EMPLOYEES

Use the Employee Management view to manage employee profiles and permission roles across multiple locations.

Managing Employee Profiles

To display the Employee Management view:

- On the main menu, click **Employees**.

SEARCHING EMPLOYEE PROFILES

- In the **Search** textbox, enter a first name, last name or employee ID then click **Search**.

ADDING A NEW EMPLOYEE PROFILE

1. On the **Employees** menu, click **Add Employee**.
2. Complete the **General Info**, **Stores** and **Password Management** tabs as needed then click **Save**.

VIEWING AND EDITING EMPLOYEE PROFILES

1. On the employee list, click the **Employee ID**.
2. Edit the details as needed then click **Save**.

DELETING AN EMPLOYEE PROFILE

1. On the employee list, click the **Employee ID**.
2. At the bottom of the view, click **Delete**.
3. When prompted, click **Yes**.

Managing Permission Roles

To display the Permission Roles Management view:

- On the **Employees** menu, click **Permission Roles**.

ADDING A NEW PERMISSION ROLE

1. Below the permission roles list, click **Add store role** or **Add Multi Location role**.
2. On the **General Info** tab, enter an **English** name for the role then click **Save** (a **French** name is optional).
3. Set the permissions in the appropriate tabs and click **Save**.
   - **Store Roles**: **POS** tab (POS application) and **Administration** tab (Store Admin application).
   - **Multi Location Roles**: **Multi Location** tab.

EDITING A PERMISSION ROLE

1. On the permission roles list, click the **Role Name**.
2. Make changes as needed then click **Save**.

DELETING A PERMISSION ROLE

1. On the permission roles list, click the **Role Name**.
2. At the bottom of the view, click **Delete**.
3. When prompted, click **Yes**.

STORES

Use the Stores Management view to manage store-specific settings across your Morris system.

Configuring Morris Store Settings

To display the Stores Management view:

- On the main menu, click **Stores**.

SEARCHING MORRIS STORES

- In the **Search** textbox, enter a store name, store ID, store email or phone number then click **Search**.

VIEWING AND EDITING STORE INFORMATION

- On the store list, click the **Store ID**.

To view or edit store contact information:

1. On the Store Details view, click the **Contact Information** tab.
2. Enter the store contact information then click **Save**.

To view or edit receipt options:

1. On the Store Details view, click the **Receipt Options** tab.
2. Configure the receipt options as needed then click **Save**.

To view or edit general store-wide settings:

1. On the Store Details view, click the **Settings** tab.
2. Configure the options as needed then click **Save**.

NOTE: The **Settings** options include: Batch Close, Open Cash Drawer, Inactivity Periods, Search Settings, Email Low Stock Notification, Service Required, Tipping, Commission, Store Credits, Layaways and Invoices.

To view or edit POS taxes:

1. On the Store Details view, click the **Tax** tab.
2. In each applicable **Registration Number** textbox, enter the registration number assigned to you by the taxing authority.
3. To change the current tax rate for an applicable tax, enter the new rate in the corresponding **Tax Rate** textbox.
4. Click **Save**.

To view or edit lanes:

1. On the Store Details view, click the **Lanes** tab.
2. Enter the lane name in the **Name** textbox *with no spaces* (e.g. Front1, Front2 etc.). The Morris PC name appears by default.
3. Select the **Use a Pinpad** checkbox as appropriate.
4. Indicate if the lane uses an **Onscreen Keyboard**.
5. Select the **Reassign Lane** checkbox if you need to reassign the Morris PC to a different lane.
6. Click **Save**.

CONFIGURATION

Use the Configuration Management view to manage Morris Multi Location application settings.

Configuring Multi Location Settings

To display the Configuration Management view:

- On the main menu, click **Configuration**.

CONFIGURING STORE SHARING

1. On the Multi Location configuration view, indicate if your Morris Stores can share:
   - Customer information
   - Store credits
2. Click **Save**.

CONFIGURING STORE INVENTORY EDITING SETTINGS

1. On the Multi Location configuration view, indicate if full inventory editing is allowed between your Morris stores.
2. Click **Save**.

NOTE: Enabling full inventory editing gives each of your Morris stores full access rights to modify the Product Details fields across all of your other Morris stores.

Copyright © 2011 Moneris Solutions, 3300 Bloor Street West, Toronto, Ontario, M8X 2X2

All Rights Reserved. This manual shall not wholly or in part, in any form or by any means, electronic, mechanical, including photocopying, be reproduced or transmitted without the authorized consent of Moneris Solutions.

Neither Moneris Solutions Corporation ("Moneris") nor any of its affiliates shall be liable for any direct, indirect, incidental, consequential or punitive damages arising out of use of any of the information contained in this guide. Neither Moneris or any of its affiliates nor any of our or their respective licensors, licensees, service providers or suppliers warrant or make any representation regarding the use or the results of the use of the information, content and materials contained in this guide in terms of their correctness, accuracy, reliability or otherwise. The Morris services are governed by the Terms and Conditions of your Morris Agreement.

If you have debit and/or credit processing with Moneris Solutions, your credit and/or debit card processing is separately governed by the Terms and Conditions of your Moneris VISA Merchant Agreement, your Moneris MasterCard Merchant Agreement and/or your Moneris Debit Card and Terminal Agreement, as applicable with Moneris.

Moneris and the Moneris Solutions logo are registered trademarks of Moneris Solutions Corporation. Morris and the Morris logo are trademarks of Moneris Solutions Corporation.

All other marks or registered trademarks are the marks or registered trademarks of their respective owners.

Morris™

Moneris Online Retail Register & Inventory System

Multi Location Quick Reference Guide

For managing customers, inventory, suppliers, and employees, running reports, and configuring settings across multiple locations.

For More Information and Assistance

Toll-free: 1-888-260-5494
Email: morrissupport@moneris.com
Web: moneris.com/morris/support

Moneris SOLUTIONS

Morris ML QRG v1.0 (12/11)

CUSTOMER, ORDERS, INVENTORY AND SUPPLIER MANAGEMENT

Use the Morris Multi Location main view to manage customers, orders, inventory and suppliers. The view appears automatically when you log in.

Managing Customers

To display the Customer Management view:

- On the main menu, click **Customers**.

SEARCHING CUSTOMERS

- **Simple Search:** In the **Search** textbox, enter a customer name, ID, email, phone or status then click **Search**.
- **Advanced:** Click the **Advanced Search** button (), enter the search criteria then click **Search**.

EDITING CUSTOMER DETAILS

1. On the customer list, click the **Customer ID**.
2. Edit the customer details as needed then click **Save**.

Managing Orders

To display the Orders Management view:

- On the main menu, click **Orders**.

SEARCHING ORDERS

- In the **Search** textbox, enter a customer name, customer ID or order ID then click **Search**.

VIEWING TRANSACTION DETAILS

- On the order list, click the **Order ID**.

NOTE: To filter the order list by transaction type, select the desired **Transaction Type** checkbox(es) then click **Search**.

Managing Inventory

To display the Inventory Management view:

- On the main menu, click **Inventory**.

SEARCHING PRODUCTS

- **Simple Search:** In the **Search** textbox, enter a Product ID, Product Name, supplier UPC or status then click **Search**.
- **Advanced:** Click the **Advanced Search** button (), enter the search criteria then click **Search**.

MANAGING PRODUCTS

To view product details:

- To view product details, click the **Product Name** or **Product ID** on the product list.
- Drill down through the product category hierarchy tree.
- To display a category's Product Names and Product IDs, click the corresponding link in the hierarchy.

To add a new product:

1. On the **Inventory** menu, click **Add Product**.
2. Complete the **General Info** tab as needed then click **Save**.
3. Enter additional product details in the remaining tabs as needed then click **Save**.

To edit the default Product ID:

1. Click the **IDs** tab then click the **Product ID** in the table.
2. Enter Product ID details as needed.
3. Click **Save** at the bottom of the view then click **Close**.

To add other Product IDs:

1. On the **IDs** tab, click **Add New ID**.
2. Enter Product ID details as needed.
3. Click **Save** at the bottom of the view then click **Close**.

To edit a Product Name or Product ID:

1. On the product list, click the **Product Name** or **Product ID**.
2. Make changes as needed then click **Save** at the bottom of the view.

NOTE: To use product categories, brand names, attributes, pricing groups, promotions or fees, see Morris Help.

Managing Suppliers

To display the Supplier Management view:

- On the main menu, click **Suppliers**.

SEARCHING SUPPLIERS

- In the **Search** textbox at the top of the **Suppliers** menu, enter a supplier name, ID, email or phone then click **Search**.

ADDING A NEW SUPPLIER

1. On the **Suppliers** menu, click **Add New Supplier**.
2. Complete the **Details** tab as needed then click **Save** (**Notes** are optional).

VIEWING / EDITING SUPPLIER DETAILS

1. On the supplier list, click the **Supplier Name**.
2. Click through the **Details**, **Notes**, **Products** and **Purchase Orders** tabs as needed.
3. To save any changes, click **Save**.

PROCESSING A PURCHASE ORDER (PO)

To create a new PO for a supplier:

1. Click the supplier's **Purchase Orders** tab then click **Add**.
2. Select a store and click **Continue** to display the Create a New PO popup.
3. Click **Add** to select and add products to the PO as prompted then click **Close** to return to the popup.
4. Enter the quantity of the product(s) to order.
5. To generate a PDF of the PO and change its status to **Ordered**, click **Generate** at the bottom of the popup.

   NOTE: To save the PO as a Draft (to edit and generate later), click **Save as Draft**.
6. When prompted, click **Download** to save and print the PO OR click **Email** to email the PO to the supplier (an email address must be set up in the supplier's profile).

To complete the PO by manually changing its status:

1. On the supplier's **Purchase Orders** tab, click the PO ID.
2. At the top of the PO Details popup, select **Received** from the status drop-down list.
3. Click **Save** then, when prompted, click **Yes**.

REPORTS

Run Morris Multi Location reports to track sales, inventory, customers, etc.

Running Reports

To run a report:

1. On the main menu, click **Reports**.
2. On the **Reports** menu, click the report category.
3. On the report list, click the report.
4. On the report's screen, specify a time period and, if applicable, specify other search parameters then click **View**.

Report Types

FINANCIAL

- Sales
- Layaways
- Invoices
- All Transaction Types
- Totals by Payment Method
- Gross Margin
- Cash Register Total Tax
- Batch Close
- Payouts
- Store Credits
- POS Discounts
- Gift Card Activations
- Fees

INVENTORY

- Inventory Count
- Top Sellers
- Products Sold
- Products Sale History
- Zero Movement
- Low Stock
- Total Sales by Category
- Total Sales by Brand Name
- Total Sales by Supplier
- Products Added via POS
- Inventory Value
- Purchase Orders

EMPLOYEE

- Sales by Employee
- Returns by Employee
- Cash-In / Cash-Out
- Cash-Out Adjustments
- Commissions

CUSTOMER

- Top Customers
- Sales Totals by Customer
- Return Totals by Customer

TRACKING AND REMINDERS

- Services
- Products with Serial #s.

MISCELLANEOUS

- Active Promotions
- Defined Promotions

STORE SUMMARY

- Quick Stats