MARQUES

USER HANDBOOK | EN

QORE

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MARQUES

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Overview

INTRODUCTION

QORE is a management software for TPOS devices, with the goal of facilitating the sync of information between the different devices connected to the same stores, like products, prices, users, and so on.

Qore also collects the information of the documents processed by the different devices so as to create statistical maps with sales information, which can be viewed by date, client, store or category.

SYNC WITH ETPOS

The only necessary requirement for QORE to be able to sync with ETPOS devices is an internet connection on both systems; one should also make sure the fiscal zone is the same on the ETPOS terminals as well as Qore.

Icon representing an active connection to an ETPOS device. In case the connection is offline,

First, however, one must give indication to ETPOS that it will start receiving commands from Qore. The menu where we give that indication is on:

- **SYSTEM** > **SETTINGS** > **NETWORK SETTINGS** > **OPTIONS** tab
  - **RECEIVE COMMANDS VIA ETWS**:

Having selected this option it is now possible to link an ETPOS device to Qore, which requires only the IP address for that device (under the **NETWORK SETTINGS** window) and the communication port (7878 by default)

After inserting the IP address of the ETPOS device when adding it to the list of devices on Qore, the latter can now send information to ETPOS (e.g.: a new product that has been created) or receive information from it (e.g.: the day's transactions).

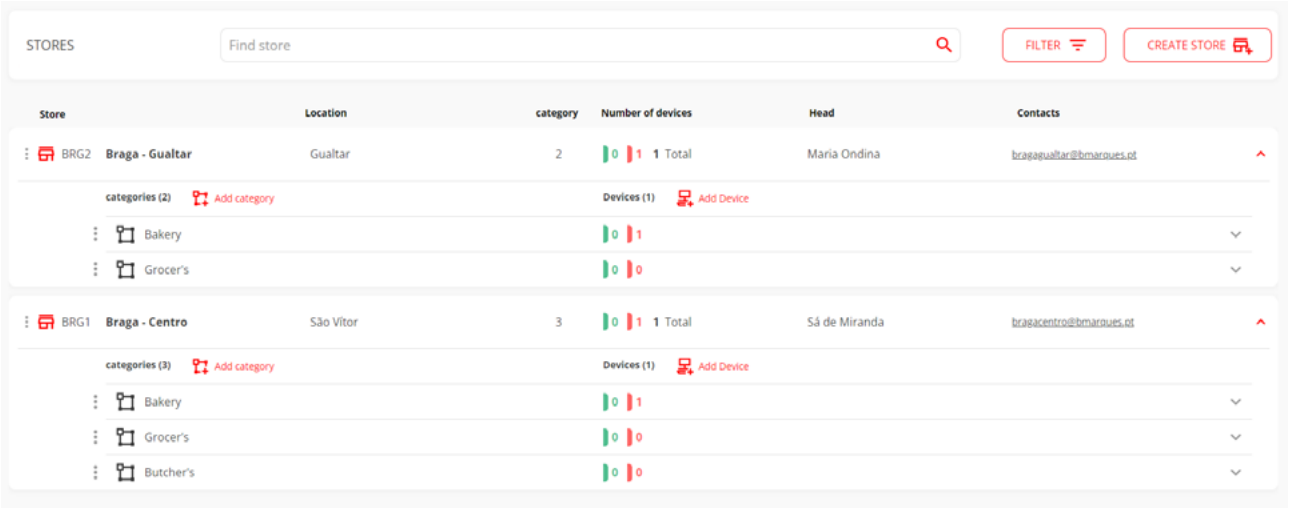
NAVIGATION

When logging into Qore, the first page displayed is **STORES**. Here it is possible to get an overview of the stores, the categories each one possesses, and the device, online and offline (in green and red, respectively) attached to each category.

Regardless of the page being viewed, however, Qore always displays two bars framing that page: the header and the sidebar.

HEADER | Where we find Qore Settings and user options, as well as the buttons for establishing communication with ETPOS: send and receive.

SIDEBAR | Where we find most of the options for Qore. We can browse through different types of data, like products, families, ingredients, etc.; schedule importing and exporting tasks for those data; and manage the devices viewing profiles.



USER

It is in the user area that we can logout and see the user information and permissions. If one wishes to edit this information, we have a button in the bottom of the page called **EDIT PERSONAL INFORMATION**.

Installation

TECHNICAL REQUIREMENTS

Software and Operating System:

- Windows 10 ou superior (32-bit ou 64-bit).

Hardware:

- Core i5 Processor;
- 8GB RAM;
- 1 x Ethernet connection.

Ideally, having an SSD disk for the operating system and a second disk of at least 1TB for data storage.

SOFTWARE INSTALLATION

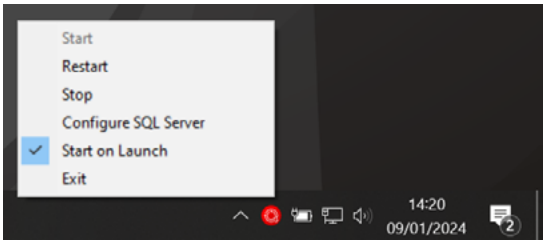
The QORE software installation process requires two programs to run properly:

- Microsoft SQL Server Management Studio
- Microsoft SQL Server Profile

In case the machine in which QORE is to be installed does not already have these two programs, the installer will detect that and install them along with QORE itself.

The installation process goes as follows:

1. **ADMIN PERMISSIONS** | QORE always requires admin permissions, not only during installation, but any time it is started. If there are admin permissions, the installation process will proceed as any other software program.
2. **RESTART COMPUTER** | After installation, it is recommended to restart the computer. After that, when installed, the software will run in the background, as a process.
3. **CHECK INSTALLATION** | QORE should have placed an icon in the desktop (shortcut), as well as one in the traybar, intended to control the process running in the background.
4. **WORKING WITH QORE** | QORE runs as a process, and starts automatically along with the operating system; this means it will be running even if the interface isn't opened in the browser. To check if it's running, we can right-click the icon in the traybar; if the **START** option is deactivated, that means it is running.



First Settings

OVERVIEW

The Qore setup begins by inserting the information for three components:

- Stores
- Store Categories (fishmonger's, bakery, etc)
- Devices

Given that several stores share similar categories, these are created first, so they can be linked to any stores created afterwards that might carry them.

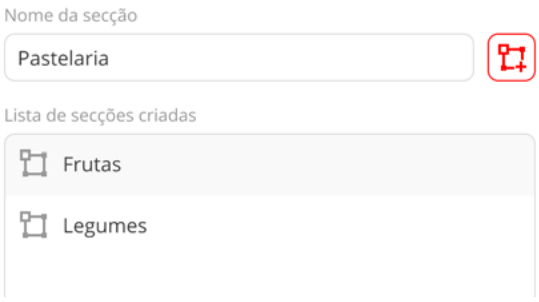
BASE SETTINGS

The first things the system asks us to define are related to the overall performance of the platform:

- Working Language;
- Fiscal Zone;
- Currency;
- Date Format;
- Nr of Decimal Places.

STORE CATEGORIES

Categories are created simply by giving them a name, like GREENS, BAKERY or BUTCHER'S, and clicking in the **SECTION** button. This category will come up in the list on screen. By creating a category, it should not be associated to a **STORE** in its name, as a category can be present in many different stores, and the same one is meant to be used in how many created stores carry it.



STORE

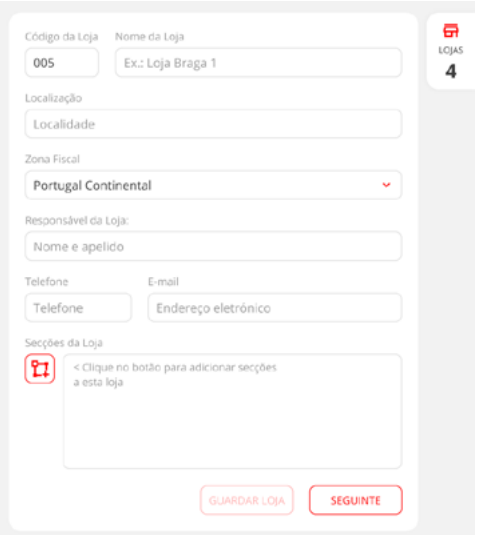
Store information to be inserted:

- Code to be assigned
- Name
- Location
- Fiscal Area in which it will operate
- Head of the store
- Contacts (phone number and email address)

In the same window a button will come up for the user to assign pre-created categories to the store being created now, by clicking the **ASSIGN CATEGORY** button. At that moment a new window will pop up in which the categories can be selected and then assigned; in case there's a category missing, it is possible to be added to the list in this screen.

As the categories are linked, these will be listed on the setup tab. When all categories have been assigned, and the correct information inserted, the button **SAVE STORE** should be pressed.

This section allows for the possibility of created several stores before proceeding. By selecting **ADD STORE**, a count will come up on the right hand side which shows, when clicked, the stores already created.



DEVICES

Device information to be inserted:

- Code to be assigned
- Name for the device
- Store and category to which it will be attached
- IP address and communication port (7878 by default)
  - It's possible to test the connection to the device, to ensure that the same has been established before saving and proceeding.

Syncing with ETPOS

QORE is as a centre of communication between several ETPOS devices; this communication works both ways, which means it's possible to **RECEIVE** information from those devices, as well as **SEND** it across to the devices that may have been linked to the system.

These options are found in the header, when they are meant to be carried out at will; it is also possible to create routines (called **TASKS**) to automate this data sync, so it is done in a specific date and time. When syncing information, it is always possible to select which pieces of information should the sync apply to.

SEND/RECEIVE

The options to receive and send establish communication with the devices in the present. It takes two steps to perform this operation:

5. Select the information that should be synced;
    - When sending data, there is still an option to send only data that has been changed since the last sync, or all of it.
6. Select the devices with which communication is to be established.

When the devices have been selected, and the send/receive button is clicked on, the system will show a visual representation of the information being sent; when it finished, a sum-up of the information that has been sent/received will appear on the left-hand side of the same window.

TASKS

Tasks are meant for scheduling operations of automated reception or sending of information. The scheduling can be made for a weekly basis (date and time, for instance: every Tuesday and Thursday at 6 pm), or cyclically (e.g.: every half hour).

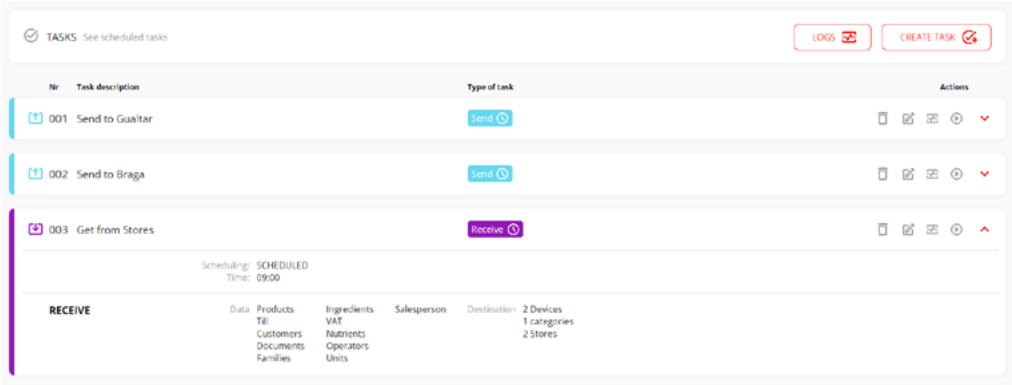
There are three types of tasks that can be created:

IMPORTING | Scheduling an import of a database in a .txt format
- It's necessary to insert the structure of the file into Qore, so it can be read correctly.

SEND | Send data from Qore onto ETPOS devices

RECEIVE | Receive data from ETPOS devices onto Qore

These operations is structured in the same way as the immediate send/receive ones: it is necessary firstly to select which information the sync will apply to, and then the devices with which the information should be exchanged.



Task panel, with 3 created tasks. Above, we can see a button to access the task logs, and one to create new tasks.

apagar tarefa

editar tarefa

registo

desempenhar tarefa

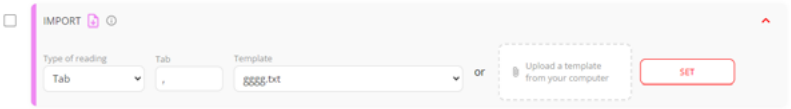
IMPORTING FILES FORMAT

For the import of files, two steps are necessary: format a template and load the relevant file; formatting the template requires two further sub-steps: tell Qore what the format of the file to be imported is (which will form the basis of the template), and then match the section of the files with the product fields on Qore. The steps are detailed below:

```
A001,White bread,0.12,6,Bakery
A002,Whole Wheat bread,1.00,6,Bakery
A003,Ciabatta,0.85,6,Bakery
A004,Baguette,0.65,6,Bakery
```

Example sample of a file to be imported into Qore, using commas as the separator, and with the following order: code, descripor, price, VAT value, and category.

FILE FORMAT I set the type of instruction and, if it is by separators, which separator is being used on the file to be imported; next, we load a file to act as a basis for those instructions, which will become available on the list of existing templates, so as not to have to load new instructions to files with the same structure, or different versions of the same file.



MATCH I Having told Qore how many fields the file has and how they are srtuctured, by clicking the match button, it is possible to match the types of information on the file with the product fields on Qore (see example sample).

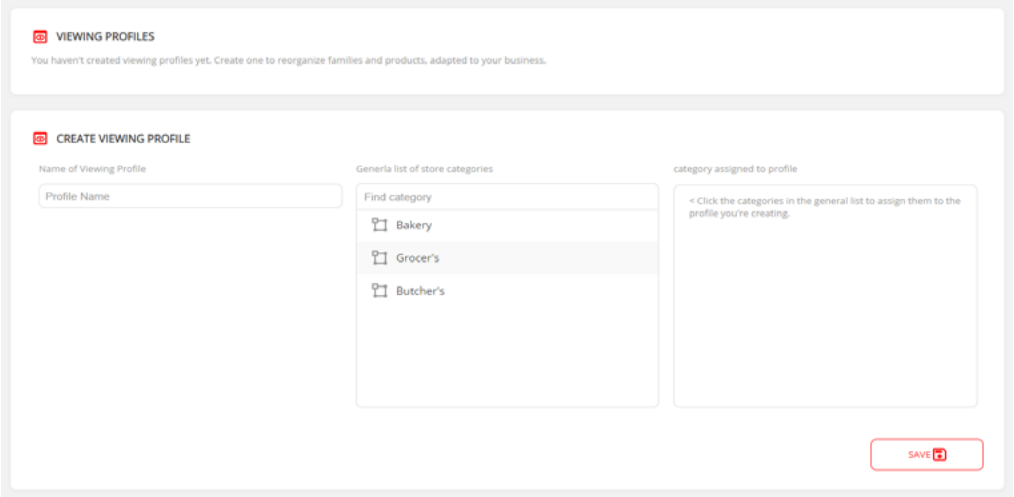
Having completed the matching, now the task can be created, and only then will the option to load the file whose information we want to import will become available.

LOAD FILE I When the task is created, we can now load the file with the information the task is supposed to extract onto Qore.

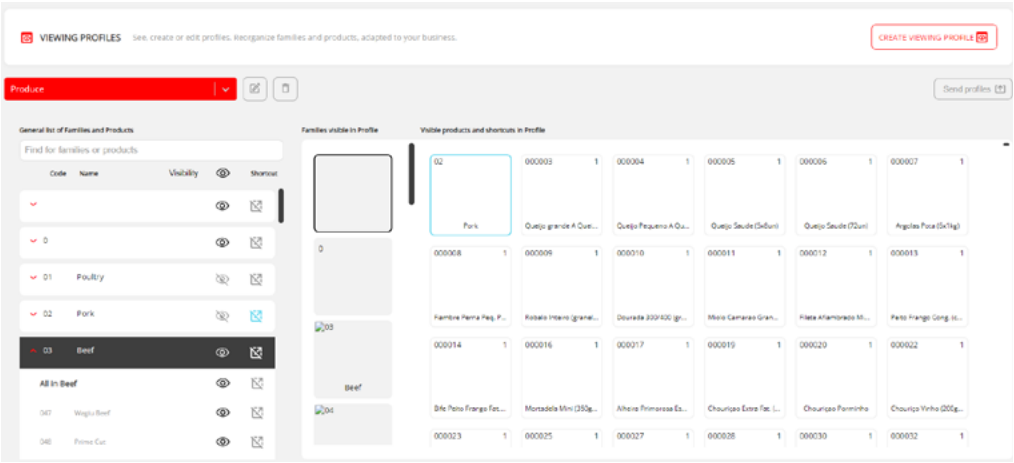
VIEWING PROFILES

Viewing profiles are a tool meant to manage the layout of the menus in ETPOS. With Qore, it is possible to create viewing profiles and connect them to all the stores where the category to which the profile was linked exist.

The profile is created and managed directly in Qore. When it is created, the system requests that the store categories on which this profile will be used are attached immediately; these can be altered afterwards if necessary.



As soon as it is created, the page displays two panels: on the left, the full list of the products that can be shown on the profile, organized by family; on the right, a preview of how the screen will look like, divided by the families (the top one on ETPOS) and the page shown when one selects **FAMILY**.



invisible product

visible product

available shortcut

created shortcut (product)

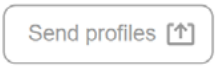
created shortcut (family)

Managing what is made visible in the profile is done via the **VISIBILITY** and the **SHORTCUT** buttons. When making a family visible, it's also possible to select which products within that family is visible, and which aren't.

Another available feature is the shortcut, created to allow a product from a given family to be placed inside a different family. The shortcut does not move the product from one family to another, it merely makes it visible in a different family for convenience.

	alternates between making the item visible or not.
	creates a shortcut for the product inside the family being viewed at the moment, even if the item doesn't belong to that family.

SEND PROFILES



Viewing profiles are the only piece of information that is not sent via the SEND button on the header bar; they are sent directly from the profile management screen, via a button named send profiles, placed in the top right hand side corner.

When profiles are sent, they are applied to all the stores carrying the category to which the profile has been assigned. This process is not reversible.

Data

Most of the data QORE syncs with ETPOS devices are available to be consulted and edited. Others, like documents and customers, are only downloaded from the devices in order to produce the statistical maps. Below a table is shown with the different types of information manageable on Qore, with each of their specifications.

PRODUCTS

The items being sold using ETPOS, with the possibility of inserting several relevant information, such as the unit by which it is counted/measured, expiration date, and others.

Prices can be edited directly (up to 4), along with cost; the system calculates the profit margins for each price given these two pieces of information.

It's also possible to attach a product to a family, as well as inserting a picture.

FAMILIES

Groups of products. When using an ETPOS device, families are the top-level screen, which helps organize how products are browsed. Families can have a description and an image to help contextualize them, as well as information to be put on the labels for all products of this family.

INGREDIENTS

In the system, an ingredient is a list of components of food products, being necessary to build the labels that are meant to accompany them. In this section ingredients are created, then each ingredient is attached to the relevant product(s): an ingredient created here can be attached to more that one product.
As to the structure of what the created ingredient contains, this can be added as a list or as a continuous descriptor – both formats aren't necessary.

NUTRIENTS

In this section the nutritional tables can be built. The table has two components: one field for free text, where the name of nutrient should be inserted, and two columns for different quantity values (e.g.: indicating the amount of sugar per 100g and per 650g, which is the size of the pack).

UNITS

Units define the way in which the quantity of a product is processed; for instance, baguettes will be sold by the unit, whereas fruit will be weighed and sold by the kilo. To allow for that, it is necessary to create both units in this section.

TAX

Area meant for defining the tax values for different Fiscal Areas. Given that it is usual for fiscal areas to have different tax rates for different things, this is where that information is managed, by inserting a description and a value for each VAT amount.

The Fiscal Zone can only be changed in the general settings, and it should be set to the same Fiscal Zone as ETPOS, so that the sending/reception of information can be performed smoothly.

MAP OF DATA ITEMS AND HOW THEY ARE RELATED

PRODUCTS
Code
EAN Code
Description (2)
FAMILY
Unit
Tax
Prices (4)
Expiration Date
INGREDIENTS
NUTRIENTS
Batch

FAMILIES
Code
Description (2)
Type
Category
Label

INGREDIENTS
Number
Continuous Description
Listed Description

NUTRIENTS
Number
Description (2)
Nutritional Value

UNITS
Number
Description
Number of decimal places

TAXES
Code
Description
Value (%)

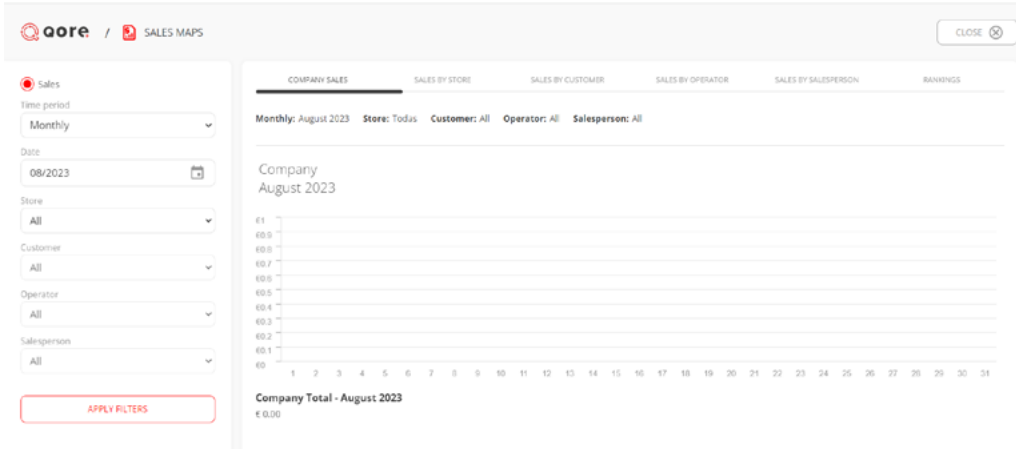
Statistical Maps

STATISTICAL MAPS are tools that collect information and make it available for viewing, based on the data received from ETPOS devices. This information is structured per month. There are four types of maps:

- Sales
- VAT
- Till
- Products

The main page of the maps presents a sum-up of the sales in the current month, trimester and year. To see information in more detail, it's necessary to choose one of the types of map listed above, and select the relevant month.

The data in each map is made available according to several points of view: for instance, when created a **SALES** map, it's possible to view it organized by Store, by Salesperson, by Customer, etc. In each of these views, it's also possible to **FILTER** information – in case one wants to see the Sales per Salesperson, but only in a given store, filtering others out.



When in the map view, the sidebar disappears; in order to navigate back into other areas of the system, instead of going back in the browser, there is a **CLOSE** button in the top right-hand corner, which takes us back to the map landing page, from where we can now browse to other areas of **QORE**.

TABLE OF THE STATISTICAL MAPS

TYPE OF MAP	FOCUS	DESCRIPTION
SALES Total sales amount	COMPANY	Sum of all sales made by the company.
	STORE	Displays sales volume by store.
	CUSTOMER	Organizes the sales volume by the customer for which they were processed.
	OPERATOR	Organizes the sales volume by the operator that processed them.
	SALESPERSON	Organizes the sales volume by the salesperson that registered them.
	RANKING	Compiles sales records into graphics orgnized by store, clients and salespeople in a ranking format.
VAT Total charged VAT	COMPANY	Maps with the sum of charged VAT.
	STORE	Displays VAT value by store.
	STORE / DOC TYPE	Displays VAT value by the type of document in which it is registered, and which stored processed it.
TILL Total billed amount	DAILY	Show the billed VAT amount per day.
	LOJA / TERMINAL	Show the billed VAT amount for each terminal, organized by store.
PRODUCTS Outgoing products	PRODUCTS	Shows total outgoing products for a period.
	FAMILY	Shows total outgoing products for a period organized by family.

Settings

GENERAL SETTINGS

The settings found here are system-wide, which means they have an impact in several areas of Qore. At the moment, these are:

- Base Currency (shows up by default in newly created product's prices)
- Currency symbol
- Language
- Fiscal Area

INVISIBLE PRODUCTS

Under settings there are two options regarding sending products and families:

- New products as invisible
- New families as inviible

In case there are any profiles set, when these are sent over to ETPOS, the family visibility settings defined there override those set here.

USERS

It is possible to create and manage users with different levels of permissions on Qore, attaching to each user a unique code, username and email address; the access credentials will be the username and password. A user can be deactivated, which will remove its access to the platform while so.

Regarding permissions, there are five that can be granted or removed from a user:

- Change Data
- Send Data
- Receive Data
- View Maps
- Access Settings

DATABASE

The database collects all of the information and settings. The system makes it possible to create an immediate export, via the export now button, but also to schedule a weekly export of the database; for that, one must choose the weekday(s) and time it should be performed in. The formats into which the database can be exported are .txt and .csv

The system also has the possibility of erasing the database; when this option is triggered, all of the information will be removed from Qore, returning it to its initial state; this means that it will become necessary to perform the first settings on the wizard again, and create stores, sections and assign devices to them once more.

LICENSING

Area with information regarding software licensing: the email address to which the license is attached, as well as the activation key of the current license and its expiration date.

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