AXESS CLICS

PART 2 - BASICS, TARIFFS

USER MANUAL V 4.0_2019

English

Contents

1 Perform these Work Steps 4

2 Enter Basic Data 5

2.1 Person Types ... 5
2.1.1 Create New Person Type ... 5
2.1.2 Copy Person Type ... 6
2.1.3 Edit or Delete Person Type ... 7
2.1.4 Assign Person Type to EDE Number ... 8
2.1.5 Person Types Translation ... 9
2.1.6 Group Person Types by defining Age Rules ... 11
2.2 Ticket Types ... 13
2.2.1 Create New Ticket Type ... 13
2.2.2 Copy Ticket Type ... 17
2.2.3 Edit Ticket Type ... 18
2.2.4 Assign Ticket Type to EDE Number ... 19
2.2.5 Ticket Types Translation ... 21
2.2.6 Assign Allotment to a Ticket Type ... 22
2.3 Pools ... 24
2.3.1 Create a Pool ... 24
2.3.2 Assign Entries to a Pool ... 26
2.3.3 Assign EDE Nummer to Pool ... 27
2.3.4 Override POE Settings for a Pool ... 28
2.4 Schedules ... 29
2.4.1 Day Schedule ... 29
2.4.2 Special Days ... 34
2.4.3 Season Parameter ... 36
2.4.4 Time Schedules ... 41
2.5 Allotment ... 44
2.5.1 Create an Allotment - Maximum Number of Guests ... 44
2.5.2 Manage Days ... 46
2.5.3 Create Allotment - plus Sub-Allotment ... 47
2.5.4 Create Sub-Allotment ... 48
2.5.5 Examples for Setting up Suballotments ... 51
2.5.6 Assign Allotment to a Ticket Type ... 53
2.5.7 Assign Allotment to a Tariff ... 54
2.5.8 Assign an Allotment while creating a New Tariff ... 56

2.5.9 Assign Allotment to a Product 57
2.5.10 Assign POE 58

3 Ticket Tariffs and Price Sheets 59
3.1 Create or Copy a Price Sheet....60
3.2 Create Price Sheet Section 62
3.3 Create Tariff....64
3.4 Copy Price Sheet Section....67
3.5 Edit Tariff 70
3.6 Set Filter for List Tariffs 72
3.7 Save Filter Settings for List Tariffs 73
3.8 Tariff Overview....74
3.9 Assign Tariff to an Allotment....75
3.10 Copy Tariff to other Person or Ticket Types....76

4 Article Tariffs and Price Sheets 79
4.1 Create Article Price Sheet 81
4.2 Create Price Sheet Sections for an Article Price Sheet 82
4.3 Create Articles 83
4.4 Assign Article Tariff....85
4.5 Article Packages....86

5 Packages 88
5.1 Create Package Price Sheet 89
5.2 Create Price Sheet Sections 90
5.3 Create Package....91
5.4 Add Ticket Tariff to Package 93
5.5 Add Article to Package 96

6 Keyboard Layout 98
6.1 Create Keyboard Layout....99
6.2 Keyboard Layout - add Tariffs, Articles and Packages 100
6.3 Keyboard Layout - Pool Assignment 103
6.4 Assign a Keyboard Layout to a Cashier 104
6.5 Copy Keyboard Layout 105

1 Perform these Work Steps

Use menu ***System*** and ***Tariff Management*** to define the necessary basic settings for your tariffs. The ***Price Sheets*** with its ***Tariffs*** are created in menu ***Tariff Management***.

We recommend: Perform the work steps in this order

1. System configuration
    a. User and User profile
    b. General data, Currencies, Tax rates, Number ranges
    c. Points of Sale
    d. Cashiers, Cashier rights
    e. Payment Types
    f. POE's, Signals
    g. Journals
2. Basic Data
    a. Person Types
    b. Ticket Types
    c. Schedules: Season Parameter, Day, Time, Special Days
3. Tariffs
    a. Price Sheets
    b. Tariffs
    c. Keyboard Layout, Contracts

The work steps 1 and 2 can be performed in in any order, but work step 3, *Tariffs*, needs the previous work steps.

> Keep in mind that some settings must be done to be available for further steps. If you want to delete settings you probably must proceed in reverse order. Child elements must be deleted first.

First put together a price sheet in written form. Here you write down all the desired settings that you want to enter, such as:

- Schedules: Season Parameter, Day, Time, Special Days
- Person Types, regular and with special conditions
- Ticket Types, Ticket Price, CardMask for tickets etc.

2 Enter Basic Data

2.1 Person Types

Function: ***General Data / Person Types***

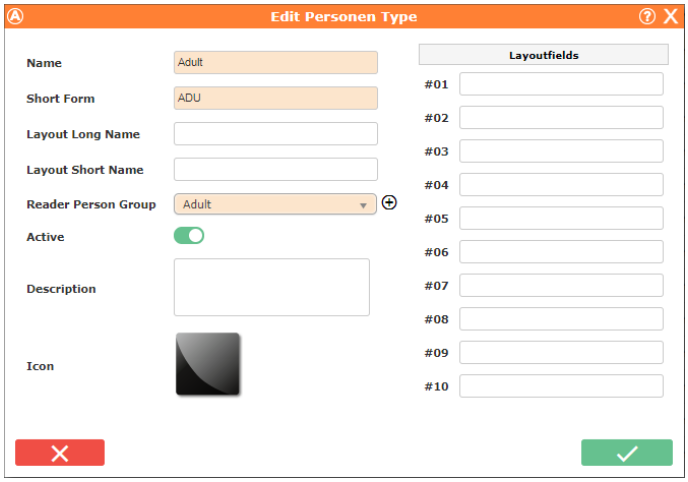
Use function ***Person Type*** to define a number of types which are basically necessary for ticket sales.

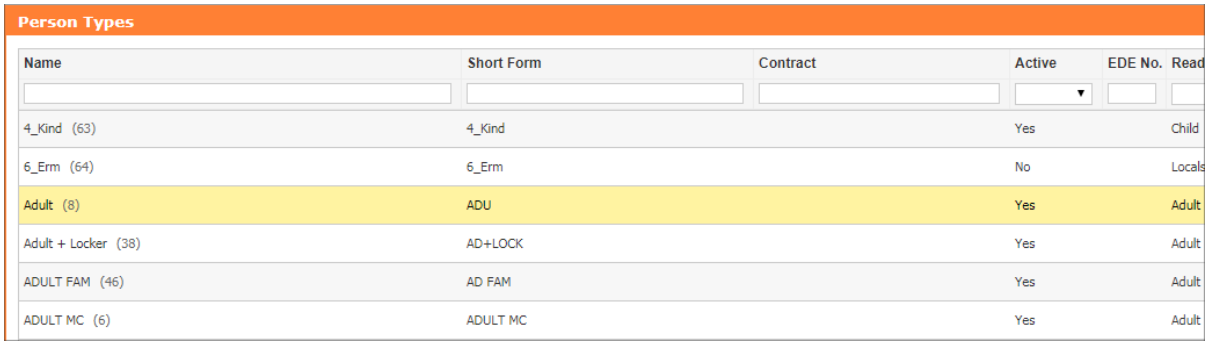
> Person Types ***MUST*** be defined to create a tariff in combination with *Ticket Type* and *Schedules*.
> Use precise terms whenever possible.

2.1.1 Create New Person Type

Unable to render include or excerpt-include. Could not retrieve page.

Example:





2.1.2 Copy Person Type

Function in menu: ***General Data / Person Types***

> Recommendation: Use function ***Copy*** if you want to create several similar person types. The selected parameters are accepted. Afterwards, adjust the new person type to your needs. Use function ***Edit*** person type.

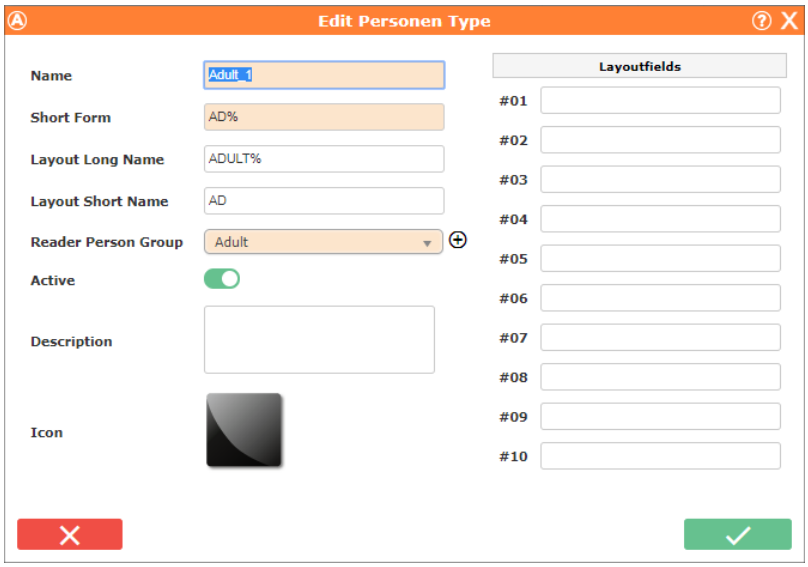
Copy Person Type

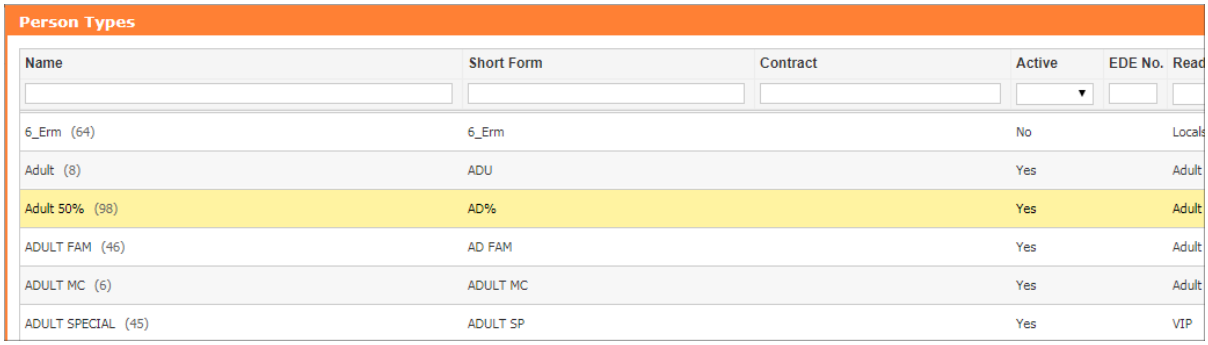
1. Function **... / Person Types** -> *List Person Types*
2. Context menu, **Copy** -> *Person Type*
   A duplicate of the person type is created.
3. ***Edit*** parameter

Save!

All non-modified parameters remain as they were in the original person type.

Example: We copy person type *Adult* and edit it to *Adult 50%*





2.1.3 Edit or Delete Person Type

Function in menu: ***General Data / Person Types***

Edit Person Type

1. Function ***... / Person Types*** -> *List Person Types*
2. Select ***Person Type***
3. Context menu***, Edit*** -> Dialog *Person Type*
4. ***Edit*** parameter

Save!

A *Person Type* cannot deleted if it is already included in a tariff. Then, you first need to delete the tariff from your system to enable the delete-process.

2.1.4 Assign Person Type to EDE Number

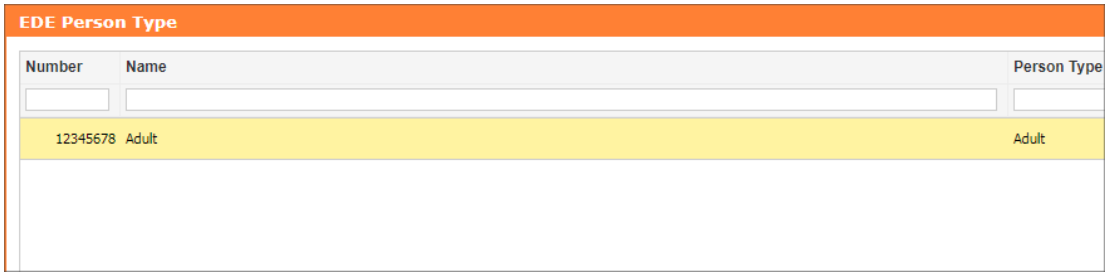
Occasionally the operator wants to transfer data from a non-Axess system into the Axess system. Use function ***EDE Assignment*** to create a mapping for the external system by entering an external *EDE Custom Ticket Number*.

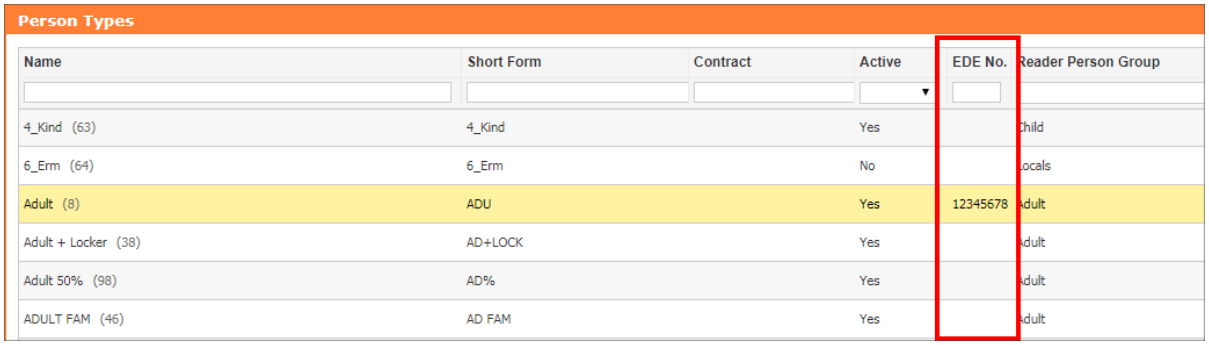
Function in menu: ***General Data / Person Types***

1. Function ***... / Person Types***; -> *List Person Types*
2. **Select** the person type
3. Context menu ***EDE Assignment*** -> List *EDE Person Type*
4. Context menu ***New*** -> Dialog *Create EDE Custom Ticket*
5. Enter Parameter

Save!

Example:





Edit EDE Assignment

1. Function ***... / Person Types***; -> List *Person Types*
2. **Select** person type
3. Context menu ***EDE Assignment*** -> List *EDE Person Type*
4. Context menu ***Edit*** -> Dialog *Create EDE Custom Ticket*
5. *Edit* parameter

Save!

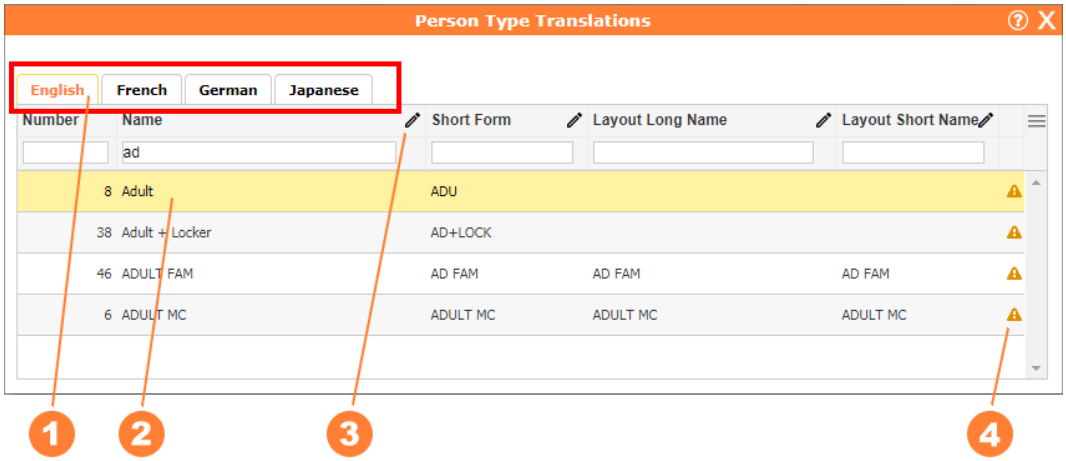
When editing an ***EDE assignment***, you can only change the ***Custom Ticket Name***. The *EDE Custom Ticket Number* cannot be changed! If you want to edit the ***EDE Custom Ticket Number***, you must delete the *EDE Assignment* and then subsequently create a new *EDE Assignment*; see below.

2.1.5 Person Types Translation

Function Übersetzungen (Translations) features to support when switching the user language the Axess Webshop. The translated names of the person types are visible on screen during ticket selection.

Übersetzungen (Translations)

1. Menu ***General Data / Person Types*** *-> Person Types*
2. Context menu, ***Übersetzungen*** *-> Person Type Translations*
3. Click on language-tab to open the desired user language



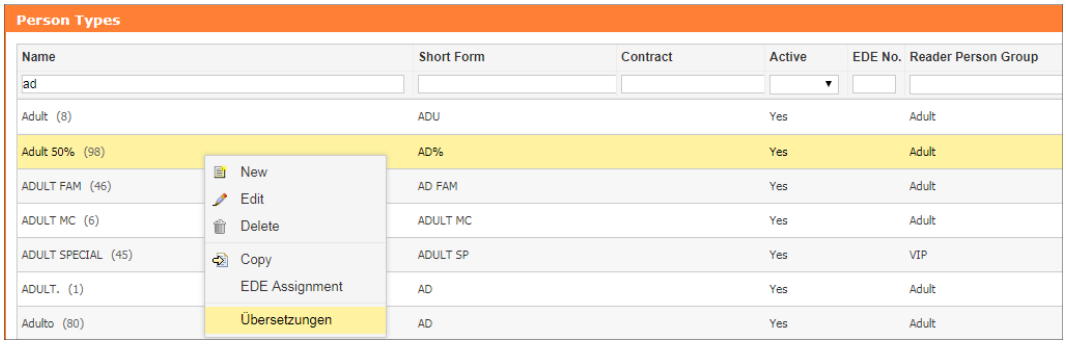
1 Language tab
2 Name of Person Type
3 Symbol: Terms in this column can be changed
4 Symbol: "This entry has no translation into "English "

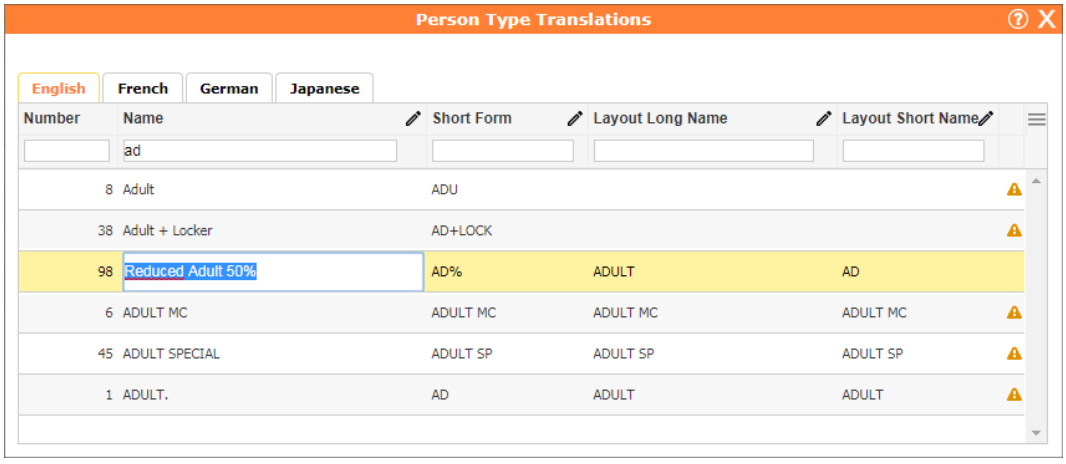
As long as no translation is available, the term is displayed in the source language.

Change Term

1. Filter to find ***person type***; here filter "ad"
2. **Double-click** on Name
3. Enter translation;
   the translation is saved immediately;
   Symbol "No translation ..." disappears

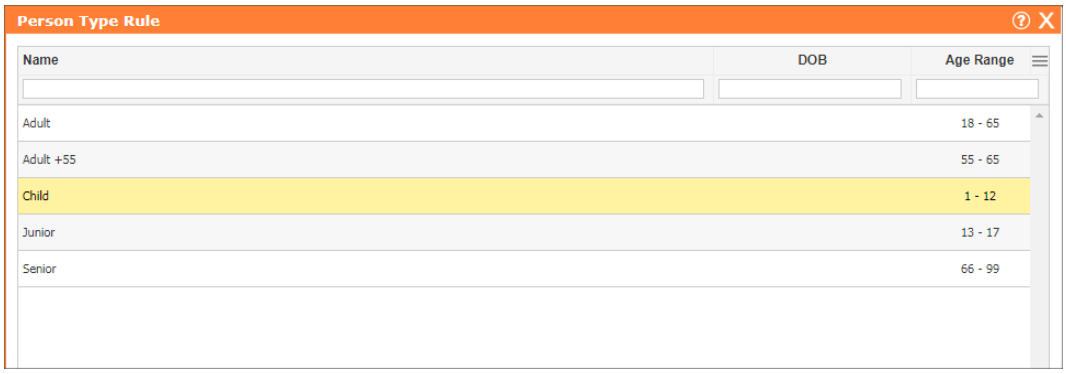
Example: Translate person type "adult 50%"





2.1.6 Group Person Types by defining Age Rules

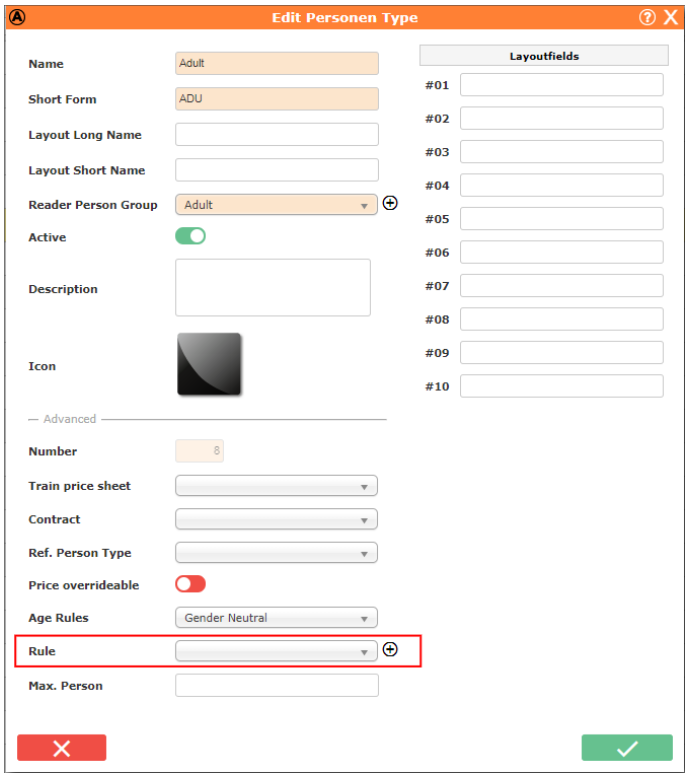
In setting ***Person Type Rules***, you define who is a *child, teenager* or an *adult,* basing on the age of a person. Person Type Rules apply throughout the system.

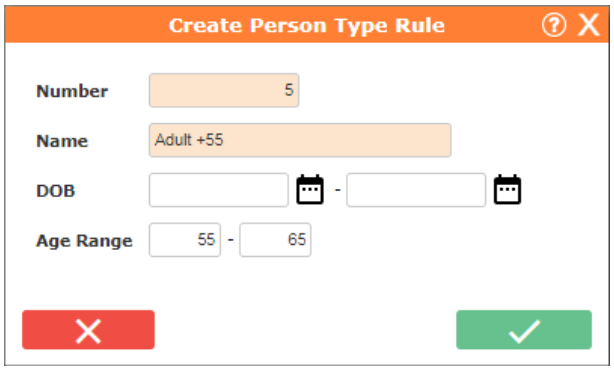


Function in menu: ***General Data / Person Types***

1. Select *person type*, context menu ***New***; → Dialog *Edit Person Type*
2. Button ***Advanced***
3. Set ***Age Rules*** to *Gender Neutral* if you do NOT want to distinguish between male and female
   or
   Set ***Age Rules*** to *Gender Specific* if you want different age rules for women and men
4. Create or select ***Rule***; Click on symbol ***"+" Add***;
5. Context menu ***New***
   or
   select *person type*, context menu ***Edit***
6. Define person type with
   a. Entry of an exact timespan *from / to,* or
   b. Dynamic input of an age in years

Example:


Edit Personen Type
Name
Adult
Short Form
ADU
Layout Long Name
Layout Short Name
Reader Person Group
Adult
Active
Description
Icon
Advanced
Number
8
Train price sheet
Contract
Ref. Person Type
Price overrideable
Age Rules
Gender Neutral
Rule
Max. Person
Layoutfields
#01
#02
#03
#04
#05
#06
#07
#08
#09
#10

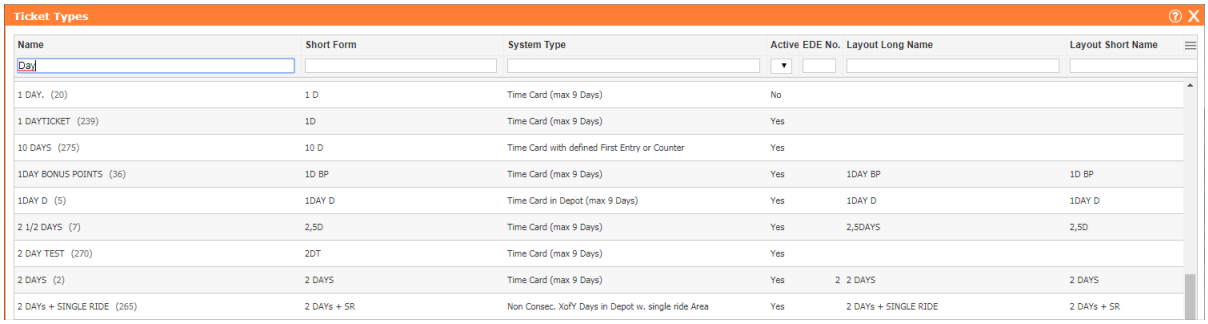

Create Person Type Rule
Number
5
Name
Adult +55
DOB
Age Range
55
65

2.2 Ticket Types

Find function in menu: ***General Data / Ticket Types***

Use function ***Ticket Type*** to define a number of *ticket types*, which are basically necessary for ticket sales; for example: *Day tickets, Half-Day*, *Hour Tickets*, or *Season Passes*.

> Ticket Types ***MUST*** be defined to create a tariff in combination with Person Types and Schedules.
> Use precise terms whenever possible.



2.2.1 Create New Ticket Type

Select Ticket Type

1. Menu ***General Data / Ticket Types*** -> *List Ticket Types*
2. Context menu, ***NEW***; -> Select Box: *System Ticket Types*
3. Select ***System Ticket Type***;-> Dialog *Edit Ticket*
   ! Attend help by function Wizard!

Save!

Create Ticket Type

1. ***Enter parameter***
   ! Attend mandatory fields!
2. Set checkbox ***Active***
3. Click on button ***A*** for ***Advanced Mode***
4. Enter number of days for ticket validity!

Assign Data Carrier

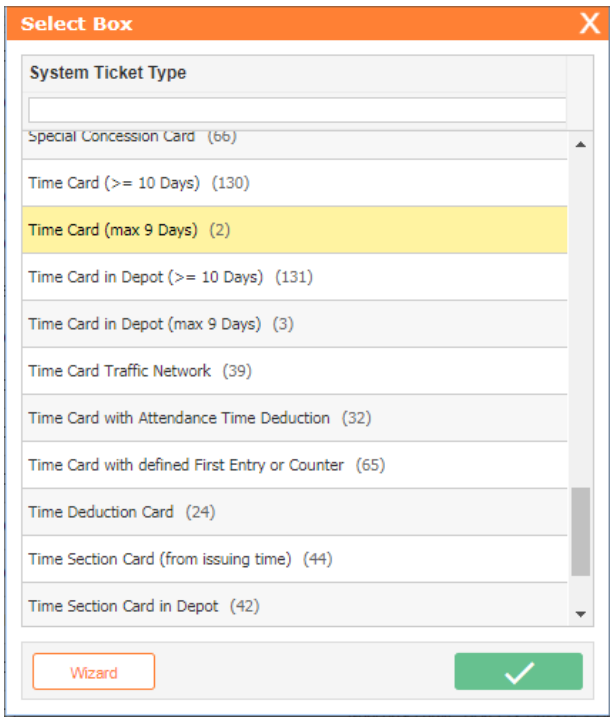
Assign one or more Data Carrier to the new Ticket Type; e.g. *ISO Format, Barcode Ticket*

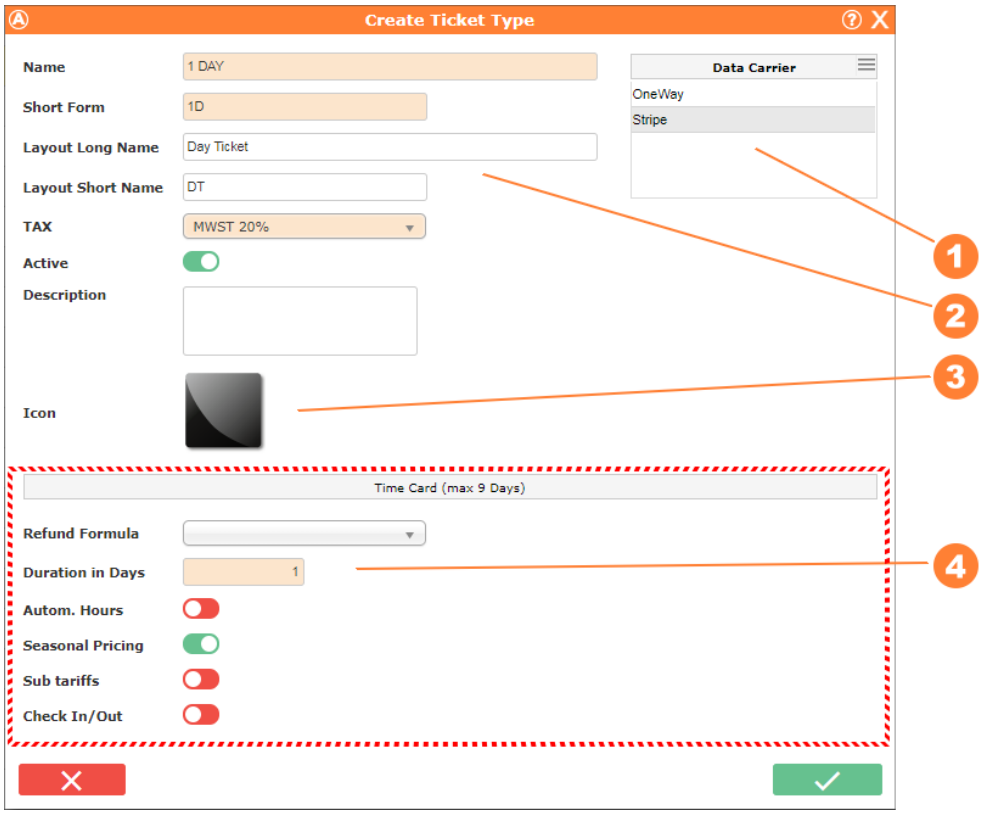
1. Place cursor in list ***Data Carrier***
2. Context menu ***Assign***; -> Transferbox *Assign Data Carrier*
3. ***Select*** *Data Carrier*

Save!

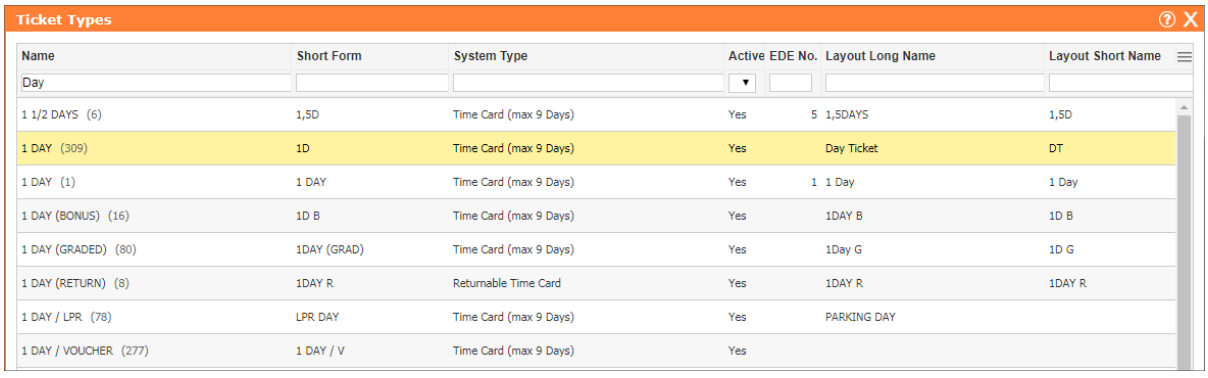
The new *Ticket Type* is saved in AX500 DataCenter. You will receive a short message: "Operation successful!".

Example:





1 Data carrier for this ticket type
2 General parameters for the ticket type
3 Select Icon for display on the POS screen
4 Special settings depending on the selected ticket type (via the wizard)



Select very short and precise *Short Forms* for *Ticket Types* and find unique aberrations. The combination of the two short forms will be displayed on the screen (virtual keyboard) later on.

Function WIZARD

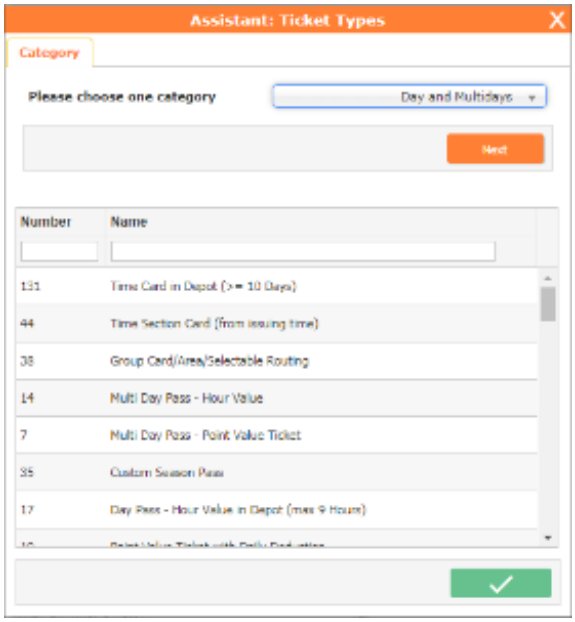
Use function ***Wizard*** to find the appropriate *ticket type* fast and precisely. In the header several characteristics of the ticket type will be queried. Your response cuts down the list of potential results until ONE single *ticket type* will remain for your final choice.

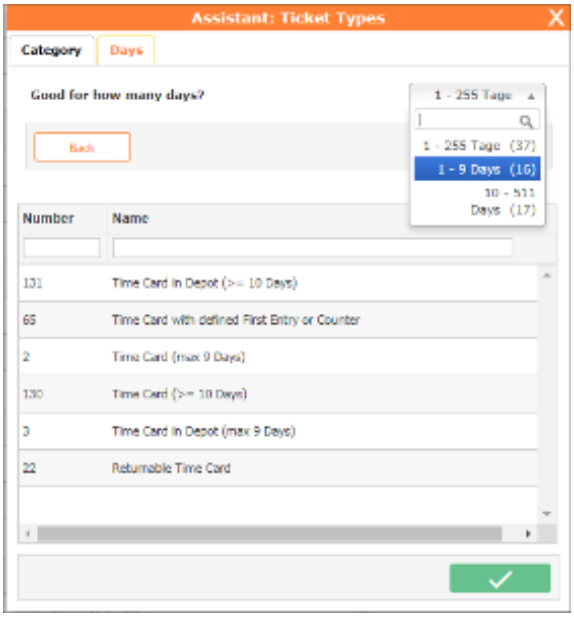
Example:

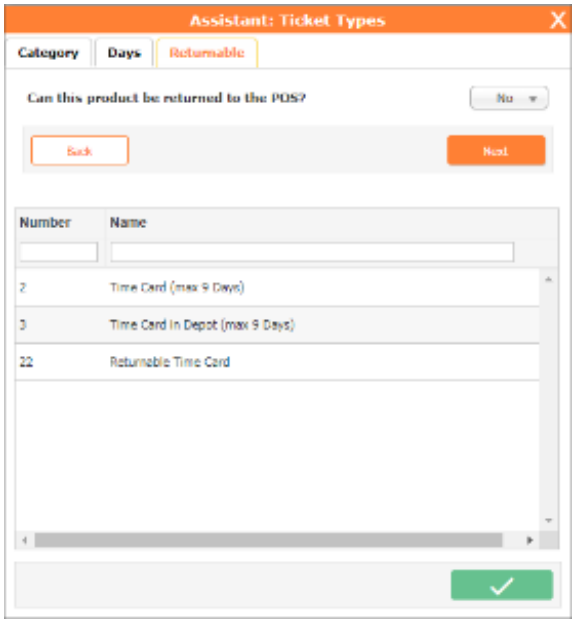
1. Click on button ***Wizard*** -> Dialog Assistant: Ticket Types
2. System Ticket Type: Please choose one category!
   Select your answer
3. **Next**
4. e.g. Days: Good for how many days?;
   Select your answer
5. **Next**
6. e.g. Returnable: Can this product be returned to the POS?;
   Select your answer
7. **Next**
8. e.g. Depot function: Depot function as default?;
   Select your answer

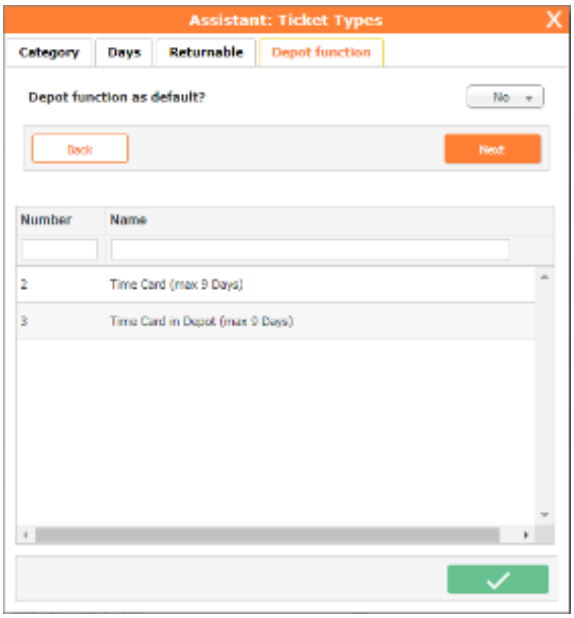
Once an proper *ticket type* has been found, the dialog *Edit Ticket Type* opens automatically. You can select a ticket type from the list at any time and so make a shortcut to dialog *Edit Ticket Type* with function *Save*.

Example:









2.2.2 Copy Ticket Type

Use function ***Copy*** if you want to create several similar ticket types. The selected parameters are accepted. Afterwards adjust the new ticket type afterwards to your needs. Use function ***Edit*** ticket type.

Copy Ticket Type

1. Meu ***General Data / Ticket Types*** *-> List Ticket Types*
2. Context menu, ***Copy*** -> Dialog *Ticket Type*
   A duplicate of the ticket type will be created.
3. Edit parameter

Save!

All non-modified parameters are transferred from the original ticket type.

2.2.3 Edit Ticket Type

Function in menu : ***General Data / Ticket Types***

Edit Ticket Type

1. Function ***... / Ticket Type*;** -> List *Ticket Types*
2. **Select** the Ticket Type
3. Context menu, function **Edit**
4. ***Edit*** parameter as desired
   !Attend mandatory fields!

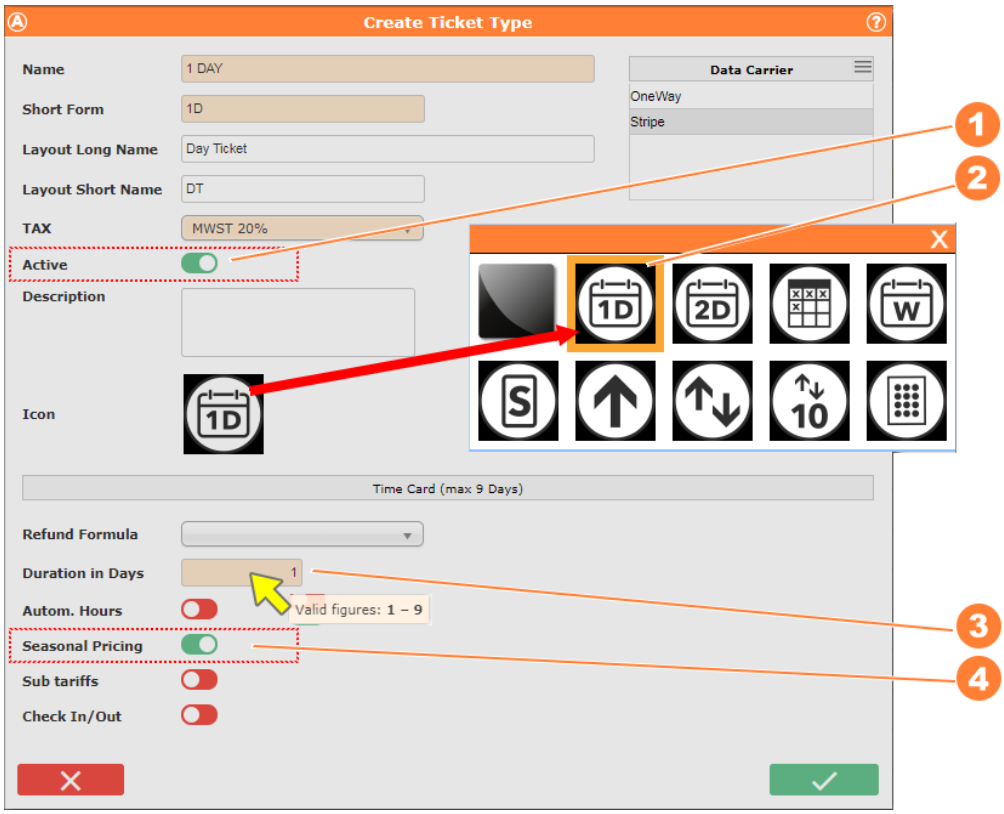
Save!

Delete Ticket Type

1. Function **... / Ticket Type** -> List Ticket Types
2. **Select** Ticket Type
3. Context menu, function **Delete**

A ticket type for example cannot be deleted if it is already included in a tariff. Then, you first need to delete the tariff from your system to enable the delete-process.
Or: Remove the checkmark from Checkbox *Active* in dialog *Edit Ticket Type*. Then the ticket type is not deleted, but will be no longer visible when selecting for a new tariff.

Example: Day Ticket



1 Setting *Active*; Make the ticket type visible for selection during ticket sales process
2 Select icon for display on the POS screen
3 Number of days for ticket validity
4 Price of the tariff can vary according to the selected season

2.2.4 Assign Ticket Type to EDE Number

Function in menü: ***General Data / Ticket Types***

Occasionally the operator wants to transfer data from a non-Axess system into the Axess system. Use function ***EDE Assignment*** to create a mapping for the external system by entering an external *EDE Custom Ticket Number*.

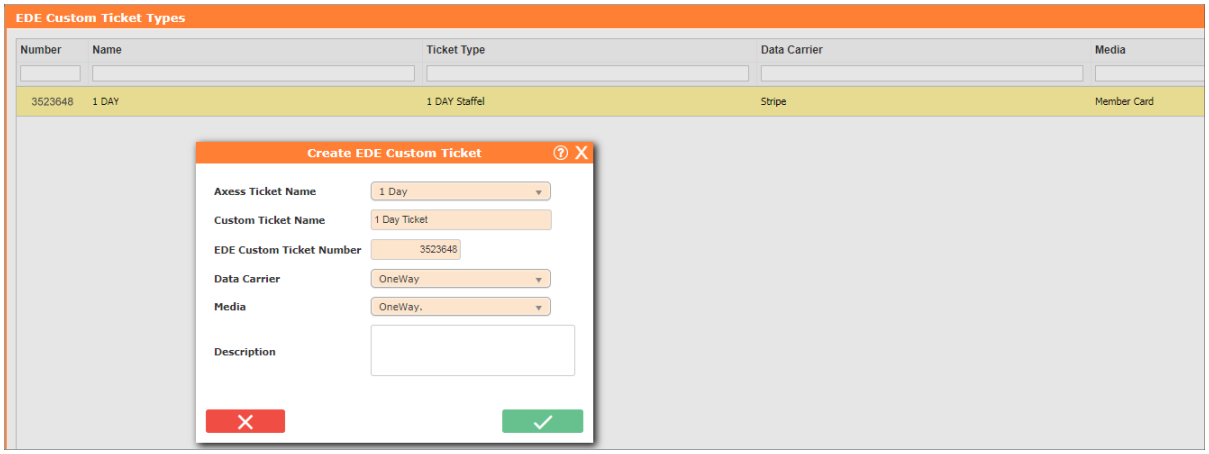
EDE Assignment

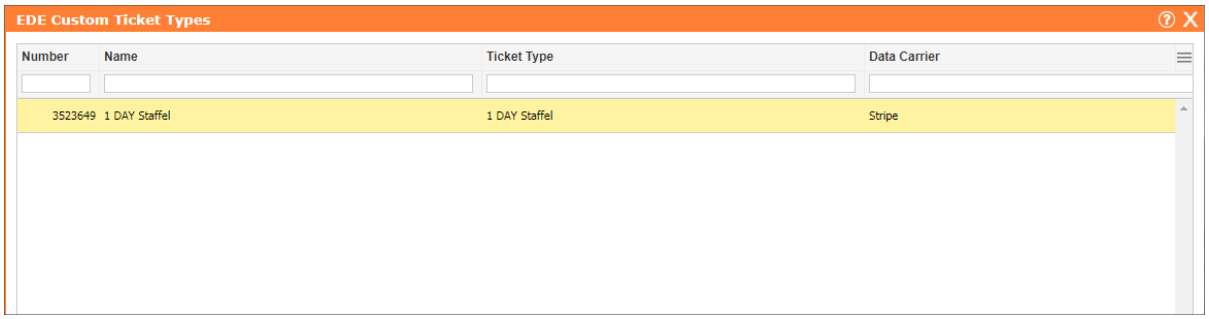
1. Function ***... / Ticket Types***; -> List *Ticket Types*
2. **Select** ticket type
3. Context menu, ***EDE Assignment***
4. Context menu, **New**
5. Enter Parameter

Save!

A ticket type can be assigned to several *EDE Numbers* at the same time. The assignments can be deleted individually.

Example:





You can also use a different ticket type, as the associate marked. To do this, first change the *Internal Name* and then make an assignment. The assignment is then entered in the selected ticket type.
Media carrier and blanks are already determined by the configuration of the ticket type, but may be changed at this point, if this is enabled by the system.

When editing an *EDE Assignment*, you can only change the ***Custom Ticket Name***. The *EDE Custom Ticket Number* is not changeable! If you want to change the *EDE Custom Ticket Number*, you need to delete the EDE assignment and then create a new one.

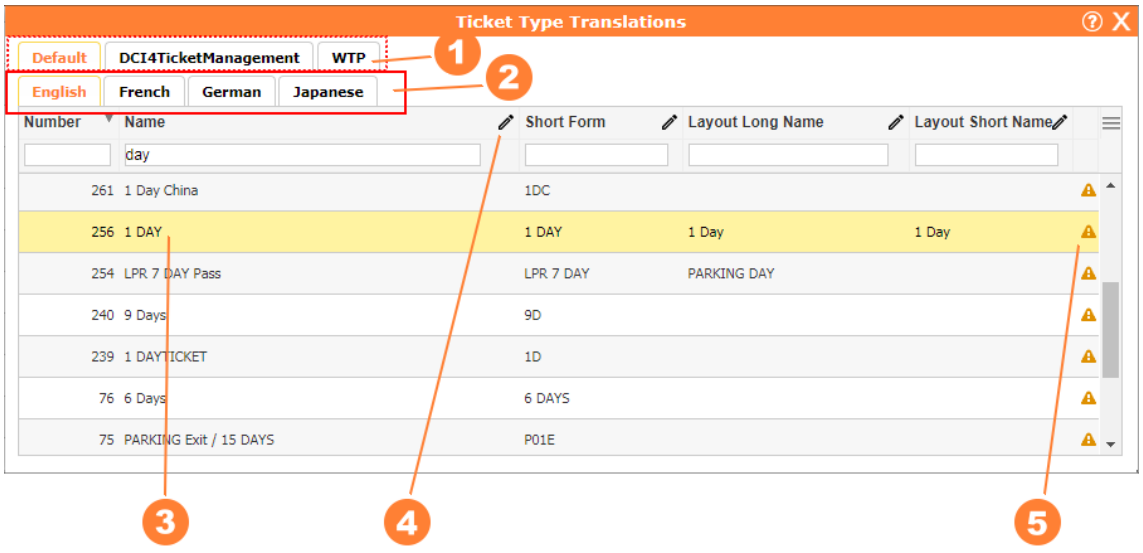
The *EDE Assignment* will be deleted and removed from the list. The ticket type itself will not be deleted!

2.2.5 Ticket Types Translation

Function ***Übersetzungen (Translations)*** features to support when switching the user language the Axess Webshop.

Übersetzungen (Translations)

1. Menu ***General Data / Person Types*** *-> Person Types*
2. Context menu, ***Übersetzungen*** *-> Person Type Translations*
3. Click on language-tab to open the desired user language
4. Select language



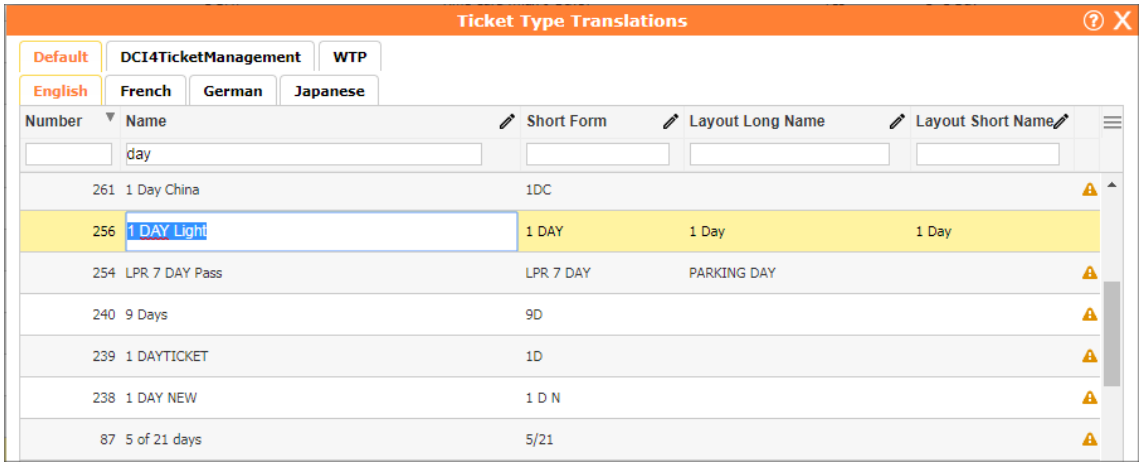
1 Applications
2 Target language
3 Name of Ticket Type
4 Symbol *Pencil*: Terms in this column can be changed
5 Symbol *Caution*: "This entry has no translation into "English"

As long as no translation is available, the term is displayed in the source language.

Change Term

1. Filter to find ***ticket type***; here filter "day"
2. **Double-click** on Name
3. Enter translation;
   the translation is saved immediately;
   Symbol "No translation ..." disappears

Example: Translate card type "1 DAY"



Using function *Sprache exportieren* (Export language) and *Alle Sprachen exportieren* (Export all languages) from the context menu, you can export the names of all card types to an Excel list.

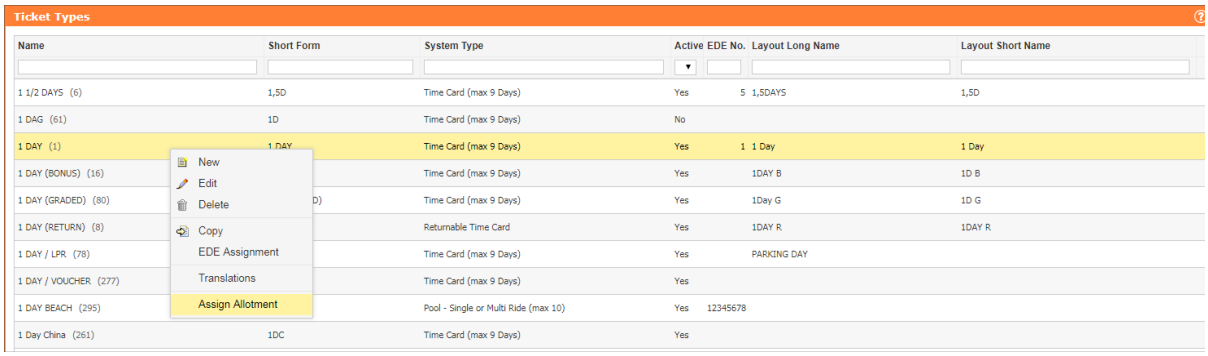
2.2.6 Assign Allotment to a Ticket Type

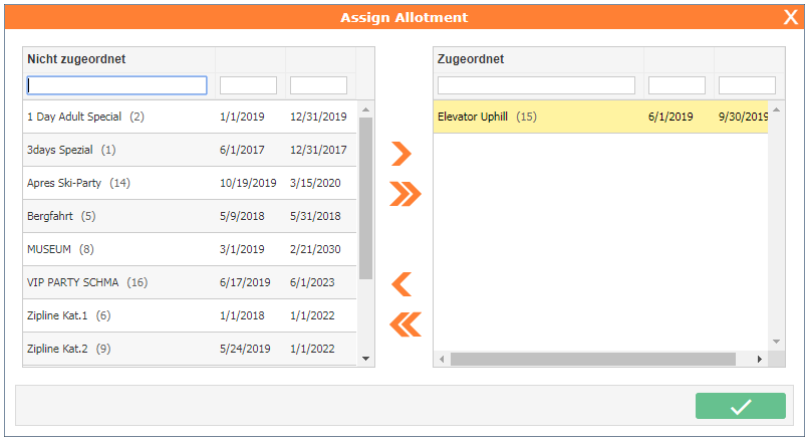
Assign an ***Allotment*** to a ticket type. The result is the same as in function ***General Data / Allotment /*** *(Select Allotment) / (Context Menu)* ***Assign Allotment***.

1. Menu ***General Date / Ticket Types***; -> List *Ticket Types*
2. Select ticket type
3. Context menu, ***Assign Allotment***
4. *Assign Allotment*

Save!

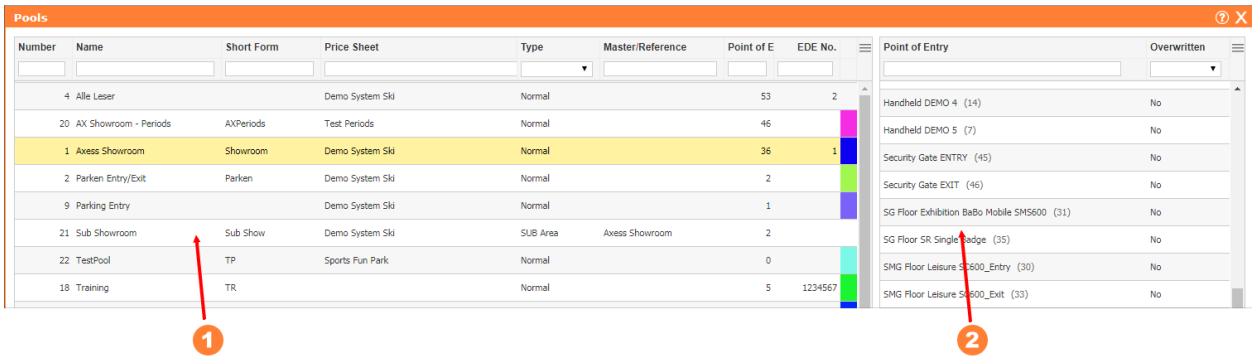
Example:


Ticket Types
Name
Short Form
System Type
Active
EDE No.
Layout Long Name
Layout Short Name
1 1/2 DAYS (6)
1,5D
Time Card (max 9 Days)
Yes
5
1,5DAYS
1,5D
1 DAG (61)
1D
Time Card (max 9 Days)
No
1 DAY (1)
Time Card (max 9 Days)
Yes
1
1 Day
1 Day
1 DAY (BONUS) (16)
Time Card (max 9 Days)
Yes
1DAY B
1D B
1 DAY (GRADED) (80)
Time Card (max 9 Days)
Yes
1Day G
1D G
1 DAY (RETURN) (8)
Returnable Time Card
Yes
1DAY R
1DAY R
1 DAY / LPR (78)
Time Card (max 9 Days)
Yes
PARKING DAY
1 DAY / VOUCHER (277)
Time Card (max 9 Days)
Yes
1 DAY BEACH (295)
Pool - Single or Multi Ride (max 10)
Yes
12345678
1 Day China (261)
1DC
Time Card (max 9 Days)
Yes
New
Edit
Delete
Copy
EDE Assignment
Translations
Assign Allotment


Assign Allotment
Nicht zugeordnet
1 Day Adult Special (2) 1/1/2019 12/31/2019
3days Spezial (1) 6/1/2017 12/31/2017
Apres Ski-Party (14) 10/19/2019 3/15/2020
Bergfahrt (5) 5/9/2018 5/31/2018
MUSEUM (8) 3/1/2019 2/21/2030
VIP PARTY SCHMA (16) 6/17/2019 6/1/2023
Zipline Kat.1 (6) 1/1/2018 1/1/2022
Zipline Kat.2 (9) 5/24/2019 1/1/2022
Zugeordnet
Elevator Uphill (15) 6/1/2019 9/30/2019

2.3 Pools

Pool means a grouping of gates. The grouping specifies which ticket will work at the gates of which group.



1 All ***Pools*** in the system
2 List of corresponding ***Point of Entries*** for the marked pool

Different colors used to identify a particular pool are especially useful if you are selling tickets for multiple operator pools at the same POS. The keys on the POS screen appear in the selected color and visually support the cashier.

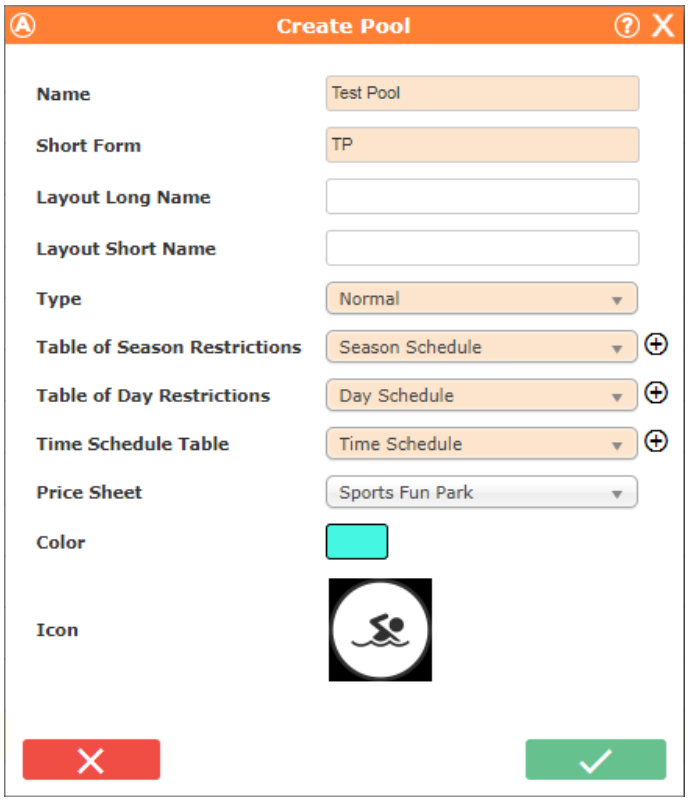
2.3.1 Create a Pool

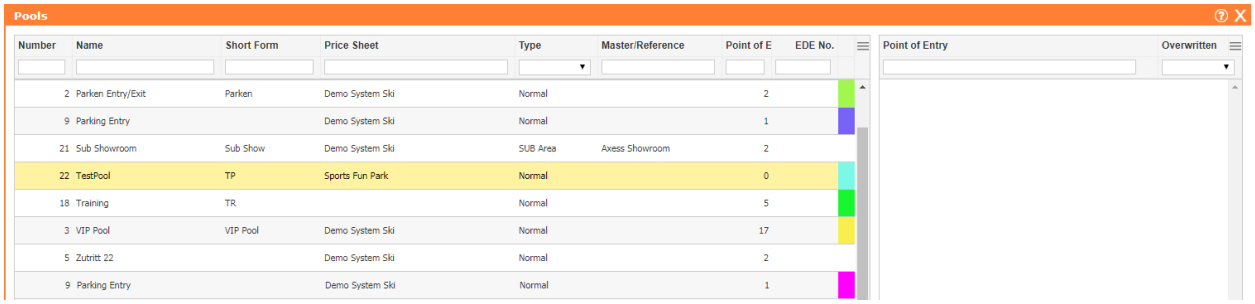
Create New Pool or Edit Pool

1. Menu ***General Data / Pools*** -> List *Pools*
2. Context menu, ***NEW (Edit)*** -> Dialog *Create Pool*;
   !Attend Mandatory Fields!
3. Enter parameter;
   !Attend Mandatory Fields!
4. Assign Schedules;
   !Attend Mandatory Fields!
5. Select Price Sheet
6. Assign specific color for Pool-Identification, refer to Info box

Save!

Example:





A pool cannot be removed if it is already involved in a tariff. Then, first delete the tariff from your system to enable function *Delete*.

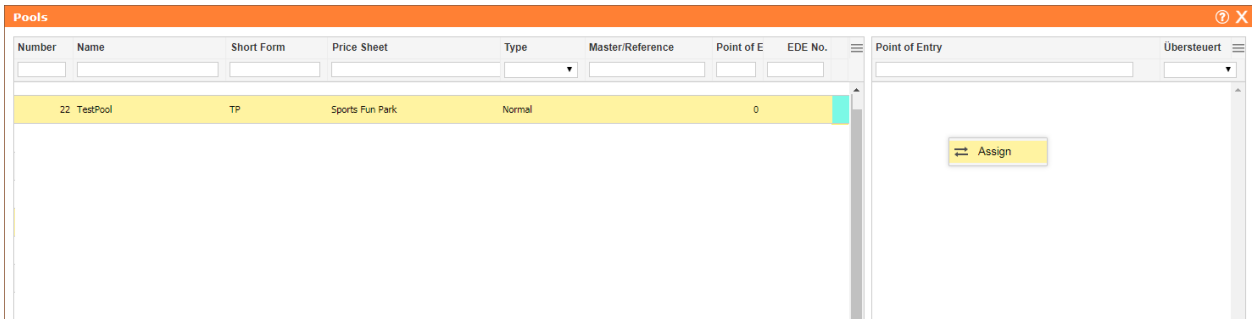
2.3.2 Assign Entries to a Pool

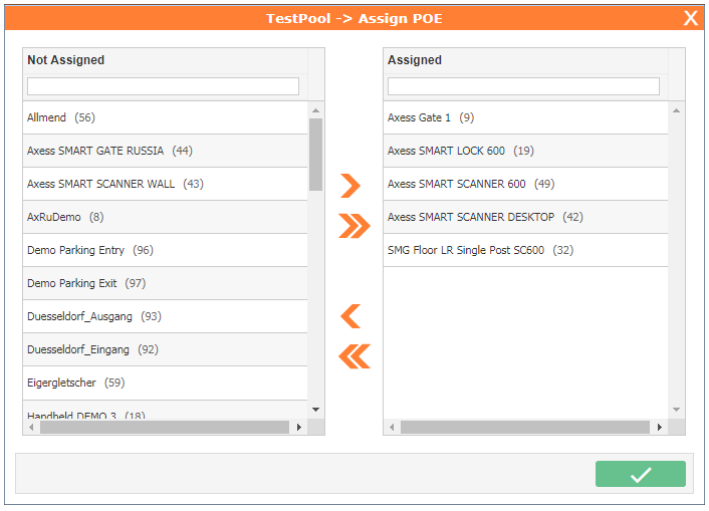
Assign one or more entries to a pool

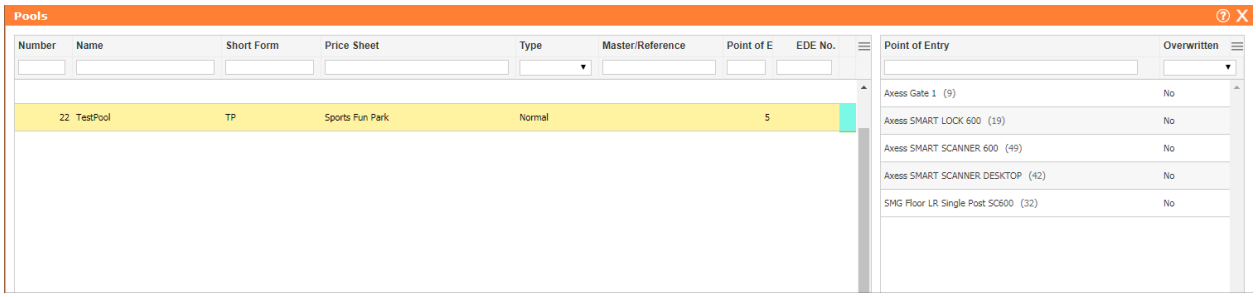
1. Select ***Pool***
2. Place cursor in list *Point of Entry*
3. Context menu, ***Assign***
4. Select Entries and assign

Save!

Example:







2.3.3 Assign EDE Nummer to Pool

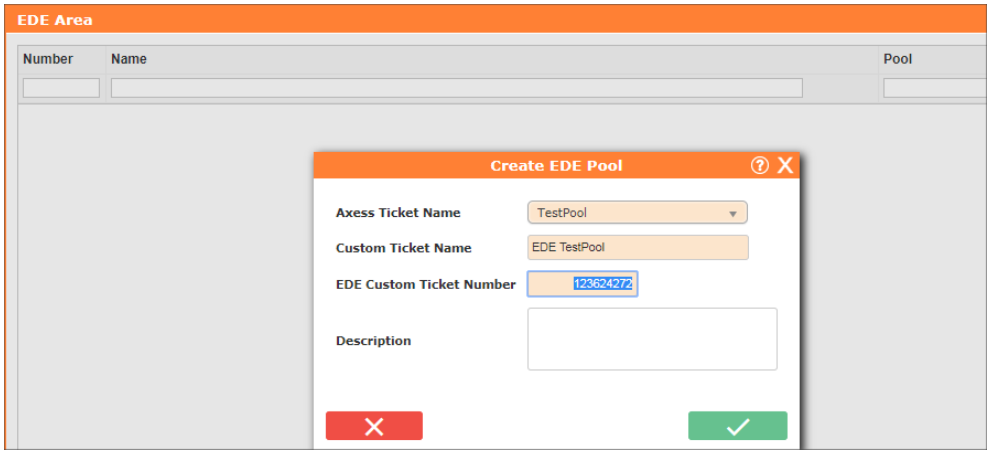
Occasionally, the operator wishes to export the data from the CLICS into a Not-Axess system. Enter the ID of the record to produce a mapping with the external system via the EDE map.

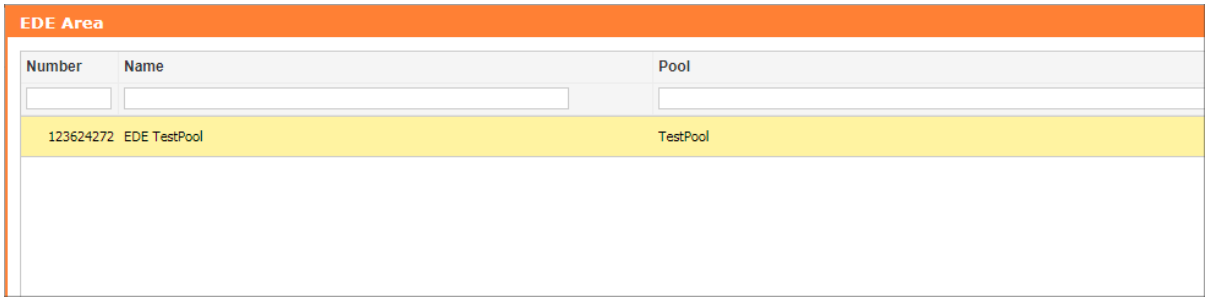
Assign EDE number to pool

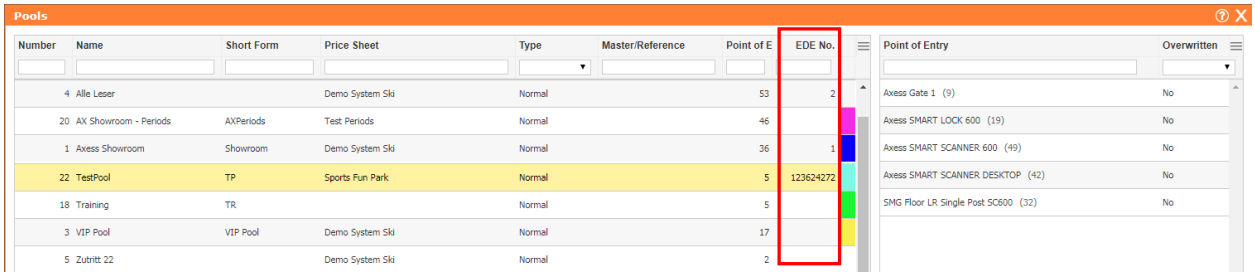
1. Menu ***General Data / Pools***; -> Dialog Pools
2. **Select pool**
3. Context menu ***EDE Pool Assignment***; -> Dialog EDE Pool
4. Context menu, ***New***; -> Dialog Create EDE Pool
5. *Select Axess Ticket Name*
6. *Enter Custom Ticket Name*
7. Enter *EDE Custom Ticket Number*

Save!

Example:







2.3.4 Override POE Settings for a Pool

Use function ***POE Modifiers*** if you want to have other settings for the tickets of a specific pool than the default settings. New values override the default settings and are always valid when tickets are read from this pool at the reader.

Find function: ***General Data / Pools /*** *(select Pool) / (Select POE) / (context menu)* ***POE Modifiers***

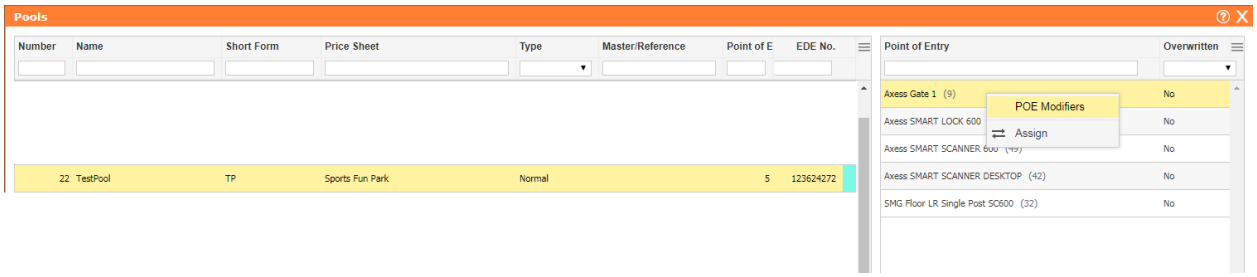
> One entry can be assigned to several pools. So the tickets of different pools work on this entry. POE Modifiers may be different for different pools at the entry.

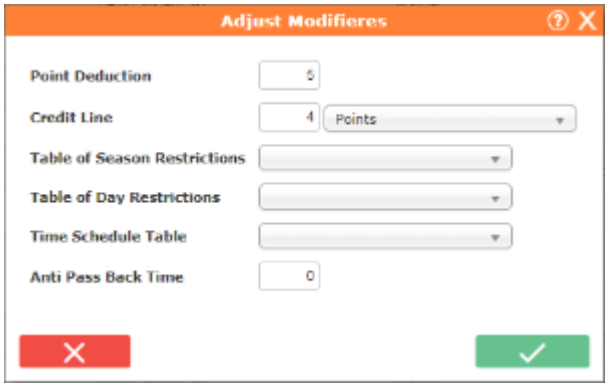
Override POE Settings

1. Menu **General Data / Pools**; Dialog -> Pools
2. **Select Pool**
3. **Select POE**
4. Context menu, **POE Modifiers**; -> Dialog Adjust Modifiers
5. Enter settings

Save!

Example:





> You can also mark and override several POEs at the same time.

2.4 Schedules

Every tariff always includes the schedules season parameter, Day and Time!

The ***Schedules***, sometimes called time schedules, are defined in advance.

Schedules serve for:

- ***Pricing at ticket*** during ticket sales at the POS
- ***Validity check*** of the ticket at the POE

In the following chapters the schedules will be explained by examples.

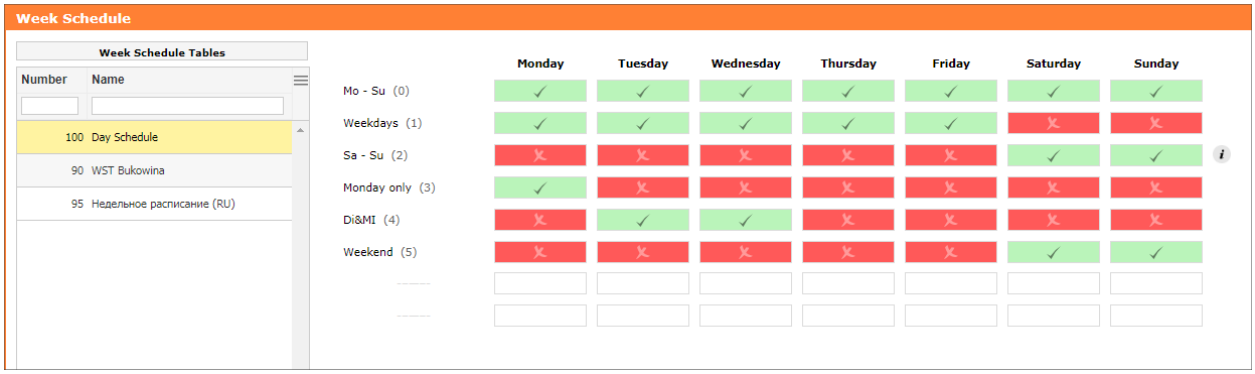
- ***Season parameters***: define, e.g. main season, pre and mid season
- ***Day*** schedules: define ticket validity depending on the day of the week.
- ***Time*** scales: define ticket validity depending on the time of day
- ***Special Days***: consider holidays and other occasions

2.4.1 Day Schedule

Find function in menu: ***General Date / Schedules / Day***

Schedule / Day determines on which days of the week a ticket should be valid, e.g. Weekdays, Sat / Sun, etc.

Example: Create several day schedules.



Day Schedule Tables

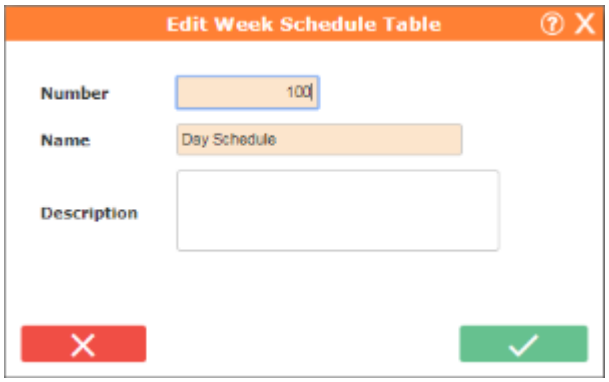
Find function: ***General Data / Schedules / Day***

Create Week Day Schedules

1. -> List *Day*
2. ***Position cursor*** in list *Week Schedule Table*
3. *Context menu*, ***New*** -> Dialog *Edit Week Schedule Schedule*
   ! Attend mandatory fields!
4. Enter ***Name***

Save!

Example:



A Weekday Schedule Table can not be deleted if it is already included into a tariff. First delete the tariff from your system to enable function Delete.

Schedule of Days

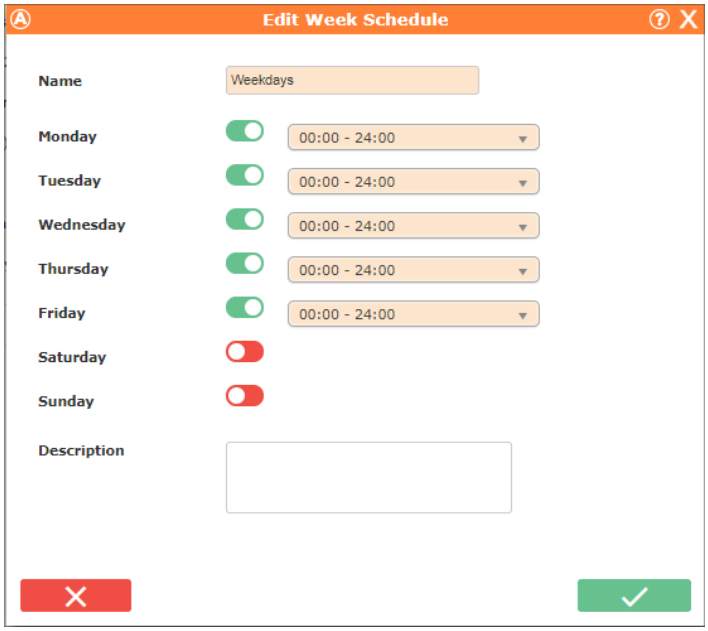
Find function: ***General Data / Schedules / Day***

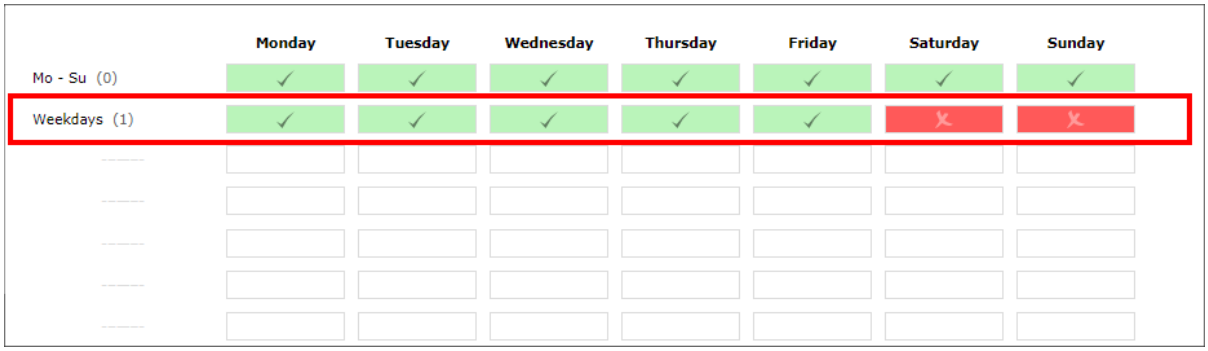
Create New Week Schedule

1. → Week Schedule Table
2. Select **Week Schedule Table**
3. Position cursor on right area of Week Schedules
4. **Context menu**, **New** -> Dialog Edit Week Schedules;
   !Attend mandatory fields!
5. **Enter Name**
6. **Select Days** which shall be valid for ticket
7. Select Time range; -> refer to description below ***Time Range***

Save!

Example: Week Schedule *Workdays*

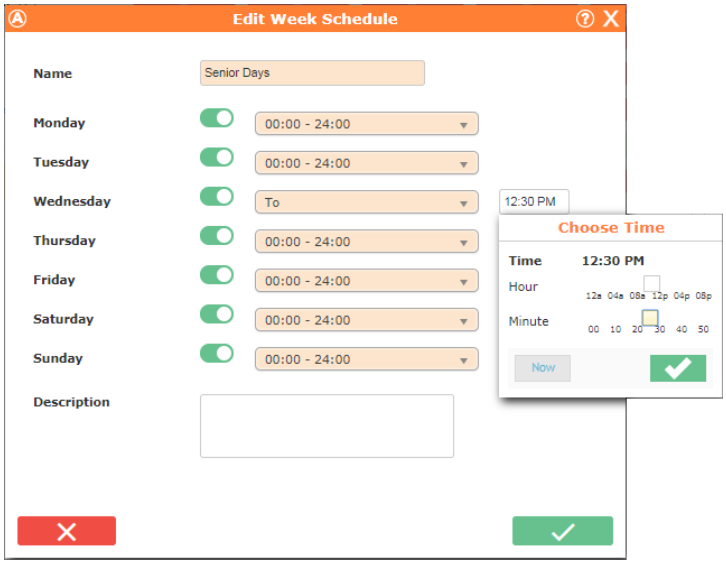


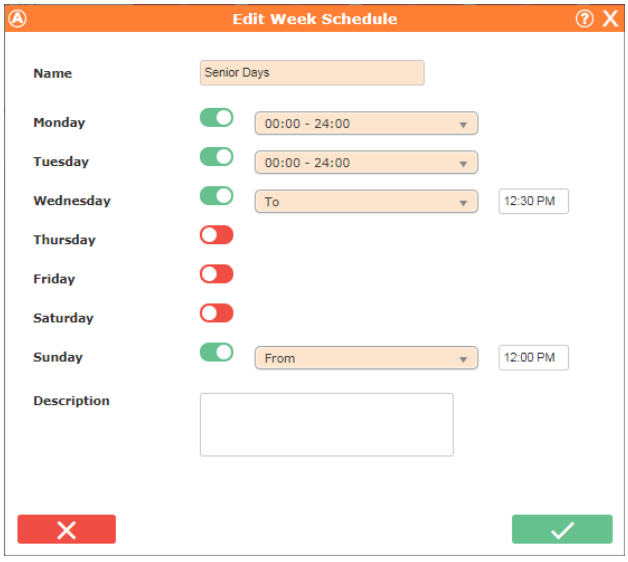


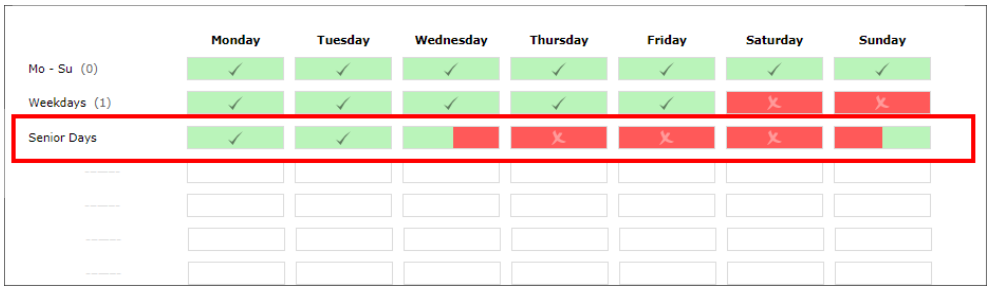
Select Time Range

Recommendation: If a tariff shall apply throughout the operating day, so just leave the default setting 0.00-24.00. The validity of the ticket is then limited by the operation hours of the gates anyway. You can define the time range of a day starting FROM a certain point in time, or a ticket can be valid UNTIL a certain point in time.

Example: Day schedule *Senior Days* should be valid FROM *Sunday noon* (from 12:00 o'clock) UNTIL *Wednesday noon* (13.00 o'clock).

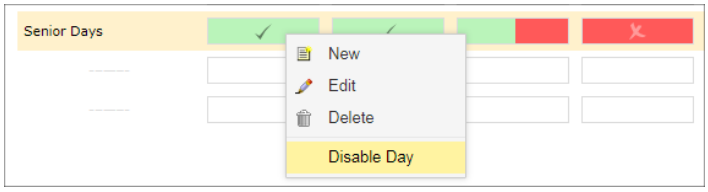






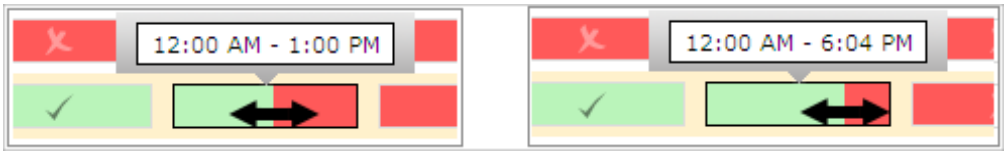
Fast processing of Days directly in the graphical presentation

Make a right mouse click on a day and use context function ***Allow Day*** or ***Disable Day*** to switch the setting.



Change the ***time range***. Place the cursor on the desired day of the week.
Use the mouse wheel:

- Mouse wheel onwards or backwards -> change time range in 15 MINUTES steps
- Press key SHIFT + turn mouse wheel onwards-backwards -> change time range in 1 MINUTE steps
- Press key CTRL + turn mouse wheel onwards-backwards -> change time range in 1 HOUR step



A *Week Schedule* can not be deleted if it is already included in a tariff. You must first delete the tariff from your system to enable the delete process.

2.4.2 Special Days

Using schedule ***Special Days*** you can exclude individual days from all other seasons and define special conditions for these days, e.g. a separate price sheet for special days.

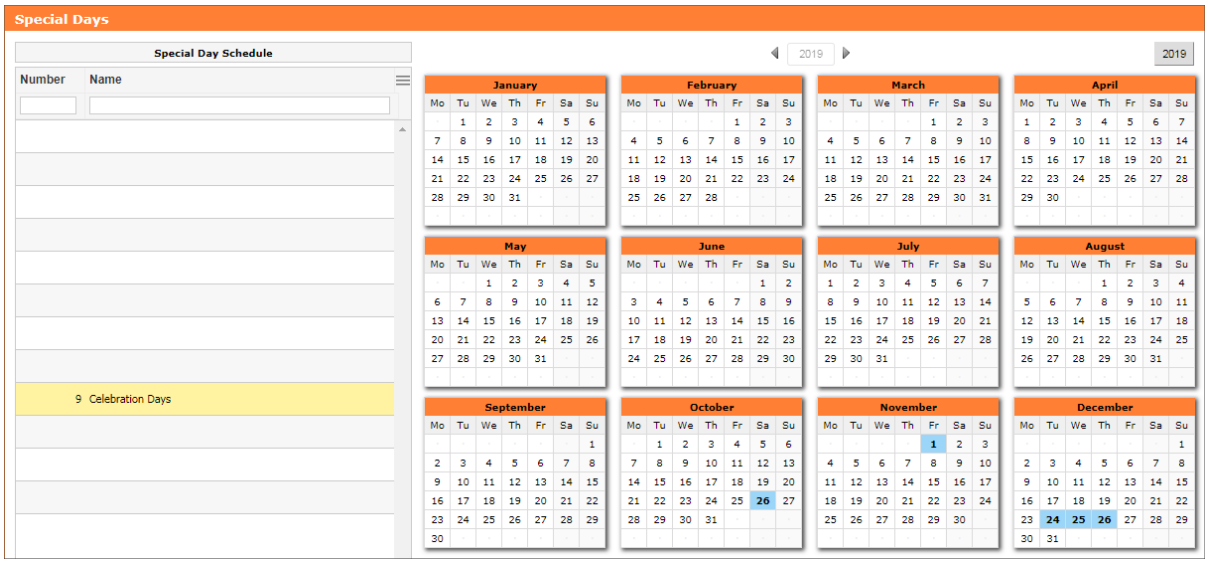
You can input the special days for several years in advance.

Special days can be:

- designed unique and will so occur without repetition, e.g. an anniversary
- defined with setting "Repeat every year" for annual repetition, e.g. annual holidays

Menu: ***General Data / Schedules / Special Days***

Example: Special Day Schedule in october, november and december.



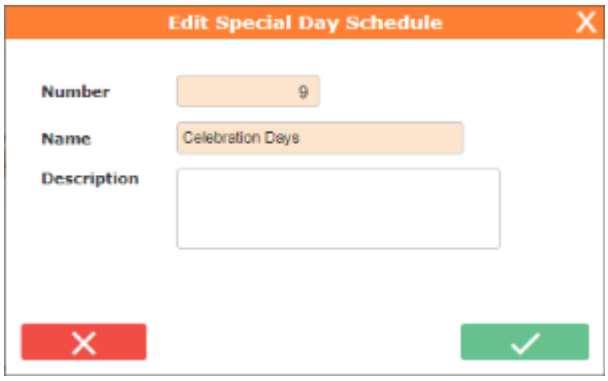
Special Day Schedule

Create New Special Day Schedule

1. Function ***... / Special Days***; -> List Special Day Schedule
2. **Position cursor** in table Special Day Schedule
3. Context menu ***New*** -> Dialog Edit Special Day Schedule;
   ! Attend mandatory fields!
4. Enter Name

Save!

Example:



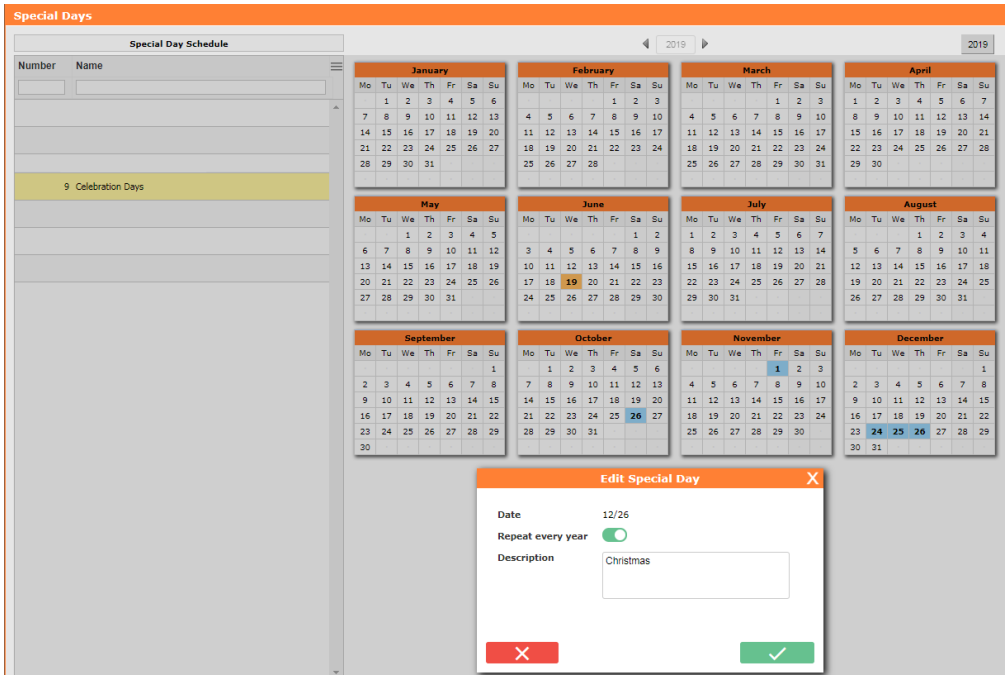
Input Special Days

Input Special Days

1. Select *Special Day Schedule*
2. Click on the desired day in the calendar; -> Dialog *Edit Special Day*
3. Click on checkbox *Repeat every year*
4. Enter *Description*

Save!

Example: Special Days



View Special Days of the following years

Click on the arrows ***Forward*** and ***Backwards***

1. Switch to previous and next year
2. Back to the current year, here *2019*

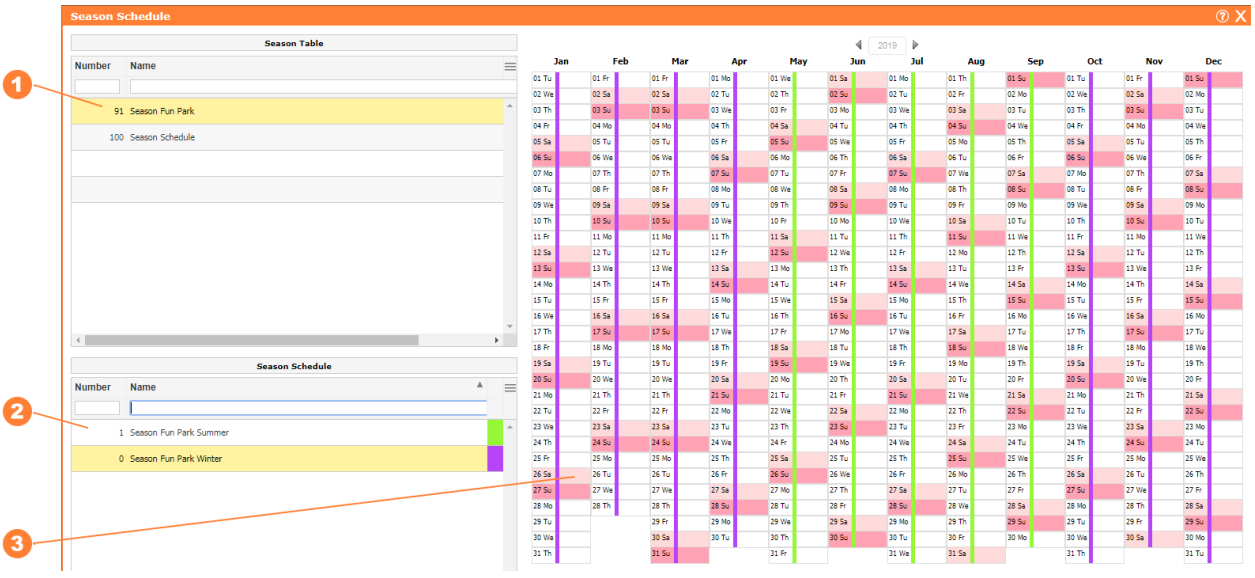
2.4.3 Season Parameter

Function in menu: ***General Date / Schedules / Season Parameter***

A season is usually divided into sections such as pre-season, main season and off-season. Each season affects a corresponding price.

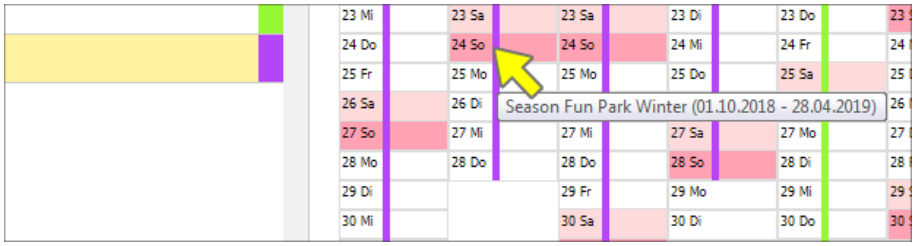
> Be careful when using and defining seasonal seasons!
> Incorrect entries have a direct effect on pricing at the POS and therefore on the sales volume.

Example:

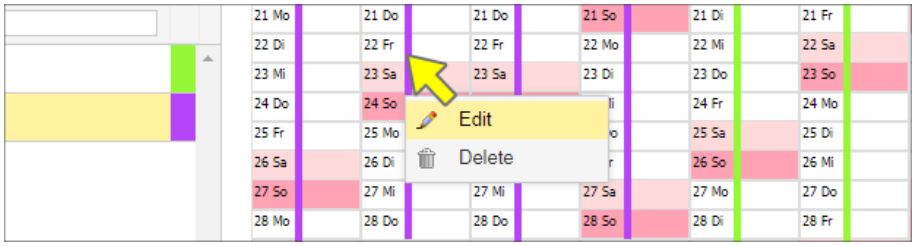


1 Season Table
2 Season schedule
3 Date range

View details while hoovering over the calender



Use direkt editing of calender via context menu



Season Tables

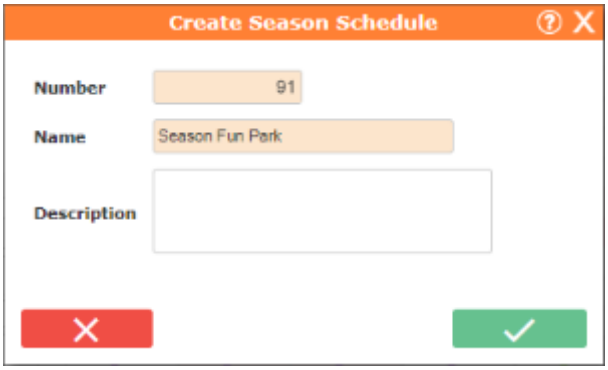
Function in: ***General Data / Schedules / Season Parameter***

Create New Season Table

1. -> List Season Schedule
2. **Position cursor** in list Season Table
3. **Context menu**, **New;** -> Dialog Create Season Schedule
   !Attend mandatory fields!
4. Enter name

Save!

Example: Season table



Attention when deleting! The season table will be deleted with all the corresponding seasons!

Season Schedules

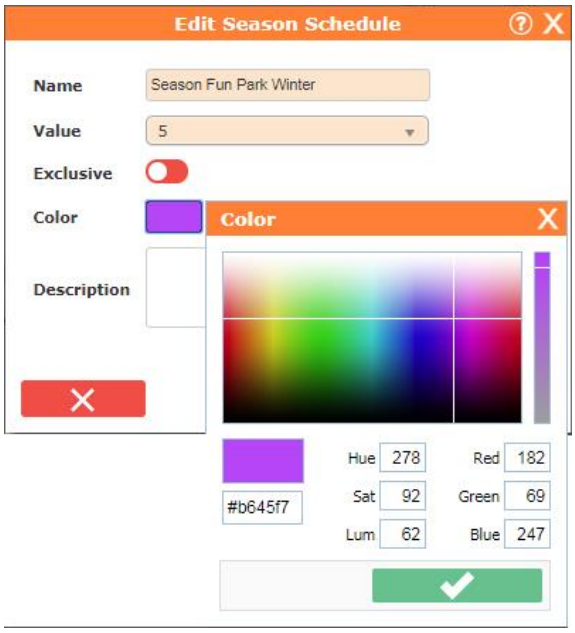
Function in: ***General Data / Schedules / Season Parameter***

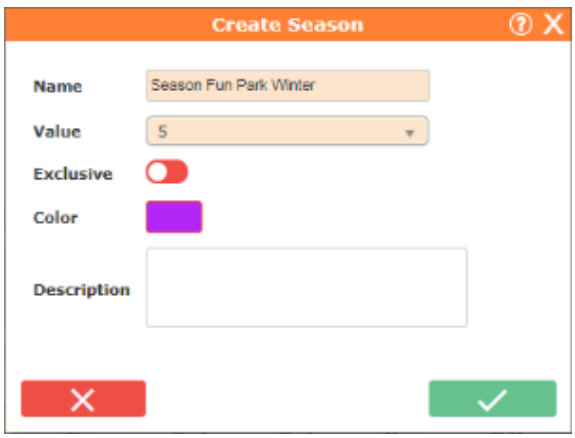
Create New Season Schedule

1. -> List *Season Schedule*
2. Cursor in list Season Schedule
3. Context menu***, NEW*** -> Dialog Create Season
   !Attend mandatory fields!
4. **Enter *Name* and *Priority***
5. Checkbox *Exclusive*
6. Select **Color** as a list marker

Save!

Example:





Priority (0, 1, 2, ... 9):

Each entry in the season table is assigned a value. Using the value, both pricing of tickets and ticket validity at the reader can be controlled. "0" is the lowest value and should be assigned, e.g. for a continuous season.

Pricing during ticket sales

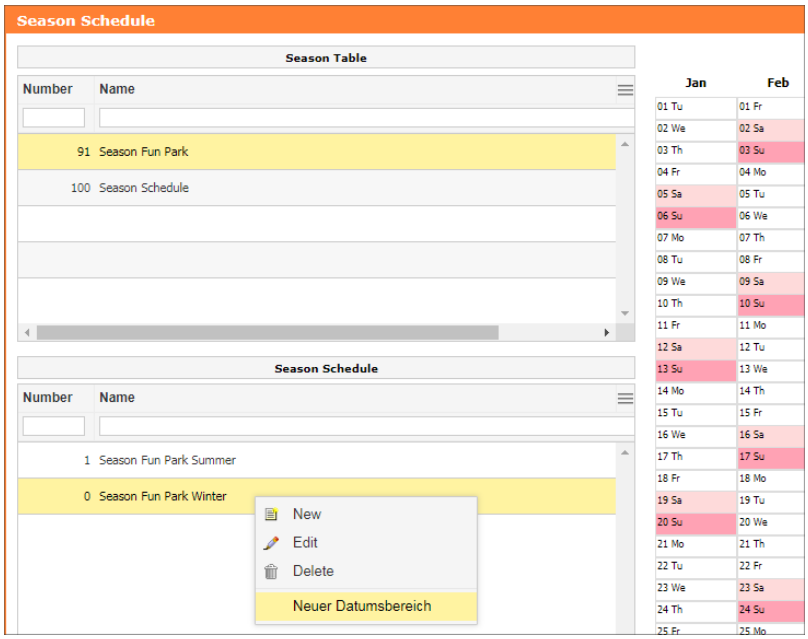
The POS assigns the currently valid season (seasons) by using the actual date. The one season with the highest value is used for ticket pricing.

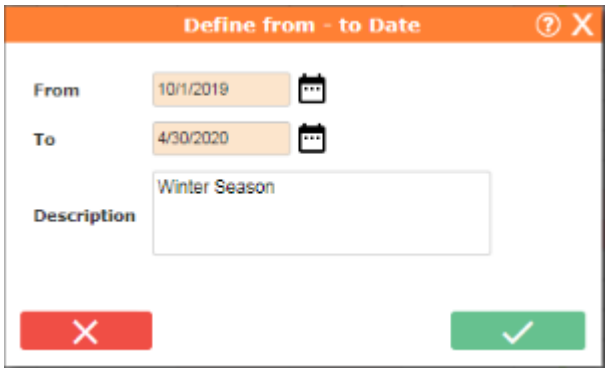
Checkbox Exclusive serves to include special days, such as 24.12., 31.12.

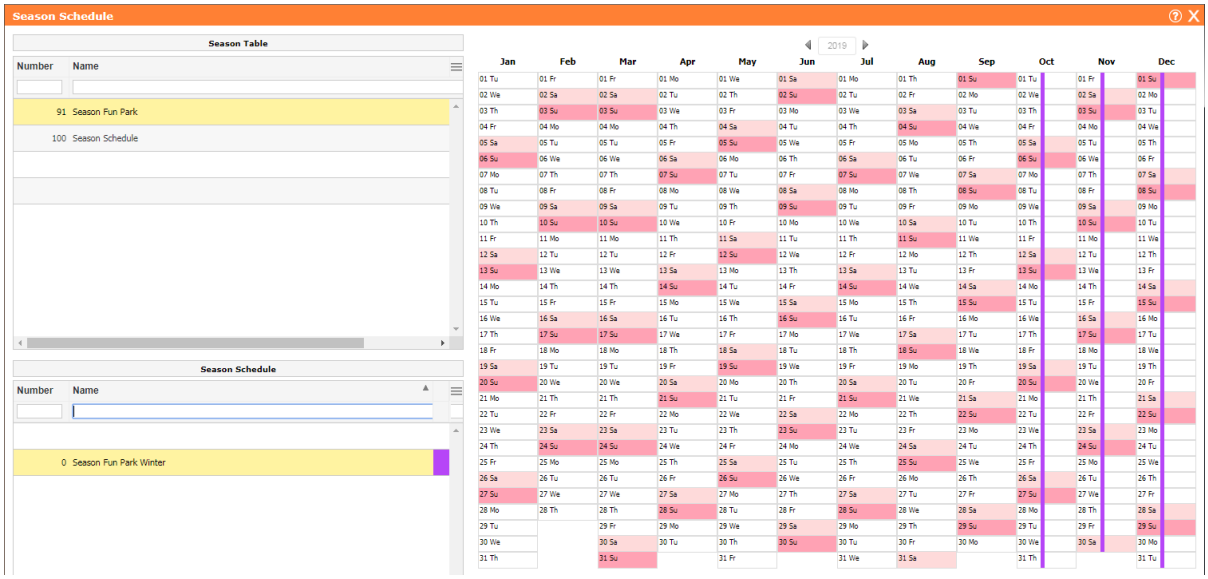
Enter new Date Range or edit Date Range

1. → List Season Schedule
2. Select *Season Schedule*
3. Context menu, ***New date range***
4. Enter data range FROM and TO
5. Add more date ranges ...

Example:







Date ranges must not overlap!

The ***Date Ranges*** of WITHIN the same SEASON TABLE MUST NOT OVERLAP! You will get an immediate error message. Adjust the date range!

2.4.4 Time Schedules

Function in: ***General Data / Schedule / Time***

Use function ***Time*** to limit the ***validity of a ticket over the time***, e.g. Full Day, Morning, etc.

Create several times schedules which are relevant for your system. Later on, these are combined with other time tables during the creation of tariffs.

Example: Time Schedule Table

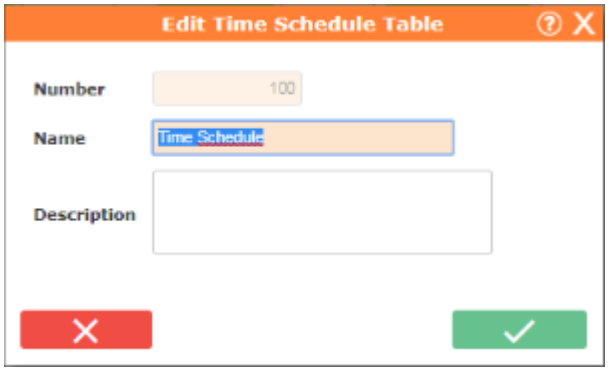
Time Tables

Create New Time Table

1. → List Time Tables
2. **Position cursor** in list Time Table
3. Context menu, **New** -> Dialog Create Table for Time Schedule
   !Attend mandatory fields!
4. Enter **Name**

Save!

Example:



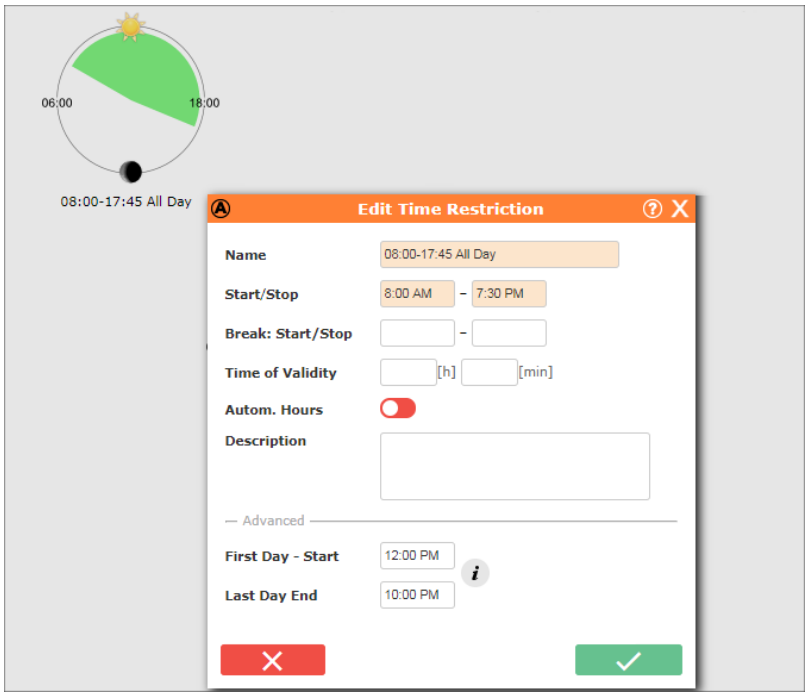
Schedule of Time

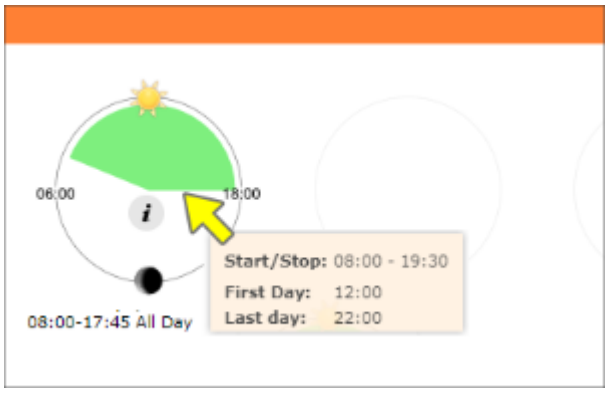
Create New Time Schedule

1. Select Time Table
2. Position cursor in area of Time Schedule
3. Context menu, New -> Dialog Create Time Schedule;
   !Attend mandatory fields!
4. Enter Name
5. Set Time Start / Stop, Enter time when the ticket will be valid at the gate (or use slide control)

Save!

Example:

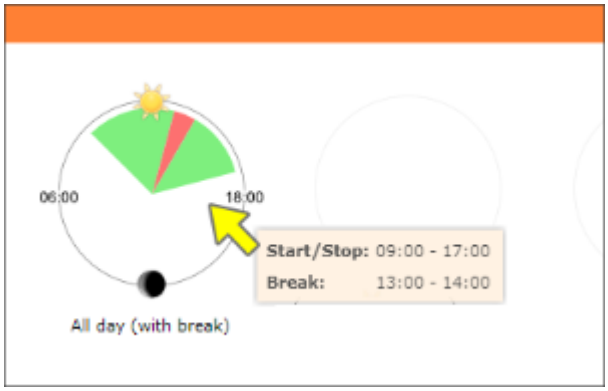




Break within the Time Schedule

During the break, the ticket will be invalid at the gate. This could, for example, be a fixed lunch for ski lessons.

Example:



2.5 Allotment

Use function ***Allotment*** to limit the number of tickets which are sold of one (or several) ticket types. By defining a ***Suballotment***, you can set a maximum number for your guests at a given time. This assures a guest a seat, e.g. to ride a gondola at a certain time, to find a place in the car of the railway or in the limited group of a guided tour. The reservation for certain time takes place during ticket sales.

Function: ***General Data*** / ***Allotment***

2.5.1 Create an Allotment - Maximum Number of Guests

Using an Allotment without setting up a suballotment at the same time is particularly suitable for events of limited duration, e.g. a framework program or a party.

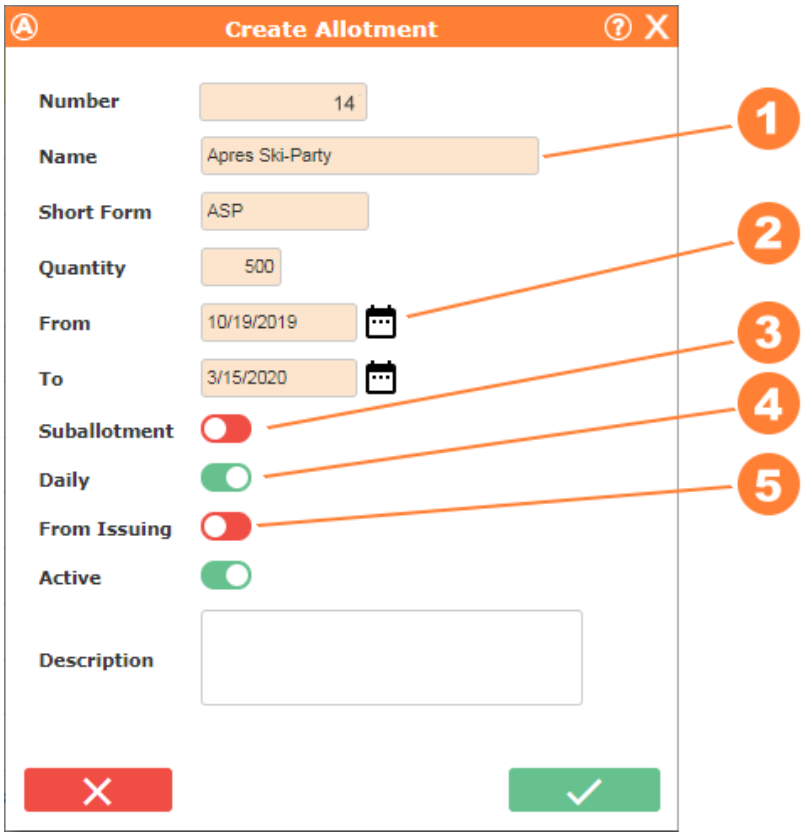
Find function: ***General Data / Allotment***

Create an Allotment

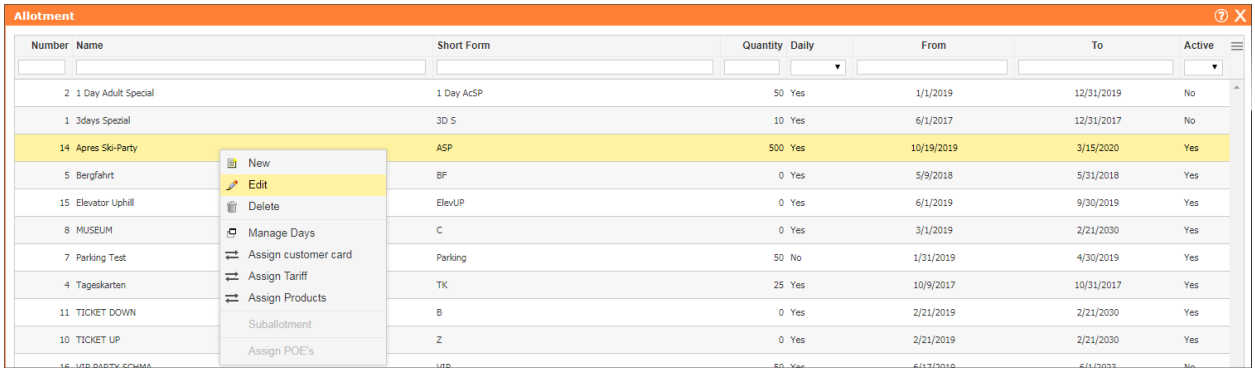
1. -> *Allotment*
2. Context menu, ***New***; → *Create an Allotment*
3. Enter parameters,
   !Attend mandatory fields!

Save!

Example: A maximum of 500 guests per day are allowed to attend the apres-ski party



1 Name of Allotment
2 Maximum number of guests
3 Period in which the allotment applies
4 **Checkbox Daily (active) -> Max. Number can be reached daily;**
Checkbox Daily (inactive) -> Max. Number may be reached during the entire period of allotment validity



The context menu provides you with additional functions for this allotment.

An allotment cannot be deleted if other settings have been made, e.g. assign a map, manage days.

Delete these settings first.

2.5.2 Manage Days

Set the maximum number of available tickets for individual days.

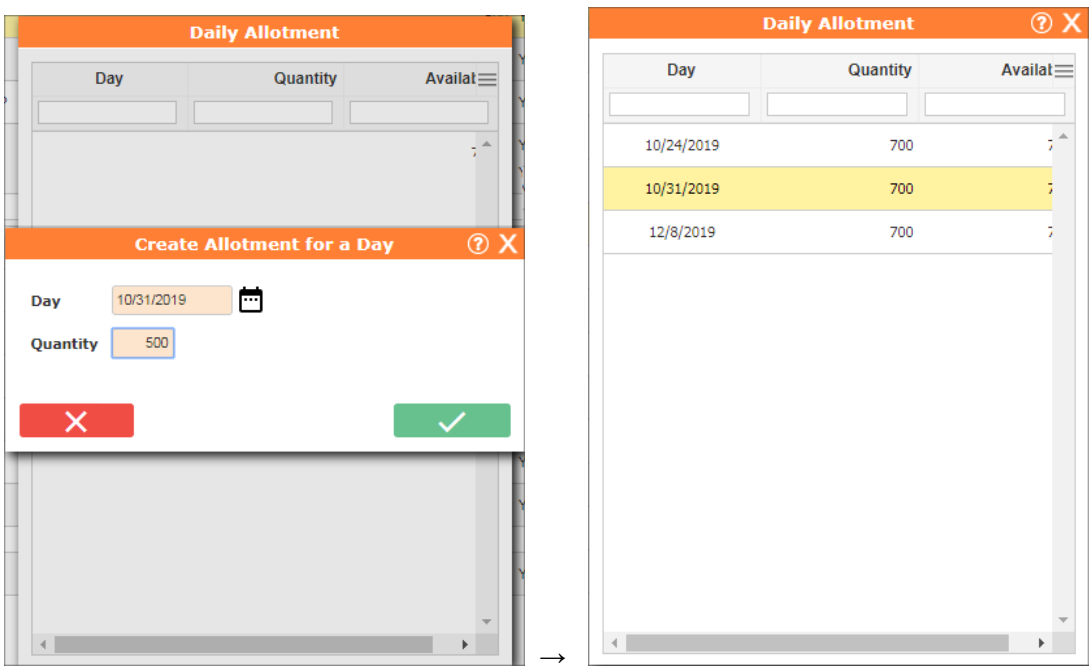
> Function is only available for contingents that have daily maximum guest numbers. This feature does not exist for total allotments over a longer period.

Manage Days

1. Menu ***General Date / Allotment***; -> *Allotment*
2. Select allotment
3. Context menu, ***Manage Days***; -> *Daily Allotment*
4. Context menu, ***New***; -> *Edit Allotment for a day*
5. Set date
6. Enter number

Save !

Example: 3 extra days with higher number of available tickets



2.5.3 Create Allotment - plus Sub-Allotment

Use function **Allotment** plus setting up a **Sub-Allotment** at the same time, when providing the possibility of reservations to your guests as well as timewise reservations.

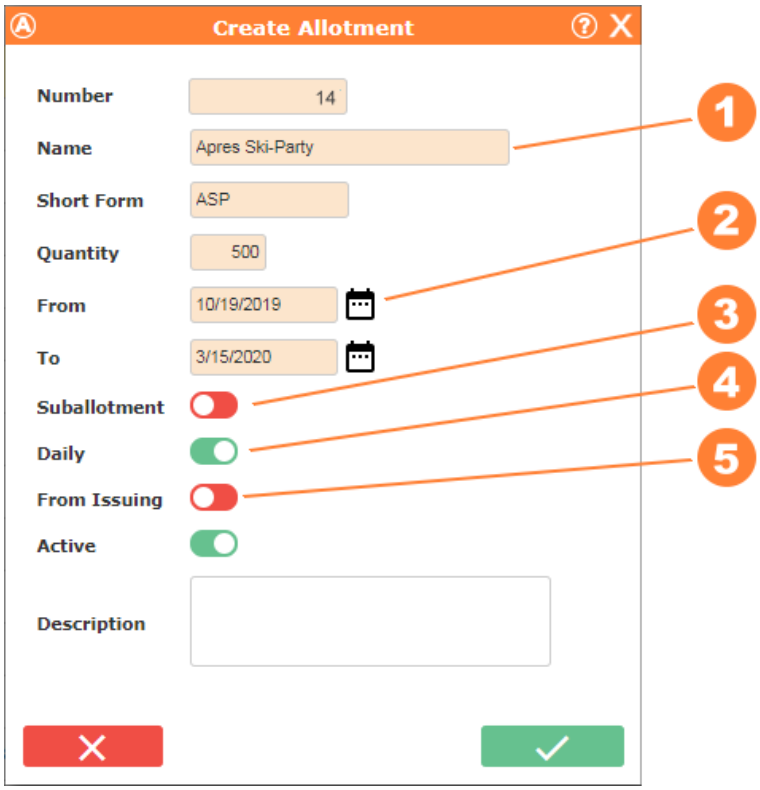
Menu: ***General Data / Allotment***

Create an Allotment

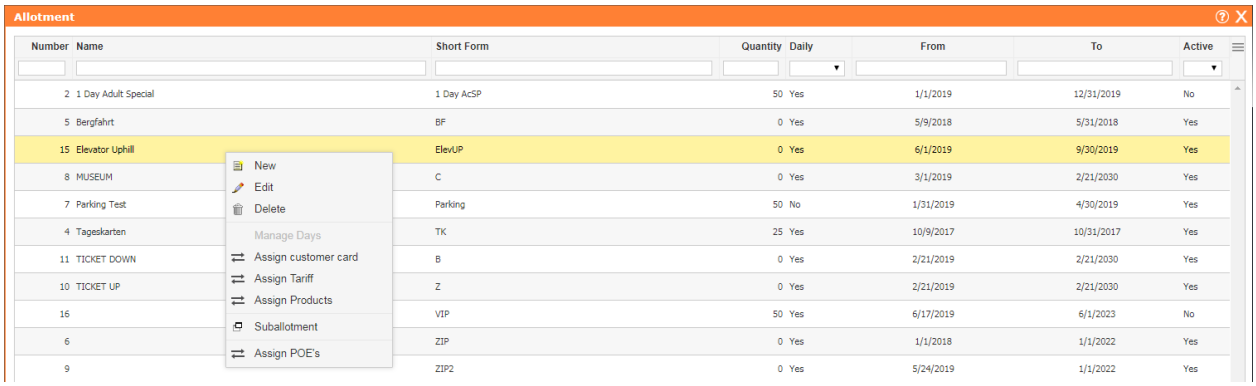
1. -> *Allotment*
2. Context menu, **New**; → Create Allotment
3. Enter parameters,
   !Mandatory fields!

Save!

Example: A maximum of 50 guests may board each uphill train; Turn on ticket reservation for a specific selected time.



1 Name of the *Allotment*
2 *Time span* of validity of the allotment
3 **Checkbox *Suballotment* (active) -> Switch on the reservation system**
4 When buying a ticket the "*reservation*" is possible, but not obligatory;
Optional "*Off*" → Reservation is mandatory
5 (not in use)



There are more functions offered in the context menu.

> An allotment can not be deleted if other settings had been made, e.g. assign Ticket, Manage days. Delete these settings first.

2.5.4 Create Sub-Allotment

You can create several Sub-Allotments for an allotment. Set a total number of guests, e.g. for admission to the train, the guided tour, etc. Define the proportion of reserved tickets for groupwise bookings and what percentage is offered in retail sale. Also define the points in time for the access.

Create Sub-Allotment

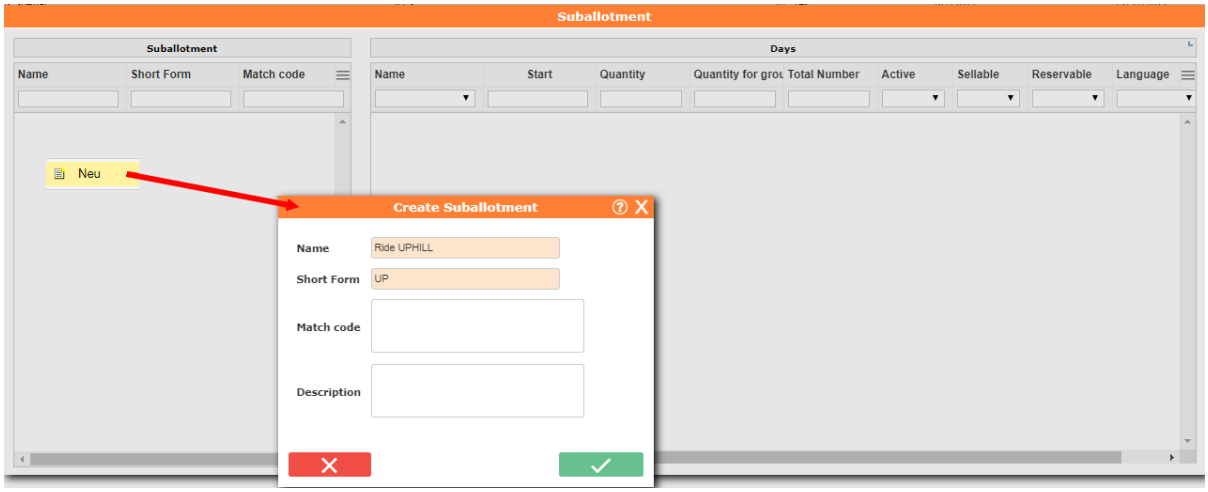
1. **General Data / Allotment**
2. Select allotment
3. Context menu, ***Suballotment***
4. Cursor in List ***Subkontingent***
5. Context menu, ***New***; ***-> Create Suballotment***

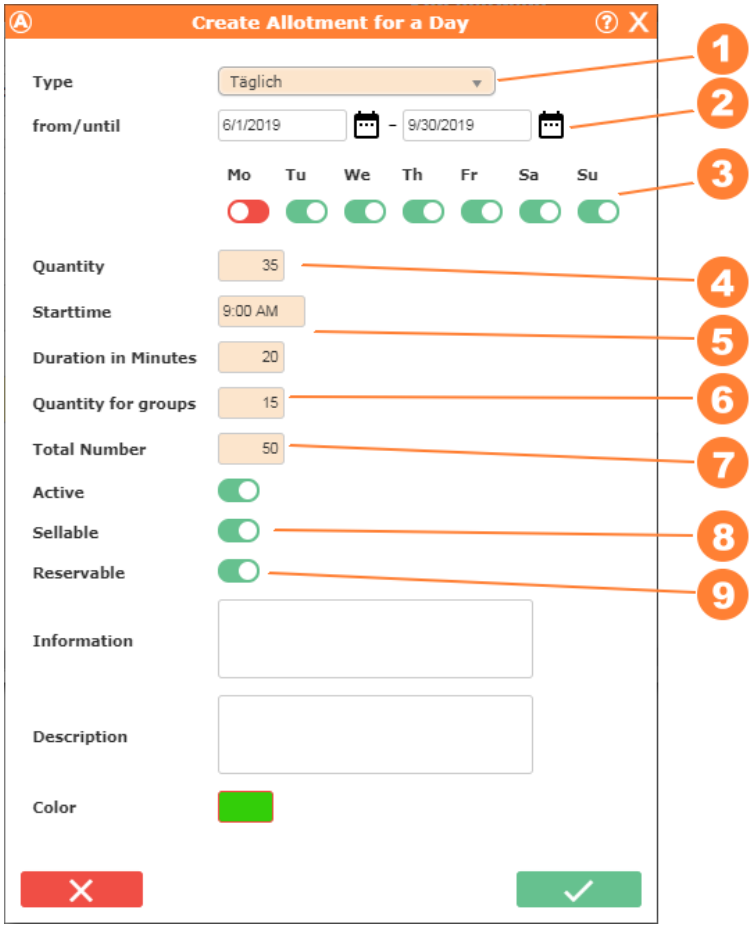
Save!

1. Select suballotment
2. Cursor in list Days
3. Context menu, **New**; *-> Create Allotment for a Day*
4. Enter parameter

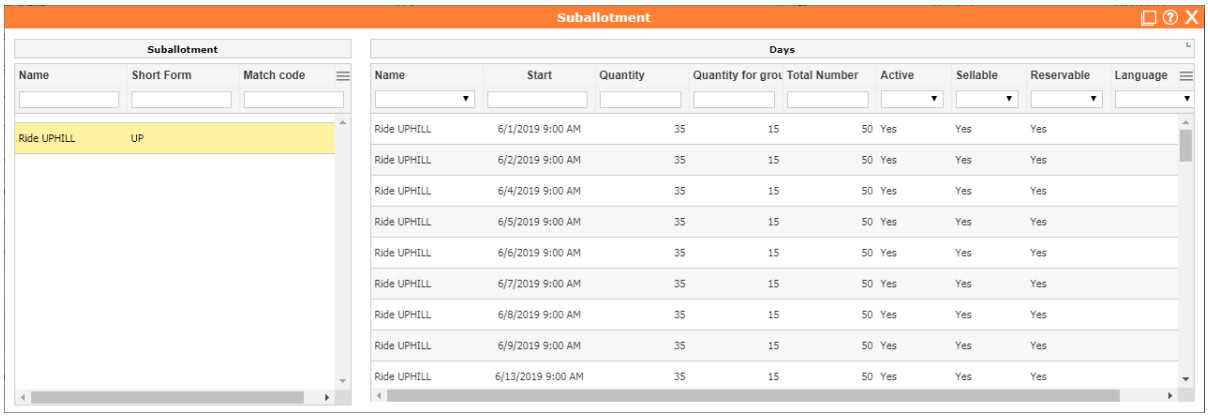
Save!

Example: Setting up a suballotment "Daily ride on an elevator at 9:00 am"

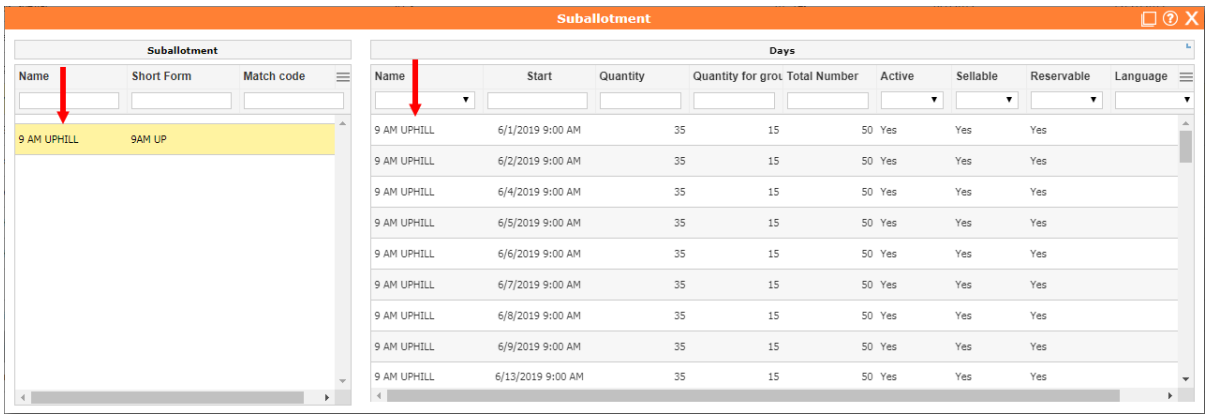




1 Type of suballotment: this day, daily, monthly, weekly
2 Period in which the suballotment should be valid
3 Days of the week on which the suballotment should be active, here for example: all days of teh week except Monday, which can be a rest day or another allotment is valid on Monday
4 Number of seats for individual reservations for sale at the POS or in the webshop
5 Start time (departure time) of the elevator; (Travel) Duration
6 Number of reserved cards for groupwise bookings
7 Total number of possible guests for this trip
8 Possibility to sell (single reservations via webshop / cash register)
9 Enable reservation option (groupwise reservation in Reservation Manager)



Rename the Suballotment for better overview:

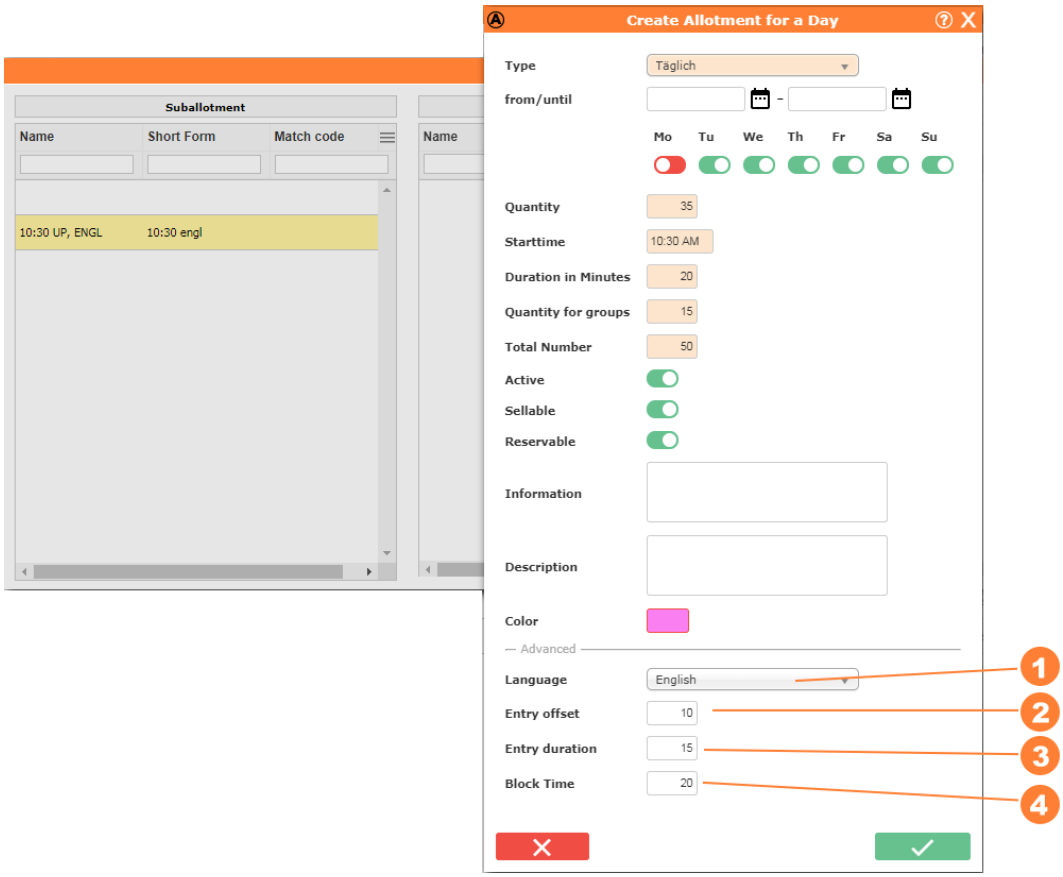


2.5.5 Examples for Setting up Suballotments

Example: Rides with an elevator to an attraction including a guided tour

Advanced mode

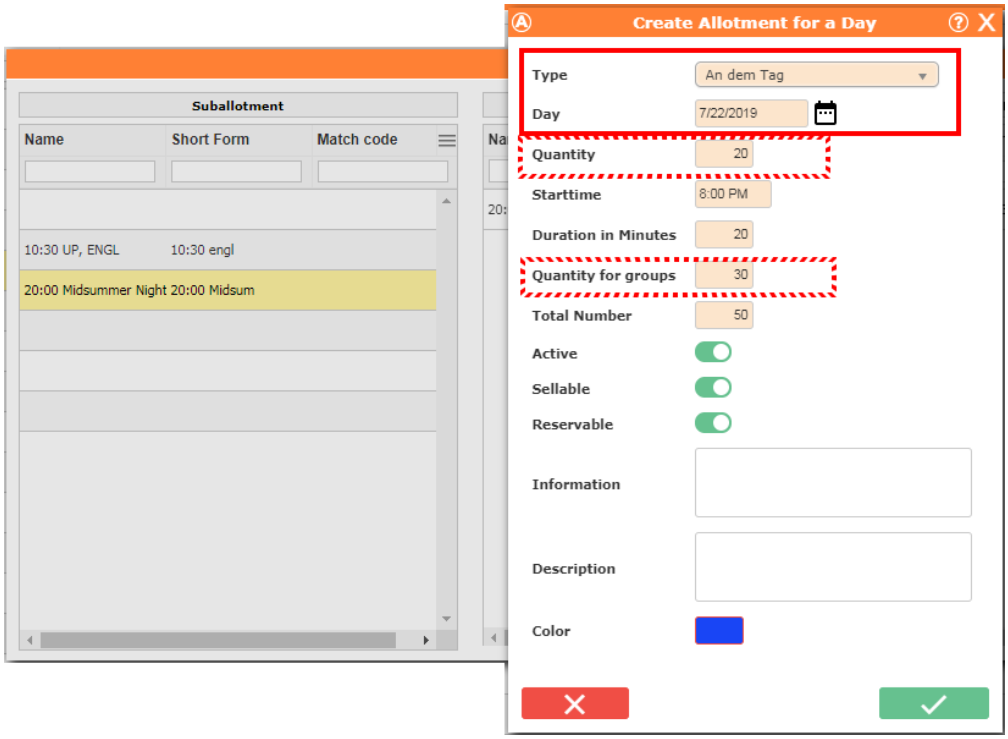
- The tour at 10.30 AM is offered in English
- Participants should be able to enter 10 minutes ahead of the planned departure

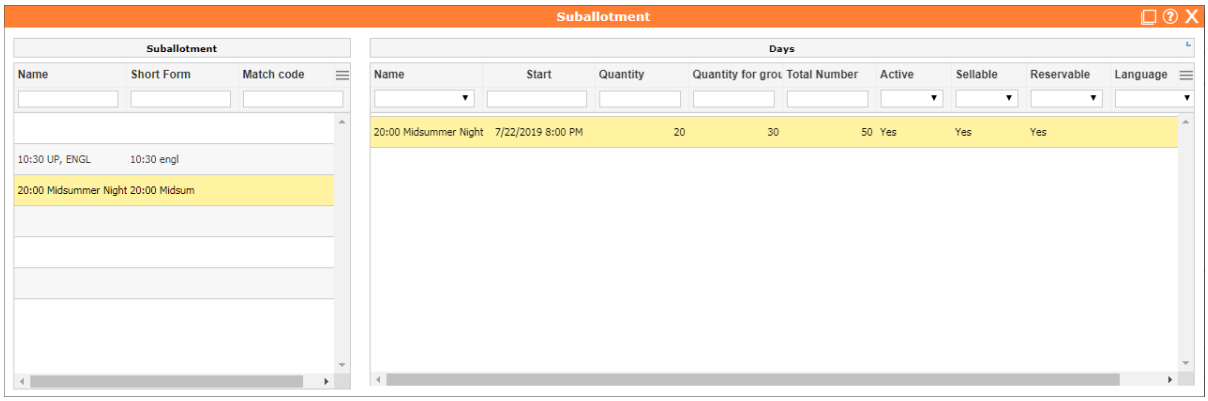


1 Language of the guided tour
2 Entry 10 minutes ahead of the planned departure
3 Latest entry 5 minutes after scheduled departure
4 Entry will be blocked for 20 minutes after departure of the elevator

Example: Setting up a Special Ride

- exact date and time
- Increase share of tickets for group booking


Suballotment
Name
Short Form
Match code
10:30 UP, ENGL
10:30 engl
20:00 Midsummer Night
20:00 Midsum
Create Allotment for a Day
Type
An dem Tag
Day
7/22/2019
Quantity
20
Starttime
8:00 PM
Duration in Minutes
20
Quantity for groups
30
Total Number
50
Active
Sellable
Reservable
Information
Description
Color


Suballotment
Suballotment
Name
Short Form
Match code
10:30 UP, ENGL
10:30 engl
20:00 Midsummer Night
20:00 Midsum
Days
Name
Start
Quantity
Quantity for grou
Total Number
Active
Sellable
Reservable
Language
20:00 Midsummer Night
7/22/2019 8:00 PM
20
30
50
Yes
Yes
Yes

2.5.6 Assign Allotment to a Ticket Type

Use function **Assign Customer Card** to enter all tariffs which include a spcific ticket type and assign them into the allotment. This means that all tariffs which enclose the assigned ticket types are included to the allotment until the total number is reached.

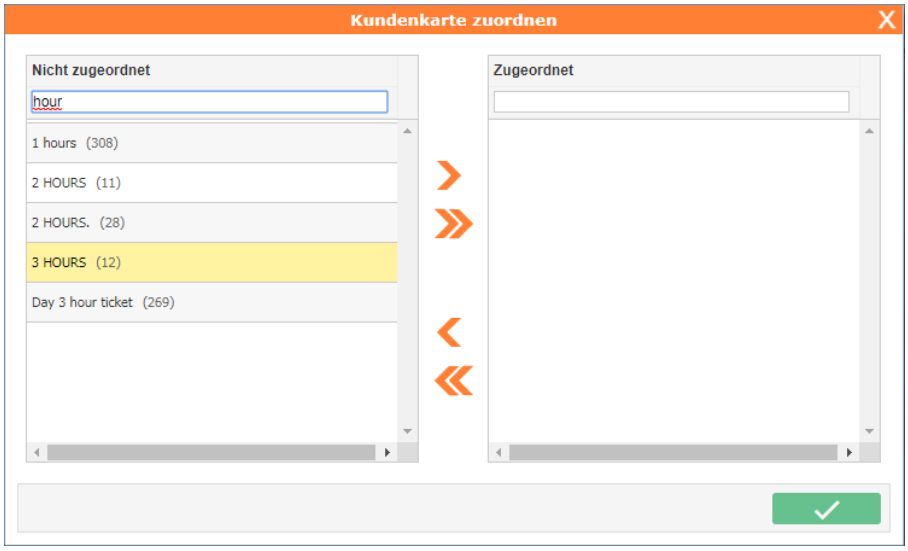
If you create a new ticket type later on, you can select and assign an allotment directly in list Ticket Types; please refer

Assign Ticket Types

1. Menu ***General Data / Allotment***; -> *Allotment*
2. Select allotment
3. Context menu, ***Assign Customer Card***; → *Assign customer card*
4. Select card type and drag to list Assigned

Save!

Example:



2.5.7 Assign Allotment to a Tariff

Use function **Assign Tariff** to assign one or more tariffs to an allotment.

When you create a tariff later on, you can select and assign an allotment directly from list *Tariffs* in the *price sheet*.

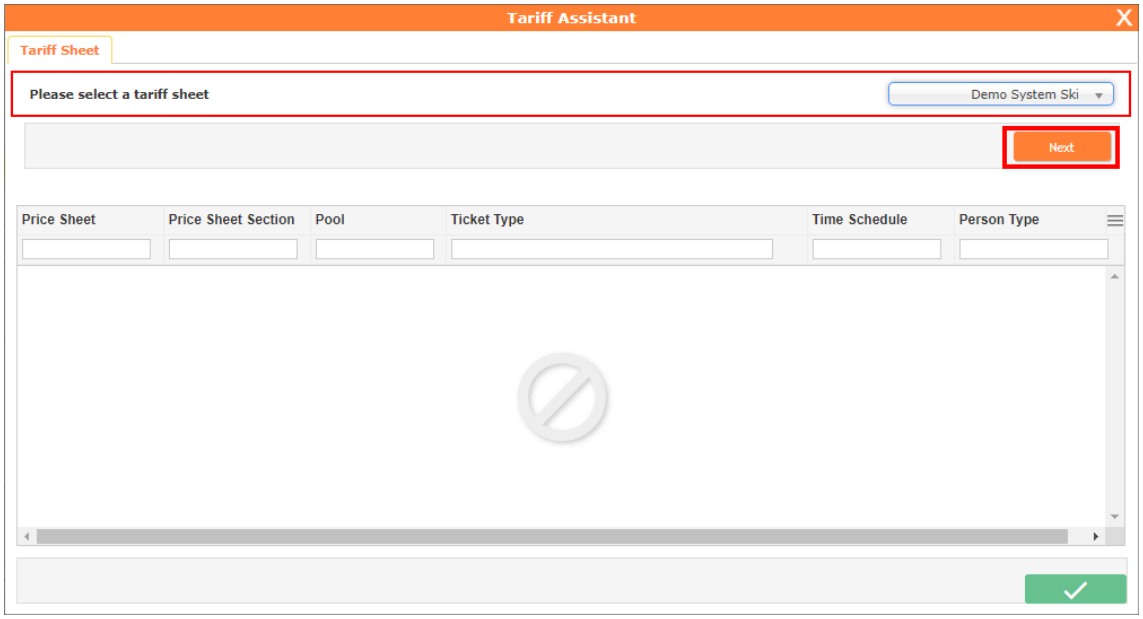
Assign tariff

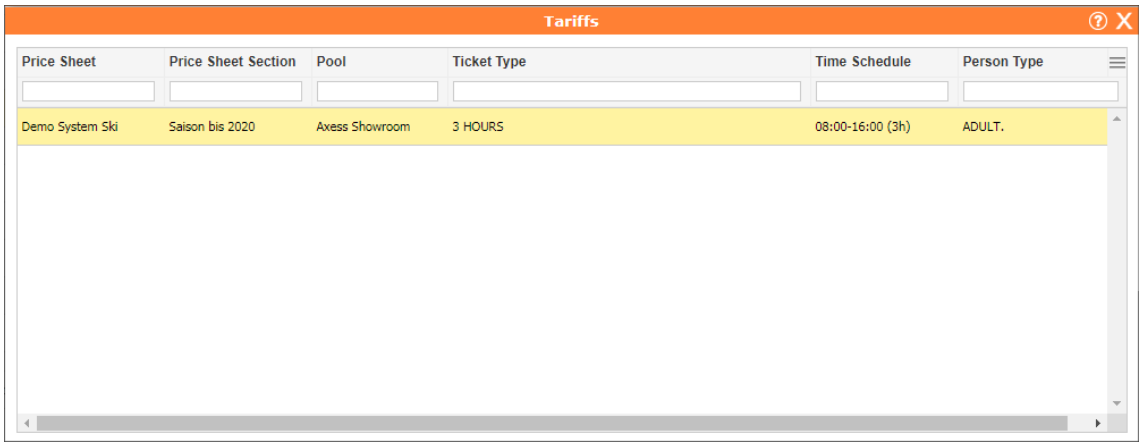
1. Menu ***General Data / Allotment***; -> *Allotment*
2. Select allotment
3. Context menu, ***Assign Tariff***; -> *Tariffs*
4. Context menu, ***Assign***; -> *Tariff assistant*
5. *Select price sheet*
6. *Select validity period*
7. Mark desired tariffs; use the filters for search

Save!

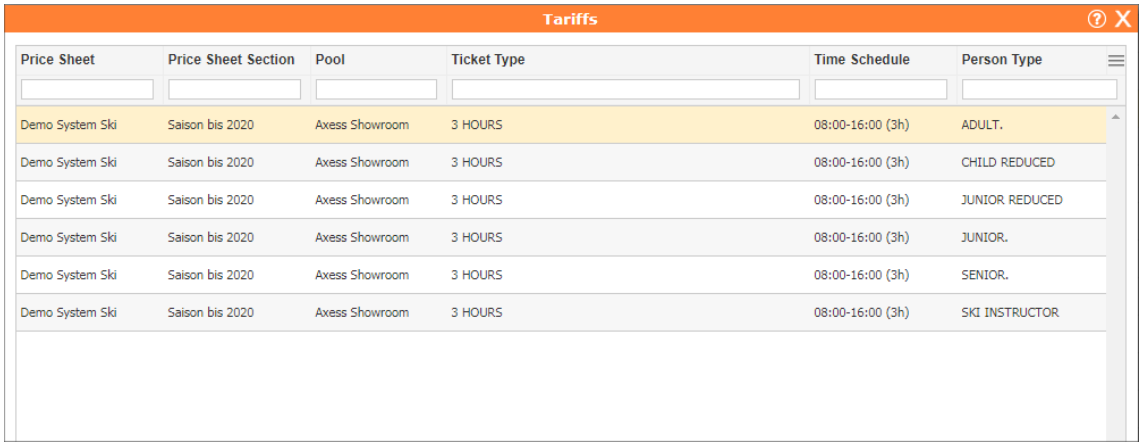
The tariffs are assigned to the allotment.

Example:





Assign more tariffs



2.5.8 Assign an Allotment while creating a New Tariff

Within the **Tarif sheet**, you can assign existing or newly created tariffs to an allotment right away.

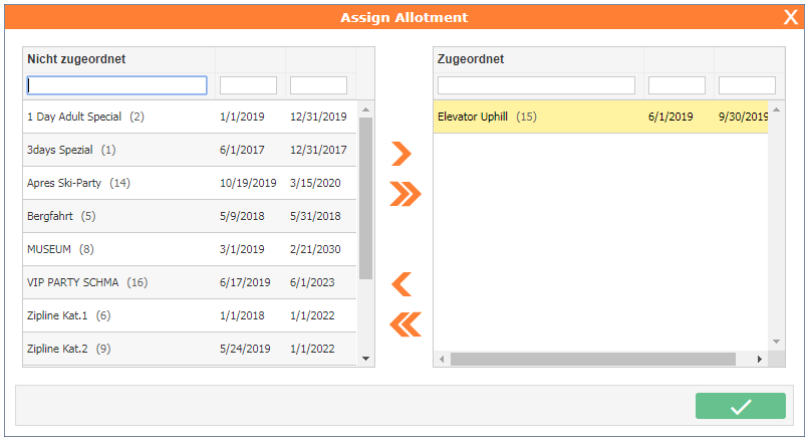
Function in menu: ***Tarif Management / Tariff Sheets / Tickets***

Assign tariff to an Allotment

1. → *List Tariffs*
2. Select tariff
3. Context menu, ***Assign Allotment***
4. Select allotment

Save!

Example:



2.5.9 Assign Allotment to a Product

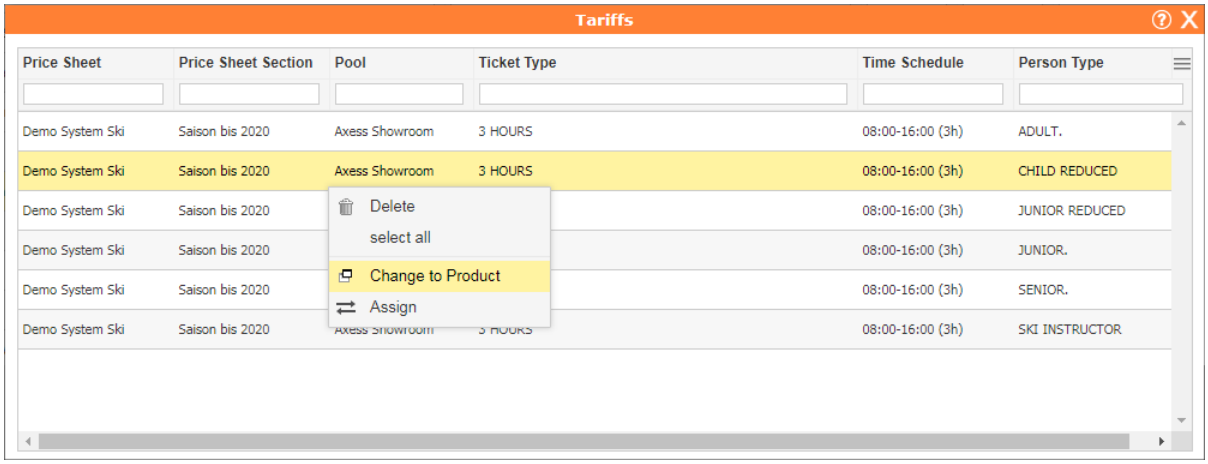
The term ***Product*** here describes a filter for the collection of tariffs. All enclosed tariffs are identical in the properties ***ticket type + person type + pool***. From then on all tariffs that have these characteristics in common will be included in the allotment, even if they are created later.

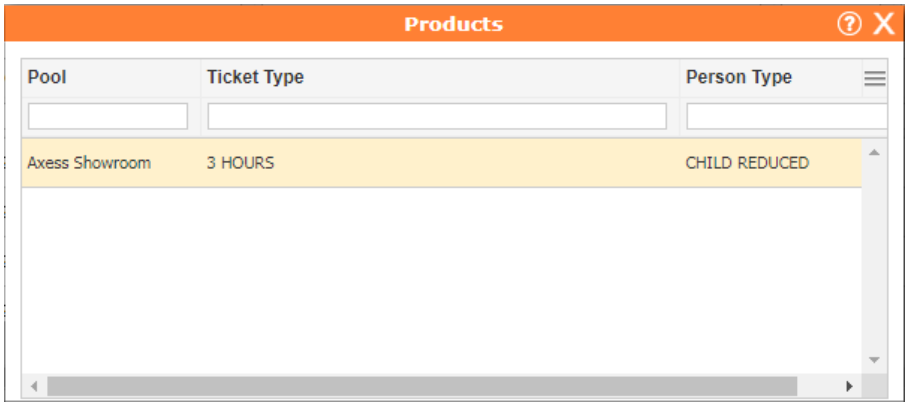
Assign product

1. Menu ***General Data / Allotment***; -> *Allotment*
2. Select allotment
3. Context menu, ***Assign Tariff;*** -> *Tariffs*
4. Select tariff
5. Context menu, **Change to Product**;-> Products

Save!

Example: Convert tariff into product





2.5.10 Assign POE

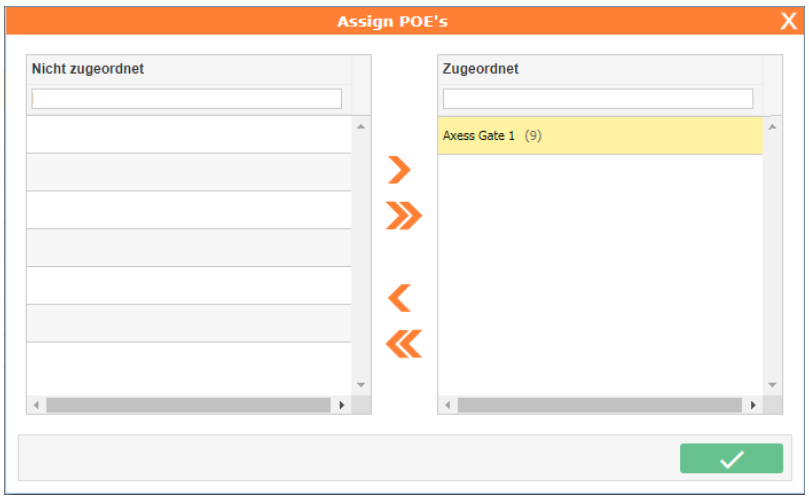
You can **Assign POE's** to the tickets of an allotment. The tickets are then valid for the assigned POE's.

Assign POE's

1. Menu ***General Data / Allotment***; → *Allotment*
2. Select allotment
3. Context menu, ***Assign POE's***; → *Assign POE's*
4. Select POE and drag into list Assigned

Save!

Example:



This feature is only available if you have selected an Allotment PLUS Sub-Allotment.

As soon as a POE is assigned, the reservations will be checked at the POE. This means, the *Reservation Cube* is required additionally to the POE in order to validate tickets and the allotment.

3 Ticket Tariffs and Price Sheets

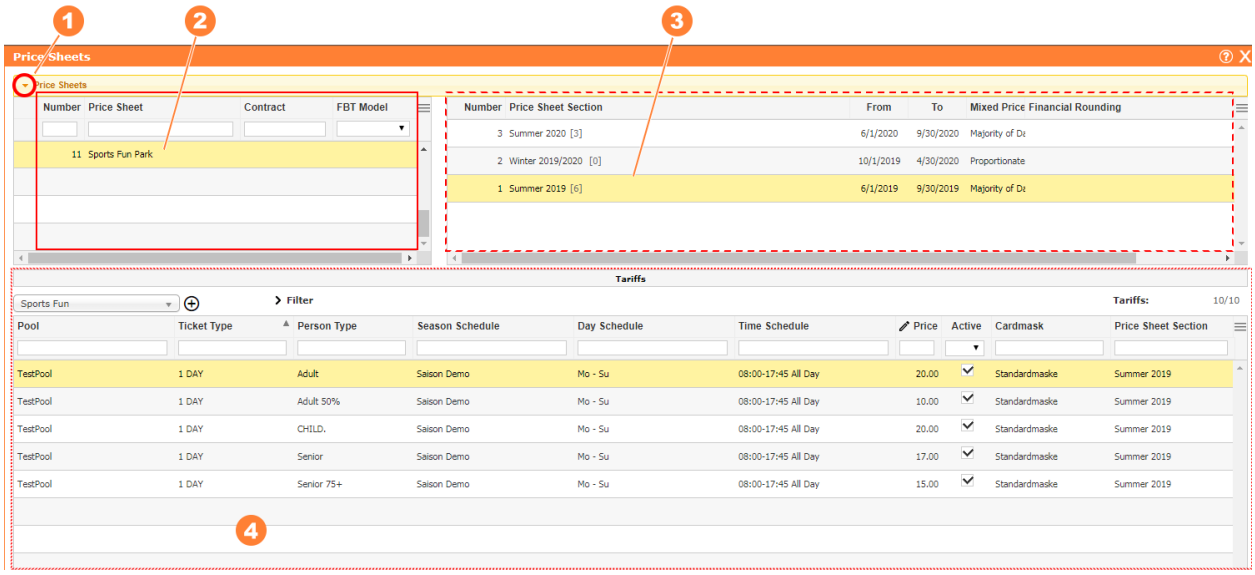
When creating Tariffs for tickets (cards), the general data Ticket Type, Person Type and Pool are processed, as well as the time schedules.

You should perform these steps:

1. Create a *Price Sheet* (sometimes called 'tariff sheet')
2. Create *Price Sheet Sections*
3. Create *Tariff*
4. Define *Keyboard Layout*

> The tariff is necessary for ticket sales at the POS.

Find function in menu: ***Tariff_Management / Tariff Sheets***



1 Function to Hide or Unhide the lists Price Sheets and Price Sheet Sections
2 List of Price Sheets
3 List of Price Sheet Sections which are enclosed in the selected price sheet
4 Tariffs which are enclosed in the selected price sheet section

3.1 Create or Copy a Price Sheet

Create a ***NEW Price Sheet***, or copy an existing price sheet, e.g. to take over the price sheet of one company for another company. The ***Price Sheet Sections*** and ***Tariffs*** are also copied and can then be edited. Single tariffs can not be copied!

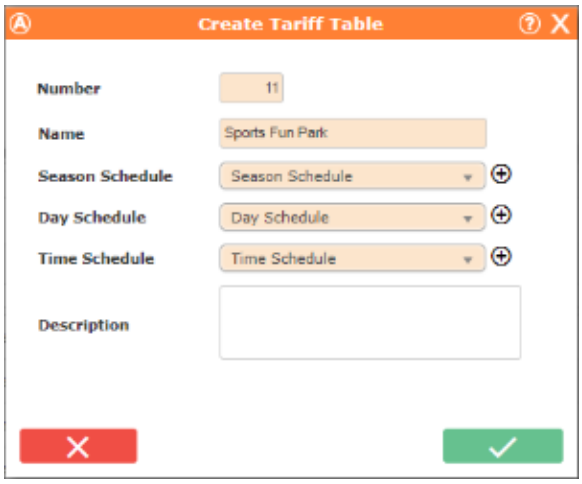
Function in: ***Tariff_Management / Tariff Sheets / Tickets***

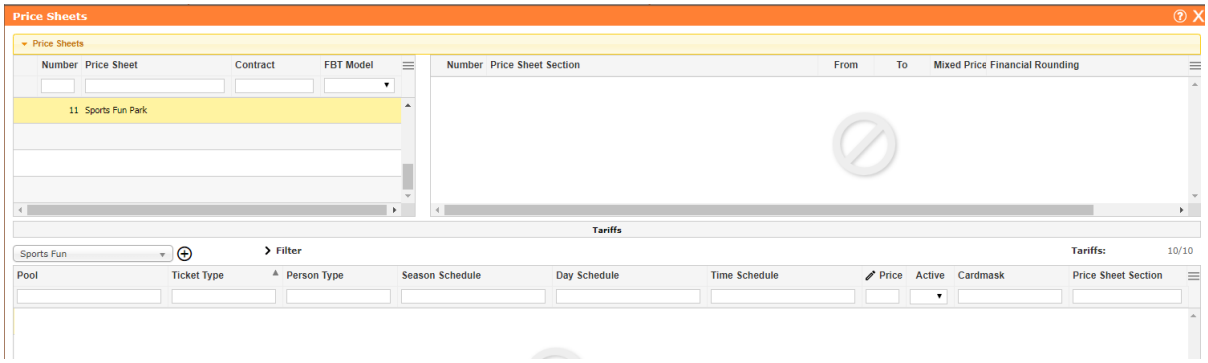
Create a NEW Price Sheet

1. Menu ***Tariff_Management / Price Sheets***; -> *List Price Sheets*
2. Position cursor in list of the price sheets
3. Context menu ***NEW*** -> Dialog *Create Tariff Table*;
   !Attend mandatory fields!
4. Enter Name
5. Select *Season Schedule*
6. Select *Day Schedule*
7. Select *Time Schedule*

Save!

Example:





Use symbol ***PLUS***, to create more seasons if the drop-down list does not contain the desired schedule.

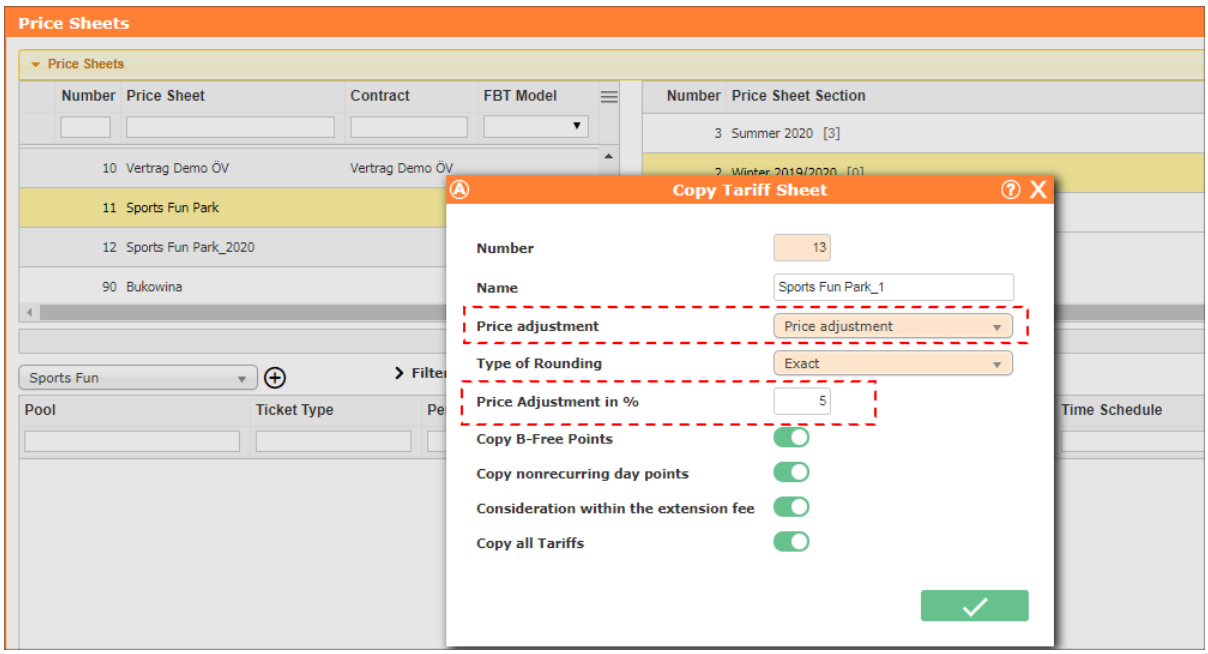
Copy Price Sheet

1. Select price sheet which you want to copy
2. Context menu ***Copy Tariff Sheet*** -> *Copy Tariff Sheet*;
   !Attend mandatory fields!
3. Enter ***Name***
4. Make ***settings for copy process***; for example p*rice changes* in % which affects all prices of all tariffs;

Save!

The new price sheet will be saved and listed in list *price sheets*.

Example:

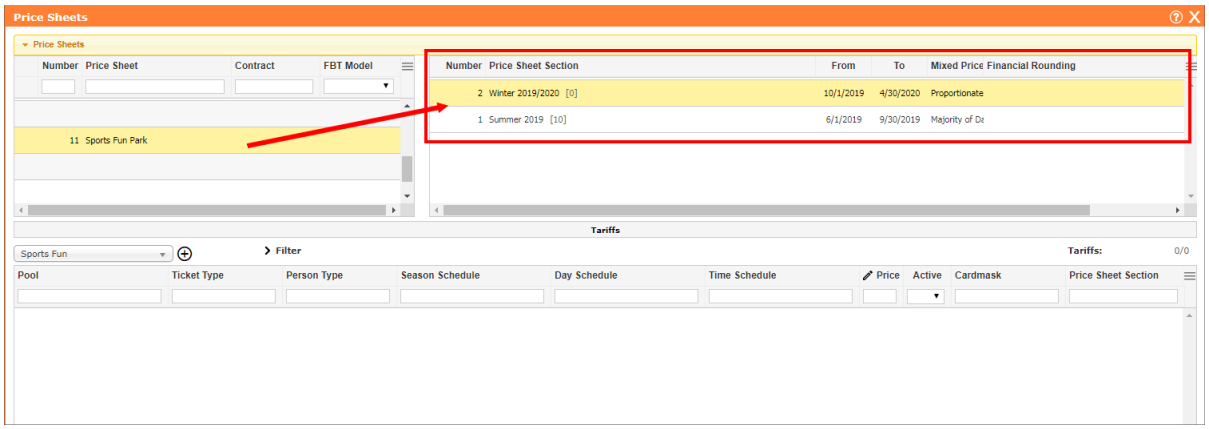


All price sheet sections and included tariffs of the new price sheet can be edited or deleted!
Setting ***Copy all Tariffs*** to ***ON (green)*** → All tariffs will be copied immediately. You can delete tariffs as long as they have not yet been used for ticket sales.
Setting ***Copy all Tariffs*** to ***OFF (red)*** → You can select all tariffs individually which will be copied.

3.2 Create Price Sheet Section

A ***Price Sheet*** can contain several ***Price Sheet Sections***, each of them defines a time frame for ticket sale, *from / until*. Price sheet sections can last several weeks, months or up to several years. Tariffs are created within the price sheet section and are set up with a corresponding price.

Find function: ***Tariff_Management / Tariff Sheets / Tickets***

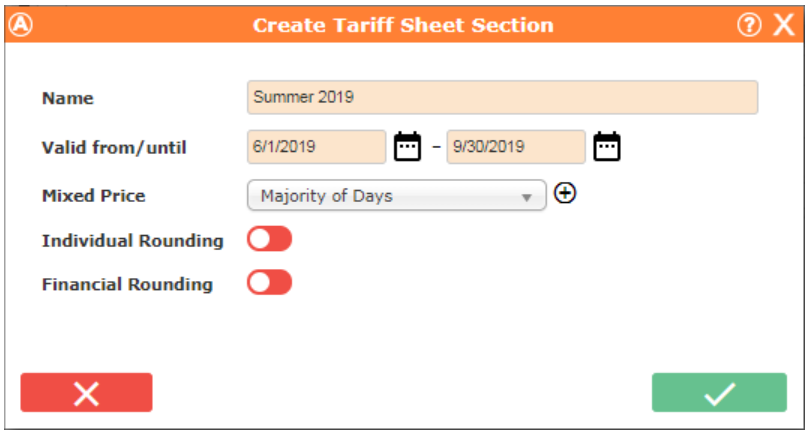


Create New Price Sheet Section

1. → list *Price Sheets*
2. Select price sheet
3. Position cursor in list Price sheet section
4. Context menu, **New;** → *Create Tariff Sheet Section*
   !Attend mandatory fields!
5. Enter time span **Valid from/until**
6. Enter parameter

Save!

Example:



Don't mix it!

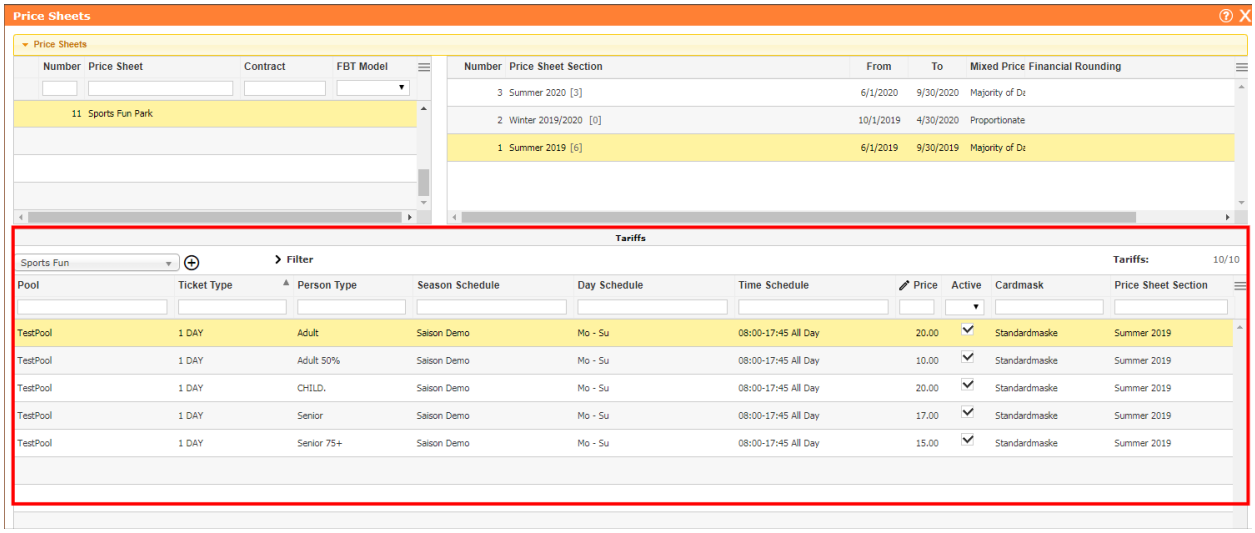
The **General Data "Schedules"** which you need to create the tariff, such as *Season parameter, Day and Time*, are good for the ticket readers at the POE; they define the "Validity" of the ticket.

It is not possible to delete a *price sheet section* if it already encloses a tariff. You need to delete the tariff first in order to enable function *Delete*.

3.3 Create Tariff

Find a list of tariffs in dialog ***Price Sheets***. These apply to the selected ***Price Sheet*** and the marked ***Price Sheet Section***. You can here *create new tariffs, edit* or *delete tariffs*.

Function in: ***Tariff_Management / Tariff Sheets / Tickets***



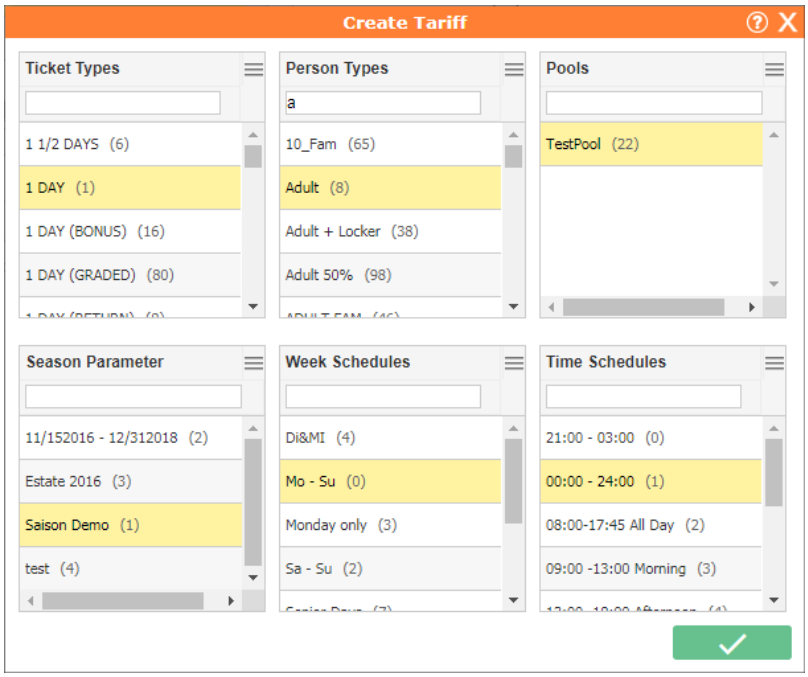
Create Tariff

1. → List Price Sheets
2. **Select Price Sheet**
3. **Select Price Sheet Sections**
4. Cursor in list Tariffs
5. Context menu, **New**; -> List Create Tariff
6. **Select components for tariff**: Ticket Type; Person Type; Pool and time tables: Season; Day; Time

Save!

> One element from each list MUST be selected to create a tariff.

Example: Day Ticket Adult for TEST Pool



Configure the Tariff

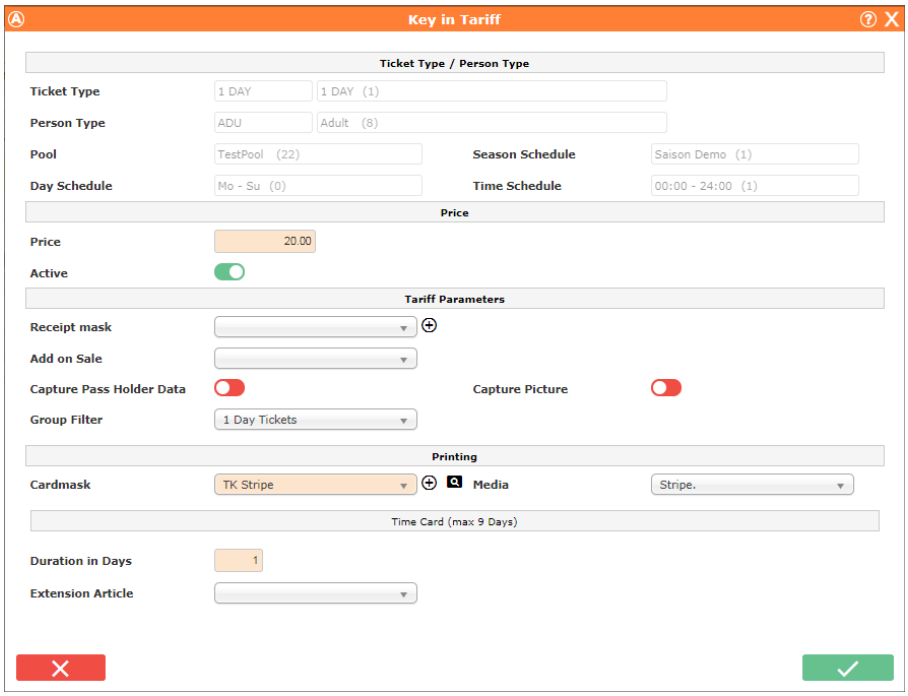
Automatically, the next dialog opens: (*price sheet section*) -> Key in tariff

The top row lines show the entries of the components selcted previously. Enter additional parameters to specify the tariff. Enter a price.

1. Enter parameters
2. Enter the price!

Save!

Example:



If you create a tariff successfully, then it will also work at the POS and the gate!
During the creation process of a tariff, CLICS runs several check-routines at the AX500 DataCenter. If any necessary parameter is missing or the combination is invalid, you will get an error message.

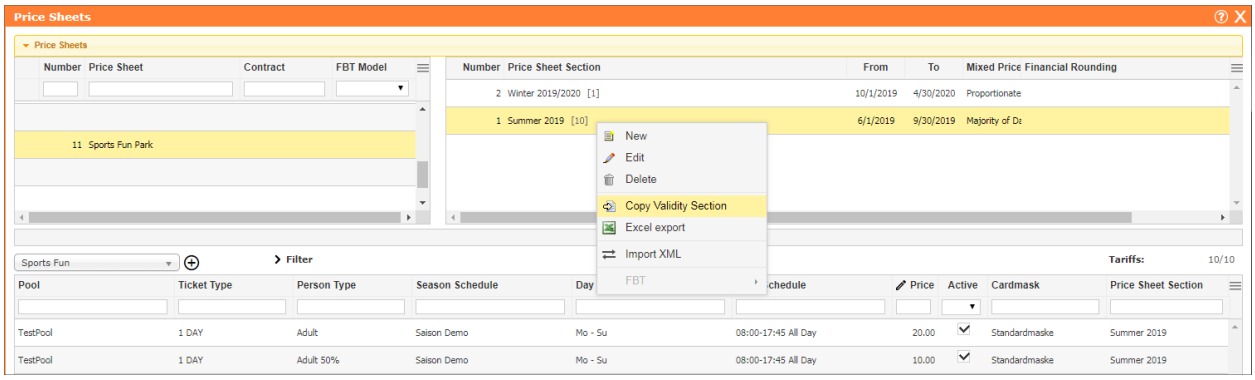
The exact same tariff may occur only once in the validity period! So you can not copy a tariff!
You can, however, Copy to person types or Copy to ticket types. All settings are retained, only the person type, respectively ticket type changes.

3.4 Copy Price Sheet Section

Save several work steps with function ***Copy Validity Section***, e.g. copying from one season to the next season. Either all, or selected, tariffs will be copied. Then change the name of the new validity section and edit the included tariffs as desired.

Function in: ***Tariff_Management / Tariff Sheets / Tickets***

Example:



Copy Validity Section

1. → List *Price Sheets*
2. *Select Price Sheet*
3. *Select Price Sheet Section*
4. Context menu, ***Copy Validity Section***; → *Copy Tariff Sheet Section*;
   !Attend mandatory fields!
5. Mark checkbox ***Copy all Tariffs;***
   -> Tariffs are copied without further confirmation

Save!

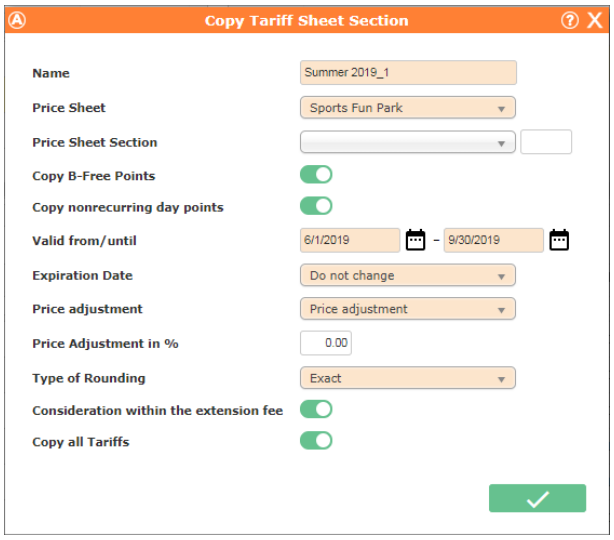
We recommend:

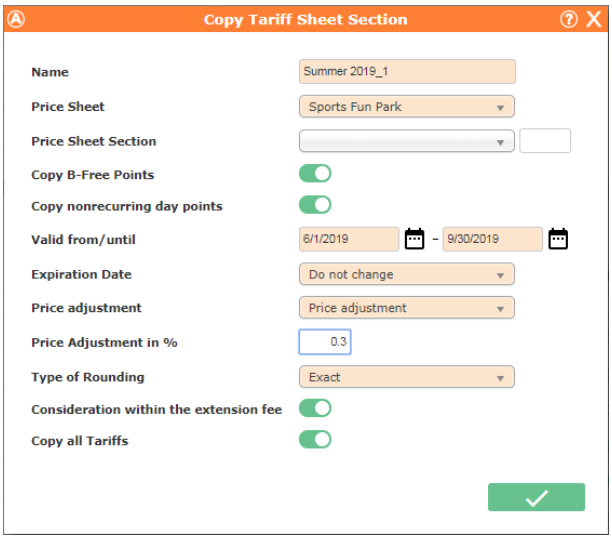
All *Validity Sections* and including tariffs of the new tariff sheet can be edited or deleted.

Setting ***Copy all Tariffs*** to ***ON (green)*** → All tariffs will be copied immediately. You can delete tariffs as long as they have not yet been used for ticket sales.

Setting ***Copy all Tariffs*** to ***OFF (red)*** → You can select all tariffs individually that are to be copied along.

Example:





Select Tariffs which will be copied

1. Deactivate setting *Copy all Tariffs*

Save!

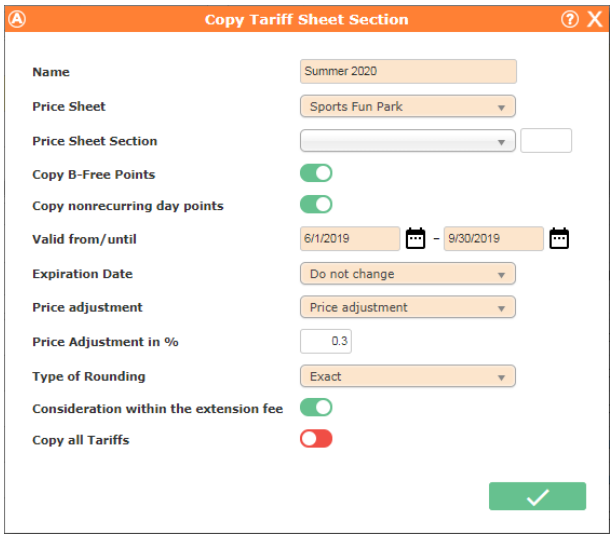
-> Copy list *Validity Period*; Tariffs that are available for copying mark desired tariffs

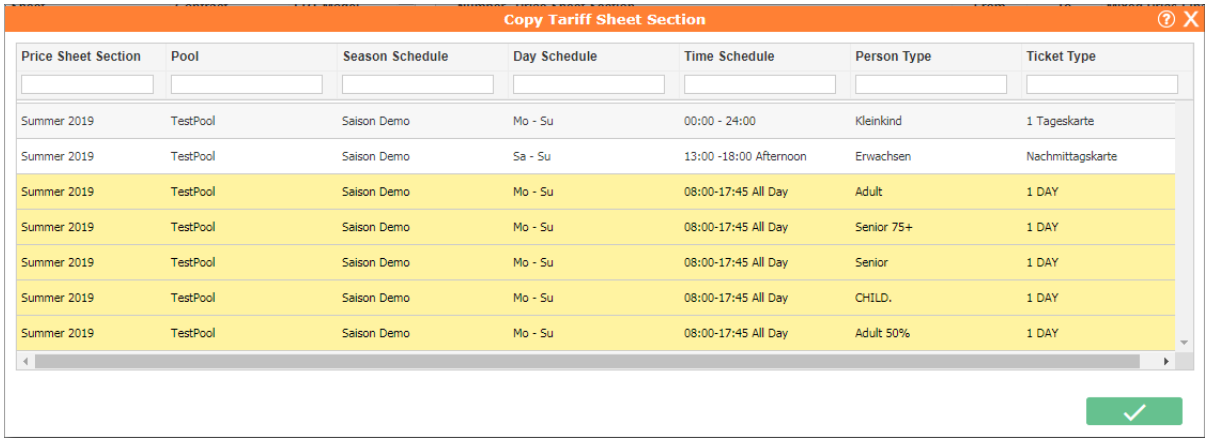
2. ***Mark*** all ***tariffs*** which shall be copied.

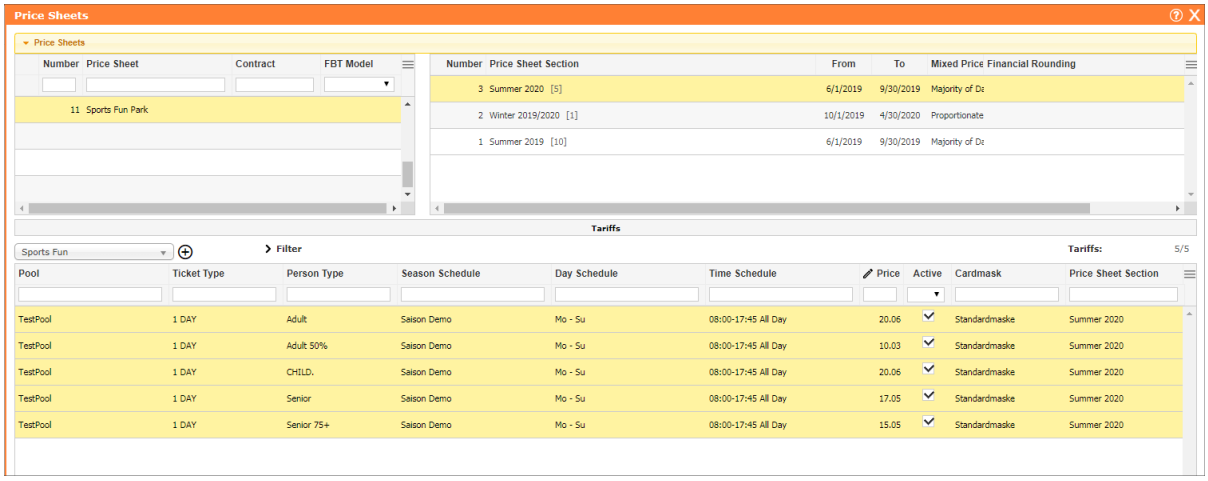
Save!

The marked tariffs are copied to the new price sheet section.

Example:




Copy Tariff Sheet Section
Price Sheet Section
Pool
Season Schedule
Day Schedule
Time Schedule
Person Type
Ticket Type
Summer 2019 TestPool Saison Demo Mo - Su 00:00 - 24:00 Kleinkind 1 Tageskarte
Summer 2019 TestPool Saison Demo Sa - Su 13:00 -18:00 Afternoon Erwachsen Nachmittagskarte
Summer 2019 TestPool Saison Demo Mo - Su 08:00-17:45 All Day Adult 1 DAY
Summer 2019 TestPool Saison Demo Mo - Su 08:00-17:45 All Day Senior 75+ 1 DAY
Summer 2019 TestPool Saison Demo Mo - Su 08:00-17:45 All Day Senior 1 DAY
Summer 2019 TestPool Saison Demo Mo - Su 08:00-17:45 All Day CHILD. 1 DAY
Summer 2019 TestPool Saison Demo Mo - Su 08:00-17:45 All Day Adult 50% 1 DAY


Price Sheets
Price Sheets
Number Price Sheet Contract FBT Model
11 Sports Fun Park
Number Price Sheet Section From To Mixed Price Financial Rounding
3 Summer 2020 [5] 6/1/2019 9/30/2019 Majority of Da
2 Winter 2019/2020 [1] 10/1/2019 4/30/2020 Proportionate
1 Summer 2019 [10] 6/1/2019 9/30/2019 Majority of Da
Tariffs
Sports Fun
Filter
Tariffs: 5/5
Pool Ticket Type Person Type Season Schedule Day Schedule Time Schedule Price Active Cardmask Price Sheet Section
TestPool 1 DAY Adult Saison Demo Mo - Su 08:00-17:45 All Day 20.06 Standardmaske Summer 2020
TestPool 1 DAY Adult 50% Saison Demo Mo - Su 08:00-17:45 All Day 10.03 Standardmaske Summer 2020
TestPool 1 DAY CHILD. Saison Demo Mo - Su 08:00-17:45 All Day 20.06 Standardmaske Summer 2020
TestPool 1 DAY Senior Saison Demo Mo - Su 08:00-17:45 All Day 17.05 Standardmaske Summer 2020
TestPool 1 DAY Senior 75+ Saison Demo Mo - Su 08:00-17:45 All Day 15.05 Standardmaske Summer 2020

3.5 Edit Tariff

You can edit the tariffs within a *price sheet section* at any time. The changes will affect all ticket transactions from the moment of synchronization of the POS. Already completed sales transactions are not affected.

Find function in menu: ***Tariff_Management / Tariff Sheets /*** *(select price sheet and price sheet section) / (mark tariff, context menu)* ***Edit***

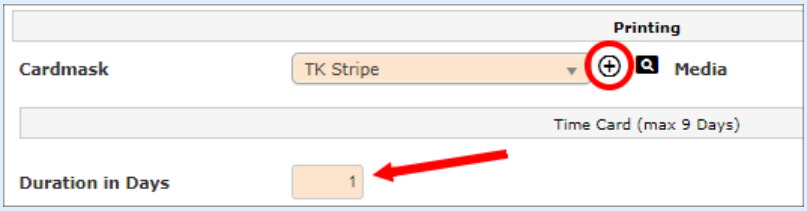
Edit Tariff

1. → Dialog Price Sheets
2. Select **Prince Sheet** and **Price Sheet Section**
3. Select **Tariff** in list Tariffs
4. Context menu, **Edit**
5. Change parameter

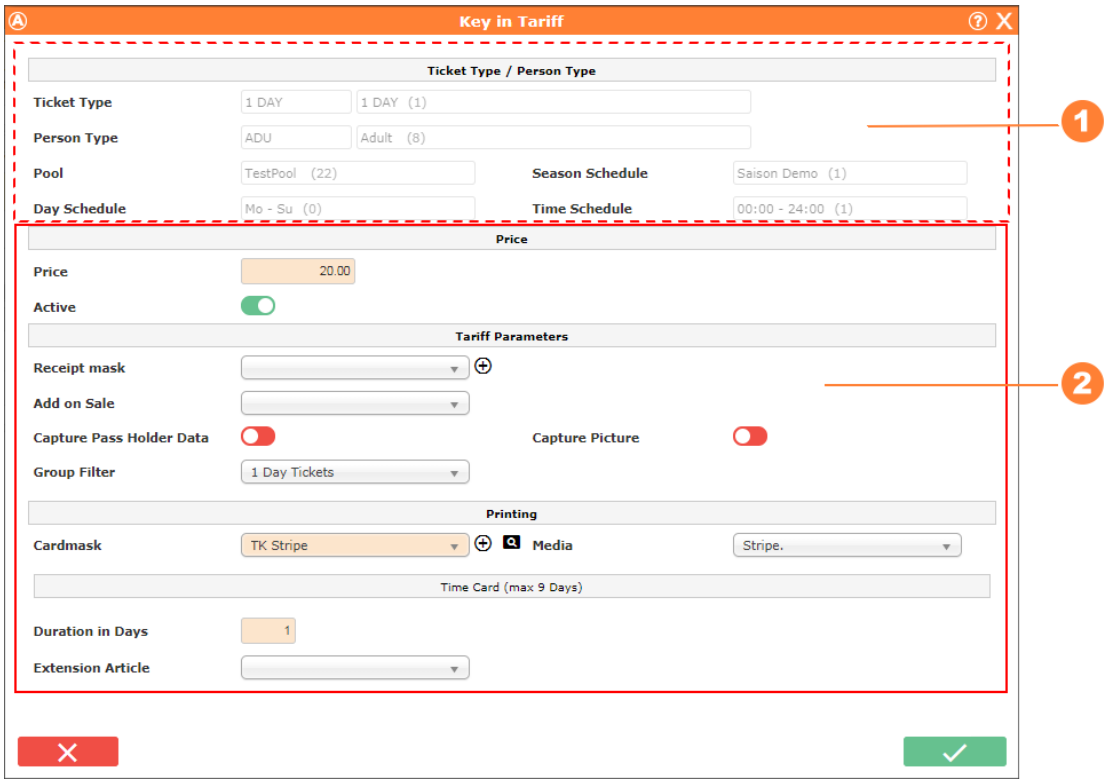
Save!

The changes are saved and the tariffs are ready for ticket sales as soon as the synchronization to the POS's is complete.

Any changes in parameters, e.g. in Tariff parameters/Add on Sale, overdrive the settings for THIS SINGLE tariff. It does not affect any other tariff.
Note! Use symbol "+" to make changes in a card mask. The "+" symbol takes you directly into the *Ticket Layout Editor*. Changes in the card mask affect all tariffs which use this cards mask.



Example:



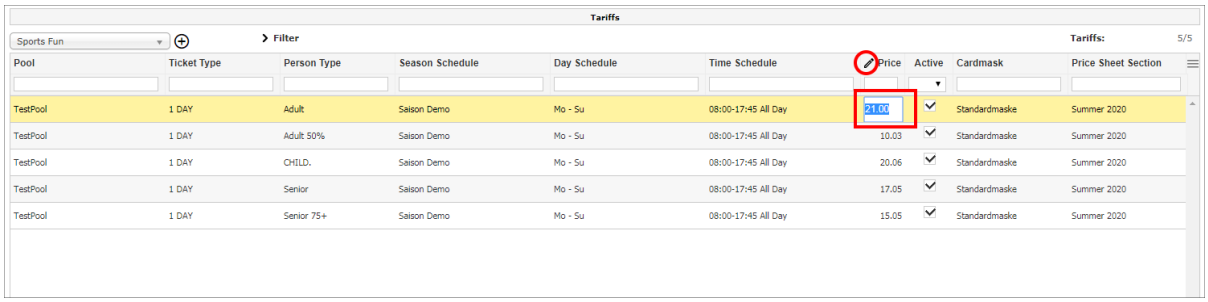
1 this area cannot be edited
2 Parameter which can be changed

Change price and parameter *Active* directly in list Tar*iffs*

1. List *Tariffs*
2. Select tariff
3. Change price: Double click on column Tariff;
   an input field opens up
4. Enter new price
5. Return-key or click on any other position of the list
   The changed price is saved immediately
6. Disable Tariff: Click on Checkbox *Active*;
   The setting is saved immediately!

CLICS confirms the correct saving with message, *Changes Saved*.

Example: Change of price



3.6 Set Filter for List Tariffs

There are numerous tariffs within an access control system. We recommend: Set ***filter*** parameters in order to restrict the display of tariffs on screen. This will give you a better overview and helps to locate a specific tariff. We also recommend: Save those filter settings that you want to use more frequently. You will get a list of different, so called ***Views***.

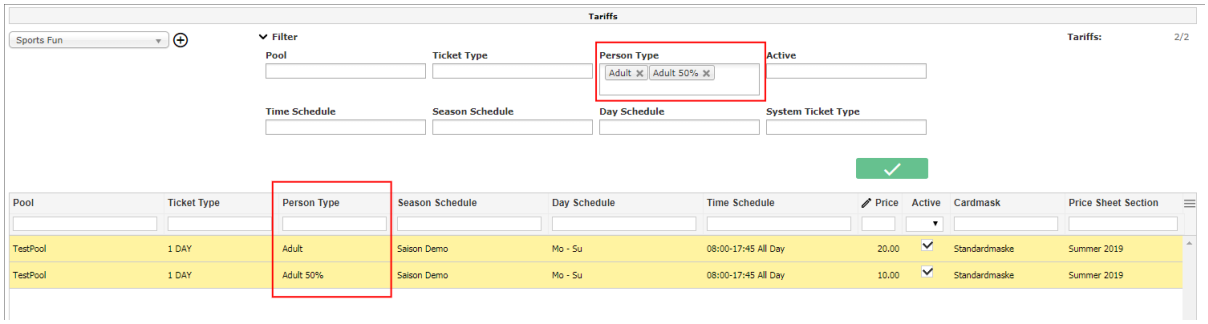
Function in: ***Tariff_Management / Tariff Sheets / Tickets***

Set Filter to list Tariffs

1. Select *Price Sheet*
2. Select *Price Sheet Section*
3. Click on function ***Filter***, *-> Filter options are shown*
4. Select filter settings

Save!

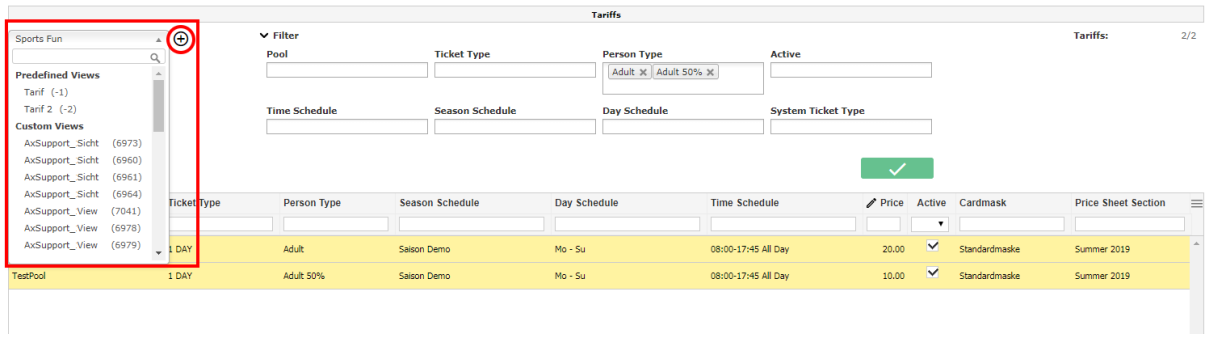
Example: Set filter for person type Adult



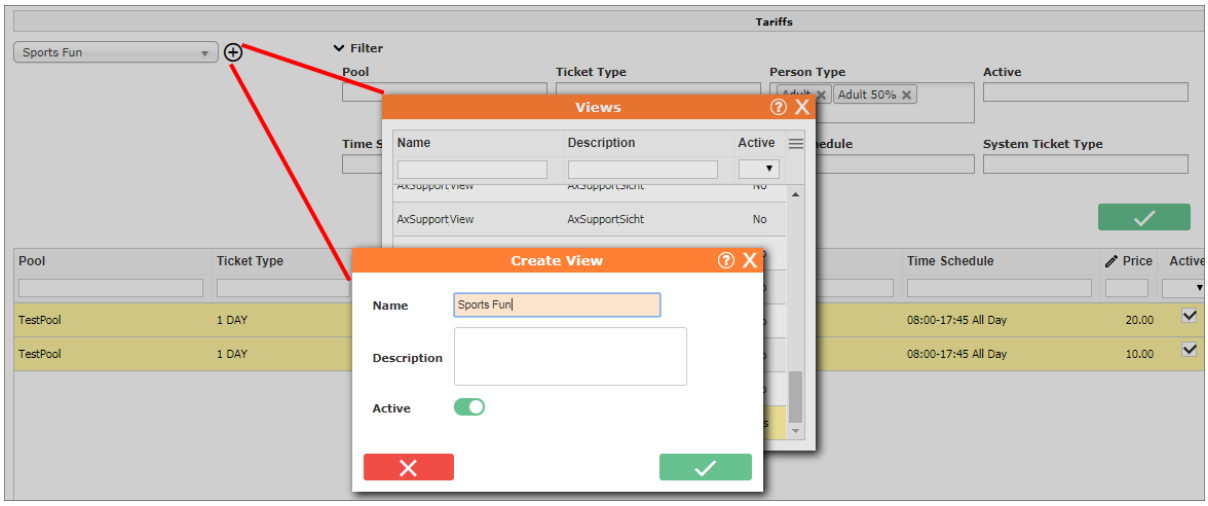
3.7 Save Filter Settings for List Tariffs

Save the filter settings by using a name or designation. You can create and save multiple different ***Views***. Using the selection list, you can freely switch from one view to the other. When selecting a new view CLICS automatically updates the filter settings according.

All available views can be seen in the selection list.



Click on symbol "+" to create a new view or rename a view.



Create a NEW view

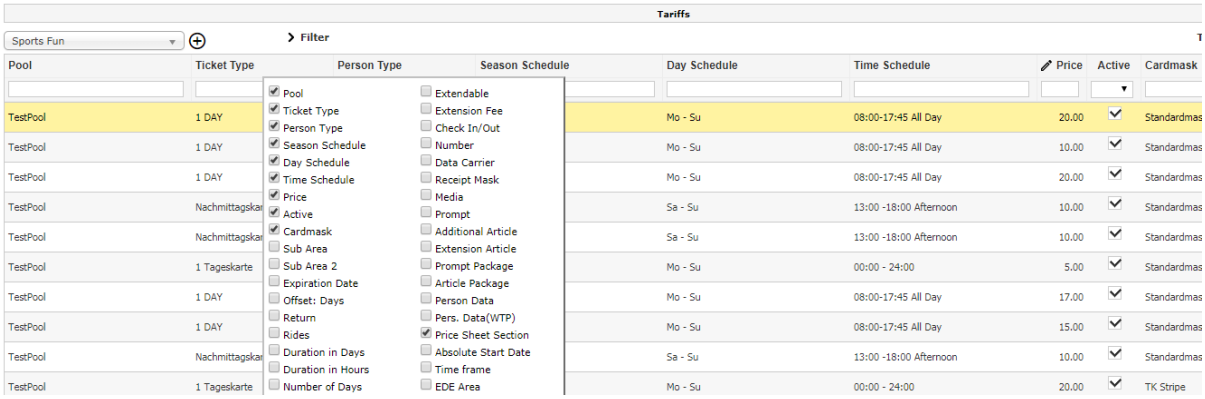
1. Click on symbol ***"+"*** ; -> Dialog *Views*
2. Context menu ***New***
3. ***Enter name***

Save!

Display the List of Tariffs

1. ***Position cursor*** on title of the table
2. ***Right-click of mouse***
3. ***Select the parameter*** you want to see on screen
   The display on screen will adjusted immediately

Example:



3.8 Tariff Overview

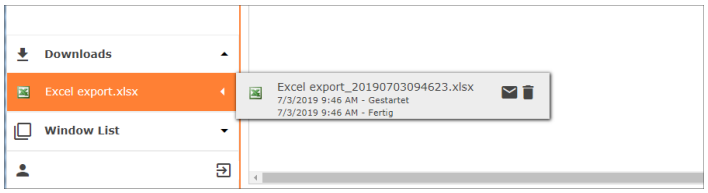
Use function ***Excel Export*** to export the overview of a price sheet as an *Excel* file. You will get a list of ***ALL tariffs of ALL validity periods***. The file can be further processed in *Excel*. Click on the symbol *trashcan* to delete the file.

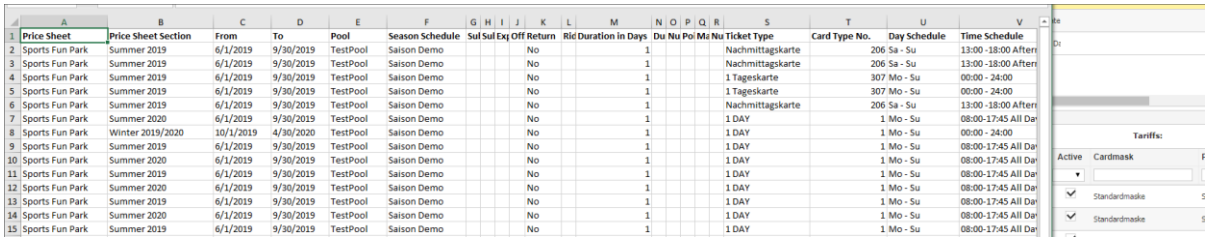
Function in: ***Tariff_Management / Price Sheets / Tickets***

Export Tariffs to Excel List

1. → List *Price Sheets*
2. Select Price Sheet
3. Context menu, **Tariff Overview**
4. Excel file will be created and the file name is displayed in the download area

Example:





Price Sheet	Price Sheet Section	From	To	Pool	Season Schedule	Off Return	Duration in Days	Ticket Type	Card Type No.	Day Schedule	Time Schedule
Sports Fun Park	Summer 2019	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	Nachmittagskarte	206	Sa - Su	13:00 -18:00 Aftern
Sports Fun Park	Summer 2019	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	Nachmittagskarte	206	Sa - Su	13:00 -18:00 Aftern
Sports Fun Park	Summer 2019	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 Tageskarte	307	Mo - Su	00:00 - 24:00
Sports Fun Park	Summer 2019	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 Tageskarte	307	Mo - Su	00:00 - 24:00
Sports Fun Park	Summer 2019	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	Nachmittagskarte	206	Sa - Su	13:00 -18:00 Aftern
Sports Fun Park	Summer 2020	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 DAY	1	Mo - Su	08:00-17:45 All Day
Sports Fun Park	Winter 2019/2020	10/1/2019	4/30/2020	TestPool	Saison Demo	No	1	1 DAY	1	Mo - Su	00:00 - 24:00
Sports Fun Park	Summer 2019	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 DAY	1	Mo - Su	08:00-17:45 All Day
Sports Fun Park	Summer 2020	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 DAY	1	Mo - Su	08:00-17:45 All Day
Sports Fun Park	Summer 2019	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 DAY	1	Mo - Su	08:00-17:45 All Day
Sports Fun Park	Summer 2020	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 DAY	1	Mo - Su	08:00-17:45 All Day
Sports Fun Park	Summer 2019	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 DAY	1	Mo - Su	08:00-17:45 All Day
Sports Fun Park	Summer 2020	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 DAY	1	Mo - Su	08:00-17:45 All Day
Sports Fun Park	Summer 2019	6/1/2019	9/30/2019	TestPool	Saison Demo	No	1	1 DAY	1	Mo - Su	08:00-17:45 All Day

3.9 Assign Tariff to an Allotment

Within the **Tarif sheet**, you can assign existing or newly created tariffs to an allotment right away.

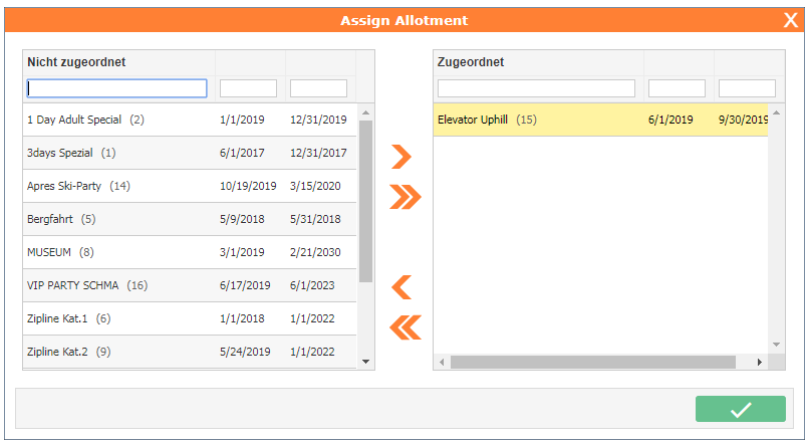
Function in menu: ***Tarif Management / Tariff Sheets / Tickets***

Assign tariff to an Allotment

1. → List *Tariffs*
2. Select tariff
3. Context menu, ***Assign Allotment***
4. Select allotment

Save!

Example:



3.10 Copy Tariff to other Person or Ticket Types

Save work steps by copying a tariff. The same tariffs cannot exist multiple times within a price sheet section! Therefore use function ***Copy to Person Types*** or ***Copy to Ticket Types***! When copying, the only parameter that is changed is the type of person or card type. This creates a new tariff that you can then edit.

Function in: ***Tariff_Management / Tariff Sheets / Tickets***

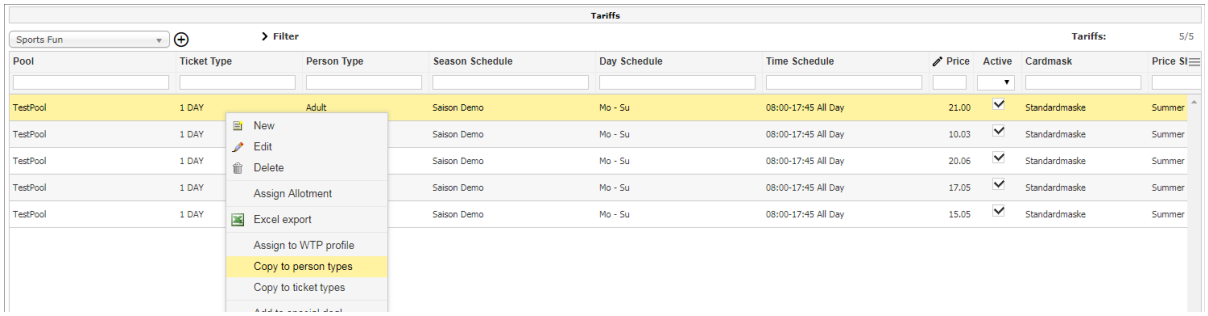
Copy Tariff to Person Types

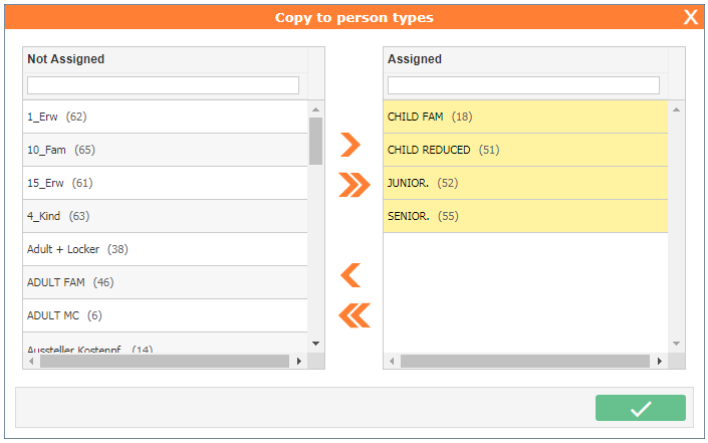
1. → List *Tariffs*
2. Select tariff
3. Context menu ***Copy to Person Types***; → *Copy to Person Types*;
4. Select and assign person types

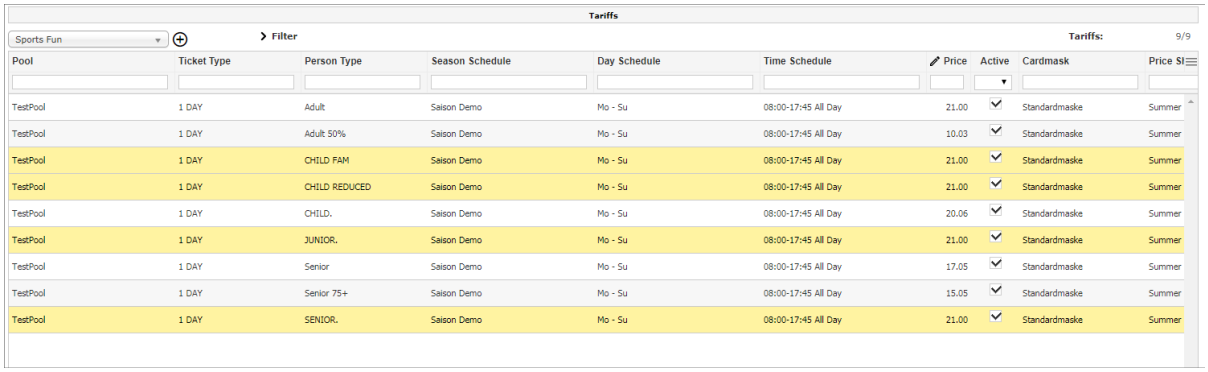
Save!

A new tariff is created for each assigned person type.

Example:







Copy Tariff to Ticket Types

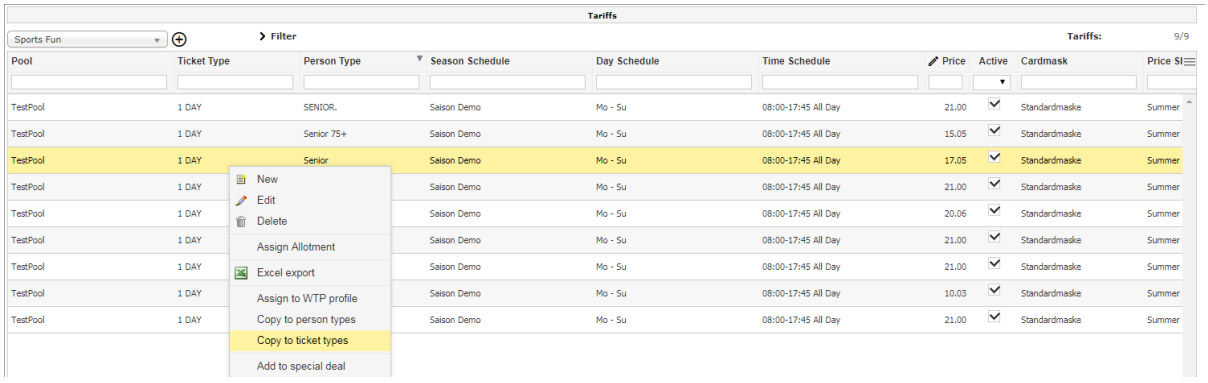
1. → List *Tariffs*
2. Select tariff
3. Context menu ***Copy to Ticket Types***; → *Copy to Ticket Types*;
4. Select and assign ticket types

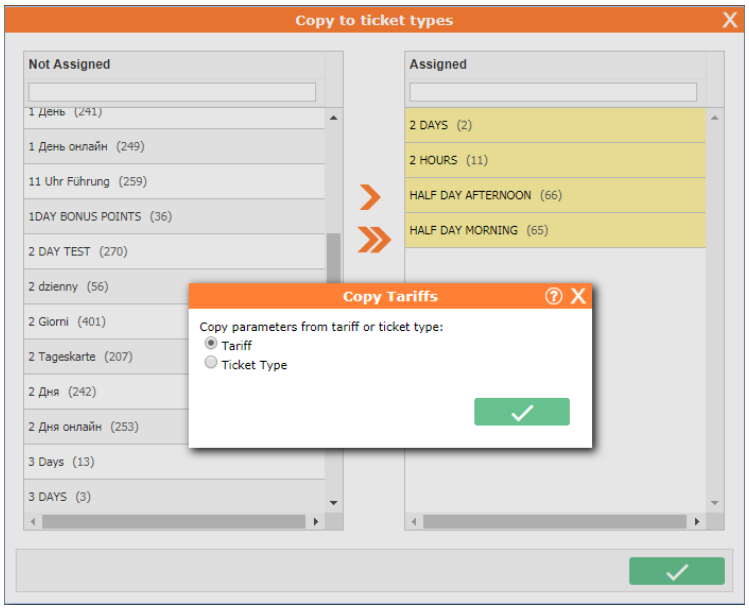
Save!

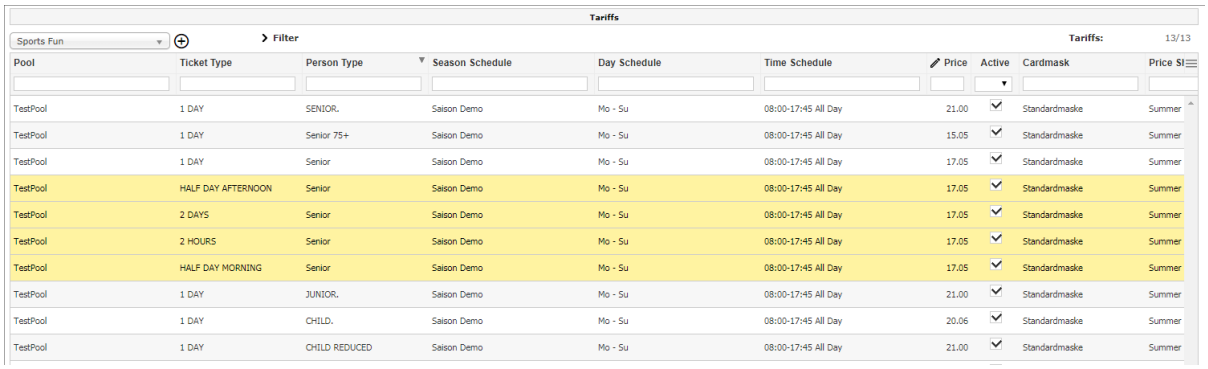
5. Setting "Copy parameters from tariff or ticket type:"
   Select setting *Tariff*

Save!

Example:




Copy to ticket types
Not Assigned
1 День (241)
1 День онлайн (249)
11 Uhr Führung (259)
1DAY BONUS POINTS (36)
2 DAY TEST (270)
2 dzienny (56)
2 Giorni (401)
2 Tageskarte (207)
2 Дня (242)
2 Дня онлайн (253)
3 Days (13)
3 DAYS (3)
Assigned
2 DAYS (2)
2 HOURS (11)
HALF DAY AFTERNOON (66)
HALF DAY MORNING (65)
Copy Tariffs
Copy parameters from tariff or ticket type:
Tariff
Ticket Type


Tariffs
Sports Fun
Filter
Tariffs: 13/13
Pool
Ticket Type
Person Type
Season Schedule
Day Schedule
Time Schedule
Price
Active
Cardmask
Price Sl
TestPool 1 DAY SENIOR. Saison Demo Mo - Su 08:00-17:45 All Day 21.00 Standardmaske Summer
TestPool 1 DAY Senior 75+ Saison Demo Mo - Su 08:00-17:45 All Day 15.05 Standardmaske Summer
TestPool 1 DAY Senior Saison Demo Mo - Su 08:00-17:45 All Day 17.05 Standardmaske Summer
TestPool HALF DAY AFTERNOON Senior Saison Demo Mo - Su 08:00-17:45 All Day 17.05 Standardmaske Summer
TestPool 2 DAYS Senior Saison Demo Mo - Su 08:00-17:45 All Day 17.05 Standardmaske Summer
TestPool 2 HOURS Senior Saison Demo Mo - Su 08:00-17:45 All Day 17.05 Standardmaske Summer
TestPool HALF DAY MORNING Senior Saison Demo Mo - Su 08:00-17:45 All Day 17.05 Standardmaske Summer
TestPool 1 DAY JUNIOR. Saison Demo Mo - Su 08:00-17:45 All Day 21.00 Standardmaske Summer
TestPool 1 DAY CHILD. Saison Demo Mo - Su 08:00-17:45 All Day 20.06 Standardmaske Summer
TestPool 1 DAY CHILD REDUCED Saison Demo Mo - Su 08:00-17:45 All Day 21.00 Standardmaske Summer

4 Article Tariffs and Price Sheets

Create ***Articles*** (sometimes also called ***Items***) in order to sell them at the POS, such as a ticket deposit, a ski insurance or items at the POS.

1. Articles are created in ***Article Price Sheets*** holding subsequent ***Price Sheet Sections***
2. An article is then *available throughout the system* to assign it to an *Article Price Sheet* and can have a different price each time.
3. An article is assigned to the *Keyboard Layout* of a cashier and can then be sold at the POS just like any ticket.

> The article is selected via key on the virtual keyboard of AX50 Smart POS screen. No article sales without article tariff.

Function in: ***Tariff Management / Tariff Sheets / Item***

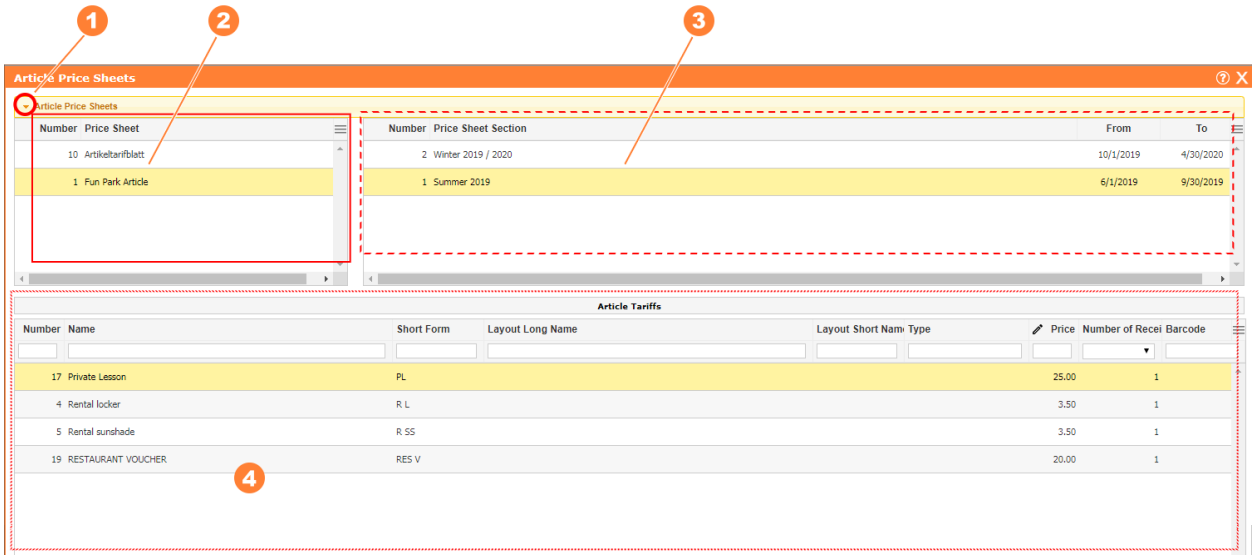
Create a New Article

1. → Dialog *Article Price Sheets*
2. Click on the *Price Sheet*
3. Click on *Price Sheet Section*
4. Cursor in list Article Tariffs
5. Context menu ***New***; → *Edit Article*
6. Enter parameters

Save!

The article is created and entered in the list of articles.

Example:



1 Hide or show lists of Price Sheets and Price Sheet Sections
2 List of Article Price Sheets
3 List of Price Sheet Sections which are enclosed in the marked price sheet
4 Tariffs that are enclosed in the Price Sheet Sections

There is still a link if an article cannot be deleted from the list, e.g. linked to a package or a keyboard layout. First delete the assignment.

4.1 Create Article Price Sheet

Function in: ***Tariff Management / Tariff Sheets / Item***

Create New Article Price Sheet

1. → List *Article Price Sheet*
2. Position **cursor** in list *Article Price Sheets*
3. Context menu ***New*** -> *Dialog Create Article Sheet*;
   Attend mandatory fields!
4. Enter ***Name***

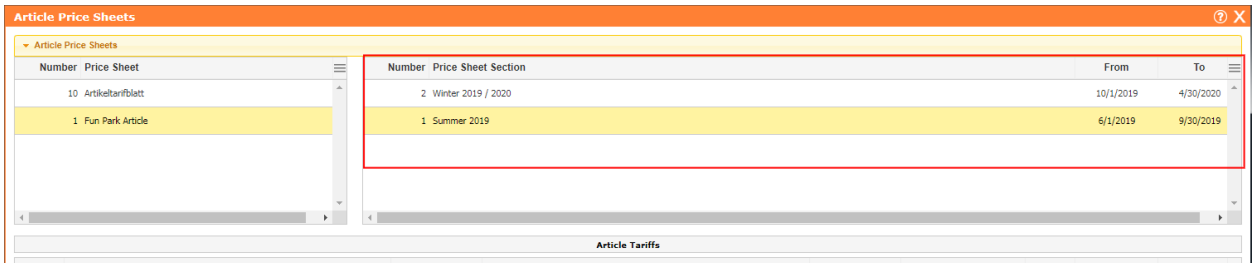
Save!

Example:

4.2 Create Price Sheet Sections for an Article Price Sheet

An *Article Price Sheet* can contain several ***Price Sheet Sections*** which are valid for a defined time span, *From / To*. *Price Sheet Sections* may last from several days, months to several years.

The articles including their corresponding prices are created within a Price Sheet Section.

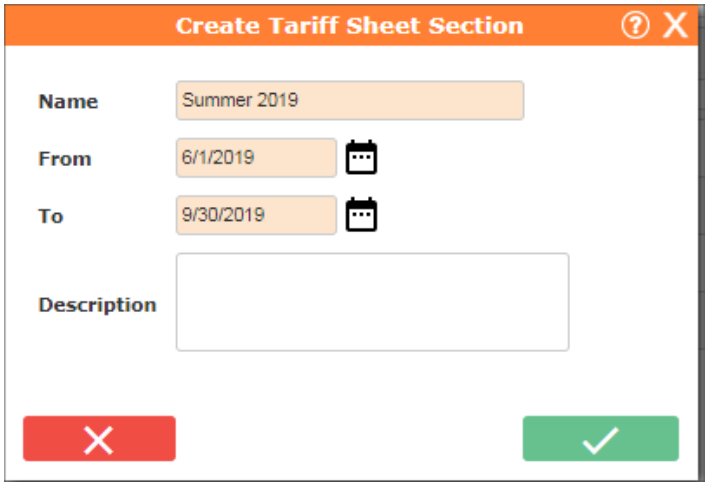


Create New Price Sheet Section

1. → List of *Article Price Sheets*
2. Select *Article Price Sheet*
3. Cursor in list *Price Sheet Section*
4. Context menu, **NEW**; → create price sheet section
   ! Mandatory fields!
5. Enter Price Sheet Section, From / To

Save!

Example:



A price sheet section cannot be deleted if it already contains an article. Then delete the article from your system first, to enable the function Delete.

4.3 Create Articles

Find a list ***Article Tariffs*** in dialog ***Article Price Sheets***. These tariffs are valid for the selcted *Article Price Sheet* and the selected *Price Sheet Section*. Here you can create new articles, assign existing articles from other tariff sheets or import articles via csv.-file.

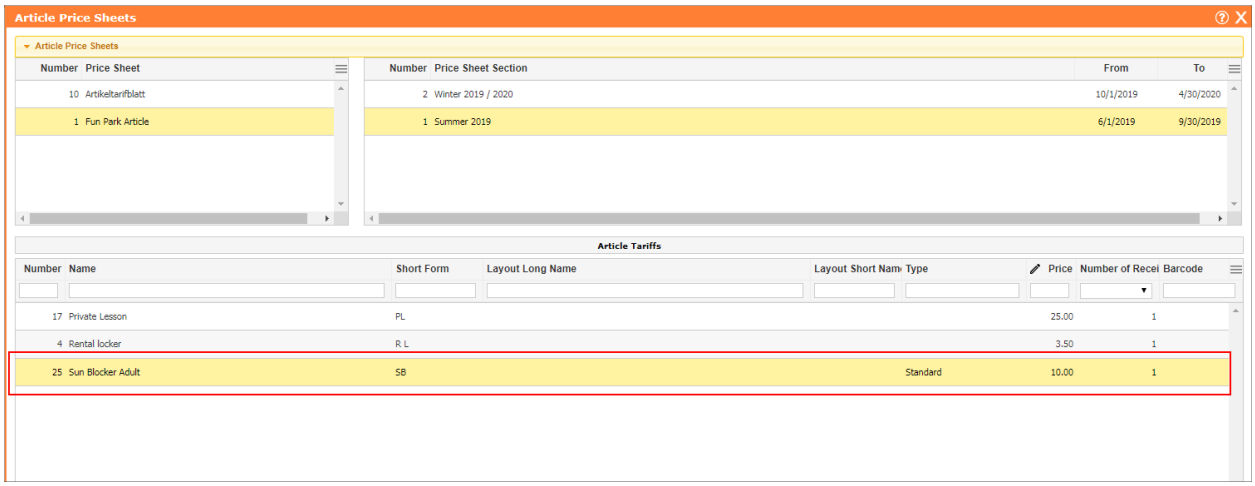
Function in: ***Tariff Management / Tariff Sheets / Item***

Create New Article

1. → List of *Article Price Sheets*
2. Select *Article Price Sheet*
3. Select *Price Sheet Section*
4. Cursor in list Article Tariffs
5. Context menu, **New**; → Create Article Tariff
   ! Mandatory fields!

Save!

Example:

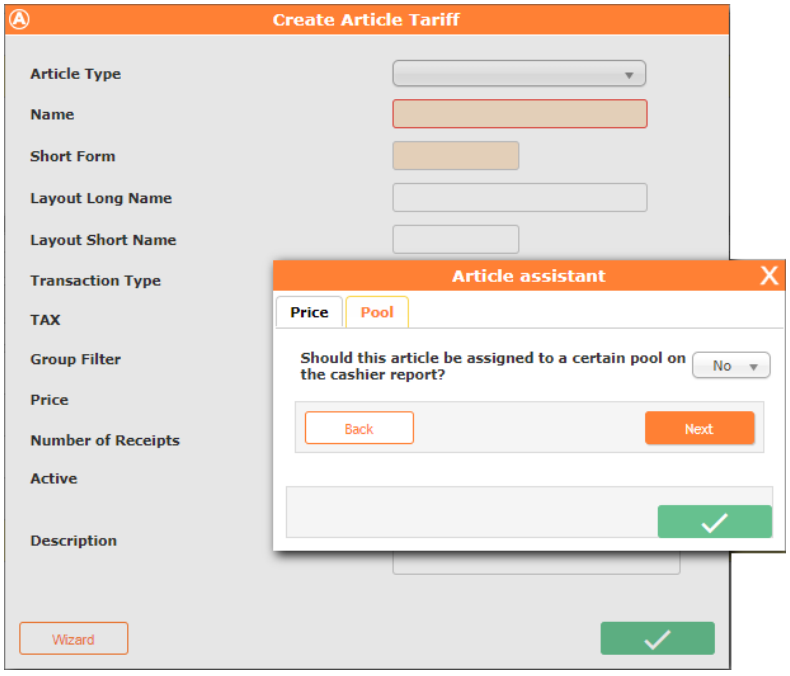


The price of the new article applies ONLY for the selected *article price sheet* and the selected *price sheet section*.
For articles that are already in the system and are added with function Assign Article, the price will be "zero" initially. Edit the article tariffs as desired.

Function ASSISTANT

Use function ***Assistant*** to find the desired article tariff while you narrow down the properties quickly and accurately. Your answers fill in a part of the dialogue that you just need to complete.

Example:



4.4 Assign Article Tariff

Tariffs of already existing articles can be '***copied in'*** when using function ***Assign Articles***. Initially there is no price included. Edit the article tariffs.

Function in: ***Tariff Management / Tariff Sheets / Item***

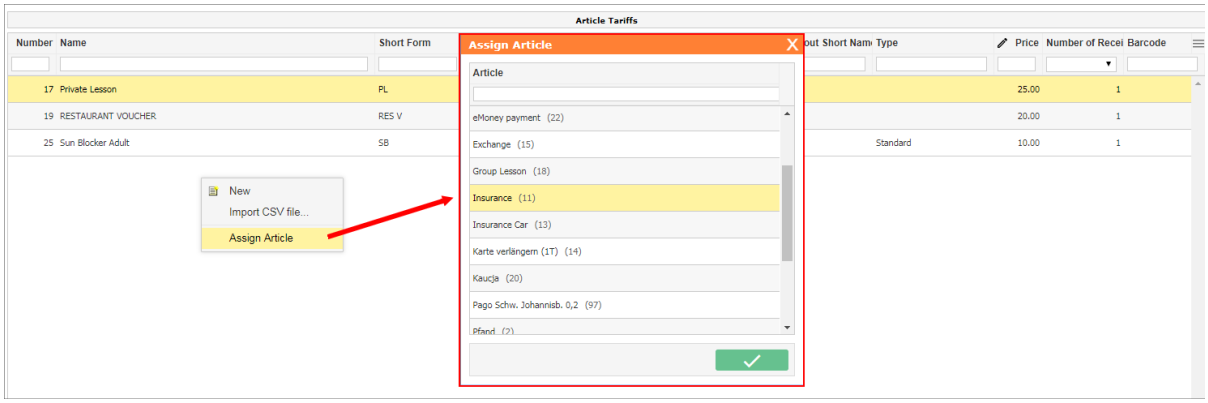
Assign Article Tariff

1. → List of *Article Price Sheets*
2. Select *Article Price Sheet*
3. Select *Price Sheet Section*
4. Cursor in list Article Tariffs
5. Context menu, **Assign Article**; -> List *Create Article Tariff*
6. Select Article
7. Enter Price

Save!

1. Now edit the prices directly in list *Article Tariffs*, or
2. Edit the *Article Tariffs* via context menu *Edit*

Example:



If you delete an *Article Tariff* from the list of article tariffs: **the article remains** when there is at least one sales transaction for it! You can reassign the article at any time.

4.5 Article Packages

Use function ***Article Packages*** to group several articles to a package and set a price for the package.

Function in: ***Tariff Management / Tariff Sheets / Packages – Items***

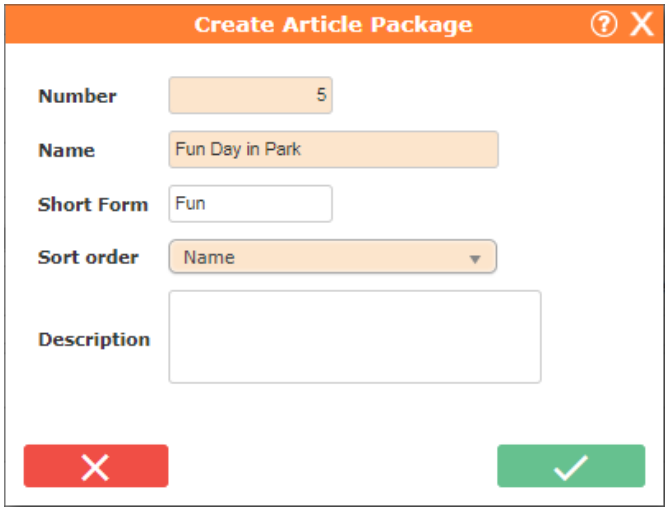
Create Article Package

1. → Dialog Article Packages
2. **Cursor** in list Name
3. Context menu **New** ; → Create Article Package
   ! Mandatory fields!

Save!

The article package will be created.

Example:



Add Articles into the Article Package

1. → Dialog *Article Packages*
2. Select *Article Package*
3. Cursor in list *Article*
4. Context menu ***NEW***; → Create *Article Package Content*;
   !Mandatory fields!
5. Select *Article*
6. Select *Prompt*;
   (Query-prompt coming up during article sales)

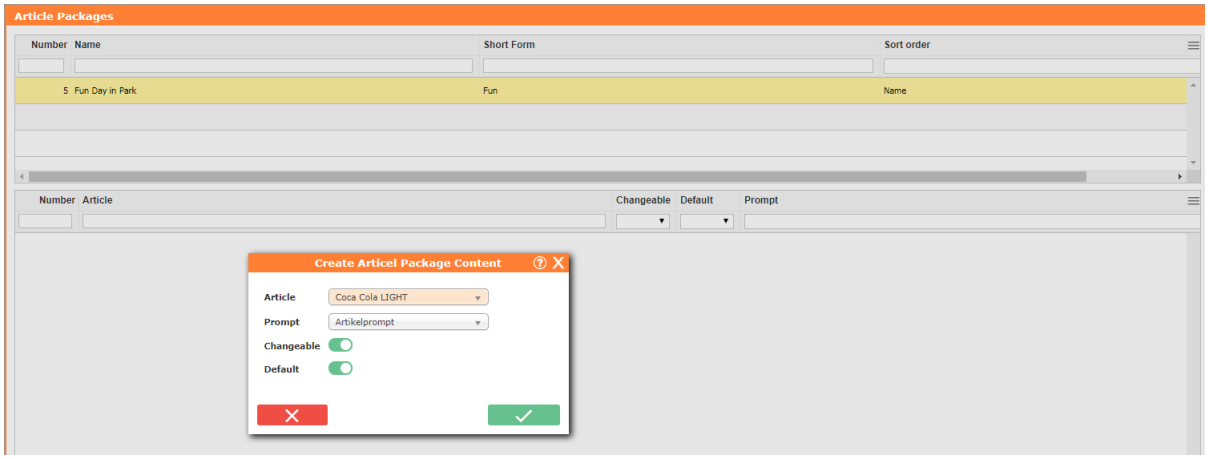
Save!

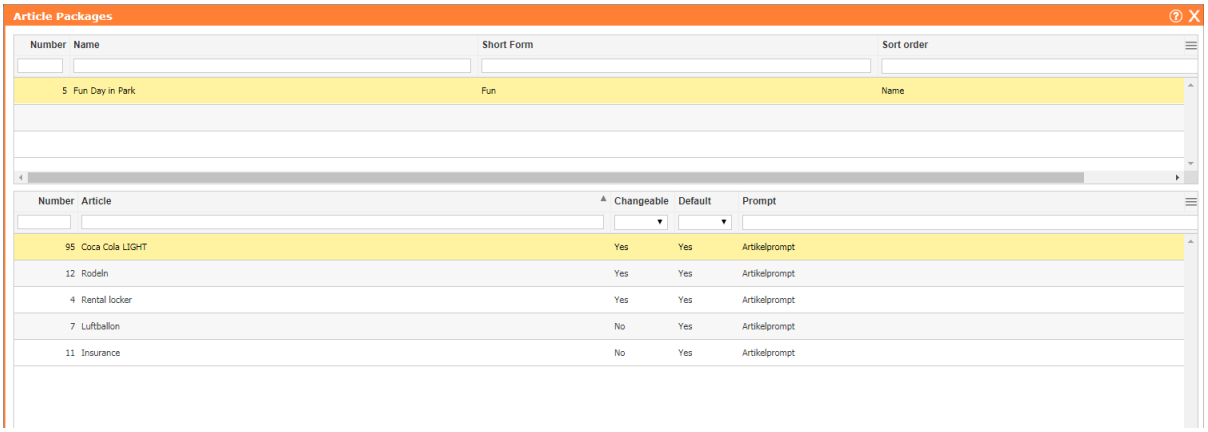
The article will be added to the article package.

Switch **ON** property ***Changeable*** → Article can be rejected when purchasing the package

Switch **ON** property ***Default*** → Article is pre-set when purchasing the package as 'accepted'

Example:





These *Article Packages* can be placed on any *Keyboard Layout* and the tariffs can so be selected like any other tariff at the POS.

5 Packages

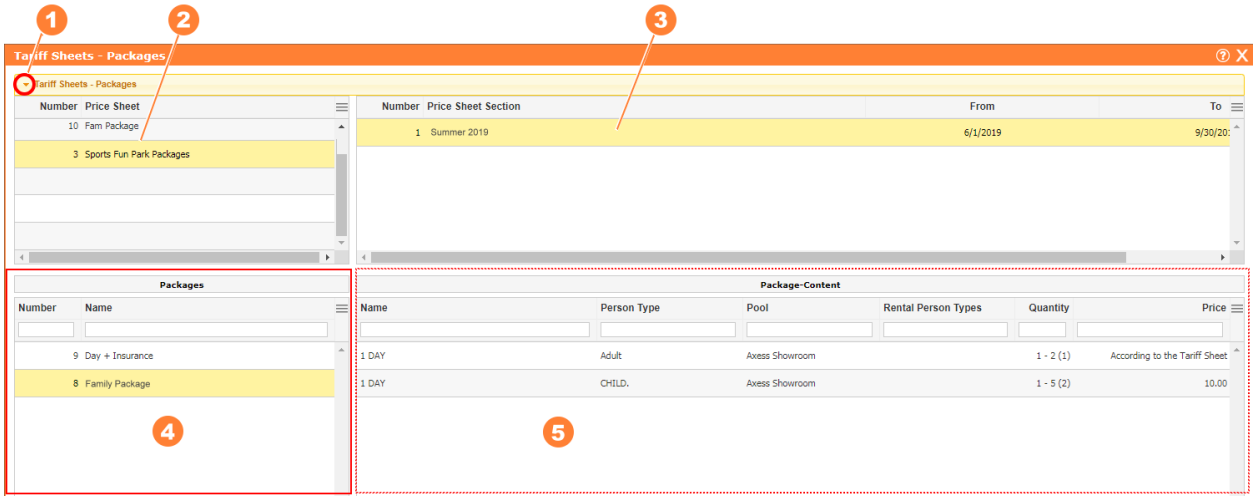
Use function ***Packages*** to combine multiple ticket tariffs, articles and rental items into packages in order to simplify and fasten the sales process and for purpose to give the packages their own price.

Perform these work steps:

1. Create a Price Sheet Package
2. Create Price Sheet Section
3. Create a Package (no price entered yet)
4. Add Tariffs to Package and enter price
5. Assign Package to Keyboard Layout

> Tariffs and articles must already exist in the system when you insert them into a package. The package can be selected and is ready for sales after assigning it to a key of the virtual keyboard of the POS.

Function in: ***Tariff_Managemant / Tariff Sheets / Packages***



1 Hide or show lists of Price Sheets and Price Sheet Sections
2 List of Price Sheets
3 List of Price Sheet Sections
4 Packages: contained in the selected price sheet section
5 *Package-Content*: Tariffs for ticket, articles and rental items

5.1 Create Package Price Sheet

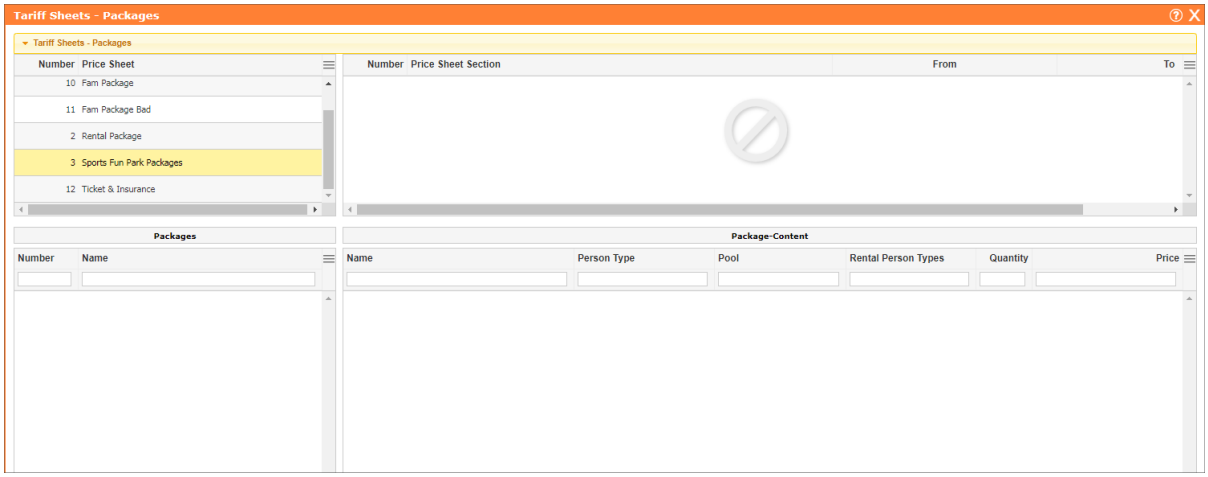
Function in: ***Tariff Management / Tariff Sheets / Packages***

Create New Tariff Sheet Package

1. → *Tariff Sheet - Package*
2. **Cursor** in list *Price Sheets*
3. Context menu ***New*** -> *Create Tariff Table*;
   !Attend mandatory field!
4. Enter *Name*

Save!

Example:



5.2 Create Price Sheet Sections

A ***Tariff Sheet*** can contain several ***Price Sheet Sections*** which are valid over a defined period in time, *From / To*. *Price Sheet Sections* may last from several months to several years. Packages are created within a *Price Sheet Section* including defintion of corresponding prices.

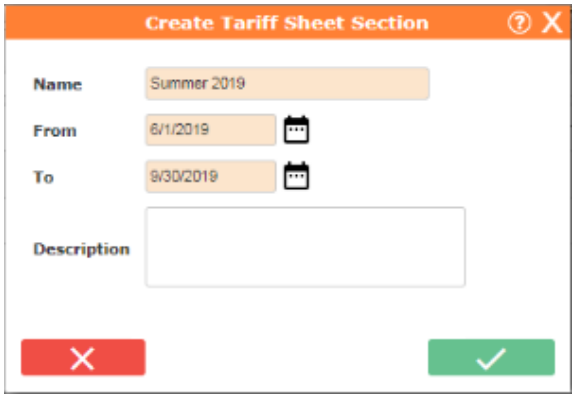
Function in: ***Tariff Management / Tariff Sheets / Packages***

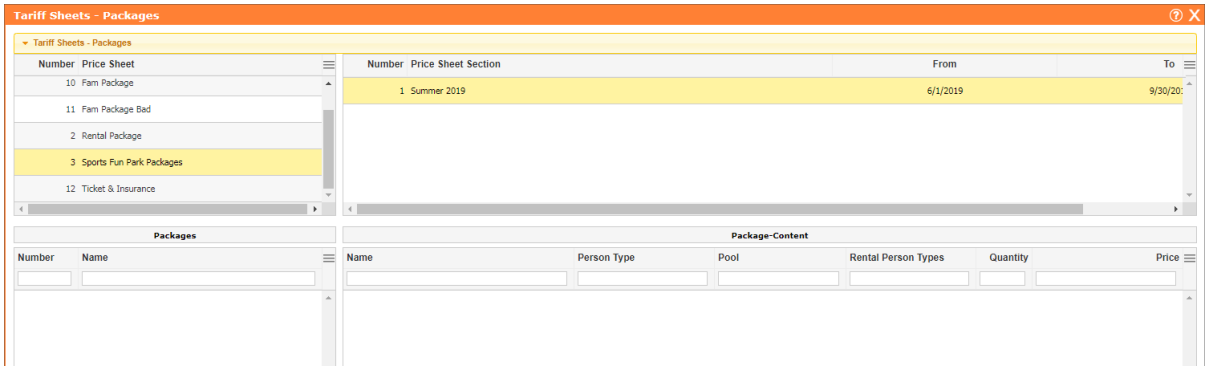
Create new Price Sheet Section

1. → List *Price Sheets*
2. Select the price sheet
3. Cursor in list price sheet section
4. Context menu, ***New***; → create *price sheet section*
   ! Mandatory fields!
5. Enter period of valifity **From / to**

Save!

Example:





A *price sheet section* can not be deleted if it already contains a package. First delete the package from your system to enable function *Delete*.

5.3 Create Package

In List ***Packages*** you create the packages for the selected price sheet section.

Here you can:

- Create, edit and delete new packages
- Add tariffs, articles and rental items to a package

Function in: ***Tariff Management / Tariff Sheets / Packages***

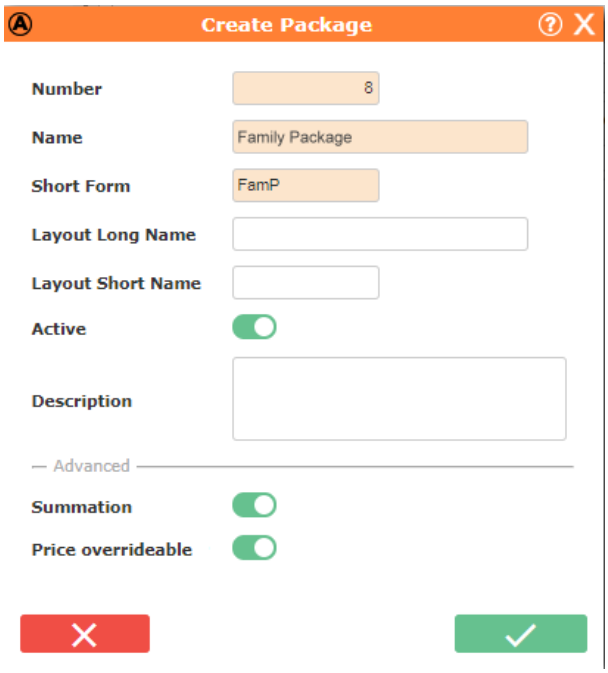
Create new Package

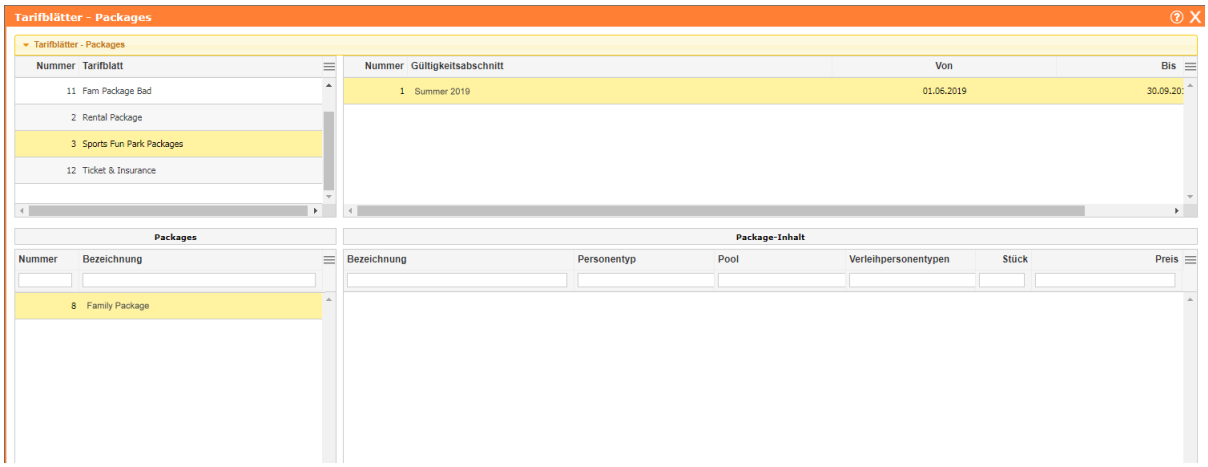
1. -> Dialog *Tariff sheets - Packages*
2. Select *Tariff sheet*
3. Select *Price Sheet Section*
4. Cursor list *Packages*
5. Context menu, ***New***; → *Create Packages*
6. Enter parameter
7. Advanced Mode: Settings Summation and Price Overrideable

Save!

The package is now created. It still doea not contain any tariffs or price.

Example:





A package can only be deleted if it does no longer contain any content.First delete the included tariffs.

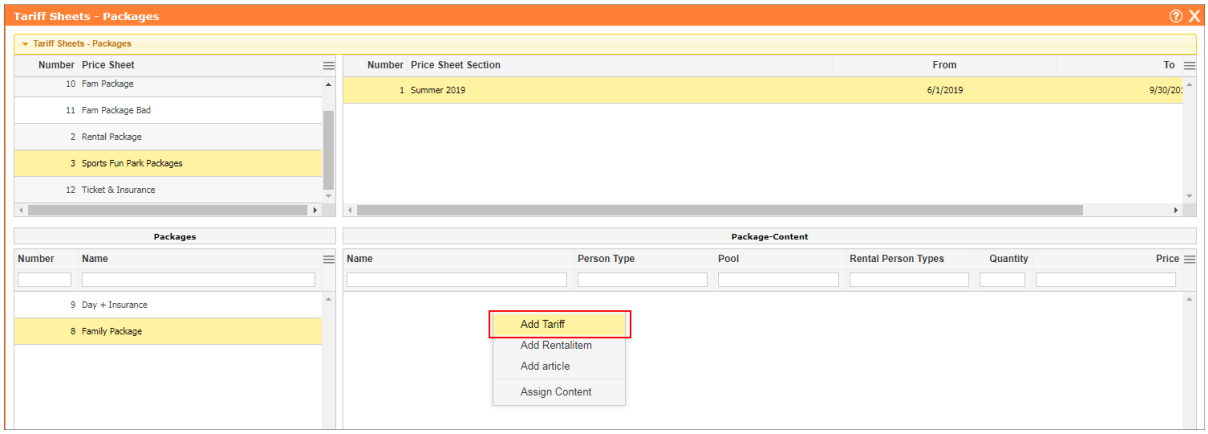
5.4 Add Ticket Tariff to Package

Tariffs and articles must already exist in the system to be available for a package.

Function in: ***Tariff Management / Tariff Sheets / Packages***

Add Ticket Tariff to a Package

1. -> Dialog *Tariff sheets - Packages*
2. Select *Tariff sheet*
3. Select *Price sheet section*
4. Select *Package*
5. Cursor in list *Package Content*



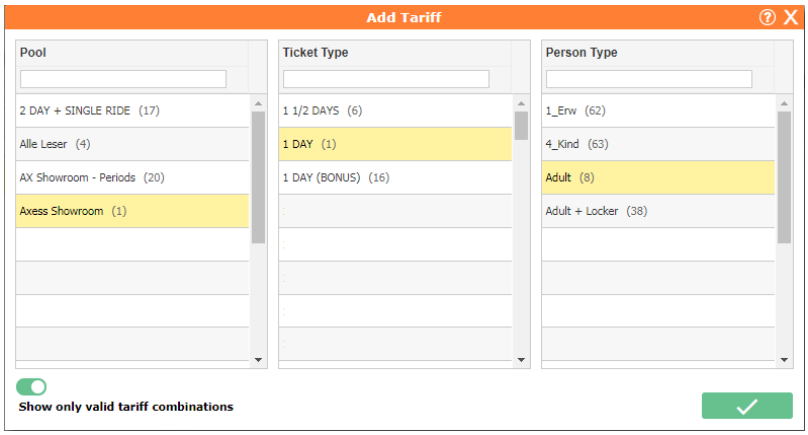
Add Ticket Tariff

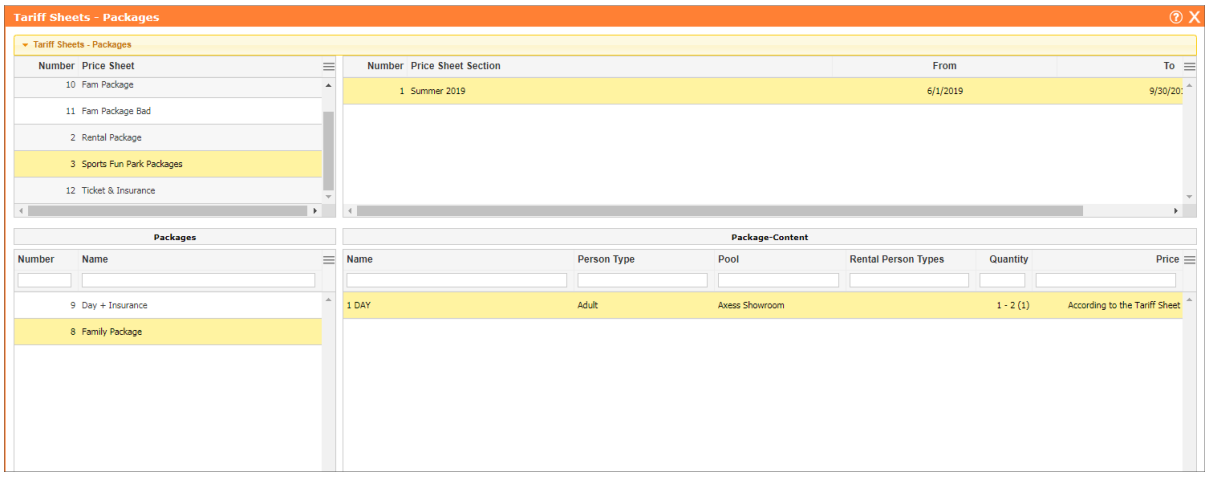
1. Context menu, ***Add Tariff***
2. *Personal Type* and *Pool* will be required automatically
3. Select ***Person Type***
4. Select ***Pool***

Save!

Ticket tariff will be added and can be edited afterwards.

Example:



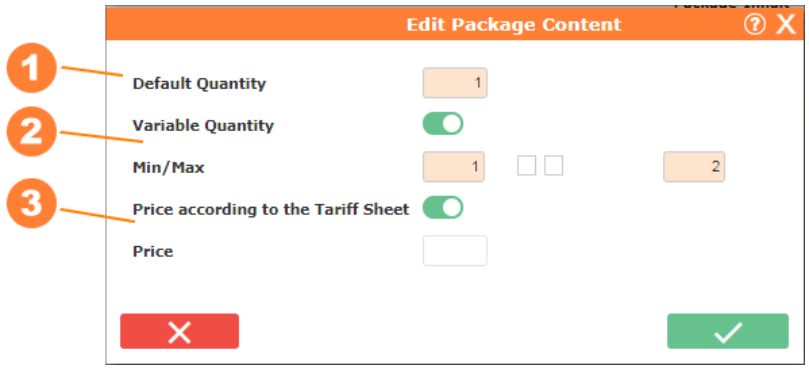


Edit Ticket Tariff

1. Select *Ticket Tariff*
2. Context menu; ***Edit***; → *Edit Package Content*
3. Enter **Default Quantity**
4. Switch on *Variable Quantity* or leave 'fixed' quantity
5. Leave the *Price according to the Tariff Sheet* or switch off, if you want to enter another price

Save!

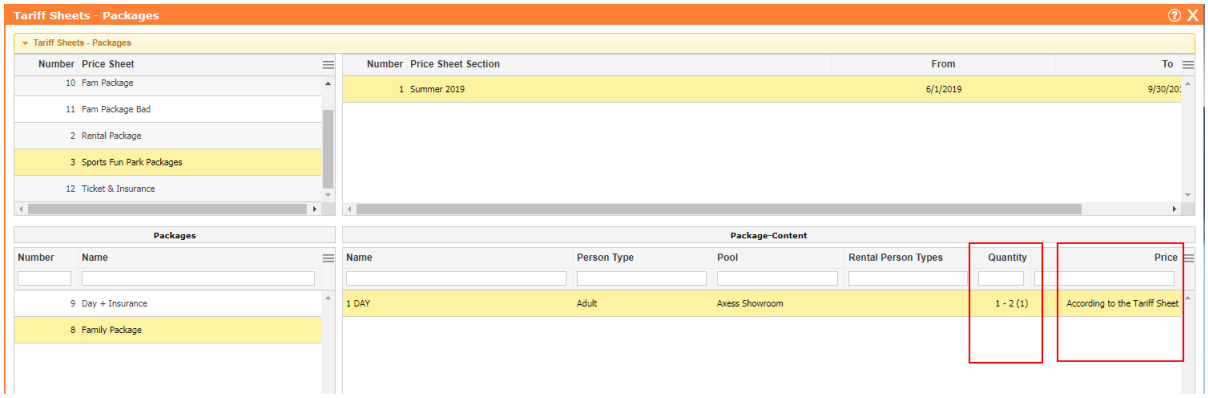
Example:



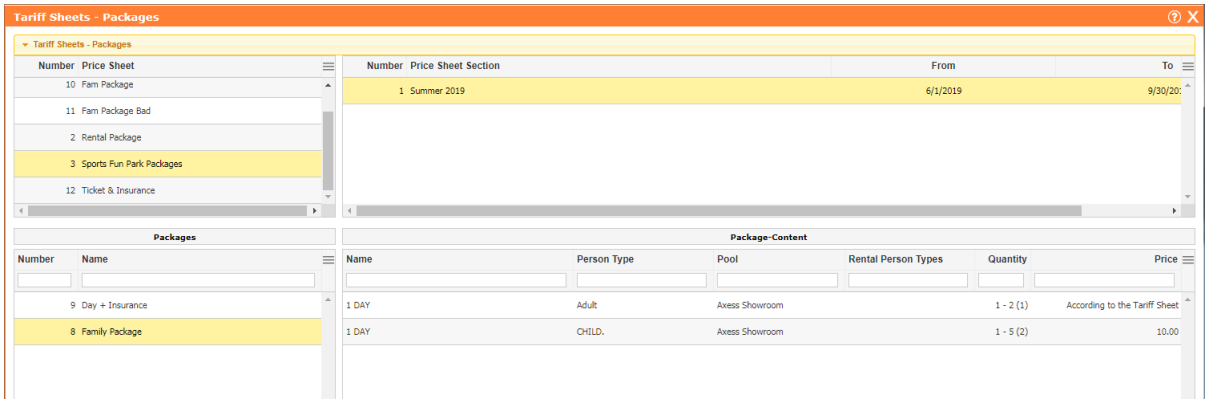
1. *Default Quantity*: Number of tickets required in the package for this Ticket Tariff
2. *Variable Quantity**ON (green)*** → Number of required tickets can vary between minimum and maximum

   *Variable Quantity**OFF (red)*** → Number of required tickets must correspond exactly to the *Default Quantity*
3. *Price according to the Tariff Sheet **ON (green)*** → Price according to the tariff sheet goes unchanged into the sum for the price calculation of the package

   *Price according to the Tariff Sheet **OFF (red)*** → Price according to tariff sheet is overruled and entered in field *Price*



Add more ticket tariffs

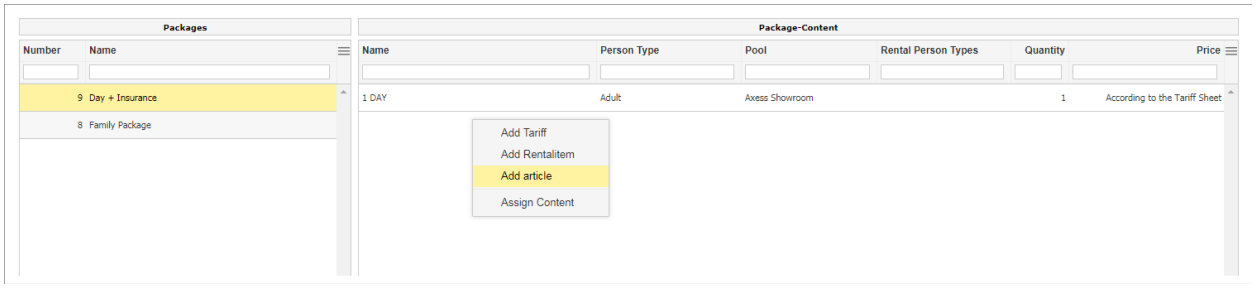


5.5 Add Article to Package

Function in: ***Tariff Management / Tariff Sheets / Packages***

Add Content to a Package

1. -> Dialog *Tariff sheets - Packages*
2. Select *Price Sheet*
3. Select *Price Sheet Section*
4. Select *Package*
5. Cursor in list *Package Content*



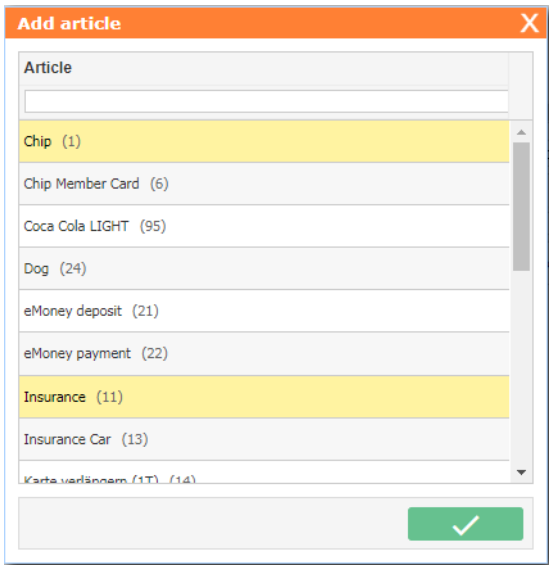
Add Article

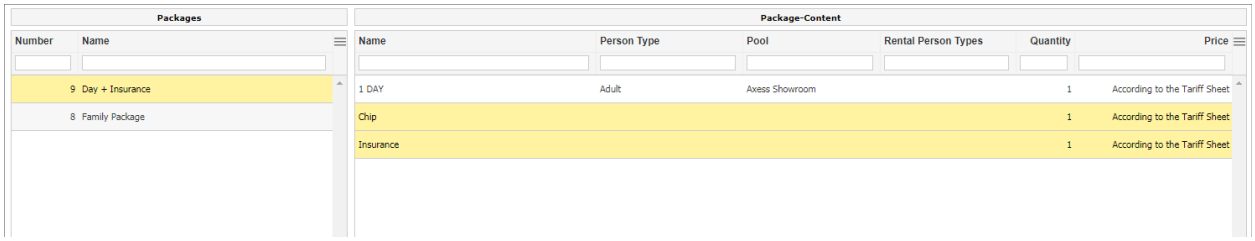
1. Context menu; ***Add Article***
2. *Select article*

Save!

The tariff is added with the set default settings.

Example: We will insert 2 articles, Chip for the ticket return deposit and the desired insurance policy.



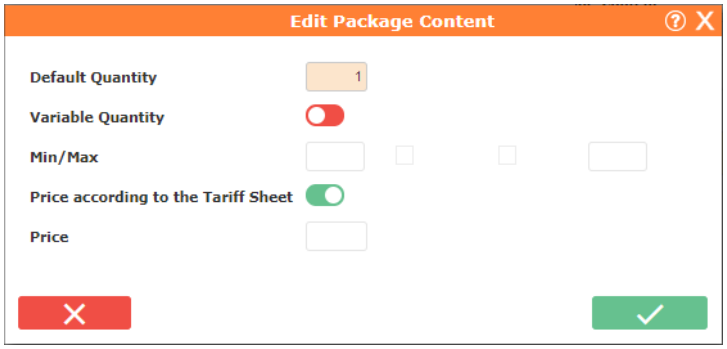


Edit Article

1. Select article
2. Context menu; Edit; → Edit package content
3. Enter **default quantity**
4. Switch on **Variable Quantity** or leave 'fixed' quantity
5. Leave the price according to the price sheet or switch off, if you want to enter another price

Save!

Example:



6 Keyboard Layout

The appropriate tariffs are first selected at the POS on the virtual keyboard, then the tickets are sold.

Our goal is to set up the POS surface in a way that the sale can be performed clearly, fast and with no errors. This means: a cashier logs in at the POS and gets the correct tariffs on the POS surface automatically. He has exactly the required tariffs, articles and packages available - nothing additional!

These ***work steps*** are necessary to enable ticket sales at the POS:

Preconditions:

1. Create person types and ticket types; Create schedules
2. Create pools
3. Create price sheets and tariffs
4. Create article sheets and articles
5. Create package sheets and packages

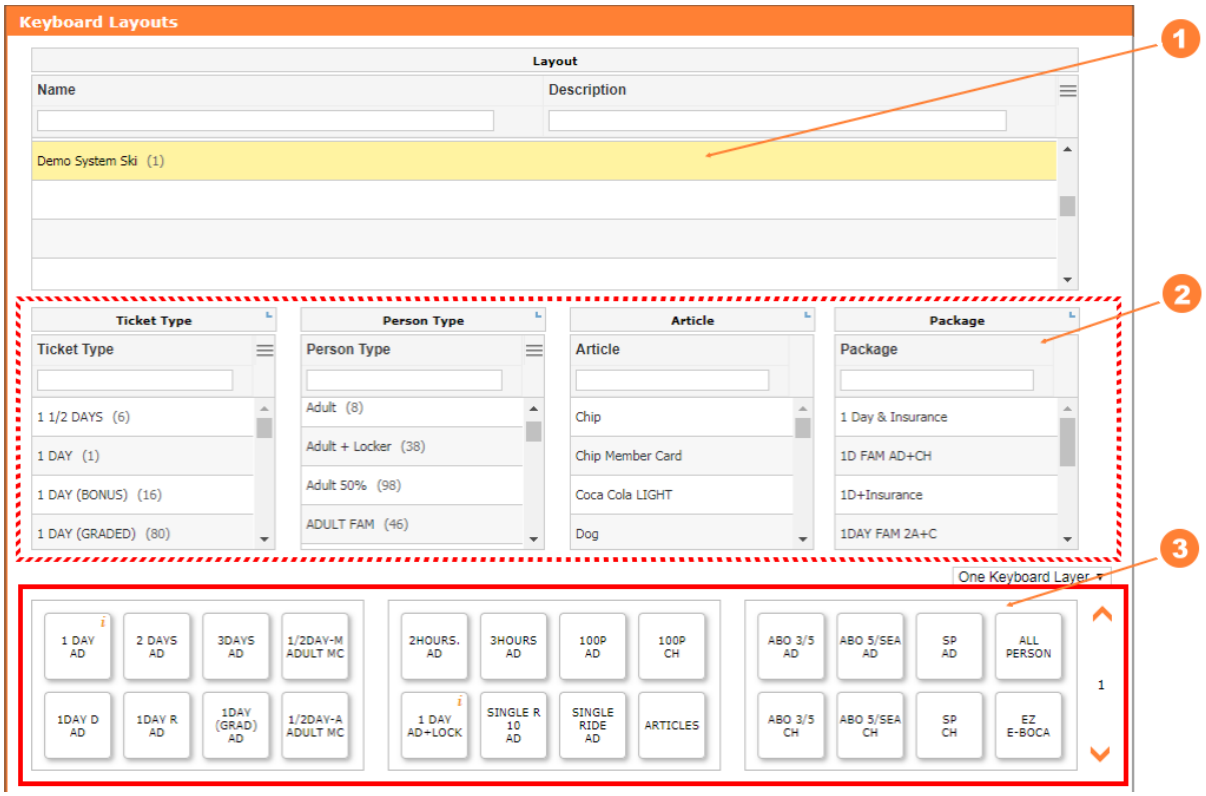
In dialog Keyboard Layouts:

1. Create a keyboard layout
2. Set up the keyboard layout for various levels of the keyboard;
   Create tariffs, articles and packages as well as ticket type groups, article groups and package groups

Then, by use of function *cashiers*:

1. ***Assign cashier*** to a keyboard layout

Example: Dialog Keyboard Layout



1 List of Keyboard Layouts
2 Tariffs, Articles and Packages; behind them find the list of Ticket Type-, Article and Package Groups
3 Keyboard with visual keys and shift-keys for up to 10 keyboard layers

6.1 Create Keyboard Layout

Function in: ***Tariff Management / Tariff Sheets*** / *(select tariff sheet)(Context menu)* ***Keyboard Layout***

or :***System / Point of Sale / Keyboard Assignment***

Create Keyboard Layout

1. → Dialog *Keyboard Layout*
2. Cursor in list **Keyboard Layouts**
3. Context menu **New**; → Create Keayboard Layout
4. Enter **Name**

Save!

Example:

6.2 Keyboard Layout - add Tariffs, Articles and Packages

Tariffs, articles and packages must be selected by the cashier to be sold at the POS. The cashier selects them by mouse click on the keypads of the POS screen, or finger tap on a touch screen.

Use simple drag-and-drop in program CLICS to customize the ***Keyboard Layout***.

Place the tariffs on ***10 levels*** (switchable from layer 0-9), each level equipped with ***24 keys***.

> The settings affect the system after synchronization.

> We recommend:
> Arrange the tariffs as efficient as possible, taking account of the habits and preferences of the cashiers. This will reduce the error quote during ticket sales.
> Usually you put frequently required tariffs on levels 1 and 2; Put those tariffs on the same level that are often purchased together; arrange gaps (blank keys) in between.

Function in: ***System / Point of Sale / Keyboard Assignment***

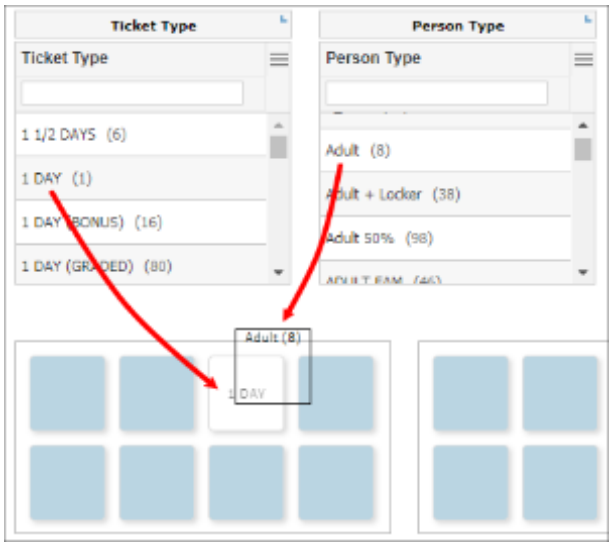
Keyboard Layout

1. → Dialog Keyboard Layout
2. The provided lists hold ALL tariffs which are enclosed in your system
3. Select **Keyboard Layout**
4. Select **Layer** which should be set up

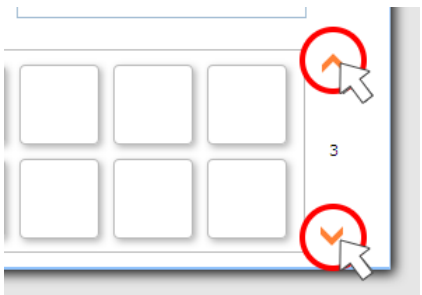
5. e.g.: Select ticket type in list ticket type
6. Drag-and-Drop ticket type on the desired key;
   The program responds "changes saved".
7. Position further tariffs in the same way; Switch in between the layers.
8. You can also create combinations of ticket type and person type by dragging both on one key

- The tariffs are immediately saved in the keyboard layout without further confirmation
- The *ticket types, person types, articles and packages* remain availble in the original lists. Therefore, a so programmed key on the keyboard layout can be deleted and inserted multiple times.
- The ***labling*** of the keys consist of the short names that you have entered when creating the *ticket types, person types...*
- A combination of a *ticket type* and *person type* on one key also results a combination of the short names for labling.

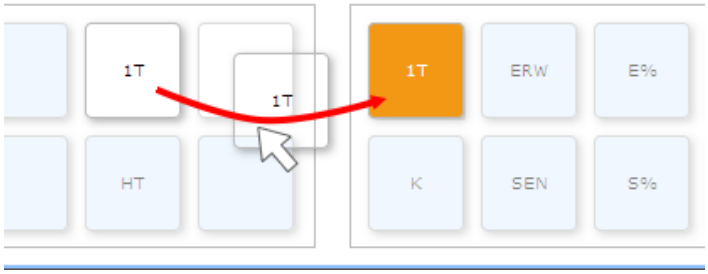
Example:



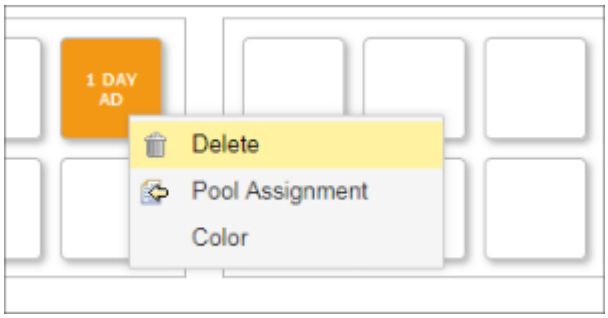
Switch in between the layers (Layer 0-9)



Reposition the Tariff on the Keyboard



Delete the Tariff on the Keyboard



Ticket types, person types, articles and packages are not deleted from the system. They remain available in the lists and can be brought to the keyboard at any time!

6.3 Keyboard Layout - Pool Assignment

Function in: ***System / Point of Sale / Keyboard Assignment***

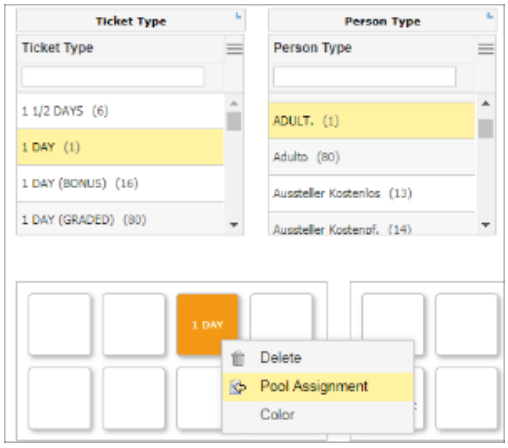
Pool Assignment

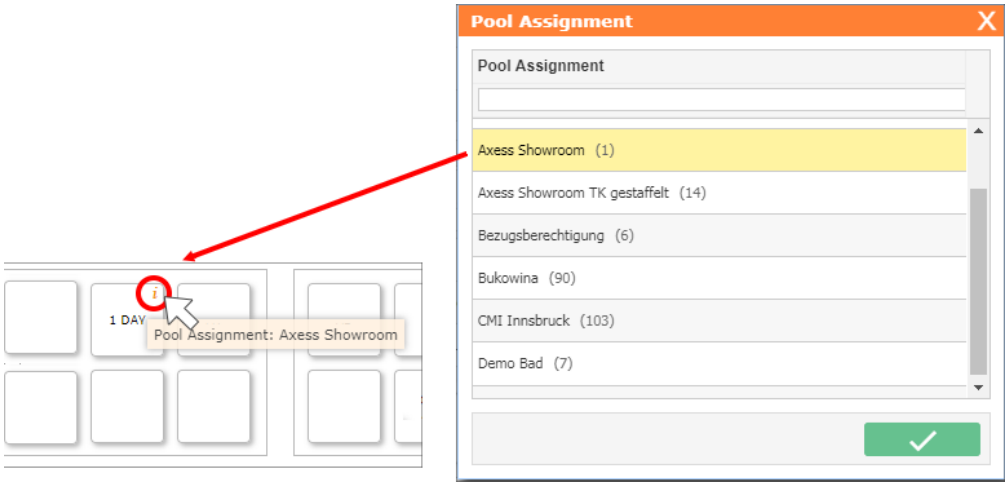
You can **Assign a Pool** to a position on the Keyboard Layout, where a combination of ticket type and person type is programmed. This will skip the work step to select a pool during ticket sales process at the POS. The assignment is indicated by symbol "i" on the keyboard:

1. Position the cursor on the keyboard
2. Context menu, ***Pool Assignment***
3. *Select pool*

Save!

Example:





Pool Assignment is not valid for articles and packages.

6.4 Assign a Keyboard Layout to a Cashier

Every cashier must be assigned to exact ONE ***Keyboard Layout***. The assignment is made in dialog *Create cashier* or *Edit cashier*.

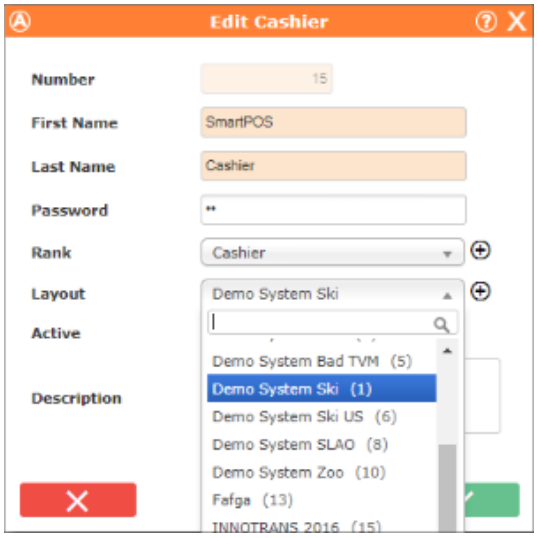
Function in: ***System / Cashiers / Configuration /*** *(select cashier) (context menu)* ***Edit***

Assign a Keyboard Layout to a Cashier

1. → List of all cashiers
2. ***Select cashier***
3. Context menu, function ***Edit***-> Dialog *Edit cashier*
4. ***Select Keyboard Layout***

Save!

Example:



Assign a Keyboard Layout to Two or More Cashiers

1. → List of all cashiers
2. ***Select*** two or more ***cashiers***
3. Context menu, ***Edit***; → Dialog *Edit cashier*
4. Select ***Checkbox*** *Keyboard Layout*
5. ***Select Keyboard Layout***

Save!

6.5 Copy Keyboard Layout

Use function ***Copy Layouts*** to duplicate a keyboard layout and edit the settings afterwards, e.g. Keyboard layout of the previous year.

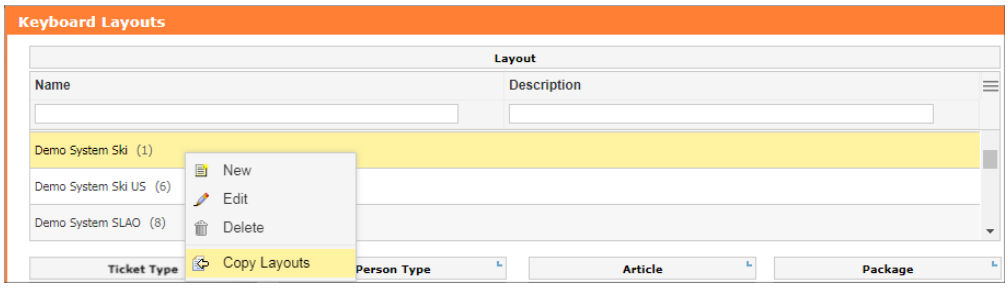
Function in: ***System / Point of Sale / Keyboard Assignment***

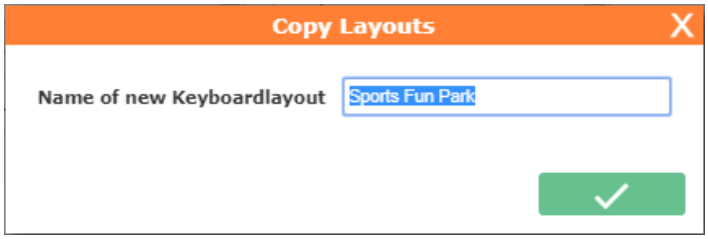
Copy Keyboard Layout

1. → List Keyboard Layouts
2. Select Keyboard Layout
3. Context menu, **Copy Layouts;** → Dialog Copy Layouts;
   Get a proposal for the new name by default
4. Enter new **Name**

Save!

Example:





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