintenance -> General Maintenance -> Stations. This program is very simple, all you need to do is hit Add, type in a station name and a location, then hit save. Do this for every station you want to create.

The second setup program is the station rate maintenance program. This can be found in Maintenance -> General Maintenance -> Station Rates. This program is where you setup all the ways this station can be rented out for. The first thing to do is select your location and station that you are setting up rates for. Then select a category and if needed a subcategory. The category and subcategory boxes represent which non inventory category will be charged for a particular station when it is rented out. The rate, units, and grace period go together to figure out the charge. The rate is a dollar amount and the units and grace period are minutes. The charge will be the total number of minutes the station was out for minus the grace period divided by the units times the charge. For instance if you have a rate of 10 dollars, a units of 15 minutes and a grace period of 2 minutes for a station that was used for 31 minutes the charge would be 20 dollars. There would be 29 chargeable minutes, which represents 2 15 minute hunks of time at 10 dollars a hunk.

Touchscreen Usage
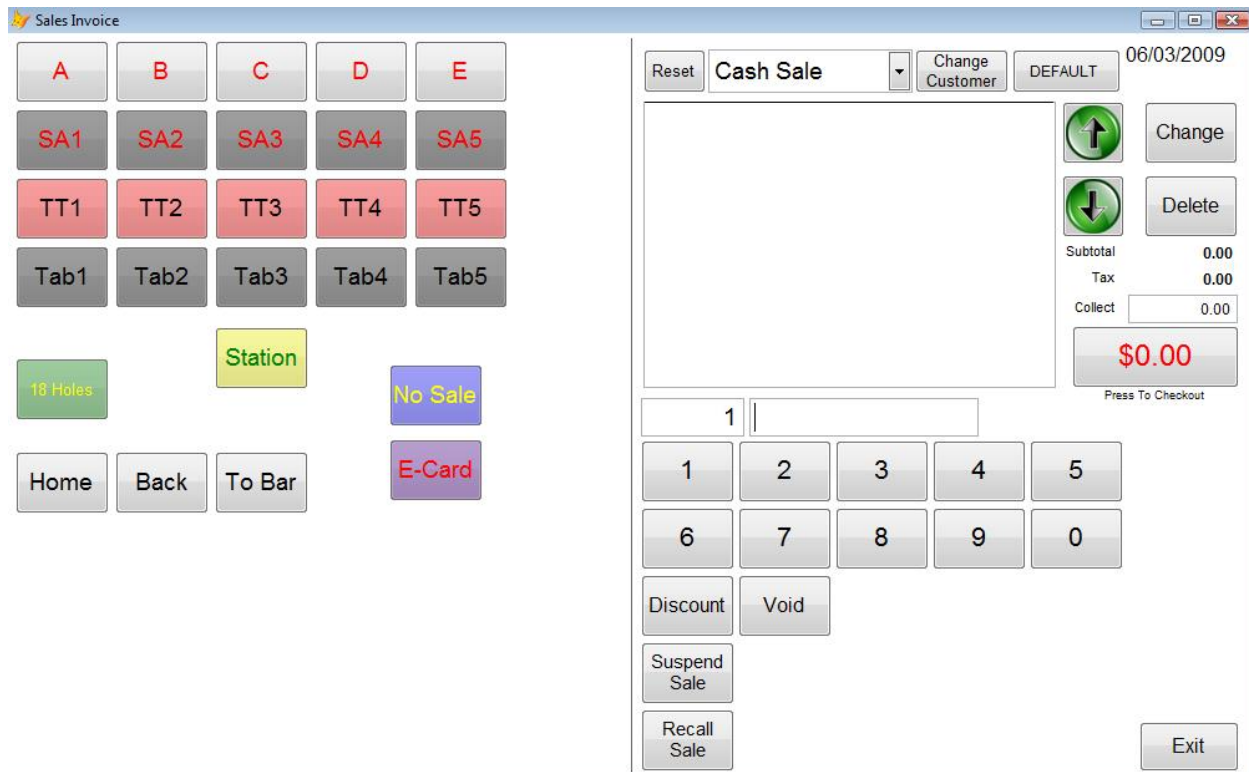
Now that all of your setup is done it is time to go over the basics of actually using the touchscreen invoice interface. The picture above is a sample invoice screen. Starting from the top right hand corner working left we have the salesman button, it reads DEFAULT in the picture. That is the username of the employee that will get credit for this sale. The button to the left of that is the choose customer button. If the customer you are ringing up has an account with you, you should select that button and choose the proper customer. The drop down box to the left of that is the customer information drop down, you can select it to see the customers address and other information. To the left of that is the reset button, which simple clears out and items and resets the form for a new sale.

Running along the right hand side of the screen from top to bottom we have the green up and down arrows. Those will highlight different line items in the item grid in case you need to delete or otherwise modify a particular line item. The change button brings up an interface that you can use to change an item's description. The delete button will remove an item from the sale. The button below the subtotal, tax, and collect buttons with the red font is the button that actually posts the sale and will bring up the payment collection screen.

The textboxes below the item grid are where if need be you can type in a quantity manually and / or type in or scan an item that there is no button for. Below that we have the number row. Hitting those will change the quantity field. If you hit numbers in rapid succession they will be put together as a quantity. For instance if you hit 1, 2, 3 quickly, the quantity will be 123. If however you hit 1, wait a minute then hit 2, the quantity will be 1 at first, then will be overwritten with 2.

The buttons under that do some special functions. The discount button will bring up the discount screen for the currently selected line item. You can use that screen to apply a discount to a line. The void button will negate any quantity you enter with the number buttons, then you can scan an

item or click a button to sell a negative quantity. This will have the effect of returning an item. If you end up with a negative dollar amount and hit the post button (with the red font) you will be prompted to return money to the customer.

The suspend and recall buttons work together. If you are at the end of a sale and someone left their wallet in the car you can hit the suspend sale button then the post button and the system will save that sale for later. When you wish to finalize a suspended sale, hit the recall button, pick the saved sale, then hit the post button.

The right hand side of the screen is where your custom designed menus will load. For the most part those buttons will add items to the item grid for sale but there are a couple of special types of buttons that will do other things. Any button that is a jump button will load up another menu. A jump home button will jump you to your home menu, a jump back menu will take you one menu back, and a jump to button will take you to whatever menu that button is assigned to. Nosale buttons run AIMsi's no sale routine, which can include opening a cash drawer and asking for a nosale reason. E-Card buttons bring up the sell e-card screen where you can sell an e-card to a customer.

There are a couple of button types that require more of an in depth explanation. The tab button has some functionality that is more complex. Tab buttons can be used to store and recall sales multiple times and are ideal for bar tabs. If you add a couple of items into the item grid then click on an empty tab it will prompt you for a tab name. After you enter a valid tab name that button will take on that name, and those items will be pulled out of the item grid and saved. If you want to add items to the tab, you need to hit that tab button, which will refill the item grid with the current tab, then add or delete items, then hit that same tab button to save them back. To finalize the tab and clear it out you will have to hit the tab button to pull the tab back in then hit the post button. That will turn the tab into a sale and clear it.

The other button type that is a bit different is the station button. When you hit a station button the station check in / checkout form will appear. The green squares represent open stations. Black squares are empty and contain no station, and red squared are stations that are already in use. The button on the top center of the form can be used to change locations, and the green arrows are scroll arrows.

There are two different ways to use a station. The first way is with a fixed check in. If you hit the fixed time button you will be prompted to select a rate for that station. The station will automatically be marked as in use from then until 1 unit's worth of minutes + the grace period. Then this screen will go away and the appropriate charge will be pulled into the invoice program. All you need to do is post the sale, and that station will clear itself out at the correct time.

The other way you can rent out station time is with the In / Out buttons. You can hit the in button and pick a rate and a record will be created that that station was checked out at that time. No

charge will be created or pulled into an invoice at that time. Later on when that person is done using a station you should hit the Out button, and the charge will be calculated based on how much time they used.

T-Scheduler Usage

This program is where the entity scheduling happens. You can schedule people for different time slots, you can delete schedules, you can access the invoice screen to do sales, you can issue rain checks, and you can move and copy schedule records.

The three buttons in the upper left hand corner marked Add, PoS, and Misc determine which menu is active. The menu is located below the Add button, and clicking any of the three buttons above and to the right of it will change the buttons that show up on the menu. The up and down buttons below that scroll the time slot area up and down by one hour at a time.

To the right of the Misc button there is the date field, if you hold a click, or press down with a touchscreen device for a second then let up on that field a right click menu will appear, and one of the options will be a calendar. You can use that to quickly find a date, otherwise the today button will snap the schedule back to today and the + / - buttons will change the day by one day. The button to the right of the minus button is the location button. Clicking that will bring up another form that will show you all of your available locations so that you may quickly change locations. The button the left of the Exit button is the entity button, which will show you the entities available for the currently selected location.

To add a reservation or a schedule record for someone click the time slot they want, then hit the Add button. You will be presented with a new screen (pictured to the right). In that new screen you can select how many people need to be scheduled and who they are. For instance if two people need a slot and you know who both of them are, click the Add Slots button and the screen will expand to have two sets of 'slots taken' controls, and you would set each set to use 1 slot, and either find each person if they are returning customers or type in their name if not.

If you are taking a reservation over the phone and someone calls in and wants four slots, but you can change the slots taken to be four, and enter that person's name and the system will lock up four slots for him or her.

The PoS menu holds the check in button where you can check people in that are coming in to claim a time slot. You can also use the quick sale button to do a sale if someone just wants to buy
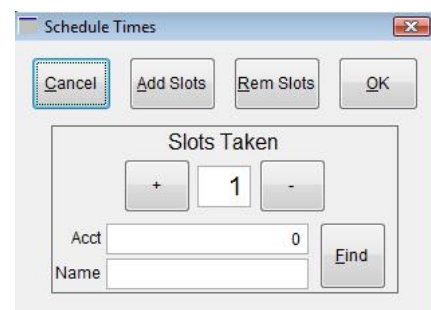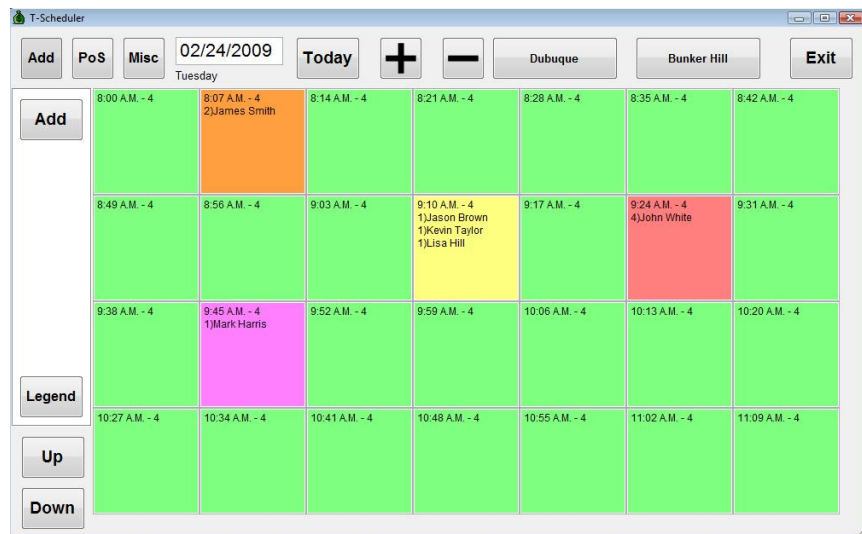
something. The last option in there would be the rain check button, which you can use to issue rain check coupons. To issue a rain check hit the Rain check button. This will bring up a form that will display all of the rain checks you have setup in the system. Pick the one you want to issue and it will automatically print to the default printer.

The Misc menu holds the move, copy, and clear buttons. Move and copy behave similarly except the copy doesn't remove the source schedule records. To do a move / copy click the source time slot, then click move or copy, then select the slots you want to move or copy then click a destination time slot. Please note that moving or copying a billed record will result in a non billed record being created. To clear a time slot click the slot you want to clear then click the clear button.