

CStoreOffice® Mobile App

For Petrosoft Users

Version 3.3

11/23/2022



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ABOUT CSTOREOFFICE® MOBILE APP

CStoreOffice® Mobile App is a mobile application that keeps retailers connected to their store and retail chain data and allows them to make important inventory and business decisions from anywhere. With CStoreOffice® Mobile App, retailers can run their business with peace of mind at home, on the road or wherever their business or life takes them.

With CStoreOffice ® Mobile App, you can use the following features:

Menu Section	Features
Location Summary	View the back-office merchandise and fuel dashboard and access major management reports
Docs and Files	Scan invoices and add them to the Petrosoft data center
Pricebook	View and edit Price Book items
PICEDOOK	Prepare shelf tags sheets
Inventory	Perform itemized inventory
Less Drevention	View video records from the cameras set up at the store (LPA)
Loss Prevention	View the POS journal (LPA)
QwickServe	Check devices and the orders queue (QwickServe)



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CStoreOffice[®] Mobile App features are permission-based. For details, see Granting Permissions to CStoreOffice[®] Mobile App Functionality.

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CStoreOffice[®] Mobile App can be run on Android and Apple iOS devices. However, the portrait mode (vertical orientation) is supported only by mobile phones while the landscape mode (horizontal orientation) is supported only by tablets.

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For details, see Installing CStoreOffice ® Mobile App and Logging In.

INSTALLING CSTOREOFFICE[®] MOBILE APP AND LOGGING IN

To start working with CStoreOffice ® Mobile App, you need to install the application and log in to it.

CStoreOffice[®] Mobile App can be run on Android and Apple iOS devices. You can download the application from Google Play Market or iTunes Store and install it on the device.

Depending on the device where CStoreOffice[®] Mobile App is installed, the following modes are supported by the app:

- Mobile phone: The app works only in the portrait mode (vertical orientation).
- Tablet: The app works only in the landscape mode (horizontal orientation).

To log in to CStoreOffice® Mobile App:

- 1. Open the application installed on your device.
- 2. In the Email field, type the email address of your Petrosoft account.
- 3. In the **Password** field, type the password of your Petrosoft account.
- 4. To view the privacy policy terms, tap **Privacy Policy**.
- 5. If necessary, switch to another language: at the bottom right corner of the logon view, tap the language icon and from the list, select the language.
- 6. Tap Sign In.

CSOMobile®		
Password	8	
	~	
Sign In		
Remember me and sign in automatically		
v3.3.0	Privacy Policy	
② Demo Account	🔇 English	



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To automatically log in to the application using the specified account, under the **Sign In** button, tap **Remember me and sign in automatically**.

If you want to evaluate CStoreOffice
[®] Mobile App capabilities, you can log in to the application using the demo account. To do this, at the bottom left corner of the logon view, tap **Demo Account**.

ြဲ csoMob	pile°
Email csodemoowner@petrosoftinc.com	
Password	8
Sign In	
Remember me and sign in automatically	
v3.3.0	Privacy Policy
② Demo Account	🔇 English

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To learn what features are available in the new CStoreOffice[®] Mobile App version, under the **Sign In** button, tap the version number.

CSTOREOFFICE[®] MOBILE APP: REQUIREMENTS FOR ENDPOINTS

Communication between the applications and Petrosoft Cloud utilizes HTTPS protocol for sensitive data. When working in restricted networks, the following endpoints should be accessible from the mobile device for proper functioning:

- External endpoints
- LAN endpoints



External Endpoints

Endpoint	Description	Ports	Required
*.petrosoft.cloud	Various Petrosoft services	80, 443, 20448, 20450	Always
*.cstoreoffice.com	Various Petrosoft services	80, 443, 20448, 20450	Always
* ant nationalities com	Loss Provention Compres	90 442 12501	If LPA features are
".apt-petrosoftinc.com	Loss Prevention Cameras	00, 443, 12301	used

LAN Endpoints

Endpoint	Description	Ports	Required
LAP Printers IPs	LAN Printer IP that is used to print from the mobile app	9100	If need to print on LAN printer
Direct Connect IP	Direct Connect local IP to allow Direct Connect setup and configuration	80, 443	If you need to set up Direct Connect from the mobile device

GRANTING PERMISSIONS TO CSTOREOFFICE® MOBILE APP FEATURES

To use the CStoreOffice® Mobile App features, you need to assign relevant permissions to the roles or users in CStoreOffice® depending on their business roles and scope of responsibility.

CStoreOffice® Mobile App Functionality Permissions

You can grant permissions to the forms and features in the following CStoreOffice® Mobile App modules:

- Location Summary
- Docs and Files
- Pricebook
- Inventory
- Loss Prevention
- QwickServe

Checking Granted Permissions in CStoreOffice®

To make sure a permission is granted to the role or user:

- 1. Open either of the following user settings in CStoreOffice®:
 - User role: Role Setup form > Access Data Types list.
 - o Employee form: Employee Setup form > Login & Password > Advanced.
- 2. In the search field, type the permission name.



To view the names of permissions for the module you need, select the relevant subsection in the CStoreOffice® Mobile App Functionality Permissions section.

3. Make sure the **Access is allowed** icon is displayed to the left of the permission name. If not - click it to grant the permission.

The Cycle count tickets permission is granted to the Area Manager role.	An employee w is allowed to scan with the Docs Scan	th the MNGR role nvoices in CSOMobile ner permission granted.	
Role Name: Area Manager	Edit Employee	NEGLEY SUN	000
Allow assignment for all users: 🗹	Employee Setup	SCOTTDALE	SUNOCO -
Access Data Types:	Personal Data	Bole	
→ Expand all ♀ Restore 🧟 cycle count	Tax Information Forms Signed	MNGR	Advanced
Data Entry	Employment History Training	→ Expand all	er O Show ove
Related Components	Data Sharing	Documents & Files Related Components	
		P Docs Scanner	
Legend		Legend	
Access is allowed		Access is allowed	
Access is demed Access is demed Access is demed		Access is denied Sefault rule is overridden	

For more information about granting permissions in CStoreOffice[®], see Roles Management Permissions.

Location Summary Permissions

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The Location Summary module's permissions in CStoreOffice[®] Mobile App are grouped by the widgets included into the module:

- Store KPI Widget Permissions
- Fuel KPI Widget Permissions
- Profit Widget Permissions
- Shifts Widget Permissions
- Fuel Inventory Widget Permissions
- Location Info Widget Permissions

In the tables below, you can find the following information:

- **CStoreOffice Mobile App Form**: The name of the form and its related functionality in CStoreOffice **R** Mobile App to which the related permission may be granted.
- CStoreOffice[®] Corresponding Permission
 - **Permission Name**: The name of permission in CStoreOffice[®] that can be granted to the role or user.
 - **Path to Permission**: Use this column's value to find the permission in the list of available permissions by opening relevant sections and subsections consecutively.

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Store KPI Widget Permissions

CStoreOffice® Makile Area Form	CStoreOffice [®] Corresponding Permission		
CstoreOffice® Mobile App Form	Permission Name	Path to Permission	
Store KPI	Key Performance Indicators web part on home page	Dashboard > Related Com-	
Store KPI > Sales	Key Performance Indicators web part on home page	Dashboard > Related Com- ponents	
Store KPI > Sales > Store Sales History	Store.Sales.Store Sales Detailed	Reports > Related Components	
Store KPI > Sales > Store Sales History > Item Sales by Tags	Store.Sales.Item Sales by Tags report	Reports > Related Components	
Store KPI > GPM	Key Performance Indicators web part on home page	Dashboard > Related Com- ponents	
Store KPI > GPM > GPM Progress	Projection Report	Reports > Related Components	
Store KPI > Profit	Projection Report	Reports > Related Components	
Store KPI > Profit > Store Profit by Category	Store.Merchandise.GPM.Store GPM Report	Reports > Related Components	
Store KPI > Inventory	Store.Inventory.Shortages.Consolidated Store Inventory Progress report	Reports > Related Components	
Store KPI > Inventory > Inventory Level by Category	Store.Inventory.Volume and State.Category Inventory Levels Report	Reports > Related Components	
Store KPI > In. Over/(Short)	Store Inventory Shortogos Inventory Adjust		
Store KPI > In. Over/(Short) > Inventory Adjustment History	Store.Inventory.Shortages.Inventory Adjust-	Reports > Related Components	

Fuel KPI Widget Permissions

CStarsOffice® Mahile App Form	CStoreOffice [®] Corresponding Permission		
CstoreOffice® Mobile App Form	Permission Name	Path to Permission	
Fuel KPI	Fuel columns at Key Performance Indic- ators on dashboard	Fuel > Related Components	
Fuel KPI > Sales	Fuel columns at Key Performance Indic- ators on dashboard	Fuel > Related Components	
Fuel KPI > Sales > Fuel Sales History	Project Report Graphics	Reports > Related Components	
Fuel KPI > Price	Fuel Prices Change History (station level)	Reports > Related Components	
Fuel KPI > Price > Price Report	Competitors gas prices	Reports > Related Components	
Fuel KPI > Price > Price Report > Price			
History Report (graphical and numeric data views)	Fuel Prices Change History (station level)	Reports > Related Components	

CStoreOffice

Fuel KPI > Pool Margin	Fuel Sales Detailed	Reports > Related Components
Fuel KPI > Pool Margin > Pool Margin Progress	Fuel Sales Detailed	Reports > Related Components
Fuel KPI > Profit	Display Fuel in the Store Projection report	Fuel > Related Components
Fuel KPI > Profit > Fuel Profit Progress	Fuel Sales Detailed	Reports > Related Components

Profit Widget Permissions

CStoreOffice® Mahila Ann Form	CStoreOffice [®] Corresponding Permission		
Cstoreoffice® Mobile App Form	Permission Name	Path to Permission	
Profit > Store	Projection Report	Reports > Related Components	
Profit > Store > Store Profit by Cat- egory	Store.Merchandise.GPM.Store GPM report	Reports > Related Components	
Profit > Fuel	Display fuel in the Store Projection report	Fuel > Related Components	
Profit > Fuel > Fuel Profit Progress	Fuel Sales Detailed	Reports > Related Components	
Profit > VIP		Fuel > Related Components	
Profit > VIP > VIP Report	Display fuel in the Store Projection report		
Profit > Allowance	Display fuel in the Store Projection report		
Profit > Allowance > VIP Report			
Profit > Total Profit	Projection Report	Reports > Related Components	

Shifts Widget Permissions

Consecution ® Mahila Ann Ferry	CStoreOffice [®] Corresponding Permission			
CstoreOffice® Mobile App Form	Permission Name	Path to Permission		
Shifts	Chift Donort	Deports > Delated Components		
Shifts > Shift Report Details	Shint керотт	Reports > Related Components		

Fuel Inventory Widget Permissions

CStoreOffice [®] Mobile App Form	CStoreOffice [®] Corresponding Permission		
	Permission Name	Path to Permission	
Fuel Inventory	Fuel inventory form	Fuel > Related Components	
Fuel Inventory > Fuel Inventory Report	Fuel Inventory form		

Location Info Widget Permissions

No permissions required. The Location Info widget is displayed for all users.



To learn more about the Location Summary module in CStoreOffice® Mobile App, see Viewing the Location Summary.

Pricebook Permissions

In the table below, you can find the following information:

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- CStoreOffice[®] Corresponding Permission
 - **Permission Name**: The name of permission in CStoreOffice[®] that can be granted to the role or user.
 - **Path to Permission**: Use this column's value to find the permission in the list of available permissions by opening relevant sections and subsections consecutively.

	CStoreOffice® Corresponding Permis	sion
CstoreOffice® Mobile App Form	Permission Name	Path to Permission
Pricebook > Items Lookup	Price Book manager	Price Book > Related Components
Pricebook > Items Lookup > Item Card	Itom Satura: Station Javal	Price Rook > Polated Components
Pricebook > Items Lookup > Item Card > Edit Item	item Setup. Stationnever	File book > Related components
Pricebook > Items Lookup > Item Card > Edit Item > Edit Item Category	Allow users to rewrite the item's Cat- egory	Price Book
Pricebook > Items Lookup > Item Card > Edit Item > Edit Item Department	Allow users to rewrite the item's Depart- ment	Price Book
Pricebook > Items Lookup > Item Card > Edit Item > Edit Item Retail	Allow users to change retail price	Price Book
Pricebook > Items Lookup > Item Card > Edit Item > Edit Item Parameters	Allow users to edit items	Price Book
Pricebook > Items Lookup > Create New Item	Allow users to set up items	Price Book
Pricebook > Items Lookup > Adding items to a cycle count ticket	Cycle count tickets	Data Entry
Pricebook > Shelf Tags	Shelf Tags	To be defined

To learn more about the Pricebook module in CStoreOffice® Mobile App, see Working with Price Book Items.

Docs and Files Permissions

To allow the user to access the Docs and Files functionality in CStoreOffice[®] Mobile App, you need to grant the **Docs Scanner** permission to the user in CStoreOffice[®].

To make sure the Docs Scanner permission is granted, check either of the following user settings in CStoreOffice®:

- User role: Role Setup form > Access Data Types list.
- Employee form: Employee Setup form > Login & Password > Advanced.

Granting the Docs Scanner permission to the role.	Granting the Docs Scanner permission to the user.
New template:	Edit Employee
Allow assignment for all users: Access Data Types: The Expand all the Destore for does scanner	Employee Setup MNGR Advanced
Related Components Related Components Docs Scanner Docs Scanner Default rule is overridden	Login & Password Tax Information Forms Signed Employment History Employment History Forms Signed Employment History Forms Signed Forms Forms Signed Forms Forms Forms Forms Signed Forms Forms Forms Forms Signed Forms For
	Training Legend Data Sharing "t⊩ Access is allowed @ Access is denied ∞: Default rule is overridden



For more information about granting permissions in CStoreOffice[®], see Roles Management Permissions.

The Docs and Files permission grants an access to the following Docs and Files features in CStoreOffice® Mobile App:

- Create new invoice. The following invoice types are supported:
 - o Merchandise
 - o Fuel
 - o Expense
 - o Lottery
- New invoice form
 - o Adding new comment
 - o Adding an image from the gallery
 - o Adding an image from the camera
- Documents calendar
 - o Documents list by date
- Edit invoice form

- o Editing comment
- Updating an image from the gallery
- o Updating an image from the camera

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To learn more about the Docs and Files module in CStoreOffice® Mobile App, see Scanning Invoices.

Inventory Permissions

In the table below, you can find the following information:

- **CStoreOffice ® Mobile App Form**: The name of the form and its related functionality in CStoreOffice **®** Mobile App to which the related permission may be granted.
- CStoreOffice[®] Corresponding Permission
 - **Permission Name**: The name of permission in CStoreOffice[®] that can be granted to the role or user.
 - **Path to Permission**: Use this column's value to find the permission in the list of available permissions by opening relevant sections and subsections consecutively.

CStoraOffica® Mahila Ann Earm	CStoreOffice [®] Corresponding Permission		
CstoreOffice® Mobile App Form	Permission Name	Path to Permission	
Inventory > Counts	Cyclo count tickats	Data Entry > Polated Components	
Inventory > Counts > Items Lookup		Data Entry > Related Components	
Inventory > Counts > Items Lookup > Edit Item	Item Setup: Station level	Price Book > Related Components	
Inventory > Counts > Cycle Count Ticket Items	Cycle count tickets	Data Entry > Related Components	
Inventory > Counts > Cycle Count Ticket Items > Item Form	Item Setup: Station level	Price Book > Related Components	
Inventory > Counts > Upload Ticket	Cycle count tickets	Data Entry > Related Components	

To learn more about the Inventory functionality in CStoreOffice[®] Mobile App, see Performing Itemized Inventory.

Loss Prevention Permissions

To allow the user to access the Loss Prevention features in CStoreOffice[®] Mobile App, the following conditions should be met:

- Loss Prevention Analytics product should be enabled for your Petrosoft account.
- The Video Journal permission should be granted to your user in CStoreOffice®.

Checking if Loss Prevention Analytics is Enabled

To check if the Loss Prevention Analytics module is enabled for your account in CStoreOffice®:

- 1. Sign in to CStoreOffice ®.
- 2. Open the General Station Options form. For details, see Setting Up Locations.
- 3. In the General Station Options form:
 - a. Set the **Advanced Mode** toggle to the **On** position.
 - b. Go to the **Product** list and click **Show Products**.
 - c. Make sure the Loss Prevention Analytics product is selected.

GL #1	101
GL #2	1
Product	Hide Products
	i49
	i99
	i199
	i239
	DPS
	Fuel Central
	Loss Prevention Analytics
	Qwickserve
	Qwickserve Remote Ordering
	SmartPOS
Back to Station Home	

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If you need to add the Loss Prevention Analytics product to your station, contact a Petrosoft representative.

Checking if Video Journal Permission is Granted

To make sure the Video Journal permission is granted, check either of the following user settings in CStoreOffice®:

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- User role: Role Setup form > Access Data Types list.
- Employee form: Employee Setup form > Login & Password > Advanced.

Granting the Video Journal permission to the user.	Granting the Video Jo permission to the us	urnal ser.
New template:	Edit Employee	
Access Data Types:	Employee Setup	MNCR Advanced
Expand all Restore video journal	Personal Data Login & Password	Expand all Restore Restore Show overrid
 Loss Prevention Analytics 	Tax Information	Is Loss Prevention Analytics
 Related Components 	Forms Signed	 Related Components
^{to} Video Journal	Employment History	Tideo Journal
Legend	Training	Legend
Access is allowed	Data Sharing	To Access is allowed
Access is denied		Access is denied
Default rule is overridden		>⊲ Default rule is overridden

For more information about granting permissions in CStoreOffice[®], see Roles Management Permissions.

To learn more about the Loss Prevention module in CStoreOffice

Mobile App, see Using Loss
Prevention Features.

QwickServe Permissions

To allow the user to access the QwickServe features in CStoreOffice[®] Mobile App, the following conditions should be met:

- QwickServe module should be enabled for your account in CStoreOffice®.
- Relevant permissions of the QwickServe module should be granted to your user in CStoreOffice®.

Checking if QwickServe is Enabled

To check if the QwickServe module is enabled for your account in CStoreOffice®:

- 1. Sign in to CStoreOffice®.
- 2. Open the General Station Options form. For details, see Setting Up Locations.
- 3. In the General Station Options form:
 - a. Set the **Advanced Mode** toggle to the **On** position.
 - b. Go to the Product list and click Show Products.

c. Make sure the QwickServe product is selected.

GL #1	101
GL #2	1
Product	Hide Products i 49 i 99 i 199 i 199 i 1239 DPS Eucl Central
Back to Station Home	Los Prevention Analytics Qwickserve Qwickserve Qwickserve Remote Ordering SmartPOS

Q	If you need to add the QwickServe product to your station, contact a Petrosoft representative.

To learn more about the QwickServe module in CStoreOffice[®] Mobile App, see Viewing QwickServe Devices and Orders.

Checking if Relevant QwickServe Permissions are Granted

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To make sure relevant QwickServe permissions are granted, check either of the following user settings in CStoreOffice®:

- User role: Role Setup form > Access Data Types list.
- Employee form: Employee Setup form > Login & Password > Advanced.

Granting relevant QwickServe permissions to the user.	
New template:	
Allow assignment for all users: 🕑	
Access Data Types:	
✓ Expand all	• Show overridden
* Da Admin Tools	
 Related Components 	
B Get/Create Qwickserve licenses list	
Locations.QwickServe	
 A Ta Qwickserve 	
 Related Components 	
Qwickserve > Device Management	
[™] Qwickserve > Ingredients	
℃ Qwickserve > Menu	
B Qwickserve > Recipe Items	
B Qwickserve > Sets	
B Qwickserve API access general	
Qwickserve.Application.Update	
Qwickserve.Menu.Active.Menu.Selection	
Cwickserve.Menu.Loyalty	
Contract Con	
Catalog Qwickserve.Menu.Push.Catalog	
Carl Qwickserve.Menu.Setup	
B Qwickserve.Pin.Creation	
B Qwickserve.Prepstation	
Carl Qwickserve.Reports	
Qwickserve.Terminal.Settings	
Qwickserve Account access	
Legend	
℃ Access is allowed	
Access is denied	
X Detault rule is overridden	





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For more information about granting permissions in CStoreOffice[®], see Roles Management Permissions.

To learn more about the QwickServe module in CStoreOffice® Mobile App, Viewing QwickServe Devices and Orders.

VIEWING THE LOCATION SUMMARY

When you log on to CStoreOffice
[®] Mobile App, you can see the summary merchandise and fuel information for the location.

- If you log in to the application for the first time, the summary information for the first location in the locations list is displayed.
- If you have already used CStoreOffice
 Mobile App, the summary information for the location with which you have recently worked is displayed.

Using the Summary view in CStoreOffice® Mobile App, you can:

- Switch between locations
- Review the merchandise and fuel summary
- Update the summary information for the location

Switching Between Locations

To switch to another location, do either of the following:

• At the top left corner of the Summary view, tap the menu button, then tap the current location and from the list, select the location.



Owner Owner Search Q interviewer Without Tags 0 Fuel 0 % Change 0 2026 (DStoreOfficeDemo Motostar Alpha Fuel Search Q Image: Construction Summary Search Q DOCS AND FILES Bench 11/28 109,541 (33,93) Image: Construction Summary Market Street 368:11/29 Purch: 11/29 70,850 (15,94) Image: Construction Summary Bench 11/28 Bench 11/28 109,541 (33,93) Image: Construction Summary Market Street Bench 11/28 109,541 (33,93) Image: Construction Summary Bench 11/29 70,850 (15,94) Image: Construction Summary Bench 11/28 Bench 11/28 (16,94) Image: Construction Summary Bench 11/28	
Without Tags 0 Fuel 0 %change Market Street 2256 (CStoreOfficeDemo Motostar Apha Fuel Carregie 2256 (CStoreOfficeDemo Motostar Apha Fuel Sales: 11/28 Purch: 11/28 109,541 (33,93) Image: Comparison of the Comp	٤
Market Street 2256 (CStoreOfficeDemo Motostar Alpha Fuel 109,541 (33.9%) Image: Concepting Demonstration Motostar Alpha Fuel Sales: 11/28 Purch: 11/28 109,541 (33.9%) Image: Concepting Demonstration Motostar Alpha Fuel Market Street 70.850 (15.9%) DOCS AND FILES Bec/272 (18.3%) Sales: 11/29 Purch: 11/29 83.134 (8.3%) Image: Concepting Demonstration Motostar Alpha Fuel Sales: 11/29 Purch: 11/29 53.134 (8.3%)	;
King Goods Xing Go	9
DOCS AND FILES Market Street 86,272 (18.3%) Image: Market Street Sales: 1723 86,272 (18.3%) Image: Market Street Sales: 11/29 S3,134 (8.3%)	6)
Walnut street Walnut street Sales: 11/29 Parch: 11/29 Sales: 11/29 Parch: 11/29	0
	;)
E Fuel Invoices	
Expense Invoices	
E Lottery Invoices	
PRICEBOOK	
Juj Items	
🗞 Shelf Tags	
INVENTORY	
E Counts	
LOSS PREVENTION	
Live Cameras	
POS Journal C Totals 319,797 (22.7%)	9
QWICKSERVE	
C Devices	
I Order Queue	

• At the bottom of the Summary view, tap the location name and from the list, select the location.

Location Summary Market Street		C.		
Store KPI 01/23/2020	Projections \$	Last Year	× Locations	
Sales	52,085	56,648 >	Without Tags 2 Fuel 2	% Chang
GPM	24.1%	26.3% 🕽	Carnegie 109,541 Sales: 11/28	(33.
Profit	\$12,561	\$14,898 🕽	King Goods 70,850 Sales: 11/29 Purch: 11/29	(15.
Inventory	\$55,647	\$58,667 >	Market Street Sales: 1/23 Purch: 1/23 86,272	(18
Inv. Over/(Short)		>	Walnut street 53,134 Sales: 11/29 Purch: 11/29	(8.
Fuel KPI 01/23/2020	Projections \$	Last Year		
Sales(Gal)	86,272	105,614 🕽		
Price	\$3.459	\$3.459 >		
Pool Margin	0.155	0.150 >		
Profit	\$13,375	\$15,846 >		
Profit	Projections \$	Last Year		
Store	\$12,561	\$14,898 >		
Market Street	Docs and Files Inventory Count	Sheff Tags		
ANT TO LEARN MORE?			C Totals 319,797	(22.

Reviewing the Merchandise and Fuel Summary

The Summary view of CStoreOffice[®] Mobile App presents the dashboard aggregating the major backoffice merchandise and fuel data for the location. The dashboard allows you to get access to the most commonly used reports that will help you to easily track and forecast the retail location performance.

You can see the following widgets in the dashboard.

- Store KPI
- Fuel KPI

CStoreOffice[®]

- Profit
- Shifts
- Fuel Inventory
- Location Info

All widgets and their forms are permission-based. For details, see Granting Permissions to CStoreOffice® Mobile App Functionality.

Store KPI

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To get the list of permissions from the Store KPI widget, see Store KPI Widget Permissions.

The Store KPI widget presents information about merchandise KPI for the location:

- **Sales**: The total sales amount, projected and reported for the last year. From the **Sales** section, you can open and view the following reports:
 - o Store Sales History report: Tap the Sales section.
 - Item Sales by Tags report: Tap the Sales section and then, in the Store Sales History report, tap the tag icon.



- **GPM**: The GPM rate, projected and reported for the last year. Tap the **GPM** section, to open and view the **GPM Progress** report.
- **Profit**: The merchandise profit amount, projected and reported for the last year. Tap the **Profit** section, to open and view the **Store Profit by Category** report.
- **Inventory**: The inventory amount, projected and reported for the last year. Tap the Inventory section, to open and view the **Inventory Level by Category** report.
- Inv. Over/(Short): Tap the Inv. Over/(Short) section, to view the Inventory Adjustment History report that displays the history of inventory adjustments made for the location.

oman		C Just now	← Store Profit by Categ	lory
ore KPI 8/2019	Projections 🗘	Last Year		
1	64,706	62,224 >	11%	14.6%
1	24.9%	25.2% >		
ofit	\$16,144	\$15,653 >	11%	
entory	\$59,879	\$66,531 >		
. Over/(Short)		>	9%	2.8
iel KPI	Projections \$	Last Year	7.2	% 5%
20/2015				
les(Gal)	109,977	114,743 >		
les(Gal) ce	\$2.540	\$2.540	01 Cigarettes	16%
les(Gal) ce	\$2.540	\$2.540	01 Cigarettes 02 Tobacco	16% 14.6%
les(Gal) ce ol Margin	109,977 \$2.540 0.146	114,743 > \$2.540 > 0.165 >	01 Cigarettes 02 Tobacco 10 Energy Drinks	16% 14.6% 11%

Fuel KPI

(i)

To get the list of permissions from the Fuel KPI widget, see Fuel KPI Widget Permissions.

The Fuel KPI widget presents information about fuel KPI for the location:

- **Sales (Gal)**: The amount of fuel sold (in gallons), projected and reported the last year. Tap this line to open the **Fuel Sales History** report.
- **Price**: The fuel price, projected and reported for the last year. From the **Price** section, you can open and view the following reports:
 - **Price Report**: Tap the **Price** section, to open the **Price** report with information about competitor fuel prices.

o Price History report: Tap the Price section and then in the Price Report, tap the history icon.

Price Report Market Street		C Just now
Price	Regular 🗘	Updated
Cost	\$2.799	12/21/12 07:17 PM
Current Retail	\$3.459	01/22/20 12:00 AM
Competitors		
SHELL Penn Ave/Bradock	\$3.459	11/17/11 12:28 PM
SUNOCO Penn Ave	\$3.459	11/17/11 12:28 PM
Get Go Penn Ave Penn Ave	\$3.459	11/17/11 12:28 PM
Sunoco Baum blvd Baum blvd		11/17/11 12:28 PM
76 Washington Washington and Frankstown av		11/17/11 12:28 PM

- **Pool Margin**: The pool margin, projected and reported for the last year. The pool margin is the estimate of total profit per gallon based upon the gasoline sales price versus cost of gasoline per gallon. Tap this line to open the **Pool Margin Progress** report.
- **Profit**: The fuel profit amount, projected and reported for the last year. Tap this line in the widget to open the **Fuel Profit Progress** report.

E Location Summary		C Just now	~	Fuel S	Sales Histor	у			
Store KPI 10/28/2019	Projections 🗘	Last Year					3,225	5 High: Avg: Low:	
Sales	64,706	62,224 >	10,000	,					
GPM	24.9%	25.2% >	9,000						
Profit	\$16,144	\$15,653 🕽	8,000						
Inventory	\$59,879	\$66,531 >	7,000						
Inv. Over/(Short)		>	6,000						
Fuel KPI	Projections \$	Last Year	5,000	3,805	3,599	3,402	3,205	031	1001
Sales(Gal)	109,977	114,743 >	3,000					ë.	
Price	\$2.540	\$2.540 >	2,000					_	
Pool Margin	0.146	0.165 >	1,000						
Profit	\$16,095	\$18,904 >		10/21 Mon	10/23 Wed	10/2 Fr	25 1	0/27 Sun	
			B	egular	Ultra	Super	Plus		
En (III)	r 3	8				Doors and Files			0

Profit

(i)

To get the list of permissions from the Profit widget, see Profit Widget Permissions.

The Profit widget displays information about merchandise and fuel profit:

- Store: The merchandise profit, projected and reported for the last year. Tap this line to open the Store Profit by Category report.
- Fuel: The fuel profit, projected and reported for the last year. Tap this line to open the Fuel Profit Progress report.
- VIP: Purchases amount by VIP (Volume Incentive Programs). Tap this line to open the VIP report.
- Allowance: Purchases amount by allowance programs. Tap this line to open the Fuel Allowance report.
- Total Profit: The total profit for the location, projected and reported for the last year.



Shifts

(i)

To get the list of permissions from the Shifts widget, see Shifts Widget Permissions.

The Shifts widget displays information about recently accepted shifts. Tap the necessary line to see shift details.

E Location Summar	У	C 31 min ago	× Shift 21			
Profit	Projections 🗘	Last Year	21	Sta 09:57 P	art M	En 12:02 AN
Store	\$16,144	\$15,653 >		10/27/	19	10/29/19
Fuel	\$16,095	\$18,904 >	Sales Summary			
VIP	\$4,355	>	Product	Current Retail	Volume	Sale
Allowance	\$0	>	Regular	2.711	2,530	\$6,858
Total Profit	\$32,239	\$34,557	Plus	2.997	216	\$647
Shifts			Super	2.77	241	\$668
Accepted 🗘	Start	End	Ultra	3.422	238	\$815
21	09:57 PM 10/27/19	12:02 AM 10/29/19 >				
21	11:49 PM 10/26/19	10:10 PM 10/27/19 >	Total Fuel		3,224	\$9,499
21	11:51 PM	12:02 AM	Net Dpt. Sales			\$1,836
	10:20 DM	12:04 444	Lottery Net Sales			\$468
21	10/24/19	10/26/19 >	Total Sales			\$11,802
			Total Other Bayenu	0		¢100

Fuel Inventory

(j)

To get the list of permissions from the Fuel Inventory widget, see Fuel Inventory Widget Permissions.

The Fuel Inventory widget displays inventory data for all fuel types. Tap the necessary line to see inventory details for a specific fuel type.

E Location Summary		C 40 min ago	← Fuel Inventory Cochran	Just no
21	11:50 PM 10/22/19	12:01 AM 10/24/19 >	Regular	
Last 7 days		>	Inventory Date 10/22/19 07:57 AM	9,172
Fuel Inventory			10/31/19 01:00 PM	min: 1,222 Gal
Regular max: 18,398 Gal	9,172	7,300 >	Illtra	
Ultra max: 9,199 Gal	2,369	1,700 >	Inventory Date 10/22/19 07:57 AM	(max: 9,199 Gal 2,369
Location Info			11/01/19 09:00 AM	min: 611 Gal
Phone 896-321123		e.		
Email csodemoowner@petro	osoftinc.com	\leq		
Address Main st 600 PENNSBL 18073	IRG PENNSYLVAN	IIA 💡	🕑 Loads	11/01/2019
Contact Person Owner Owner			Ultra	1,700
Link Contact Link contact from your	r Contact Book	Ð	Regular Swipe to see previou	7,200 s/next Loads
Cochran Items Lookup D	Inces and Files Inventory Co	unt Shelf Tags	Cochran Items Lookup Docs and Fil	les Inventory Count Shelf Tags



Location Info

(i)

No permissions required to display the Location Info widget.

The Location Info widget displays information about the location set up in CStoreOffice®.

E Location Summary		C 40 min ago
21	11:50 PM 10/22/19	12:01 AM 10/24/19 >
Last 7 days		>
Fuel Inventory		
Regular max: 18,398 Gal	9,172	7,300 >
Ultra max: 9,199 Gal	2,369	1,700 >
Phone 896-321123		Ľ.
Location Info		
Email csodemoowner@petro	softinc.com	
Address Main st 600 PENNSBU 18073	RG PENNSYLVAI	NIA 🔮
Contact Person Owner Owner		
Link Contact Link contact from your	Contact Book	Θ
Cochran Items Lookup D	ocs and Files Inventory Ca	ount Shelf Tags

Updating the Summary Information

The summary information for the location is updated automatically.

- To see when data was last updated, at the top right corner of the Summary view, check the date below the sync icon.
- To update the summary information manually, tap the sync icon.

CStoreOffice[®]

Location Summary Market Street		C 10/29
Store KPI 12/28/2012	Projections 🗘	Last Year
Sales	76,999	74,319 >
GPM	33.2%	34.4% >
Profit	\$25,550	\$25,550 >
Inventory	\$14,614	\$14,614 >
Inv. Over/(Short)		>
Fuel KPI 12/28/2012	Projections 🗘	Last Year
Sales(Gal)	68,973	55,543 >
Price	\$3.459	\$3.459 >
Pool Margin	0.130	0.162 >
Profit	\$8,997	\$8,997 >
Market Street Items Lookup Doc	s and Files Inventory Cou	Int Shelf Tags

WORKING WITH PRICE BOOK ITEMS

CStoreOffice[®] Mobile App allows you to view and work with items added to the account Price Book in CStoreOffice[®]. You can perform the following operations with items:

- View and edit item data
- Add items to a cycle count ticket
- Add the item barcode to a shelf tags sheet
- Create shelf tags

(i)

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All pricebook forms and related functionality are permission-based. For details, see Granting Permissions to CStoreOffice® Mobile App Functionality.

Viewing and Editing Items

You can view information about a specific item available in the Price Book and edit the item data, if necessary.

To be able to edit item data, you need to have relevant permissions granted to your user. If you do not have this permission, once you attempt to edit the item data, CStoreOffice® Mobile App displays a warning. To request a permission, in the warning window, tap **Request permissions** and select an application over which you want to send the request.



To view information about a specific item and edit it, you first need to find the item you need. You can do it in two ways:

- Scan the item barcode. Do the following:
 - a. At the bottom of the Summary view in CStoreOffice® Mobile App, tap Items Lookup.

Location Summary Market Street		C 10/29
Store KPI 12/28/2012	Projections 🗘	Last Year
Sales	76,999	74,319 >
GPM	33.2%	34.4% >
Profit	\$25,550	\$25,550 >
Inventory	\$14,614	\$14,614 >
Inv. Over/(Short)		>
Fuel KPI 12/28/2012	Projections 🗘	Last Year
Sales(Gal)	68,973	55,543 >
Price	\$3.459	\$3.459 >
Pool Margin	0.130	0.162 🕽
Profit	\$8,997	\$8,997 >
Market Street	s and Files Inventory Co	unt Shelf Tags

- b. Point the device camera at the item barcode. CStoreOffice

 Mobile App will automatically find the item in the Price Book by the scanned barcode and display the item card with the item information.
 - Currently, only UPC-A item codes can be scanned via CStoreOffice® Mobile App. Make sure your item has the UPC-A item code. It should consists of 12 digits.
- Find the item in the Price Book. Do the following:
 - a. At the top left corner of the Summary view, tap the menu button and then in the **Pricebook** section, tap **Items**.

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CStoreOffice®



b. In the search field at the top of the view, type the item name or a part of it and tap the search icon to the right. You can also search for items by UPC.

imes Items Lookup			
pizza	×	Q	(ini)
TOTINO PIZZA ROLLS PEPPER & CP 004280000583	HEESI	E 12CT	>
LUNCHABLES CHEESE PIZZA 16CT 004470002410			>
HP PIZZA 004695071116			>
Pizza \$5 004800126526			>
JUMBO PIZZABURGER 010000003338			>
PIZZA 010000003970			>
TIMS PIZZA 011594090070			>
Lean Cuisine Cheese Pizza			>
Lean Cuisine Four Cheese Pizza			>

c. In the list of search results, tap the necessary item to open the item card.

You can now view and edit the following item data:

- Image assigned to the item
- Item description

CStoreOffice

- CR description
- Current retail
- UPC
- PLU
- Category
- CR department

Adding Items to a Cycle Count Ticket

If you want to perform itemized inventory, you can add an item to a cycle count ticket directly from the item card.

Q	To be able to add an item to a cycle count ticket, you need to have relevant permissions granted to your user.
i	For more information about CStoreOffice [®] Mobile App pricebook permissions, see Pricebook Permissions.
i	Permissions are granted in CStoreOffice [®] . For details, Roles Management Permissions.

CStoreOffice®

Do the following:

- 1. At the bottom of the Summary view, tap the location name and from the list, select the necessary location.
- 2. Find the necessary item by scanning the item barcode or finding the item in the Price Book. For details, see Viewing and Editing Items.
- 3. At the bottom of the item card view, tap **Inventory Count**.

< JUMBO PIZZABUR	GER 🔒
	010000003338
Description JUMBO PIZZABURGER	
CR Description JUMBO PIZZAB	
Current Retail O	
UPC-A 010000003338	PLU O
Category 22 Fast Food	
Department 10 FastFood	
Inventory Count	Shelf Tags

4. In the displayed window, scroll up or down to define the number of items counted during the inventory.



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5. Tap **Done**.



Result: A cycle count ticket is created, and the item is added to it. You can add more items to the ticket later. For details, see Performing Itemized Inventory.

If at least one item is added to a cycle count ticket, in the Summary view, CStoreOffice® Mobile App displays the number of added items over the **Inventory Count** button.

Adding Items to a Shelf Tags Sheet

If you need to print item barcodes, you can add the item barcode to a shelf tags sheet directly from the item card.

Q	To be able to add the item barcode to a shelf tags sheet, you need to have relevant permissions granted to your user.
(j)	For more information about CStoreOffice [®] Mobile App pricebook permissions, see Pricebook Permissions.
i	Permissions are granted in CStoreOffice [®] . For details, Roles Management Permissions.

CStoreOffice®

Do the following:

- 1. At the bottom of the Summary view, tap the location name and from the list, select the necessary location.
- 2. Find the necessary item by scanning the item barcode or finding the item in the Price Book. For details, see Viewing and Editing Items.
- 3. At the bottom of the item card view, tap **Shelf Tag**.

< JUMB	O PIZZAB	URGER
		01000003338
Description JUMBO PIZ	ZABURGER	
CR Description	ZAB	
Current Retail O		
UPC-A 010000003	338	PLU O
Category 22 Fast Foo	d	
Department 10 FastFood	d	
	<u>1</u> 9	

You can now proceed to setting up the shelf tags sheet. For details, see Creating Shelf Tags.

Q

If at least one item is added to a shelf tags sheet, in the Summary view, CStoreOffice® Mobile App displays the number of added items over the **Shelf Tags** button.

Creating Shelf Tags

You can create shelf tags sheets with barcodes and retail prices for items in CStoreOffice® Mobile App on your mobile device. The created sheet can then be shared or sent by email as a PDF file to be printed later.



To be able to create shelf tags sheets, you need to have relevant permissions granted to your user.



To create a shelf tags sheet:

- 1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to create shelf tags.
- 2. At the bottom of the Summary view, tap Shelf Tags.

Location Summary Market Street		10/29
Store KPI	Projections 🗘	Last Year
Sales	76,999	74,319 >
GPM	33.2%	34.4% >
Profit	\$25,550	\$25,550 >
Inventory	\$14,614	\$14,614 >
Inv. Over/(Short)		>
Fuel KPI 12/28/2012	Projections \$	Last Year
Sales(Gal)	68,973	55,543 >
Price	\$3.459	\$3.459 >
Pool Margin	0.130	0.162 🕽
Profit	\$8,997	\$8,997 >
a 500		®

- 3. Add an item to the shelf tags sheet. You can do it in the following ways:
 - Scan the item barcode: At the bottom of the view, tap Scan Barcode and point the device camera at the item barcode. CStoreOffice
 Mobile App will automatically find the item in the Price Book by the scanned barcode and add the item to the sheet.
 - **Add the item from the item card**: You can add the item to a self tags sheet directly from the item card. For details, see Adding Items to a Shelf Tags Sheet.
- Populate the sheet with item tags. To do this, in the **Items** list, tap the necessary item and then in the **Template** section, tap one or more cells. The tag for the item will be placed to the selected cell(s).

CStoreOffice [®]	
---------------------------	--

imes Print Shel	f Tags	
Layout Type	Shelf Ta	д Туре
Petrosoft (3x10) 🗘	Petroso	ft ‡
Vpper case de	scription 🗌 Use	Taxes
Items		
SWISHER CIGA 025900000059	RILLOS SNG	×
SWISHER CIGA 025900000158	RILLOS ST/BERF	^{YY} ×
SWISH SWEET SNGL 025900000967	WHITE GRAPE CI	IGARILLO
Template		
SWISHER CIGARILLOS SNG 025900000059	SWISHER CIGARILLOS ST/BERRY 025900000158	SWISH SWEET WHITE GRAPE CIGARILLO SNGL 025900000967
Scan Barcode	Dpen PDF	Share PDF

- 5. At the top of the view, configure the sheet settings:
 - o Layout Type: Select the sheet layout type Petrosoft, Circle or EBY Brown Format.
 - Shelf Tag Type: Select the type of shelf tags Petrosoft or Standard.
 - **Upper case description**: Enable this option to print item descriptions in the upper case.
 - **Use Taxes**: Enable this option to print the retail price with taxes.
- 6. At the bottom of the view, tap **Open PDF** to preview the created sheet or **Share PDF** to send the created sheet by email, messenger and so on.



imes Print Shel	f Tags	
Layout Type	Shelf Ta	д Туре
Petrosoft (3x10) 🗘	Petrosof	it ≎
Vpper case de	scription 🔲 Use	Taxes
ltems		
SWISHER CIGA 025900000059	RILLOS SNG	×
SWISHER CIGA 025900000158	RILLOS ST/BERR	Y X
SWISH SWEET SNGL 025900000967	WHITE GRAPE CI	GARILLO ×
Template		
SWISHER CIGARILLOS SNG 025900000059	SWISHER CIGARILLOS ST/BERRY 025900000158	SWISH SWEET WHITE GRAPE CIGARILLO SNGL 025900000967
SWISHER CIGARILLOS SNG 025900000059	SWISHER CIGARILLOS ST/BERRY 025900000158	SWISH SWEET WHITE GRAPE CIGARILLO SNGL 02590000967
SWISHER CIGARILLOS SNG 025900000059	SWISHER CIGARILLOS ST/BERRY 025900000158	SWISH SWEET WHITE GRAPE CIGARILLO SNGL 025900000967
SWISHER CIGARILLOS SNG 025900000059	SWISHER CIGARILLOS ST/BERRY 025900000158	SWISH SWEET WHITE ORAPE CIGARILLO SNGL 025900000967
SWISHER CIGARILLOS SNG 025900000059	SWISHER CIGARILLOS SNG 025900000059	SWISHER CIGARILLOS SNG 025900000059
SWISHER CIGARILLOS SNG 025900000059	SWISHER CIGARILLOS SNG 025900000059	SWISHER CIGARILLOS SNG 025900000059
Scan Barcode	Open PDF	Share PDF

SCANNING INVOICES USING CSTOREOFFICE® MOBILE APP

With CStoreOffice[®] Mobile App installed on a mobile device, you can take pictures of paper invoices and upload them to the CStoreOffice[®] data center. Petrosoft operators will then turn these documents into electronic invoices, and the invoice data will become available in CStoreOffice[®].

This option can be thought of as a 'mobile version' of Docs Scanner. For more details about this tool, see Docs Scanner.



To be able to scan invoices, you need to have relevant permissions granted to your user. For details, see Docs and Files Permissions.

To scan an invoice with CStoreOffice® Mobile App:

- 1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to add the invoice.
- 2. At the bottom of the Summary view, tap Docs and Files.



3. In the **Docs and Files** menu, tap the necessary invoice type.

Location Summary Carnegie		C 15 min ago
Store KPI	Projections 🗘	Last Year
Sales	71,914	71,003 >
GPM	32.7%	33.1% >
Profit	\$23,505	\$23,505 >
Inventory	\$947	\$947 >
Inv. Over/(Short)		>
Fuel KPI 12/28/2012	Projections \$	Last Year
Sales(Gal)	43,174	40,494 >
Price	\$3.499	\$3.499 >
Merchandise Inv Pool I Fuel Invoices	oices	202 >
Profit Expense Invoices	6	194 >
Lottery Invoices		
Carnegie Items Lookup Doc	s and Files Inventory Co	unt Shelf Tags

- 4. Tap the calendar icon and select the date for which the invoice is added.
- 5. At the top right corner of the view, tap the plus icon to add the invoice.

← Merch _{Carnegie}	andise Inv	oices	Ju	C st now	+
Ê					
_					
	Sunt	5	民	8	>
Carnegie	Items Lookup	Docs and Files	Inventory Count	Shelf	Tags

6. In the **Invoice** form, fill the following invoice data:

- Shift number: Type the shift number for the invoice.
- Vendor: Select the vendor for which the invoice is added.
- o Invoice #: Type the invoice number.
- o **Cost**: Type the invoice cost.
- MOP: Select the method of payment for the invoice.
- 7. Add the invoice image. You can do it in two ways:
 - o To add a photo, tap the photo icon and take the invoice photo with the device camera.
 - To add a saved image, tap the image icon and browse to the invoice image on the device.



8. At the bottom of the view, tap **Save**.

× New Invoice		
Date	Shift #	
10/30/2019	2	
Vendor		
Coca-Cola(6)		
Invoice #		
1234		
Cost		
120.9		
мор		
Cash		
		0
	Save	

Result: The invoice is sent to the Petrosoft data center for further processing by operators.

You can monitor the sending status in the **Docs and Files** menu at the bottom of the view. At the top right of the **Docs and Files** menu, you can view a digit (colored red) that indicates the number of images to be uploaded. When the red digit disappears, it indicates that all images are uploaded.



PERFORMING ITEMIZED INVENTORY

You can use CStoreOffice[®] Mobile App to perform itemized inventory with your mobile device. In particular, you can create a cycle count ticket and add to it all items that need to be counted, either by scanning item barcodes or manually. Once the items are counted and the cycle count ticket is ready, you can upload it to CStoreOffice[®], and the store manager can then proceed with the ticket.



To be able to perform an itemized inventory, you need to have relevant permissions granted to your user. For details, see Inventory Permissions.

To perform itemized inventory:

- 1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to perform itemized inventory.
- 2. At the bottom of the Summary view, tap Inventory Count.

E Location Summary		C 10/29
Store KPI 12/28/2012	Projections \$	Last Year
Sales	76,999	74,319 >
GPM	33.2%	34.4% 🔊
Profit	\$25,550	\$25,550 >
Inventory	\$14,614	\$14,614 >
Inv. Over/(Short)		>
Fuel KPI 12/28/2012	Projections 🗘	Last Year
Sales(Gal)	68,973	55,543 >
Price	\$3.459	\$3.459 >
Pool Margin	0.130	0.162 >
Profit	\$8,997	\$8,997 >
Market Street Items Lookup D	cos and Files	Shelf Tags

3. Add an item to the cycle count ticket. You can do it in the following ways:

- **Scan the item barcode**: To the right of the search field, tap the barcode icon and point the device camera at the item barcode. CStoreOffice

 Mobile App will automatically find the item in the Price Book by the scanned barcode and add the item to the cycle count ticket.
- **Find the item in the Price Book**: In the search field, enter the item name or a part of it and tap the search icon to the right. You can also search for items by UPC. In the results list, tap the item you want to add.
- **Add the item from the item card**: You can add an item to the cycle count ticket directly from the item card. For details, see Adding Items to a Cycle Count Ticket.
- 4. In the **Count** field, specify the number of counted items. You can type the number directly or tap the arrow icon to the right and scroll up or down in the **Pick a Count** window.

imes Cycle Count Ticket				
Search or Add New			Q	(III)
Open Tobacco 000000000901				×
Count				
2 v of 9			Entr	y #3
Open Tobacco				×
Pick a Count				
	2			
00	3			
6	4			
		CANCEL	DONE]}
1 v of 1			Entr	y #1
	Upload Ticket			

5. Repeat steps 3-4 for all items you want to add to the cycle count ticket.



6. At the bottom of the view, tap Upload Ticket.

Search or Add New Q UL Open Tobacco occocococosol ~ ~
00000000000000000000000000000000000000
•
Proved in the second seco
3 v of 10 Entry #3
Open Tobacco ×
۲
Count Entry #2
Open Tobacco X
•
Count Entry #1
TEST ITEM NEW 2 × 000000005890
۲
Count Entry #1
Upload Ticket

Result: The ticket is uploaded to CStoreOffice[®] and becomes available in the **Itemized Inventory** form. For details, see Itemized Inventory.

USING LOSS PREVENTION FEATURES

With CStoreOffice ® Mobile App, you can use the following Loss Prevention features:

- View videos from cameras installed at your location and also check if all cameras are functioning properly. For details, see Viewing Retail Cameras.
- Review cash register transactions and watch store camera records for these transactions using a mobile device. For details, see Viewing the POS Journal.

The Loss Prevention functionality is available in CStoreOffice[®] Mobile App under the following conditions:

- If the Loss Prevention Analytics product is enabled for your Petrosoft account.
- If your user has relevant permissions.



For details, see Loss Prevention Permissions.

(i)

Viewing Retail Cameras

With CStoreOffice[®] Mobile App, you can view videos from cameras installed at your location. You can also check if all cameras are functioning properly.

To be able to view videos from cameras installed at your location, you need to have relevant permissions granted to your user. For details, see Loss Prevention Permissions.

To view cameras at the store:

- 1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to view cameras.
- 2. At the top left corner of the Summary view, tap the menu button and then in the **Loss Prevention** section, tap **Live Cameras**.



3. Below the video stream, select the necessary camera and use controls to watch the video.



To watch the video in the full screen mode, below the video stream, tap the full screen icon.



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If a camera is unavailable or the video stream cannot be loaded, CStoreOffice ® Mobile App displays red connection and view icons under the camera.

(i)

Viewing the POS Journal

With CStoreOffice[®] Mobile App, you can review cash register transactions and watch store camera records for these transactions using a mobile device.

To be able to review cash register transactions, you need to have relevant permissions granted to your user. For details, see Loss Prevention Permissions.

To view the POS journal:

- 1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to view the POS journal.
- 2. At the top left corner of the Summary view, tap the menu button and then in the **Loss Prevention** section, tap **POS Journal**.

Owner Owner csodemoowner@petrosoftinc.com	Last Vaar
	Last real
Market Street > 3296 CStoreOfficeDemo Motostar Alpha Fuel >	56,648 >
Location Summary	26.5% >
DOCS AND FILES	\$14,998 >
Fuel Invoices	\$66,816 >
Expense Invoices	>
E Lottery Invoices	
PRICEBOOK	Last Year
(III), Items	105,614 >
🗞 Shelf Tags	\$3.459 >
INVENTORY	0.149 >
LOSS PREVENTION	\$15,726 >
Live Cameras POS Journal	Last Year
QWICKSERVE	\$14,998 >
Devices	R
⊟ Order Queue v3.3.0	Shelf Tags

- 3. At the top of the view, tap **Filters** and set up the filter for the list of transactions you want to view:
 - **Period**: In the **From** and **To** fields, enter the start and end dates of the period for which you want to view transactions or tap a link of a predefined period below.
 - o Time: Specify the time interval for which you want to view transactions.
 - o **Cost**: Enter an approximate cost for transactions.
 - o **Events**: Select the check boxes next to events you want to display in the list of transactions.
- At the bottom of the Video Journal Filters view, tap Apply Filter. To discard the filter, tap Reject Filter.

imes Video Journal Filters			
Period From 11/26/2019 Today Yesterday Last 7	To 12/03/2019 Days MTD YTD		
Time From 12:00 AM	то 11:59 РМ		
Cost			
Events All Events Voids and Cancels Refunds Discounts Direct Department Sale Age Restricted Sales ED Cash Control Payments Control FDA Compliance No Event	s cceptions		
Apply Filter	Reset Filter		

5. In the POS Journal view, tap the transaction you want to check.

Q

The letter code to the right of the transaction defines the transaction type: 'V' for void transactions, 'C' for cancel transactions and so on.

Cochran	C Just now
Filters 11/26/2019 - 12/03/2019; 12:00 AM - 11:59 PM;	
Journal Void: \$20.00 #1012477	V
11/26/19 12:12:20 AM SHAWN HOMLES Void: \$8.65 #1016017	V
11/26/19 12:31:30 AM SHAWN HOMLES	
Cancel: \$4.49 #12201 11/26/19 12:40:28 AM SHAWN HOMLES	C
Cancel: \$1.99 #255401 11/26/19 1:10:39 AM SHAWN HOMLES	C
Cochran Items Lookup Docs and Files Inventory Count	Shelf Tags

6. Review the transaction details. You can check the following data:

• Below the video, use the controls to switch between cameras and play video records from these cameras.

To watch video records from all cameras at once in the dashboard, tap All.



To watch the video record in the full screen mode, at the bottom of the video section, tap the full screen icon.



• At the bottom of the transaction view, check the transaction details. You can see the description of the item(s) sold, and the transaction statistics: date and time, cashier's name and so on.



To close the transaction details and get back to the transactions list, at the top left of the transaction view, tap the close button.

VIEWING QWICKSERVE DEVICES AND ORDERS

You can view the list of QwickServe devices set up for your account and check the queue of orders coming from these devices.

This functionality is available only if the QwickServe module is enabled for your Petrosoft account. For details, see QwickServe Permissions.

To check QwickServe devices and the order queue:

(i)

- 1. At the bottom of the Summary view, tap the location name and from the list, select the location for which you want to check QwickServe devices.
- 2. At the top left corner of the Summary view, tap the menu button and in the QwickServe section,



tap Devices or Order Queue.

8	C Just now
Owner Owner csodemaowner@petrosoftinc.com	Last Year
Market Street > 3296 CStoreOfficeDemo Motostar Alpha Fuel	56,648 >
En Location Summary	26.5% >
DOCS AND FILES	\$14,998 >
Fuel Invoices	\$66,816 >
E Expense Invoices	>
E Lottery Invoices	
PRICEBOOK	Last Year
[អា] Items	105,614 >
🗞 Shelf Tags	\$3.459 >
INVENTORY	
Counts 2	0.149 >
LOSS PREVENTION	\$15,726 >
Live Cameras	_
POS Journal	Last Year
QWICKSERVE	\$14,998 >
🖵 Devices	
≔ Order Queue	Shelf Tags
v3.3.0	

You can now review the list of devices and orders.



FAQS: CSTOREOFFICE® MOBILE APP

CANNOT ADD MULTIPLE IMAGES TO THE INVOICE

The number of images which can be added to the invoice in CStoreOffice® Mobile App is limited to 1. Therefore, it is strongly recommended to add only one image to the invoice.

If you are still trying to upload several images at once, only the first image will be added or you may experience issues with the CStoreOffice [®] Mobile App.

(j)

For more information on how to add an invoice using the CStoreOffice
[®] Mobile App, see Scanning Invoices Using CStoreOffice
[®] Mobile App.

CANNOT USE CAMERA FROM CSTOREOFFICE® MOBILE APP

In this case, check that the corresponding permission is enabled for the CStoreOffice® Mobile App app in your device settings:

- 1. From your device, go to Settings > Apps > Manage apps.
- 2. In the Manage apps list, tap CStoreOffice® Mobile App.



3. In the CStoreOffice
[®] Mobile App settings screen, go to **Permissions** > **App permissions**.

4. In the **App permission**s screen, make sure the **Camera** toggle is set to the **On** position. If not, set it to the **On** position.

<	()		←	App permissions	:
			٥	CSOMobile	Ġ
CSOMobile Version: 3.4.2			0	Camera	
C Storage	55 31MB 义		8	Contacts	
	0B >		•	Location	
Battery	0.0% >	>		Storage	
Permissions					
Autostart					
App permissions Manage permissions related to location, sto phone, messages, and contacts.	rage, >				
Force stop Uninstall Clear data					

Result: After the **Camera** permission is enabled for the CStoreOffice[®] Mobile App app on your device, you should be able to use camera from CStoreOffice[®] Mobile App.

Image: Provide a strain of the screens, settings and steps navigating you to the CStoreOffice Image: Mobile App camera permission may vary depending on your device model.

WHY IS MY ITEM NOT SCANNED?

Currently, only UPC-A item codes can be scanned via CStoreOffice[®] Mobile App. Make sure your item has the UPC-A item code. It should consist of 12 digits.

WHAT DOES "ENTRY #" MEAN IN THE CYCLE COUNT TICKET?

The **Entry #** label is displayed to the right of each item added to the cycle count ticket. It indicates the order in which the same items are added to the ticket as single line items.

Each time the same item is added to the ticket, it is displayed in a separate line with the **Entry #** value which is increased by one.

For example in the image below, the **Open Tobacco** item is added to the ticket three times as this item is displayed in three single lines.

× Cycle Count Ticket		
Search or Add New	Q	(m)
Open Tobacco		×
0000000901		۲
3 of 10	Entr	y #3
Open Tobacco		×
		۲
1 ✓ of 10	Entr	y #2
Open Tobacco 00000000991		×
		۲
6 ✓ of 10	Entr	y #1
TEST ITEM NEW 2 00000005890		×
		•
18 V of 18	Entr	y #1
Upload Ticket		