

CONCEPTS

- AUTOMATION
- ACCOUNTS

AUTOMATION

The heart of the DinePlan is the Automation.

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The following tutorial will give the brief introduction of the Automation in DinePlan.

NOTE : This is for the Advanced Users to who want to Tweak the application to their needs

EVENTS

Events are thrown when something happens inside the POS system:

- Button is clicked
- Order is added to a ticket
- The user clicks on a screen in the POS system

These events can then cause rules to be checked and executed.

ACTIONS

Actions are basically tasks to execute at certain times or under certain circumstances (which are decided by a rule).

For example:

- show a popup message
- add a free item to the current ticket
- print a report

DinePlan is already setup with a number of configured actions to get you started (for a basic setup), but you can define new actions to perform certain tasks, based on your needs. Which tasks you can perform through actions is only limited by the available action types.

RULES

Rules are checked when a certain event is thrown. A rule tells the system: When XXX happens, and the circumstances are YYY, do ZZZ.

XXX is the event that has to be thrown to execute the rule

YYY is a 'constraint' or prerequisite (for example, the user who clicked a button is an admin, or the order added is for a pizza margherita)

ZZZ is an action (for example, popup a window that says 'thank you for your order' on another screen, or add a free gift to the ticket)

So the rule says: when a certain event happened and all constraints (prerequisites) are met, then execute an action.

AUTOMATION COMMANDS

Automation command buttons are buttons you can define to be placed where you want them in the POS system, which will throw an event. You can setup a rule to be executed when the button is clicked.

TRIGGERS

Triggers are like Alarm Clock. It helps us to do certain things at the Certain Times. For example,

- Send Sales Report at Every Hour
- Auto Logout at 12 AM

Whenever we have a Trigger created in DinePlan, it has the timer which will tell when it will be executed. When the time comes, it fires the EVENT and its respective RULE will be chosen and executed. The rules will have set of ACTIONS. The actions will be fired in the SEQUENCE.

PRE-DEFINED EVENTS

EVENT	DESCRIPTION	PARAMETERS
Trigger executed	Triggered when a trigger is executed.	The name of the trigger that is executed.

Triggered			
when		Name	
someone		of	
clicks	Automation	AutomationCommandName	
on		Automation	
an		Command	
automation		Value	
command		of	
button	Command	Value	
widget		Automation	
or		Command	
some			
DinePlan		If	
features		Toggle	
Automation		Values	
that		setting	
command		for	
supports		an	
executing		automation	
automation		command	
commands.			
It		NextCommandValue	
can		is	
be		enabled	
also		that	
triggered		parameter	
by		will	
executing		return	
Execute		next	
Automation		value.	
Command			
Action.			

ACCOUNTS

INTRODUCTION

DinePlan accounting is a simple accounting system designed for restaurants. Basically if you need to track a financial amount what you'll need is an account. For example:

What I sold? > Sales account

How much I'll receive? > Receivables account

How much Cash settled? > Cash account

Discount totals? > Discount account

How much Mr. Brown should pay? Customer account.

How much tax I'll pay? > Tax account.

During installation DinePlan automatically generates some accounts for general use. You can create additional accounts or account types for your business needs.

ACCOUNT TYPES

We have lots of accounts of same type. For example we have Customer Accounts, Payment Accounts or Discount Accounts. Do you need to track personnel wages? You'll start by creating an account type called "Personnel Accounts". Will you track Taxes? You need to create "Tax Accounts" type.

ACCOUNT TRANSACTIONS

An account transaction works with two accounts. A source account and a target account. It transfers amount from source account to target account. Or we can say it debits an account and credits another. Or for some cases we can think one account increases and other one decreases. For example Mr. Brown pays his previous bills with Cash. His account total will decrease and the cash account total will increase. Account Transactions does that.

ACCOUNT TRANSACTION TYPES

We need to know how an account transaction will work. For example Customer Cash Payment Transaction type Debits Customer Accounts and Credits Cash Account. It is a pre-defined transaction type. If you create new account types you'll need new transaction types to operate them. For example if you need to track personnel wages you'll create an Account Type named as "Personnel Accounts" and a "Account Transaction Type" named "Wage Payment". Wage Payment Transaction type will increase "Personnel Account" amount and decrease "Cash Account" amount . That means amount will transfer from Cash to Personnel account.

ACCOUNTING RELATED TRANSACTIONS

Normally we'll add account transactions through Accounts screen. Some DinePlan operations automatically generates account transactions too. For example creating a ticket creates a "Sale" transaction. A Tax Template creates a "tax liability" transaction. A payment creates a "payment transaction" or a discount creates a "discount transaction". We can monitor all transactions from Accounts > Transactions menu.