



Store Manual

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Chapter 15: Other Items and Features

Notifications

A notification application has been added to cynergi|suite to improve communication among your company. This could be used to notify personnel of tasks, events, or praises throughout your company, stores, or to individual employees.

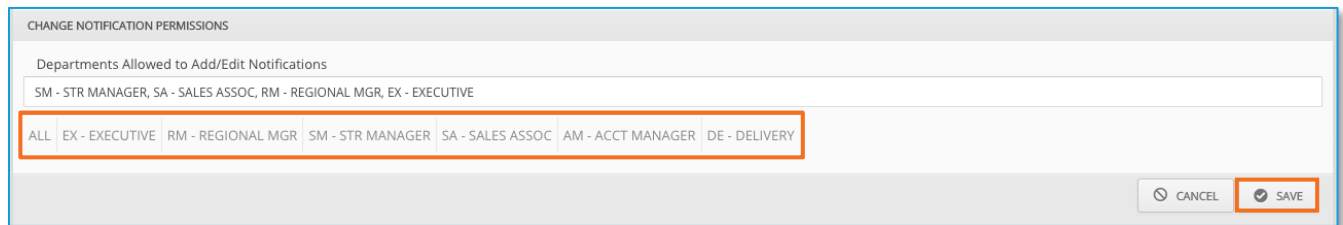
Setting Permissions

Permissions to add or edit notifications are defined by Department.

- Click the **Hammer and Wrench** icon in the top right corner of your screen to access permission types. 
- Click on the **NOTIFICATIONS CONFIGURATION** button.

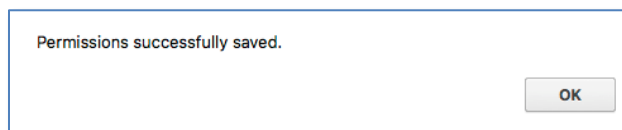
NOTIFICATIONS CONFIGURATION

- Permissions are controlled by department using the text found at the bottom of the *Change Notification Permissions* screen. Clicking departments works like a toggle. Click to add and then click again to remove.
- To setup permissions, click the departments that you wish to be able to edit and manage. If “ALL” is selected, everyone in your company will have access to edit, compose and delete notifications.

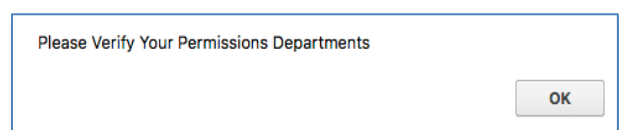


- Click the **SAVE** button to save the permissions. If you successfully add them, you will see an alert stating permissions successfully saved. Otherwise, an alert will prompt you to fix permissions.

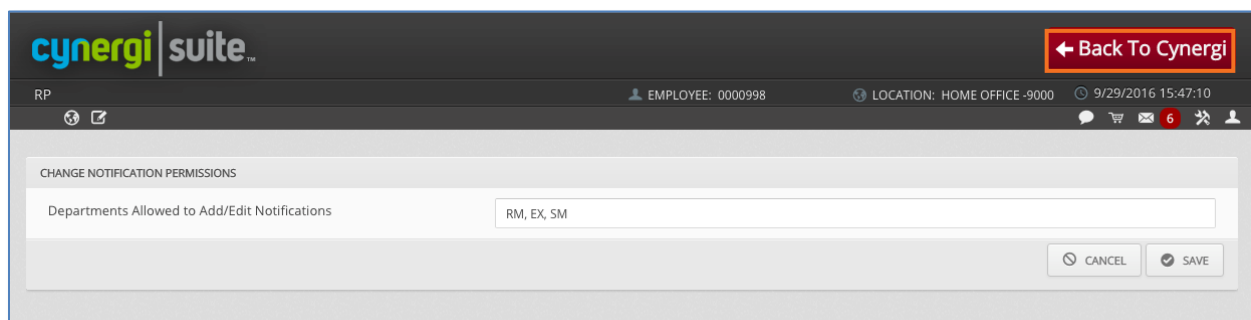
Successful Save



Failed Save

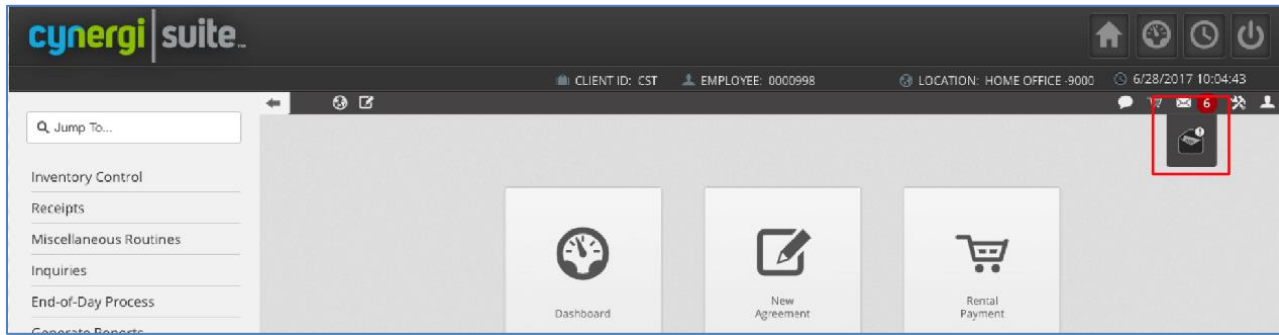


- Click the red **Back To Cynergi** button at the top right to return to your daily routine.

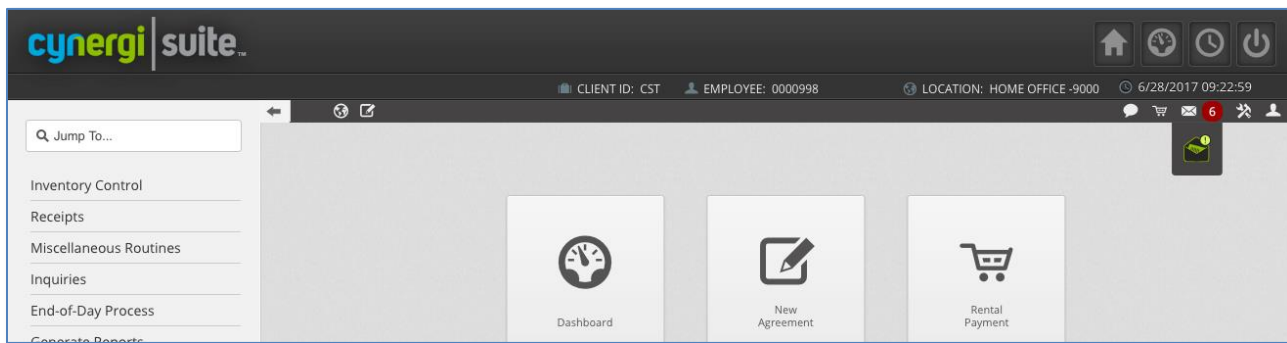


Viewing Notifications

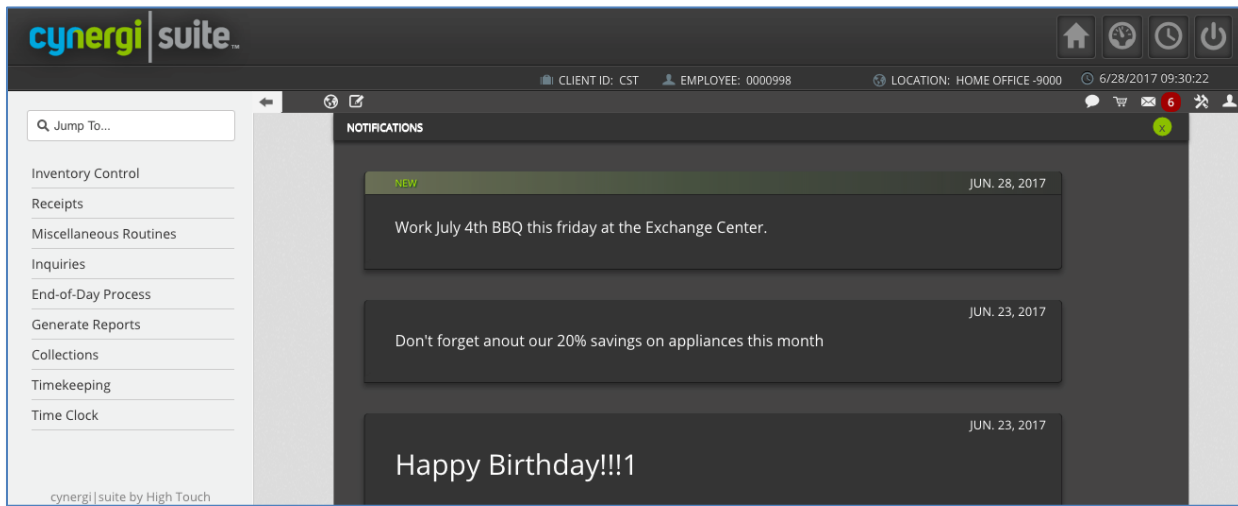
On the Home Screen, you will see an open envelope icon at the top right of the screen.



If you have a new notification, the envelope will appear green. Otherwise, it will be gray, indicating no new messages. To access your notifications, click on the **Notifications Envelope** icon.



Your messages will slide down for viewing.

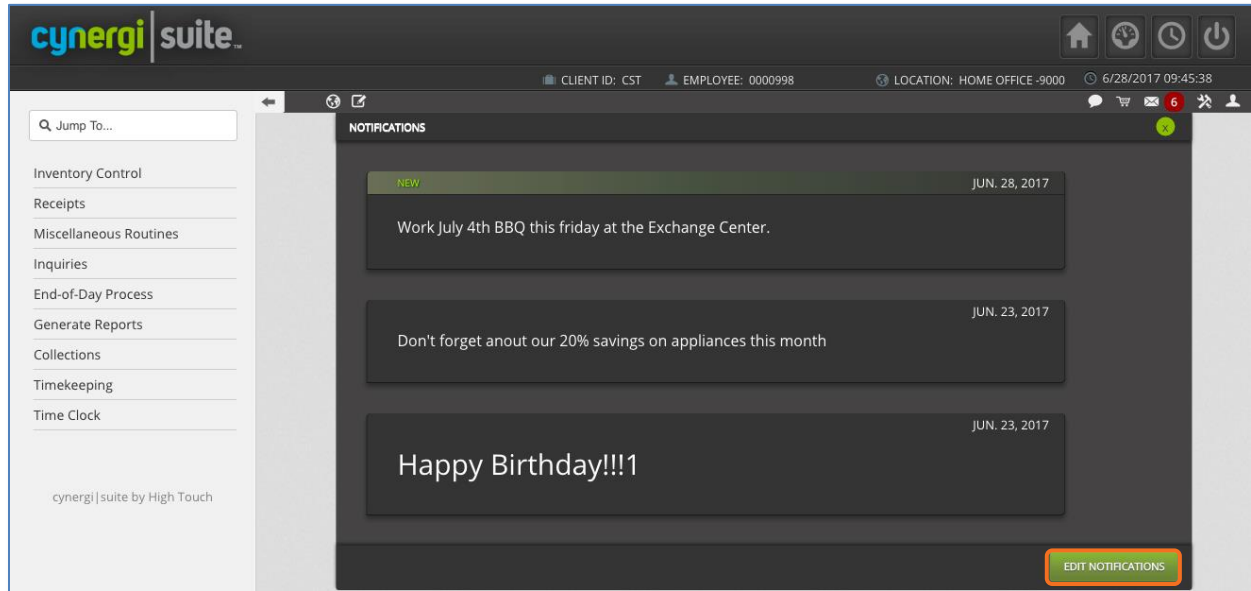


- On the right of each message, you will see the date the message was sent. The green bar at the top will denote a new message. The messages are organized from newest at the top to the oldest at the bottom.
- When you are finished reading your messages, click the **green circle** at the top right and the messages will slide up.
- Unless given permissions, you will not be able to delete any messages. Each message is only available until the designated expiration date that was set by the sender. Once the expiration day has passed, the associated message will no longer appear.

Creating and Editing Notifications

Creating a Notification

- To create a new notification, click the **EDIT NOTIFICATIONS** button from the notifications drop-down on the screen.



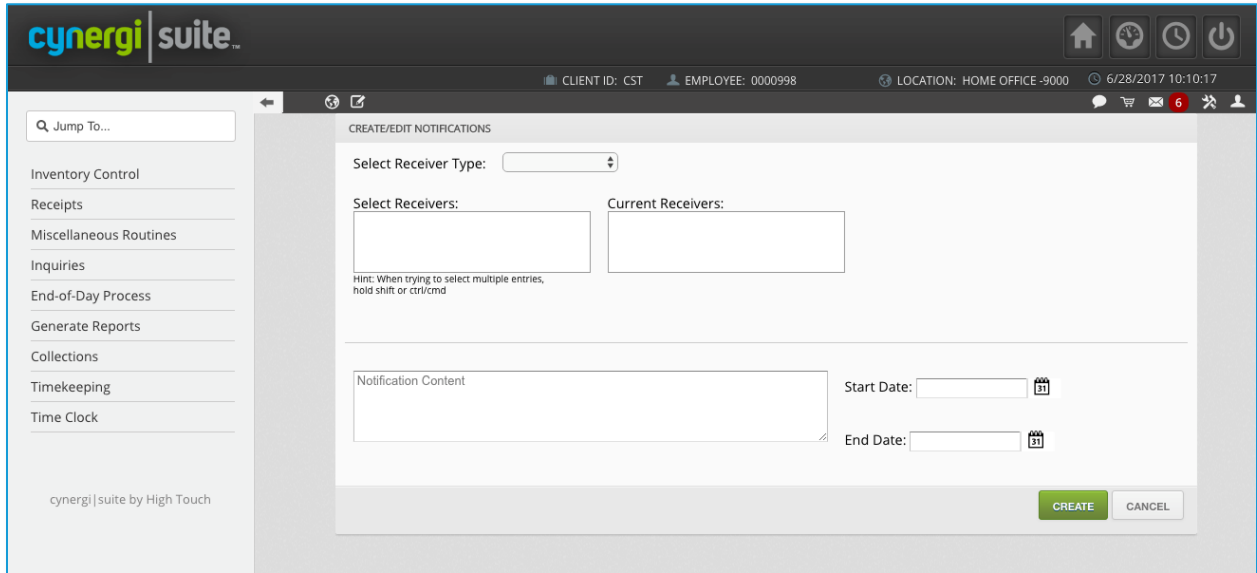
- Click the green **ADD** button at the bottom right corner of the screen.

EDIT NOTIFICATIONS					
Date Created^	Message	Recipients	Start Date	End Date	Actions
2017-06-21		All	2017-06-21	2017-06-27	
2017-06-13		All	2017-06-13	2017-06-19	
2017-06-13		All	2017-06-10	2017-06-22	
2017-06-13		All	2017-06-10	2017-06-20	
2017-06-13		LEWIS AMATO - 101 LEANNE LODGE - 102 BRANDON RELF - 103 NICHOLAS JOHNSON - 104 EVAN SCHERBARTH - 105	2017-06-13	2017-06-19	
2017-06-13		OSHAWA - 001 LINDSAY - 002 AJAX - 003 PETERBOROUGH - 004 TRENTON - 005	2017-06-13	2017-06-19	
2017-06-13		All	2017-06-14	2017-06-20	
2017-06-13		LEWIS AMATO - 101 LEANNE LODGE - 102	2017-06-14	2017-06-14	

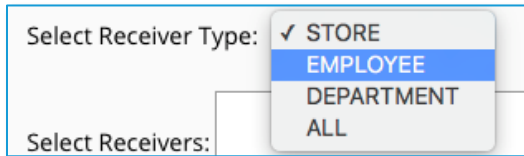
Showing 0 to 0 of 0 entries

ADD MAIN MENU

- This will display the **Create/Edit Notifications** screen, where most of the activity concerning your notifications will occur. Here you can choose who receives your message, when they receive it, and what the message will say.

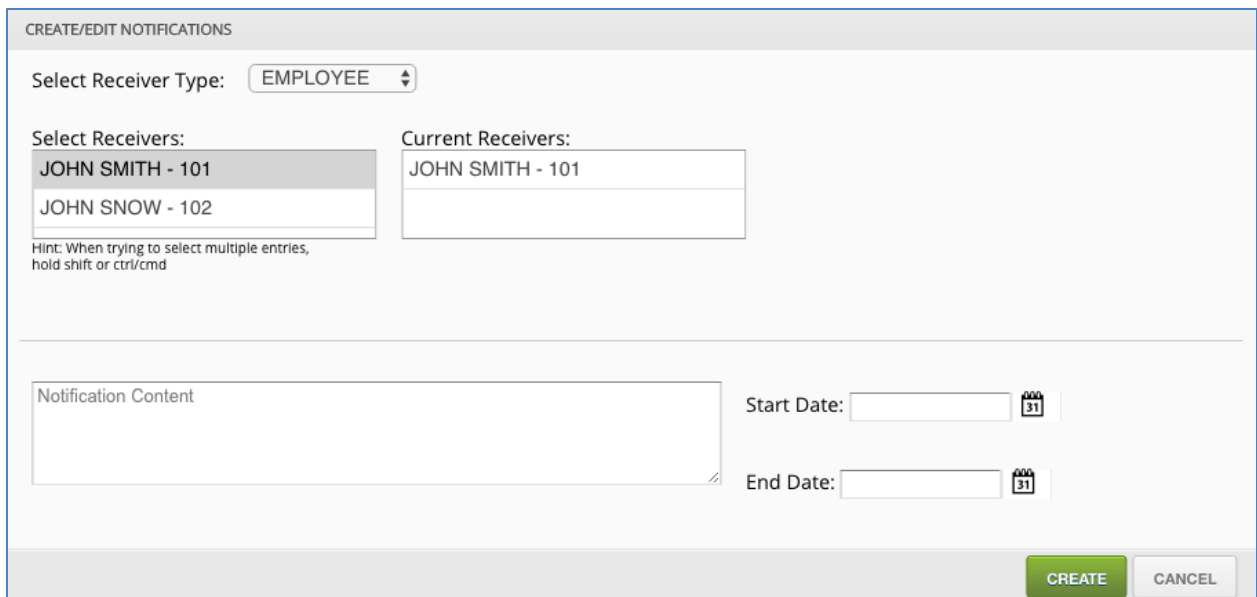


- Click the **Select Receiver Type** drop-down to select the group of people that will receive your messages.



- To send a message to everyone in your company, choose **ALL**. You can be more specific by choosing **STORE** or even a single employee by selecting **EMPLOYEE** (as shown below).

Please Note: Clicking on each category will load its corresponding results into the **Select Receivers** box.



- Click the recipients you wish to receive the message and they are automatically added into the **Current Receivers** box.
*Please Note: You can hold the **SHIFT** or **CTRL** key to select more than one person at a time.*
- To remove a receiver, deselect it from the **Select Receivers** box.

<p>Select Receivers:</p> <div style="border: 1px solid gray; padding: 2px;"> <p>JOHN SMITH - 101</p> <p>JOHN SNOW - 102</p> </div> <p><small>Hint: When trying to select multiple entries, hold shift or ctrl/cmd</small></p>	<p>Current Receivers:</p> <div style="border: 1px solid gray; padding: 2px;"> <p>JOHN SMITH - 101</p> </div>
--	---

- In the **Notification Content** box, type what you wish your recipients to see.

Don't forget about our 25% savings on Televisions for this month

- When finished, choose the **Start Date** and **End Date** that your message will appear to the recipients.
*Please Note: The **End Date** will autofill to seven days after the **Start Date**, but it can be altered to any date after the **Start Date**.*

<p>Start Date: <input type="text" value="2017-07-20"/> </p> <p>End Date: <input type="text" value="2017-07-26"/> </p>	<p>Start Date: <input type="text" value="2017-07-20"/> </p> <p>End Date: <input type="text" value="2017-07-26"/> </p>
---	---

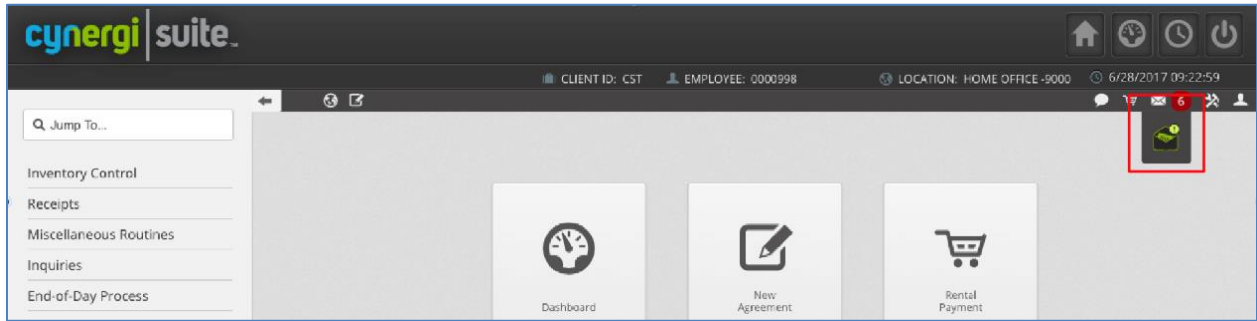
- Click the green **CREATE** button at the bottom right of the **Create/Edit Notifications** screen to save it.

CREATE

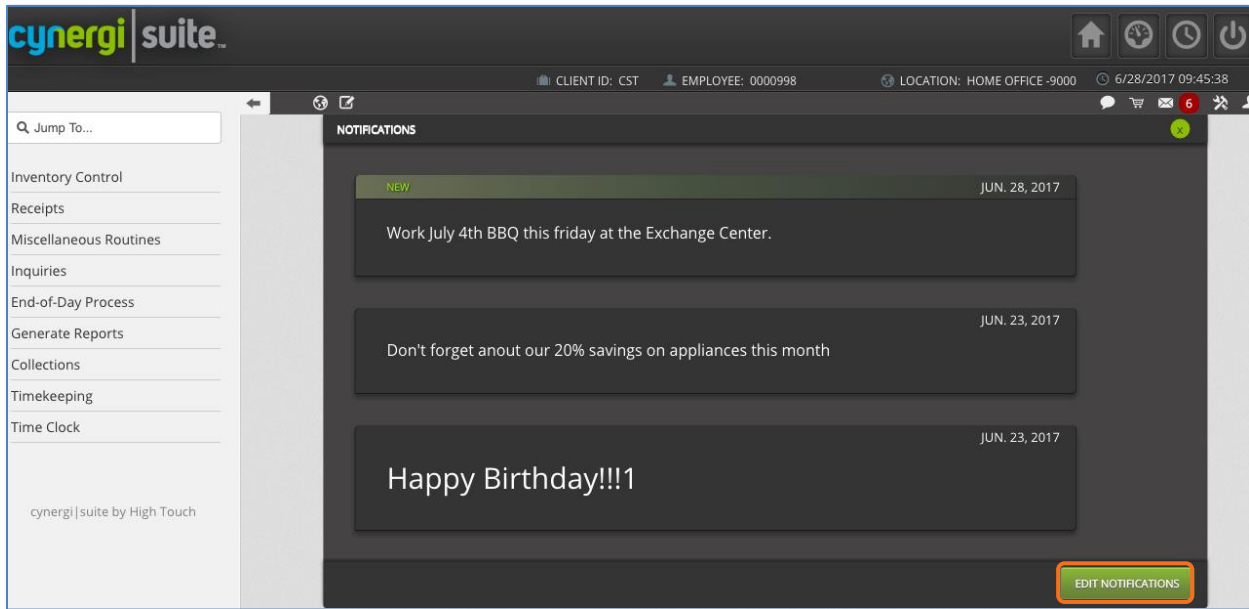
CANCEL

Editing a Notification



















- To edit the notifications you have created, click on the **Notifications Envelope** icon at the top right corner of the screen.



- Once your notifications are open and if you have correct permissions, you should see an **EDIT NOTIFICATIONS** button at the bottom right of the screen. Click this button to edit the notifications that you have created.



- From here you can add, edit, copy, and delete notifications that are under the **Actions** column.

EDIT NOTIFICATIONS					
Date Created*	Message	Recipients	Start Date	End Date	Actions
2017-06-21		All	2017-06-21	2017-06-27	  
2017-06-13		All	2017-06-13	2017-06-19	  
2017-06-13		All	2017-06-10	2017-06-22	  
2017-06-13		All	2017-06-10	2017-06-20	  
2017-06-13		LEWIS AMATO - 101 LEANNE LODGE - 102 BRANDON RELF - 103 NICHOLAS JOHNSON - 104 EVAN SCHERBARTH - 105	2017-06-13	2017-06-19	  
2017-06-13		OSHAWA - 001 LINDSAY - 002 AJAX - 003 PETERBOROUGH - 004	2017-06-13	2017-06-19	  

- Under the **Actions** column, there are three icons:



- Click the **Pencil** icon to edit that notification.
 - Click the **Page** icon to copy content into a new notification.
 - Click the **Trashcan** icon to delete that notification.
- Clicking either the green **Pencil** or the blue **Page** icon will lead you to the **Create/Edit Notifications** screen.

CREATE/EDIT NOTIFICATIONS

Select Receiver Type: EMPLOYEE

Select Receivers:

JOHN SMITH - 101

JOHN SNOW - 102

Hint: When trying to select multiple entries, hold shift or ctrl/cmd

Current Receivers:

JOHN SMITH - 101

Start Date: 2017-06-14

End Date: 2017-06-14

EDIT
CANCEL

- Whether you edit or copy a notification, this screen will display the message that you had previously created and its recipients with the dates initially chosen. Follow the same steps in creating a notification in order to change any of the fields. When finished, click the green **EDIT** or **COPY** button in the bottom right of the screen to save the updated or copied notification.

EDIT
CANCEL

COPY
CANCEL

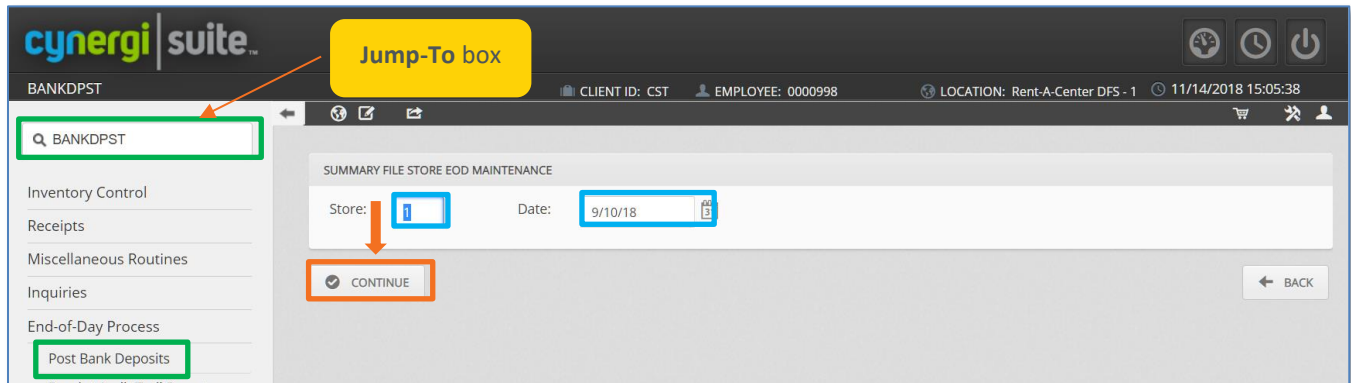
Bank Deposit

The Bank Deposit is part of the closing of the daily business. The Bank Deposit may be filed multiple times if corrections need to be made. The cynergi|suite software system will apply the last *Deposit* filed when the *End of Day* runs.

To begin, type **BANKDPST** into the **Jump-To** box and press the **TAB** or **ENTER** key. You may also select **Post Bank Deposits** from your company's cynergi|suite menu.

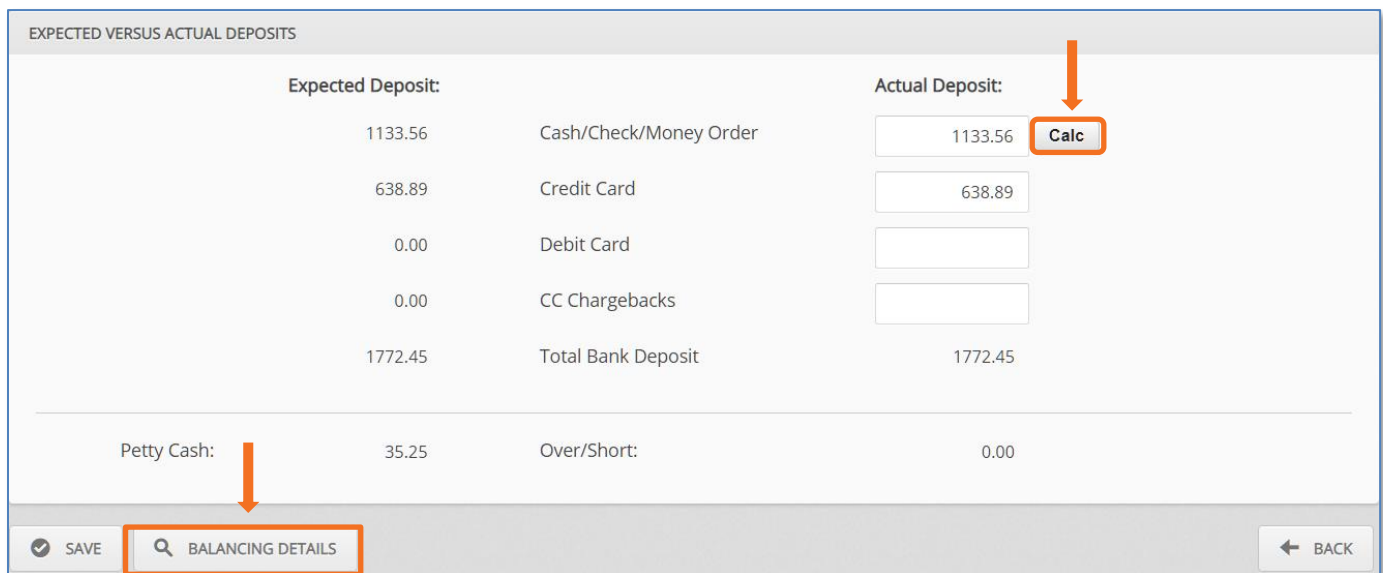
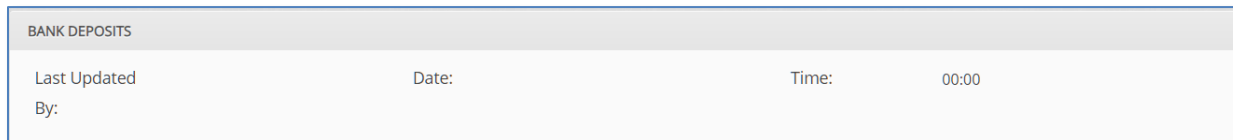
Please Note: Your menu option may be different than what is shown below.

The Store number will default to the store you are logged into and display the current business date. Click **CONTINUE**.



From the **Bank Deposits** screen, you may begin entering the deposit amounts (see **Bank Deposits Screen** on the next page).

- The **Calc** button is an optional quick calculator available to help count down the cash drawer (see **Bank Deposits Calculator** later in this section).
- If additional information is required to reconcile the *Bank Deposit*, click on the **BALANCING DETAILS** button (see **Balancing Details Screen** later in this section).



Bank Deposits Screen

The Cash/Check/Money Order, Credit Card, and Debit Card totals are automatically populated with a total from the receipts taken for the day and do NOT include the Cash Drawer beginning balance.

- If using the **Calc** option, or after counting down the cash drawer, the populated amounts may be overridden to input the actual amounts for the business day.
- The *Deposit* total and *Over/Short* amount will be calculated automatically.
- Please Use Caution: Do NOT include the Cash Drawer beginning balance in this total.

If additional information is required to reconcile the *Bank Deposit* click on the **BALANCING DETAILS** button. If additional information is not needed, the *Bank Deposit* may be filed by clicking the **SAVE** button.

BANK DEPOSITS

Last Updated: _____ Date: _____ Time: 00:00
 By: _____

EXPECTED VERSUS ACTUAL DEPOSITS

	Expected Deposit:		Actual Deposit:
	1133.56	Cash/Check/Money Order	<input style="width: 80px;" type="text" value="1101.46"/> Calc
	638.89	Credit Card	<input style="width: 80px;" type="text" value="638.89"/>
	0.00	Debit Card	<input style="width: 80px;" type="text"/>
	0.00	CC Chargebacks	<input style="width: 80px;" type="text"/>
	1772.45	Total Bank Deposit	1740.35

Petty Cash:	35.25	Over/Short:	32.10-
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✔ SAVE
🔍 BALANCING DETAILS
← BACK

Please Note: When Cash Drawer was counted, the Actual Deposit is different from the Expected Deposit. The difference is put in the Over/Short.

Clicking the **SAVE** button will display the confirmation screen.

Click **CONFIRM** to file the deposit or click **Revise** to go back and make changes.

ATTENTION!

File Bank Deposit as \$1,740.35?

Over/Short \$32.10-

REVISE
✔ CONFIRM

Bank Deposits Calculator

From the main Bank Deposit screen, clicking on the **Calc** button will open the calculator.

- As the cash drawer is counted, enter the number of coins and bills into each category, and the total of checks and money orders. The **Total** column will automatically update as each quantity field is entered.
- Enter the amount to be left in the cash drawer into the **Remaining Cash Drawer** box.
- The **Actual Deposit** amount will automatically be calculated.
- The **RESET** button will reset all quantity amounts. The **CANCEL** button will return back to the **Bank Deposits** screen.

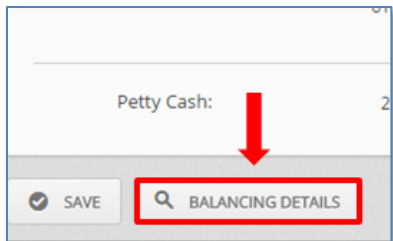
Click **SAVE** to save the amounts.

CALCULATOR		
	Quantity	Total
Pennies:	<input type="text" value="16"/>	= 0.16
Nickels:	<input type="text" value="13"/>	= 0.65
Dimes:	<input type="text" value="14"/>	= 1.40
Quarters:	<input type="text" value="9"/>	= 2.25
Rolls of Pennies:	<input type="text" value="2"/>	= 1.00
Rolls of Nickels:	<input type="text" value="1"/>	= 2.00
Rolls of Dimes:	<input type="text" value="1"/>	= 5.00
Rolls of Quarters:	<input type="text" value="2"/>	= 20.00
1\$ Bills:	<input type="text" value="19"/>	= 19.00
5\$ Bills:	<input type="text" value="6"/>	= 30.00
10\$ Bills:	<input type="text" value="15"/>	= 150.00
20\$ Bills:	<input type="text" value="16"/>	= 320.00
50\$ Bills:	<input type="text" value="5"/>	= 250.00
100\$ Bills:	<input type="text" value="5"/>	= 500.00
Cash Total:		= 1301.46
Remaining Cash Drawer:		= <input type="text" value="200"/>
Cash Deposit:		= 1101.46
Checks:	= <input type="text" value="0"/>	
Money Orders:	= <input type="text" value="0"/>	
Actual Deposit:		= 1101.46

Clicking **SAVE** will return you back to the **Bank Deposits** screen where you can continue with filing the Bank Deposit.

Balancing Details Screen

From the main **Bank Deposits** screen, if additional information is required to help with reconciliation, selecting the **BALANCING DETAILS** button will open up an additional screen.



The *Balancing Details* screen will display the following information:

- Bank Deposit (Cash/Check/Money Orders) *(This is the amount that will be physically taken to the Bank.)*
- Credit Card and Debit Card totals
- Totals for Payments for Other Stores and Payments from Other Stores
- ACH OLP/PAP Payments
- Credit Card OLP/PAP Payments
- Credit/Debit Chargebacks
- ACH Chargebacks
- Cash Sales total
- Over and Short total
- Petty Cash total
- Store RTO total

SUMMARY FILE EOD CHANGE

Date: 9/10/18 Store: 1 11/14/18 15:38:35 Updated By-Date-Time: 101 9/10/18 19:43

Store Total: 1798.12

Bank Deposit:	1101.46	Pmts for Other Stores:		Pmts from Other Stores:	
Credit Card In Store:	638.89	ACH OLP/PAP Payments:		Credit Card OLP/PAP Payments:	57.77
Debit Card In Store:		Credit/Debit Chargebacks:		ACH Chargebacks:	
In Store Bank Deposit:	1740.35				

Fields highlighted in blue can be edited for the Deposit.

Fields highlighted in orange can be edited, but should not need to be altered.

EOD SALES DETAIL *Cash Sales*

	Payment Amt	Tax Amt	Misc Fees	Receivable	AR Paid	NSF Refund	Total
RTO:	1220.62	112.40	398.05	80.90	53.50		1865.47
Sales:	50.00	3.50	0.00	53.50-	0.00		0.00

EOD ACTIVITY DETAIL

Agreements Delivered: 2	Agreements Picked Up: 1	Agreements Paid/Charged Off: 4
Units Delivered: 2	Units Picked Up: 1	Units Paid/Charged Off: 6
Store RTO Total: 1798.12	RTO Over/Short(-): 32.10-	RTO Adjustment:
Store Sale Total:	Sale Over/Short(-):	Petty Cash Total: 35.25

The lower section of the screen will display the **Petty Cash Totals** by category.

There are five options available at the bottom of the screen:

- **SAVE:** Will save and file the Bank Deposit
- **SAVE AND PRINT:** Will save and file the Bank Deposit and allow printing a copy to the printer
- **RECALCULATE DEPOSITS:** Will recalculate deposit values based on receipts and will return back to the beginning **Bank Deposits** screen
- **LIST CHECKS:** Will display a listing of all checks taken on the business day
- **PETTY CASH DETAILS:** Will display all Petty Cash receipts filed on the business day

PETTY CASH TOTALS

Trns To/From PDL:	<input type="text"/>	General Supplies:	<input type="text" value="35.25"/>	Legal:	<input type="text"/>
Postage:	<input type="text"/>	Freight:	<input type="text"/>	Office Supplies:	<input type="text"/>
Inv Parts/Suppls:	<input type="text"/>	Rprs-Appliances:	<input type="text"/>	Rprs-Electronics:	<input type="text"/>
Rprs-Furniture:	<input type="text"/>	Rprs-Misc Invtry:	<input type="text"/>	Misc Expense:	<input type="text"/>
Repair & Maint:	<input type="text"/>	Pest Control:	<input type="text"/>	Vehicle Repair:	<input type="text"/>
Gas & Oil:	<input type="text"/>	Adver Spec Event:	<input type="text"/>	Adver Misc:	<input type="text"/>
Cust Referral:	<input type="text"/>	Computer Suppls:	<input type="text"/>	Computer Maint:	<input type="text"/>
Brk/Cshr Chk Fee:	<input type="text"/>	Not Used:	<input type="text"/>	Not Used:	<input type="text"/>

SAVE
 SAVE AND PRINT
RECALCULATE DEPOSITS
☰ LIST CHECKS
PETTY CASH DETAILS

← BACK
🏠 MAIN MENU

Example of LIST CHECKS

Displays all Checks taken on the business day. Pressing **BACK** will take you back to the previous screen.

CHECKS RECEIVED AT STORE 🔍

Customer ▲	Last Name	Check	Ticket	Amount	Type	Stat
1008533	BOLLES	101	1033021	95.46	O	N

Showing 1 to 1 of 1 entries 1

← BACK

Example of PETTY CASH DETAILS

First screen allows selecting the printer. Click **OK** to continue.

EDIT REPORT DESTINATION

Printer or File Pathname:

OK
🏠 MAIN MENU

After clicking **OK**, the second Screen displays detailed information on all Petty Cash receipts filed on the business day.
Click **BACK** to return to the *Balancing Details* screen.

PETTY CASH RECEIPTS

Date: - Store: Rent-A-Center DFS
 Type: Employee:

RESULTS

Date	Store	Time	Amount	Type	Description	Employee	Comment
9/10/18	1	10 : 58 : 31	34.39	2	GeneralSupp	105	WINN DIXIE-CLEANING
9/10/18	1	18 : 35 : 41	0.86	2	GeneralSupp	105	ACE BULK FASTNER

Showing 1 to 2 of 2 entries

1

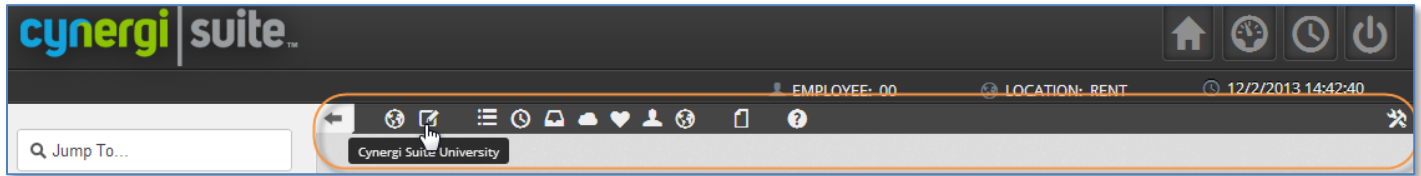
← BACK

Example of SAVE AND PRINT
Sample of the printed Bank Deposit


SUMMARY FILE EOD CHANGE								
Date: 9/10/18	Store: 1	11/14/18 16:09:54	Updated By-Date-Time:		101 9/10/18 19:43			
Store Total:	1798.12	Pmts for Other Stores:		Pmts from Other Stores:				
Bank Deposit:	1101.46	ACH OLP/PAP Payments:		Credit Card OLP/PAP Payments:		57.77		
Credit Card In Store:	638.89	Credit/Debit Chargebacks:		ACH Chargebacks:				
Debit Card In Store:								
In Store Bank Deposit:	1740.35							
EOD SALES DETAIL								
RTO:		Payment Amt	Tax Amt	Misc Fees	Receivable	AR Paid	NSF Refund	Total
		1220.62	112.40	398.05	80.90	53.50		1865.47
Sales:		50.00	3.50	0.00	53.50-	0.00		0.00
EOD ACTIVITY DETAIL								
Agreements Delivered: 2	Agreements Picked Up: 1		Agreements Paid/Charged Off: 4					
Units Delivered: 2	Units Picked Up: 1		Units Paid/Charged Off: 6					
Store RTO Total:	1798.12	RTO Over/Short(-):	32.10-	RTO Adjustment:				
Store Sale Total:		Sale Over/Short(-):		Petty Cash Total:	35.25			
PETTY CASH TOTALS								
Trns To/From PDL:	General Supplies:		35.25	Legal:				
Postage:	Freight:			Office Supplies:				
Inv Parts/Suppls:	Rprs-Appliances:			Rprs-Electronics:				
Rprs-Furniture:	Rprs-Misc Invtry:			Misc Expense:				
Repair & Maint:	Pest Control:			Vehicle Repair:				
Gas & Oil:	Adver Spec Event:			Adver Misc:				
Cust Referral:	Computer Suppls:			Computer Maint:				
Brnk/Cshr Chk Fee:	Not Used:			Not Used:				

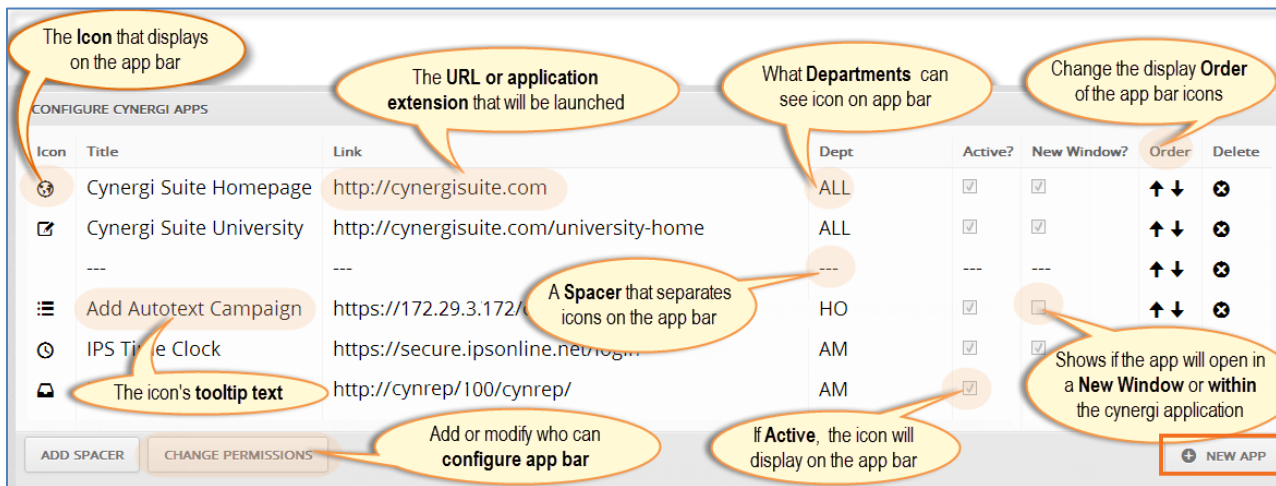
Application Toolbar

The cynergi|suite **Application Toolbar (App Bar)** is a set of icons which provides easy access to frequently used websites and common tasks. With appropriate security, the Application Toolbar can be customized to meet your company's needs.



Customize the Application Toolbar

Select the **Hammer and Wrench** icon , located at the far right of the **App Bar**. The **Configure Cynergi Apps** window will display. *Please Note: The **App Bar** is stored on the cynergi|suite server. Therefore, changes to the **App Bar** are companywide and will display after a user logs out and logs back in.*

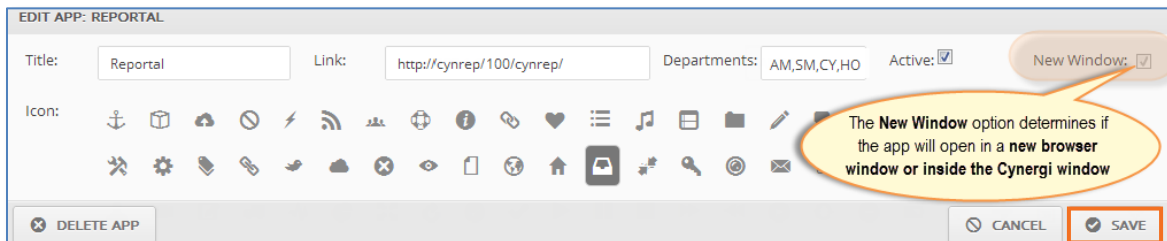


Add, Modify, or Delete an App

To **add** a new app, select the **NEW APP** button on the **Configure Cynergi Apps** window (on the far right hand side at the bottom of the screen). To **modify** an existing app, click the desired line item on the **Configure Cynergi Apps** window. The **Add or Edit App** screen will display (see below).

- 1) Add or edit the app's **Title** and **Link**.
- 2) Enter the appropriate **Departments** (see **Security Settings** on the next page).
- 3) Select whether or not the app should open in a **New Window** (see **Opening an App in a New Window** on the next page).
- 4) Select an appropriate icon to display on the **App Bar**.
- 5) Click **SAVE** to save the changes.

To **delete** an app, select the **DELETE APP** button. At the *Are you sure* prompt, answer **OK**.

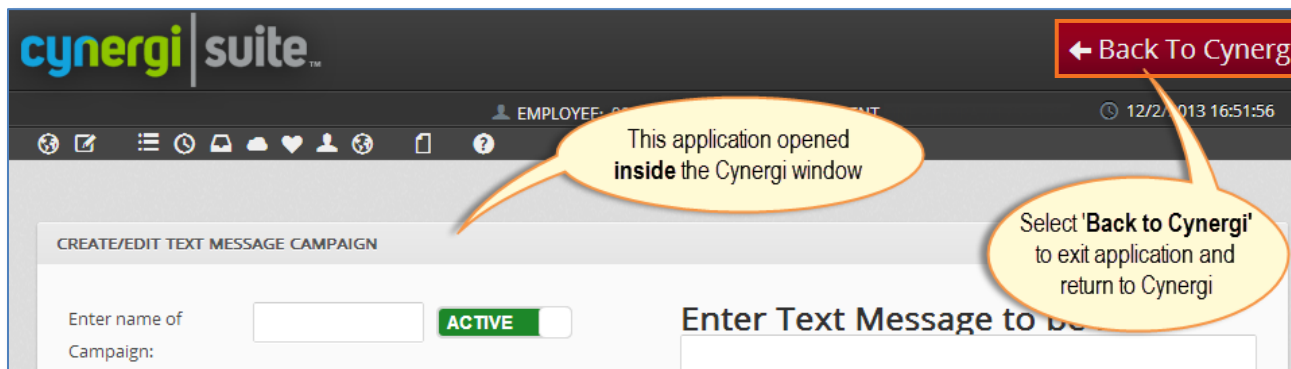


Opening an App in a New Window

If the **Link URL** begins with **https**, by *default* the app will open inside the cynergi|suite window. This feature can be overridden by selecting or deselecting the **New Window** checkbox on the **Edit App** screen. A URL beginning with **http** is unsecure and will always open in a **new browser window**.

Exiting the Cynergi|suite App Window

To **exit an app** that is open inside the cynergi|suite window, click the red **Back to Cynergi** button to return to the cynergi|suite application.



Security Settings

There are two types of **Security Settings** for the **Application Toolbar**:

- 1) Which departments are allowed to **view and utilize the app** on the **App Bar**
 - These permissions are set by the **Department** field within the **Add** or **Edit App** window (see **Add, Modify, or Delete an App** on the previous page).
 - To allow **all** employees to use the app, enter a **Department** of **ALL**.
 - For **multiple Departments**, use a comma to separate departments.
 - Applicable **departments** are based upon the settings within the **DEPTMNT** program.

The screenshot shows the 'EDIT APP: REPORTAL' form. The 'Title' field contains 'Reportal' and the 'Link' field contains 'http://cynrep/100/cynrep/'. The 'Departments' field is highlighted with an orange circle and contains 'AM,SM,CY,HO'. The 'Active' checkbox is checked.

- 2) Which departments are allowed to **configure the Application Toolbar**
 - *Please Note: Typically, this setting is limited to executive level departments because changes made to the Application Toolbar are system wide and across all locations.*
 - Select **CHANGE PERMISSIONS** from the **Configure Cynergi Apps** window.

The screenshot shows the 'CONFIGURE CYNERGI APPS' window. It contains a table with columns: Icon, Title, Link, Dept, Active?, and New. The 'CHANGE PERMISSIONS' button is highlighted with an orange circle.

Icon	Title	Link	Dept	Active?	New
	Cynergi Suite Homepage	http://cynergisuite.com	ALL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Cynergi Suite University	http://cynergisuite.com/university-home	ALL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- In **Departments Allowed to Access Configure Screen**, enter specific departments, separated by a comma, that can **add and edit apps**. Select **SAVE**.