HOW TO USE NOWBOOKIT WITH BOSSII

The Trustee for The Help You Unit Trust
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A.B.N. 78 962 339 138

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Support: 1300 805511 (option 2)
Accounts: 1300 805511 (option 3)
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Log into the cloud server using the supplied credentials
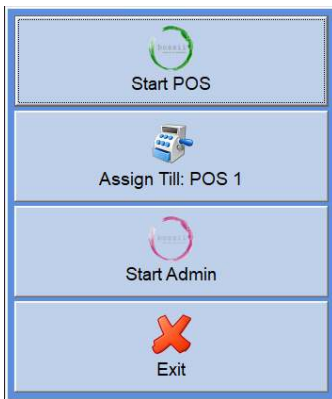
Start POS will launch BOSSIIPOS

Start Admin will launch BOSSIIAdmin

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Setting up for NBI

Launch **BOSSIIAdmin** and log in with the code "111"

Select **Setup -> System Setup -> System Configuration -> NowBookIt** Tab

Tick the **Use NowBookIt** integration box

Click on the **NBI API Token** field and press "ctrl" + "V" on the keyboard to paste the API key that has been copied from NBI and that will now need to be pasted here

The NBI URL allows a differentiation between the NBI test website and the live website

Default time from UTC time zone is set to 10 hours. For all SEQ client businesses, UTC is to be set to 10 hours.
You will now need to select the default settings for the other options

1. Default Payment Type must be chosen. Best practice is to setup a new or use an existing payment type such as "Online Payments". This payment type *must not* be counted on the Cash Up. If there is no payment type showing in the Selection box, then a new payment type needs to be setup to be linked herein.

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(If one doesn't exist, go to Setup -> System Configuration -> Payment Types -> copy a similar Payment type and setup as required)

2. Default Voucher Type must be an "online" voucher type. *(If one doesn't exist go to Pricing & Discounts -> Voucher Types -> copy a similar Voucher type and setup as required)*

3. Default Booking Type is the type of booking that all NowBookIt bookings will be associated with. Best practice is to create a booking type that is called NowBookIt. This way you can report on the number of bookings that NBI bring to your venue. *(If one doesn't exist go to Setup -> Setup Bookings -> Booking Type -> copy a similar Booking type and setup as required)*

4. Default Booking Status. This is the status that the booking will be set to if the booking from NBI has a status which has not been set up. Best practice is to marry the Booking Status's in BOSSII to a corresponding Booking Status in NBI.

5. Default Booking Area. This is the area that the booking will be set to if the booking from NBI is linked to tables that don't exist within BOSSII.

6. Default Till. This is the till against which all NBI voucher sales and booking prepayments / deposits will be placed against.

7. "*Only Import bookings with Payments from NBI*" allows a venue to only receive bookings into their BOSSII system that have pre-payments associated with them and disregard for transfer any bookings from NBI that do not have any pre-payments.

8. "*Allow Non-NBI Fields to be Changed on NBI Bookings in BOSSII*" – this option will allow NBI originated bookings to be edited in BOSSII but only the fields that aren't imported from NBI e.g. the food, bar tab, entertainment fields etc for functions

9. "Send Pax back to NBI for NBI Bookings" – editing the booking in BOSSII will send changes made to the pax back to NBI for NBI bookings only

10. "Send Tables back to NBI for NBI Bookings" – editing the booking in BOSSII will send changes made to the allocated tables back to NBI for NBI bookings only

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11. "Send Status back to NBI for NBI Bookings" – editing the booking in BOSSII will send changes to the status back to NBI for NBI bookings only. This includes when the status changes as a result of fully paying the deposit amount in BOSSII

12. "Send Sales back to NBI for NBI Bookings" – once the booking is completely cashed off in BOSSII, an itemised list of the bill and all payments will be sent through to NBI for reporting purposes.

13. "Send Status back to NBI when booking started" – when this option is ticked, starting the booking in BOSSII will trigger a status change in NBI to tell NBI that the booking has started. The status send through to NBI will be what is on the textbox to the right of this option. Normally this would be set to "Seated"

14. "Send Status back to NBI when booking finished" – when this option is ticked, fully paying off the booking in BOSSII will trigger a status change in NBI to tell NBI that the booking has finished. The status send through to NBI will be what is on the textbox to the right of this option. Normally this would be set to "Finished"

PLEASE NOTE:
1. Bookings originating in BOSSII will not be sent back to NowBookIt

2. Section names in NowBookIt must match exactly with the Section Names in BOSSII

3. Table numbers in NowBookIt must match exactly with the Table Numbers in BOSSII

4. Table numbers/names should be unique – do not have the same table number used in two different sections ie: Section called "Outside" should not have a table 10 as does a section called "Inside" have a table 10

5. A status of cancelled in NBI will mark the booking in bossii as inactive and will be removed from all active bossii bookings

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6. You cannot change the booking date / start time in BOSSII for any bookings that have originated in NBI

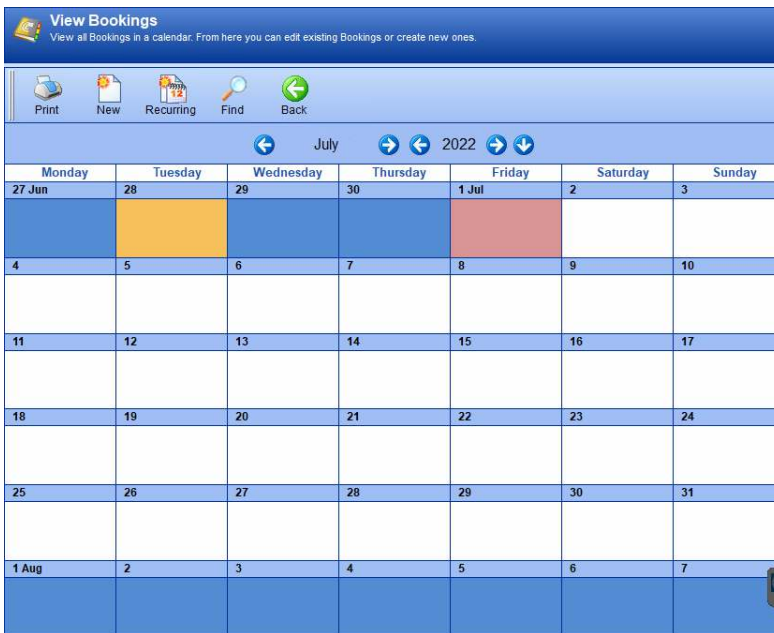7. BOSSII will poll NBI for new bookings every 2 minutes. This polling time can be adjusted

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Viewing Bookings in Admin

Launch **BOSSIIAdmin** and log in with the code "111"

Select **Bookings → View Bookings**

You will be presented with a calendar, displaying which days have bookings attached to that day

Double-click on the day you wish to see the bookings for

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This is a list of all bookings for the selected day.

NBI in the first column lets you know that this is a booking that has originated from NBI.

Double-click on the booking to view the bookings details

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Here we can see the details of the selected booking

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Starting the POS

Launch **BOSSIIPOS** and log in with the code "111"

You may be presented with the following screen
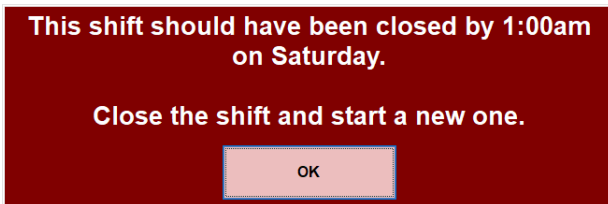
Click **OK**

You will now be prompted to close the shift. To close the shift:
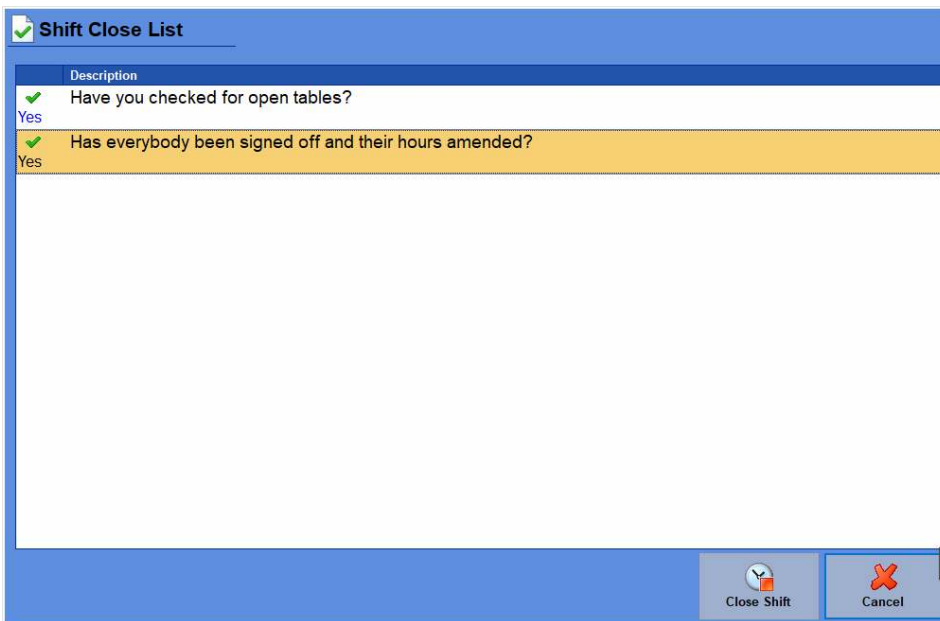
Select each of the options and click **Yes** when prompted

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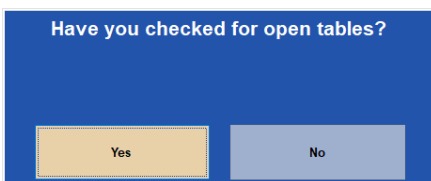
Click **Close Shift** when available
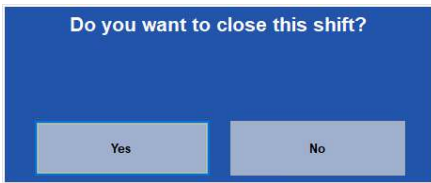
Click **Yes**

You will then be prompted to create a new shift
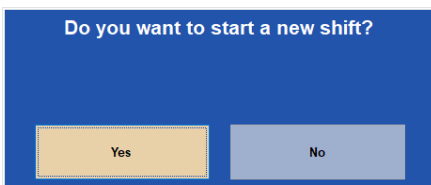
Click **Yes**

Click **OK** to select the Temperature

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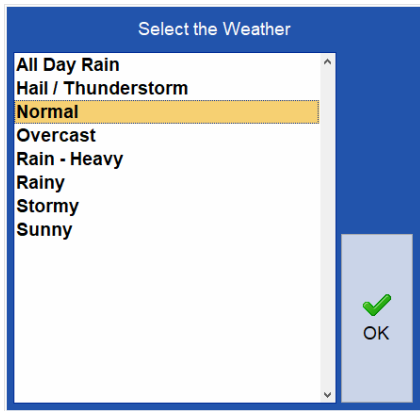
Click **OK** to select the weather

Once a new shift has been started you will log into BOSSIIPOS

Click the **BOSSII icon** in the top left corner to return to the log in screen

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How to Exit BOSSII

Whilst **BOSSIIPOS** is open, log in with the code "111"

Select **Options** → **Manager Options** → **Shift Functions**
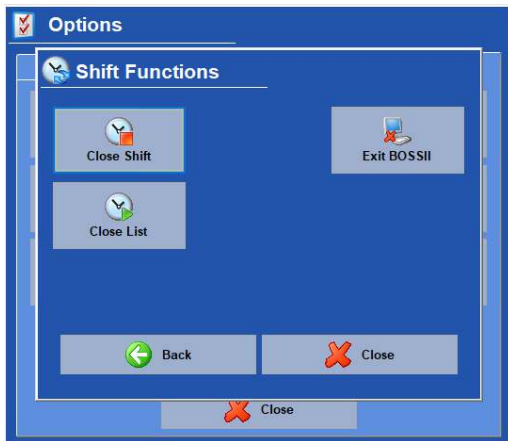
Click **Exit BOSSII**

You will be returned to the Launch screen
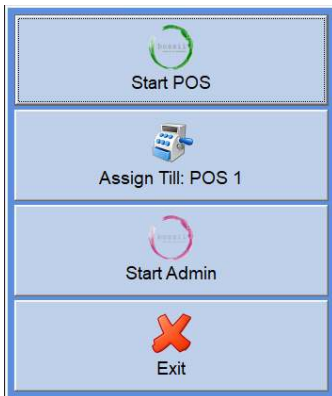
Click **Exit** to close out of the logged in session

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Starting a Booking

Launch **BOSSIIPOS** and log in with the code "111"

Select **Options** → **Other Options** → **Start Booking**

This will give you a list of all bookings that are able to be started today
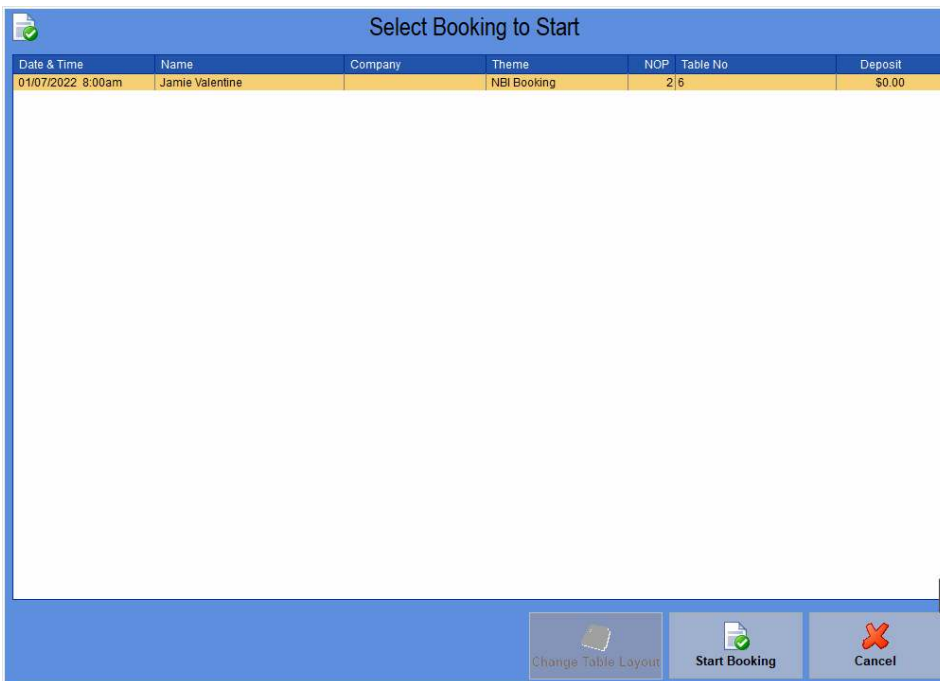
Only **confirmed** bookings are able to be started

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Select the booking you wish to start and click **Start Booking**

Click **Yes** to start the booking onto the specified table

You will now be able to add items to the bill for this booking

Add items to the bill by clicking on the product buttons on the right hand side

To finalise the bill, click the **Pay Bill** button

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Click **Pay Full Amount** to set the payment to the amount owing

Click **Accept Payment**

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If the bill is completely paid off by this payment then the bill will be finalised and the sales amount sent through to NBI

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Viewing Vouchers in Admin

Launch **BOSSIIAdmin** and log in with the code "111"

Select **Pricing & Discounts → Outstanding Vouchers**

This is a list of all vouchers available in BOSSII for use in paying bills.

Voucher # is the number to be entered into BOSSII to use this voucher
Online # is the voucher number in NBI

The voucher # in BOSSII is derived from the NBI voucher number by removing the last 4 characters ie. voucher number + XXXX

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Using a voucher in BOSSIIPOS

Launch **BOSSIIPOS** and log in with the code "111"

You can create a new bill in BOSIIPOS just by adding items to an empty bill

Add items to the bill by clicking on the product buttons on the right

Click **Pay Bill**

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Click **Use Voucher** to pay this bill using a voucher

Click **NBI voucher**

Enter the middle sequence of numbers on your NBI voucher. This is in the format XXXX – voucher number – XXXX

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Click **OK**

Click **Yes** to use this voucher.

The voucher redemption amount will then be sent to NBI.

If the amount used is less than the amount available on the voucher then a new voucher will be issued to you by NBI for the amount remaining.

This voucher can be used in BOSSII until completely redeemed.

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