Frequent Diner/Delivery

User's Guide

Release 7.3.300

DIGITAL DINING *for Windows*

The Restaurant Solution

By MenuSoft Systems Corporation

Frequent Diner/Delivery User's Guide

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Introduction

Overview

In this section, we'll inform you about Digital Dining, its Frequent Diner/Delivery program, and the associated *Frequent Diner/Delivery User's Guide.* We'll also describe a) how we've organized the rest of the *Frequent Diner/Delivery User's Guide* and b) how you can contact technical and sales support.

About Digital Dining

Digital Dining for Windows runs on the Microsoft Windows 95, 98, 2000, and NT operating systems. Digital Dining for Windows is comprised of four programs:

- Digital Dining Setup
- Digital Dining Back Office
- Digital Dining Point-of-Sale
- Digital Dining Frequent Diner/Delivery

The Digital Dining Frequent Diner/Delivery program is fully integrated with the Digital Dining POS database.

The Digital Dining Documentation Set

Release 7.3.300 of Menusoft's Digital Dining documentation set includes the following publications.

Digital Dining Setup User's Guide. Informs users how to set up and customize Digital Dining.

Digital Dining Back Office User's Guide. Informs the restaurant owner and management staff on all back office or management features and functions.

Digital Dining POS User's Guide. Informs end users about Digital Dining's Point of Sale features and functions.

Digital Dining Frequent Diner/Delivery User's Guide. Informs end users about the Frequent Diner/Delivery program and its features and functions.

Digital Dining Inventory User's Guide. Informs end users about the Inventory program within the Digital Dining product suite.

Digital Dining Labor Scheduling User's Guide. Informs end users about the Labor Scheduling program within the Digital Dining product suite.

Digital Dining Multistore User's Guide. Informs end users about the Multistore Office and Multistore Setup programs within the Digital Dining product suite.

About the Digital Dining Frequent Diner/Delivery Program

The Digital Dining for Windows Frequent Diner/Delivery program is a supplementary program that works with the Digital Dining Setup, Back Office, and POS programs. You can use this program to provide a frequent diner reward service to encourage repeat business. You can also use this program to help provide delivery service to your customers more quickly and efficiently.

If you want to provide frequent diner service, you can use the Frequent Diner/Delivery program to create frequent dining plans for your customers. A frequent dining plan is a reward offered to your customers for their frequent patronage of your restaurant. Using the Frequent Diner/Delivery program, you can create one or more frequent dining plans in the Back Office and invite your customers to join them. You can then reward enrolled customers with special coupons or credit. While frequent dining plans encourage customers to patronize your restaurant more frequently, they also afford you more flexible marketing opportunities. By enrolling customers as frequent diners, you can collect special personal information about individual customers (such as special interests or special occasions), and then specialize your marketing efforts to customers with particular interests.

If you want to provide new delivery service (or enhance your existing delivery service), you can use the Frequent Diner/Deliver program to simplify the process of receiving, processing, and delivering customer orders. The Frequent Diner/Delivery program allows you to record customer information (such as telephone numbers and street addresses) and to access it again quickly on future calls. You can also organize your drivers more efficiently by creating delivery zones, predetermined delivery areas which you can associate with customer records. By associating customer records with delivery zones, you can assign multiple orders from a single zone to a single driver, thus minimizing their delivery time.

About the Digital Dining Frequent Diner/Delivery User's Guide

This document represents Release 7.3.300 of the *Frequent Diner/Delivery User's Guide*, which is the companion document to Release 7.3.300 of the Digital Dining Frequent Diner/Delivery program. Furthermore, we have developed the *Frequent Diner/Delivery User's Guide* into distinct media: printed and online.

The documentation and online Help will describe how you can use the Frequent Diner/Delivery program. We have provided both conceptual help (a description of how we designed the program or a description of how an interface works) and practical help (step-by-step instructions for completing most tasks). Within each task, cross-references (in the hard-copy manual) and hypertext links (in the online Help) will let you quickly access the associated reference information you might need to complete each task.

When working within the Frequent Diner/Delivery program, you can access the online help file through the **Help** menu. Within the help system, you can look for answers with a table of contents, an index, or a find capability. Furthermore, we've linked many of the topics with hypertext links ("jumps"), which make finding the right information quicker and easier.

Document Organization

Each section in this manual builds on the concepts or procedures detailed in the previous section(s). The description of the topics and procedures, therefore, become more involved as you progress through the manual.

We divided the *Frequent Diner/Delivery User's Guide* into the following sections:

- Digital Dining Basics

  This section describes the main concepts, windows, and functions that you will encounter in most Digital Dining programs.
- Frequent Diner Basics

  This section describes the basic concepts of frequent diner service, as well as how to use the Frequent Diner/Delivery program to provide effective frequent diner service.

- Setting Up a Frequent Dining Plan

  This section describes the process of setting up a simple frequent diner service.
- Delivery Basics

  This section describes the basic concepts of delivery service, as well as how to use the Frequent Diner/Delivery program to provide effective delivery service.
- Setting Up a Delivery System

  This section describes the process of setting up a simple delivery service.
- Complaints

  This section briefly describes how to use and set up customer complaints, including the windows involved in creating and using the complaint functions.
- Setup Menu

  This section describes the various setup windows featured in the **Setup** menu, including the POS Entries window.
- Layouts Menu

  This section describes the three layout maintenance windows featured in the **Layouts** Menu, where you can create and maintain coupon layouts.
- Frequent Dining Plans Menu

  This section describes the windows and utilities featured in the **Plans** Menu, where you can create and maintain frequent dining plans.
- Customers Menu

  This section describes the windows and utilities featured in the **Customers** Menu, where you can create and maintain customer records.
- Reports Menu

  This section describes the various maintenance windows featured in the **Reports** Menu, where you can create reports to analyze your sales and customer information.
- Setup and Back Office Features

  This section describes how to coordinate your Setup and Back Office programs with the Frequent Diner/Delivery program.
- Frequent Diner at the POS

  This section describes how to use the Frequent Diner/Delivery program at the Point of Sale for frequent diner service.
- Delivery at the POS

  This section describes how to use the Frequent Diner/Delivery program at the Point of Sale for delivery service.

What's New

For the most recent information about the latest additions to any of the Digital Dining programs, click **What's New** on the **Help** menu.

Technical Support

Your local dealer provides all technical support and sales support.

If you cannot access parts of the Digital Dining Frequent Diner/Delivery program, check with your Digital Dining System Administrator (possibly a dealer or restaurant employee). He or she can set or change the system access permissions to specific Digital Dining programs. Please check with your System Administrator for any questions regarding access permissions to the Frequent Diner/Delivery program.

Digital Dining Basics

Overview

This chapter describes the windows, functions, and features that are common to all of the Digital Dining programs. In it, you will find detailed

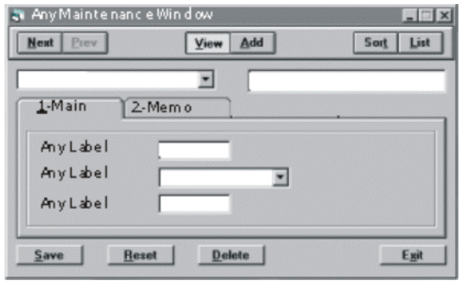
- Descriptions of the different maintenance windows
- Procedures for drilling through a maintenance window
- Descriptions of filters
- Descriptions of Find Windows

Maintenance Windows

Each maintenance window is designed to maintain records for specific areas for the Digital Dining program(s). For example, the Inventory Item Maintenance window maintains records about your inventory items. The Register Option Maintenance window maintains records about the password levels for accessing register options.

Maintenance Window Commands

Every maintenance window contains a group of commands. The commands that you can use depend on the type of maintenance window you are accessing, which can be either a Set Up maintenance window or a User maintenance window. In the upper right hand corner of each maintenance window, you can expect to see a pair of buttons, which will be either **Sort** and **List** or **Order** and **Filter.** Most maintenance windows will contain **Find**, **Next**, **Prev**, **View**, **Add**, **Save**, **Reset**, **Delete**, and **Exit**, as shown below.



This maintenance window is generic; therefore, it does not include some commands (for example, **Filter**, **Print**, **Preview**, **Order**, or **Find**) that you will find on other maintenance windows.

Find

Click **Find** (or press ALT+F) to locate a specific item. Digital Dining opens the Find window, from which you can select an item (for more information, see "Find Windows" on page 13).

Next

Click **Next** (or press ALT+N) to activate the next item in the sequence. Digital Dining will save any changes you make to the current item when you exit (unless you click **Reset** and then click **Exit**). If you are using a filter, Digital Dining will display only the database items that pass that filter.

Prev

Click **Previous** (or press ALT+P) to activate the previous item in the sequence. Digital Dining will save any changes you make to the current item when you exit (unless you click **Reset** and then click **Exit**). If you are using a filter, Digital Dining will display only the database items that pass that filter.

View

Click **View** (or press ALT+V) to display the details of database items. You can view records by scrolling through the database (click **Next** or **Prev**) or searching for a specific item (click **Find**).

Add

Click **Add** (or press ALT+A) to change to the Add mode. In this mode, you can add and save new items by clicking **Save** or **Exit.**

Save

Click **Save** (or press ALT+S) to save any changes made to the current database item and keep the active window or dialog box open.

Reset

Click **Reset** (or press ALT+R) to cancel any change(s) you have made to the current item in the database. You can cancel the change(s) even if you have selected and edited information on a different tab within the current window. You cannot cancel changes once you have clicked **Save** or **Exit.**

Delete

Click **Delete** (or press ALT+D). A message box will ask: "Are you sure you want to delete this?" Click **Yes** to delete the item or click **No** to cancel the delete operation.

Exit

Click **Exit** (or press ALT+X) to save changes and close the active window or dialog box.

Sort

Click **Sort** (or press ALT+S) to open the Reorganize List window. From the Reorganize List window, you can drag an item to change the order which the items will appear in List reports.

List

Click **List** (or press ALT+L) to generate a report that lists the items in the database that relate to the current window. For example, if you click **List** in the Inventory Location Maintenance window, then Digital Dining will display a report that lists all of the Inventory Locations.

Order

Click **Order** (or press ALT+O) to set the order that the cursor will move through the current maintenance window. In the Edit Order window, you can

- Save the new tabbing order for the current data-entry task only (click **OK**),
- Save the changes to the tabbing order permanently (click **Save**) so that the new tabbing order becomes the default tabbing order,
- Return to the maintenance window without saving any changes (click **Reset**), or
- Reset the tabbing order to the default (click **Reset**).

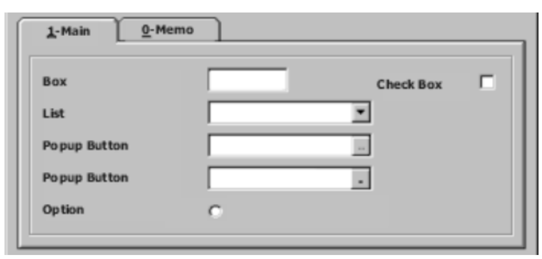
Digital Dining changes the tabbing order *for the current maintenance window only.* You might want to set the tabbing order of a maintenance window when, for example, you are creating a new inventory based on previous invoices, and the invoices follow a different order than the maintenance window. Setting the tabbing order can save you time.

Filter

Click **Filter** (or press ALT+L) to exclude unwanted database items from the displayed sequence (for more information, see “Filters” on page 12).

Maintenance Window Tabs

Every maintenance window also contains at least two tabs (a **Main** tab and a **Memo** tab). Each tab, in turn, contains a group of objects, such as boxes, lists, options, check boxes, and so on. These objects allow you to create and organize how you want a particular part of Digital Dining to work or look.

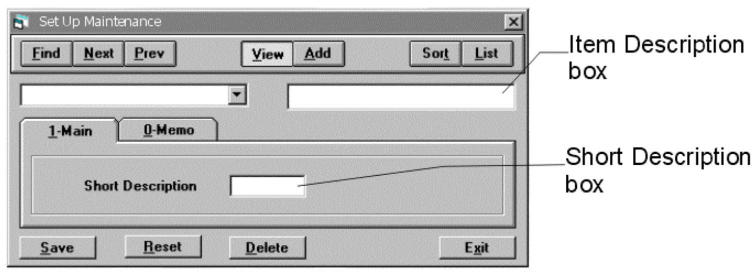


On the **Main** tab in the illustration above, you might notice that the label “Popup Button” appears twice, each time with a different control. However, if you click either control, Digital Dining will perform the same operation: open a Find window.

Types of Maintenance Windows

Digital Dining uses two types of maintenance windows: Set Up maintenance windows and the User maintenance windows. A Set Up maintenance window is self contained. That is, you do not need information from any other maintenance window to complete this type of maintenance window. A User maintenance window, on the other hand, is not self contained, and it requires that you use information from at least one other (sometimes more) maintenance window, which can be either a Set Up or User maintenance window.

Generally, a Set Up maintenance window only requires that you create an item description and short description (as shown below).



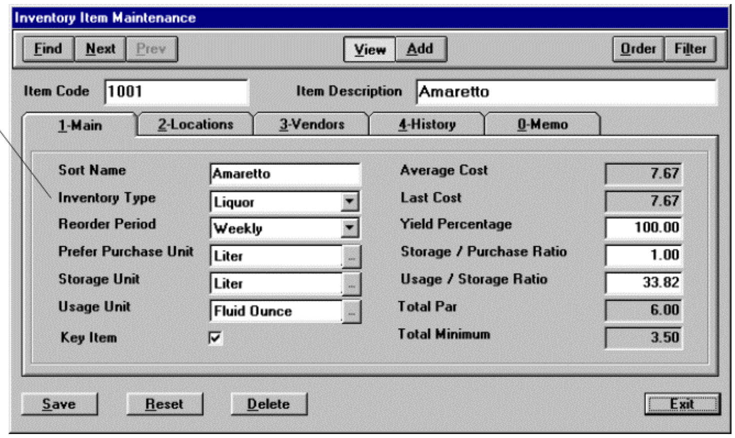
A User maintenance window, however, requires that you access (and insert) information you have created with either another User maintenance window or a Set Up maintenance window. When you select information from a list in Digital Dining, you are almost always selecting information you have created in a different maintenance window. If you cannot find the information you want in the list, you can often drill through the window to open a different maintenance window to create the information that you want. You can then select the new item from the list in the original maintenance window.

Drilling Through

The drilling through feature is available to most Digital Dining programs. When you drill through a maintenance window, another maintenance window appears. You then create new information on this maintenance window, close it, and then choose the newly created information from the list you just drilled through.

For example, let’s say you’re working with the Inventory program, and you have the Inventory Item Maintenance window active. You can drill through the “Inventory Type” label if you need to create a new inventory type for this inventory item.

Double-click the Inventory Type label to drill through to the Inventory Type Maintenance window. You can then create a new inventory type and use it for the current inventory item.



However, you cannot drill through all labels on all maintenance windows. Typically, although not a rule, you can drill through the labels that have lists associated with them.

Filters

Filters let you work more efficiently by limiting the number or type of records that Digital Dining displays with the current maintenance window or for the current report. For example, if you need to modify a group of records that belong to one type, then you can exclude all the records that do not belong to that type.

You might use a filter, for example, when you are adding new menu items to an existing menu. You can filter the existing menu items so that Digital Dining displays only the correct sales or prep types of the existing menu items. Then, when you click **Add** (to add the new menu item), Digital Dining will automatically bring up the next available PLU number for the menu items matching that filter.

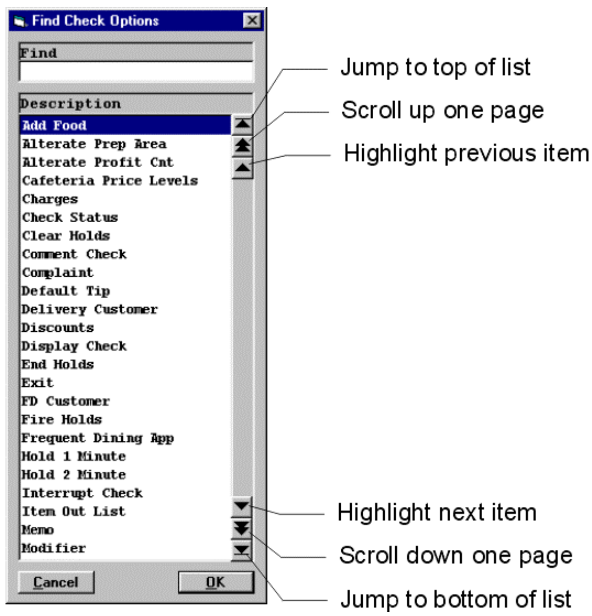
How does a Filter Work?

All filters work in essentially the same way: they allow you to limit what you view and/or edit. The process is simple. You set the filter criteria, Digital Dining checks every item based on the criteria you set, and then Digital Dining displays only those items that meet the criteria you have set.

Find Windows

Depending on the maintenance window you are working with, you have access to Find windows. Find item windows allow you to find a records quickly so that you can view or edit the record, which can save a lot of time and effort when you have a large system.

Each Find window will identify what you will be finding (the example below shows that you will find an Inventory Location), a box for you to type the name of the item you're looking for, and a list of items you can select from.



If you can click **Find** on the maintenance window, if the maintenance window has a [button], or if the maintenance window has a [button], you can access one of the many Find windows in Digital Dining.

Using Find Windows

Once you access a Find window, you have several options or methods for searching the list of records in the window. You can use any of the tools that allow you to scroll (for example, highlight the next item, scroll up one page, or jump to top list). You can also begin typing text in the description box. The description box coordinates with the list of records and selects the records depending on what and how much you type. For example, if you type "s", the first record (based on the alphabet) that starts with "s" will be highlighted (let's say it's "salad"). If you type “st”, salad is no longer highlighted; rather, the first record that starts with “st” is highlighted (let’s say it’s “strip steak”). You can continue to type more letters until you see the record you want or until the record is automatically selected.

Frequent Diner Basics

Overview

Many restaurants earn the bulk of their profit from repeat business, rather than one-time-only customers. If you earn most of your money from the customers who patronize your restaurant regularly, you should take special care to please them. We designed the Digital Dining Frequent Diner/Delivery program with this in mind, to help you identify and reward your most valuable customers. Using this program, you can create frequent dining plans to offer your regular customers special deals, such as discounts, coupons, or other benefits. By rewarding them for their patronage, you can encourage their continued business. Also, by creating a frequent diner customer database, you can analyze customer information in various ways, recognize trends among your customers, and customize your marketing efforts accordingly.

In this chapter, we will discuss the basic concepts behind a frequent diner service, and how it can enhance your business. We will also discuss how you might set up and use frequent dining plans. Before creating frequent dining plans in the system, you must first make some decisions. You need a basic understanding of what kind of plans you want and how you want to use them. By the end of this chapter, you should be able to make those decisions.

Collecting Customer Information

In any frequent dining rewards service you must first collect customer information. To use the Frequent Diner/Delivery program, you must ask your customers to give you some personal information, such as their names, addresses, and telephone numbers. You must then enter this information into a customer record, located in the Frequent Diner/Delivery program. Once you have this information in your program, you can examine and use it in creative ways. Early on, you should decide how best to collect this information and when to enter it into your records.

Printed Applications

Most managers prefer to use printed applications to collect customer information. Invite customers to fill out an application, a printed form, which they can complete and return at their leisure. Once you collect a batch of these applications, you can enter them all into the Frequent Diner/Delivery program at a later time, in the back office. You could print blank applications and place them on your tables or have your servers offer them to customers with their checks.

Ideally, you should ask your customers to fill out and return an application on a single visit, perhaps while they wait for their order. You *could* ask customers to fill out applications at home and return them on a later visit, but this method is unreliable. A patron who leaves with an application will probably never return it.

For a better response, you can instruct your servers to invite customers to apply for a frequent diner account immediately after taking their order. When customers agree, they can fill out the printed application while waiting for their food and return the application as they pay. You have their information immediately. You can enter this information later in the back office, and (if necessary) mail membership cards (or any other pertinent information) to the customers.

You can encourage customers to join your frequent diner plans and collect their information in many different ways. You must decide which method is most suited to your needs. If you decide to collect printed applications from your customers, you should also decide when to enter these applications into the database. Try to do this on a regular basis, such as nightly or weekly. You probably don’t want customer applications to sit idle any longer than absolutely necessary. The sooner you register these customers as frequent diner members, the sooner they will return to enjoy their benefits.

Point of Sale

You can, if you wish, create new customer files directly at the POS. By doing so, you could create new customer files by entering some, but not all, of their customer information. You *could* enter all of a new customer’s information at the POS, but this process is time consuming and very impractical. A more feasible method might be to add part of their information, perhaps no more than a customer ID number, and then add the rest of the customer information later, in the Back Office. You can then create a customer’s account immediately at the POS, give the customer a special ID number or card, save your copy of the customer’s application, and then enter the rest of the data at a more convenient time.

Customer Identification

Once you create new frequent diner accounts, the customers must have some way of identifying themselves as frequent diners in the future. Each new account must have a unique identification number, and frequent diner customers typically use this number to identify themselves at the POS. The system can automatically generate this number, or the server can enter it manually. You can use some other number unique to the customer, such as a telephone number, driver's license number, or credit card number. This method is fairly quick, and the customer is not likely to lose it.

Many restaurateurs prefer to give their frequent diner customers some form of special identification card, which features their customer ID number. Customers can then use this card to identify themselves at the POS. You can customize your frequent diner ID cards to your particular needs, such as printing cards which feature your restaurant logo. If you create more than one frequent dining plan, you might find ID cards particularly convenient. You could print cards with different colors or styles for each of your separate plans.

Furthermore, you can give your customers special “swipe cards,” frequent diner ID cards that include a magnetic strip, like an ATM or credit card. Your staff can “swipe” such a card at the POS to enter the customer’s ID number automatically. You can purchase a batch of individually prenumbered cards and give them to your frequent diner customers in the restaurant or by mail. (You can use the pre-printed card numbers as the ID numbers for new customers.)

Note

If you are interested in using frequent diner swipe cards, contact your Digital Dining dealer for more information. Our dealers can supply you with cards and the hardware necessary to use them.

If you decide to issue ID cards to your frequent diner customers, mail them to your customers promptly after you create their accounts. Or, if you plan to create new accounts at the POS, keep a stack of cards available near the register.

Customizing Your System

With some imagination, you can find which methods of data collection and entry work best for your particular restaurant, or you can modify or customize these methods to meet your needs.

Consider the following scenario. While taking an order, your server invites a customer to join a Frequent Dining plan. The customer agrees and fills out an application while waiting for the order (see the sample application below).

Menusoft Bar & Grill
Frequent Dining Application Form

For Official Use Only
ID Number:________________

First Name | Last Name
Street Address | Building Name or Number
City | State | Zip Code
Phone Number | Fax Number

Special Interests:
(Pick six maximum by numbering 1 –6)

Bowling League ____
Beer Aficionados ____
Cigar Aficionados ____
Little League ____
Rotary Club ____
Silver Seniors ____
Soccer League ____
Softball League ____
Wine Aficionados ____

Special Occasions:
(Include Names & Dates accordingly)

Birthday ____ **Date**
Spouse's Birthday ____ **Name** ____ **Date**
Son's Birthday ____ **Name** ____ **Date**
Daughter's Birthday ____ **Name** ____ **Date**
Wedding Anniversary ____ **Date**

I, ____________________________, have read and agree to the terms of the
Print Name
Menusoft Bar & Grill Frequent Dining program. ____________________
Signature

When the customer finishes, the server takes the application to the register, creates a new frequent diner account but does not enter all of the customer's information. The server uses a new swipe card to enter the customer's ID number, thereby associating the card with the new customer record. The server then writes the card number on the printed application and stores the application in some special location. The new frequent diner customer earns points immediately for that order. Later, a member of your staff takes the application and edits the new customer file, entering the remaining information. With such a system, the server gives the customer a new frequent diner card immediately, rewards the customer with frequent diner points on that first meal, and creates a new customer record without occupying the register for a long time.

You have various ways to carry out these tasks, but only you can decide how best to collect and enter this data into your system. After some thought and experimentation, you can determine which features best serve your particular needs.

Using Customer Information

After acquiring some frequent diner customers and entering their information into the database, you can put that information to good use. The Frequent Diner/Delivery program includes numerous reports that allow you to examine customer and sales data. These reports will help you to monitor important trends and market to specific groups.

Note

You can export any of the frequent diner reports to other word processing or spreadsheet applications, such as Microsoft Word or Excel.

Monitoring Trends

Using the frequent diner reports, you can determine who your best customers are, exactly how much they are spending, or how often they are visiting your restaurant. You will always know what is happening with your most valued customers, individually and generally.

You can divide your customers by demographic area (such as zip codes) or by their interests. You can also assess the exact benefit of your assorted frequent dining plans. If you have multiple frequent dining plans, you can determine how many customers are enrolled in each of them and how much business they are earning you. You can determine which plans are succeeding and which are not. You can also assess how well they are succeeding, and which groups are most valuable to you. For instance, if you are providing uniforms for the local softball league, you will want to know how much business they are earning you and if the investment is really worthwhile. The frequent diner reports minimize the guesswork in such decisions.

You can also track the sales of certain menu items and determine their popularity with your frequent diner customer base. If certain items are not selling well with your frequent diners, they may not be worth carrying. If you are introducing new menu items, these reports can let you know how your frequent diners are responding to them. If your frequent diners respond positively, then you should probably continue serving those items.

You can also monitor lost business and negative feedback with our reports. If any long-time frequent diner customers suddenly stop patronizing your restaurant, you'll know it. Having their contact information readily available, you can call them and ask if they were dissatisfied on their last visit, and if so, why. You might offer them a coupon for a free item to encourage them to come back. You may impress many patrons with such a show of personal concern, and they may consider returning.

The Frequent Diner/Delivery program also allows you to monitor specific complaints by your frequent diner customers. You can examine which customers have been complaining and what they've been complaining about. If you find any recurring complaints among multiple customers, you'll know that these issues require prompt attention. And if any of your frequent diner customers are chronic complainers, you can quickly recognize it and not waste too much time and effort trying to please someone who is impossible to satisfy.

Creative Marketing

Along with the usual contact information, you can also store more specialized customer information, such as personal special occasions or special interests. With this information, you can tailor your marketing efforts to individual frequent diner customers or groups of customers. The Frequent Diner/Delivery program allows you to print mailing labels for specific groups of customers, simplifying your promotional direct mail campaigns.

On your frequent diner application, you might include a list of special interests and ask your applicants to select their favorites. You should associate these interests with certain clubs or groups that you are marketing towards, such as a Football Club, an Imported Beer Club, or a Chess Club. You can then use this valuable information for selective promotions. You can send a mass mailing of special coupons to all of your frequent diners with a shared interest. For example, you might send a promotional coupon to attract football fans to your restaurant on the afternoon of a popular televised game. You'll know which customers will be most receptive to that promotion, and which will not. Therefore, you will not waste resources sending mail to uninterested customers.

> **Note**
>
> Rather than marketing to select customers enrolled in a single Frequent Dining plan, you can also offer different plans to different groups. You may wish to market to groups that do not qualify as "special interests." For instance, you can create a Frequent Dining plan offering some general discount to senior citizens.

Also on your frequent diner application, you might ask for the customer's birthday, children's birthdays, spouse's birthday, wedding anniversary, or any other significant personal dates. You can use this information for special promotions as well, by sending personalized greeting cards, complete with customized coupons for some item (maybe a free birthday cake). At the end of each month, you can print a list of all your frequent diner customers with upcoming birthdays and send a mass mailing to them.

Rewards

Once you have a healthy number of frequent diner customers, you can begin using their information. But to encourage customers to join your frequent dining plans, you need to offer them some incentive. You must decide what rewards to give your frequent diners.

You have two main types of rewards to offer your customers: credit and coupons. A reward credit is a cash discount off of a purchase. Customers earn credit with each visit, which they can redeem immediately at the POS or save for a later visit.

A reward coupon is a document given directly to the customer, which they can use on a future visit. Unlike reward credit, customers must usually earn a certain number of points over many visits before earning a coupon. Since reward coupons offer a wider range of options than reward credit, they tend to be more popular among our users.

You can always modify these rewards, however, to meet whatever special needs you may have. For instance, you could use frequent dining plans for charitable promotions. You could offer to donate some percentage of your profit from a plan to a particular charity. The more money a frequent diner customer spends in your restaurant, the more you will donate to this charity. To calculate this, you might attach a donation amount per frequent diner point. At the end of a visit, you could give your customers a status report displaying their total points accumulated and the total of your donation.

Coupons

You can use reward coupons in a wide variety of ways. You can offer a coupon for a free menu item, a percentage discount off a single menu item, or a percentage discount off a total order. You can even offer rebate coupons, which customers can redeem for cash. We discourage this, however, since the general goal of frequent diner rewards is to encourage customers to buy more items more frequently.

Discount coupons are a good tool to foster general repeat business, but free-menu-item coupons might prove more useful to encourage customers to try certain menu items that they have not previously tried. For example, if you promote a new menu item, a coupon can give your frequent diner customers a free sample. If they like it, they may order it again in the future.

There are two different types of frequent diner coupons, depending on when you print and give them to customers: immediate coupons and batch coupons.

Immediate coupons print at the POS. You can set your system to print a reward coupon immediately at the POS when the customer accumulates the required points. The POS will print both a receipt and the reward coupon. The customer will then have the printed coupon, which they can redeem on a future visit.

Batch coupons do not print at the POS. On regular intervals (nightly, weekly), you can print a list of all the frequent diner customers who have accumulated their required points. You can then use another application to print a batch of reward coupons (or outsource the print job to a professional print shop) and send them to all the appropriate customers in a mass mailing.

Setting Up a Frequent Dining Plan

Overview

Before you begin setting up a frequent dining plan, we suggest that you read "Frequent Diner Basics" so that you have a better understanding of the different methods of using frequent dining plans.

In this chapter, we will discuss the basic steps of setting up a new frequent dining plan:

- creating a frequent dining plan
- creating a reward coupon for the plan
- setting the POS Entries window properly
- creating a customer record
- creating a check option and adding it to an appropriate register in the Digital Dining Setup program

We will describe these steps in more detail in subsequent chapters. In this chapter, you will walk through a simple tutorial. You will create a frequent dining plan for a free salad and a simple reward coupon for the plan.

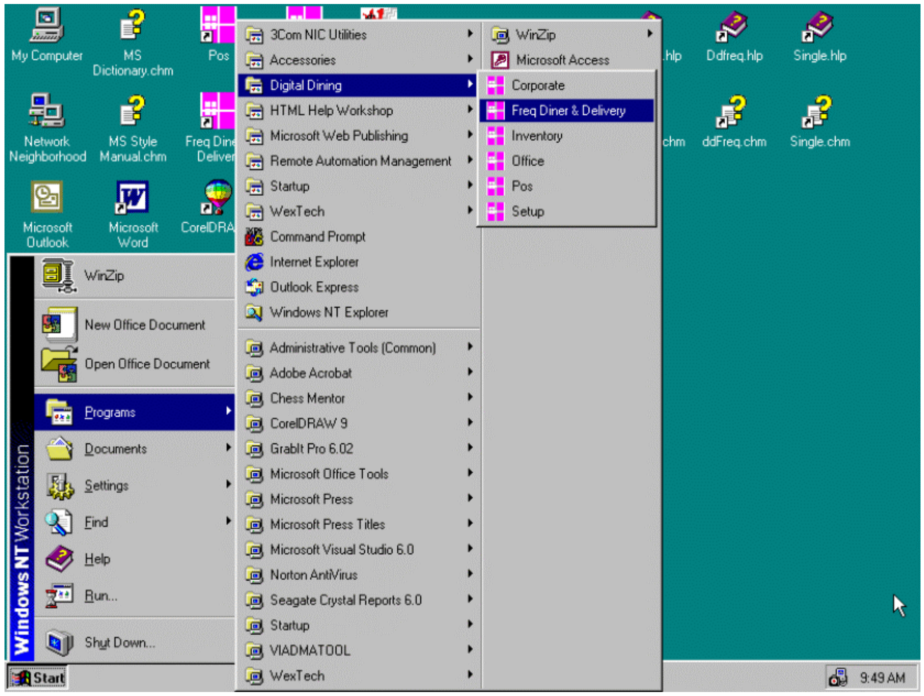
Opening the Frequent Diner/Delivery Program

As with most programs, you can open the Digital Dining programs from the **Start** menu on the Taskbar. Once you open the Frequent Diner/Delivery program, you can create and edit frequent dining plans and customer records.

To Open the Frequent Diner/Delivery Program

1 On the Taskbar, click **Start** and point to **Programs**.

2 Point to **Digital Dining** and then click **Freq Diner & Delivery**.



3 In the **Name** box, type your Digital Dining access name.

4 Press the TAB key and then type your password.

5 Click **OK.**

Note

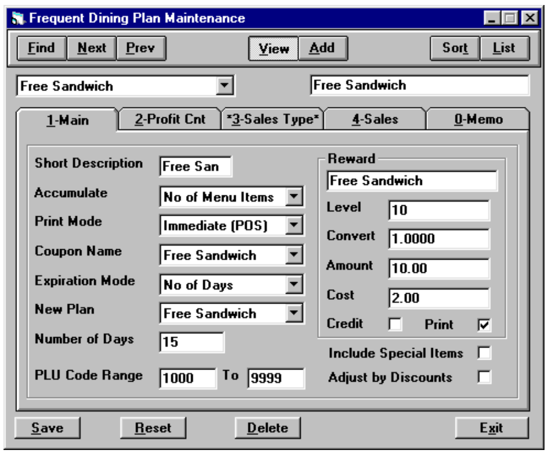
Your System Administrator assigns passwords based upon your position title. Access rights to the program are defined by position titles. For more information, please refer to the *Digital Dining Setup User's Guide* or your System Administrator.

Creating a Frequent Dining Plan

Your first step is to create the frequent dining plan itself. But before you can do that, you must decide what kind of plan you want to create. What reward do you want to offer, a credit or coupon? If it is a coupon, where will it print, at the Point of Sale (POS) or in the Back Office? Will the coupon expire? If so, when? How will your customers accumulate points? And what will the point level be?

For our tutorial, you will create a simple plan that gives customers a coupon for a free salad. You want the coupon to expire 30 days after it prints. You want this coupon to print at the POS. Your customers will earn this coupon after visiting the restaurant five times.

Before creating a plan, we will briefly examine the Frequent Dining Plan Maintenance window.



Accumulate list

The Frequent Diner/Delivery program operates on a point system. It gives a certain number of points to a customer and then prints the coupon after a customer accumulates a specified level of points. Customers can earn points in four different ways, so you must decide which way customers can accumulate points for our plan.

You want your coupon to print on a customer's fifth visit. To do this, you must set the program to give a customer one point per visit, and then print the coupon after a customer earns five points. To set the program to reward the customer one point per visit, you must set the plan to accumulate points by "number of purchases" in the Frequent Dining Plan Maintenance window.

Print Mode list

The Frequent Diner/Delivery program can print reward coupons either at the POS (immediately after a customer earns one) or in batches in the Back Office (after many customers have earned them).

You want your coupon to print at the POS, immediately after a customer earns it. To set the program to print coupons at the POS, you must set the print mode to **Immediate (POS)**.

Coupon Name list

If you want your plan to print a reward coupon for a customer, then you must select the coupon that the program will print. You must create your reward coupons in the Reward Coupon Maintenance window. After you create it, the coupon name will appear in the **Coupon Name** list of the Frequent Dining Plan Maintenance window.

You have not created a coupon for your plan yet. You will do this after you have edited the rest of the plan. You can create a reward coupon before creating a frequent dining plan, but many users prefer to create the plan first.

For now, you will just set the **Coupon Name** to **Default**. You will change it later, after you create a new reward coupon for it.

Expiration Mode list

If you want a reward coupon to expire after a certain amount of time, you must select an expiration mode. You can set a coupon to expire after a certain number of days after the customer receives it or you can set it to expire on a specific date.

You want your coupon to expire 30 days after the customer earns it, so you will set the **Expiration Mode** to **Number of Days**. You will specify how many days (30) in the next step.

Number of Days box

After you set the **Expiration Mode** to **Number of Days**, you must specify the number of days. You must do this in the **Number of Days** box of the Frequent Dining Plan Maintenance window. Had you selected **Expiration Date** in the **Expiration Mode** list, you would now need to specify the date in this box.

Reward Description box

You should include a brief description of the reward in the **Reward Description** box. By doing so, you can use this description in a reward coupon layout later.

Point Level box

In the **Level** box you must enter the number of points that a customer must earn to receive the reward coupon. You want your customers to earn a coupon after five visits, earning one point per visit. Therefore, you should set your plan's **Level** to "5".

Print and Credit check boxes

As we discussed earlier in "Frequent Diner Basics," you can offer reward coupons or reward credit with a frequent dining plan. If you offer a coupon with your plan, you must select the **Print** check box within the **Rewards** area. If you are offering credit, you must select the **Credit** check box within the **Reward** area.

Now that you have reviewed the options necessary for your tutorial, you can create a new frequent dining plan.

To Create a Frequent Dining Plan

1. On the **Plans** menu, click **Frequent Dining Plans**.
2. Click **Add**.
3. In the **Item Description** box, type "Free Salad," then press the TAB key. The first eight letters of this description will automatically appear in the **Short Description** box.
4. Click **No of Purchases** in the **Accumulate** list, then click **Immediate (POS)** in the **Print Mode** list.
5. Select **No of Days** in the **Expiration Mode** list, then type "30" in the **Number of Days** box, and then select **Default** in the **Coupon Name** list.
6. Type "Free Salad" in the **Reward Description** box, then type "5" in the **Level** box, and then select the **Print** check box in the **Rewards** area.
7. Click **Save** to save the change(s) and keep the current window open and active.

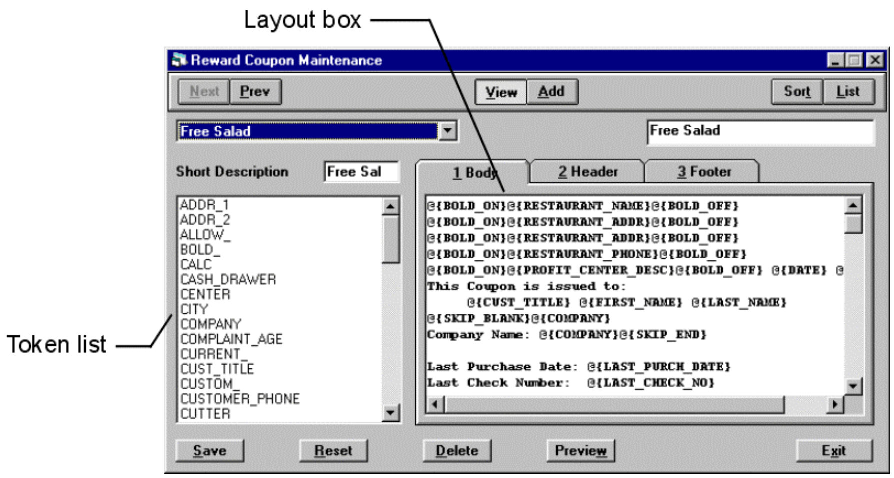
   OR Click **Exit** to save the change(s) and close the current window.

Creating a Reward Coupon

Now that you've created a frequent dining plan, you need to create a coupon to go with it. When you were creating the plan, you associated the plan to the "Default" coupon. Now you will create a new coupon expressly for our "Free Salad" plan. We will do this in the Reward Coupon Maintenance window.

To Add a Reward Coupon

1 On the **Layouts** menu, click **Reward Coupons**.



2 Click the **Body** tab and then click **Add**.

3 Type "Free Salad" in the **Item Description** box, then press the TAB key. The first eight letters of this description ("Free Sal") will automatically appear in the **Short Description** box.

4 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

You have just created a new coupon for the "Free Salad" frequent dining plan. Right now, this coupon looks exactly like the default coupon, and you can edit it later. Right now, let's preview what the coupon will look like when it prints for the customer.

To Preview a Reward Coupon

1 On the **Layouts** menu, click **Reward Coupons**.

2 Click **Next** or **Prev** to scroll through your reward coupons until you find **Free Salad**.

OR In the **Reward Coupon** list, select **Free Salad**.

3 Click **Preview**.

4 When you have finished previewing the coupon, click **OK** to close the Reward Coupon Preview window.

By opening the Reward Coupon Preview window, you can preview how the coupon will look when it prints for a customer at the POS. You can also see if you need to edit the coupon. You will not be editing the coupon in our tutorial.

Now that you've created the coupon for our frequent dining plan, you should edit the plan to associate it with the new coupon.

To Associate a Reward Coupon with a Frequent Dining Plan

1 On the **Plans** menu, click **Frequent Dining Plans**.

2 Click **Next** or **Prev** until you find **Free Salad**.

OR In the **Frequent Dining Plan** list, select **Free Salad**.

3 In the **Coupon Name** list, click **Free Salad**.

4 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

Now the Frequent Diner/Delivery program will print the "Free Salad" reward coupon when a customer earns the required five points.

Setting Up POS Entries for Frequent Diner

Now that you've created the plan and the reward coupon, you are almost ready to start enrolling customers. However, before you actually start creating customer files, you must check the POS Entries settings.

The POS Entries window helps you to control how the Frequent Diner/Delivery program functions at the POS. Most of the POS Entries settings are optional, but a few of them are required for frequent diner service. We will examine the vital settings here.

The POS Entries window includes two required settings for frequent diner service. The first is in the **New Entries** area. You must select one of the three **Entry** options:

- **Full Entry**. If you select this option, the program will require you to enter all of the forced entries when creating a new customer record. You must also manually enter a new member ID at the POS.
- **Quick Entry**. If you select this option, the program will automatically generate a member ID number at the POS. However, you must still manually enter a member when creating customer records in the Back Office.
- **None.** If you select this option, you will not be able to create new customer files at the POS. You will create new customer files exclusively in the Back Office.

You will set the program for Quick Entry, which will allow you to create customer records either at the POS or in the Back Office.

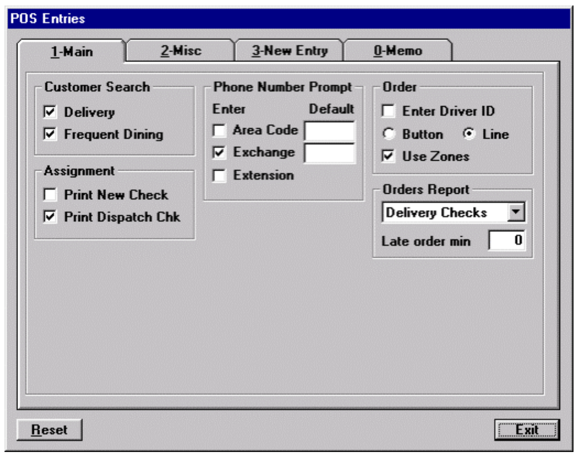
You must select the **Frequent Diner** check box in the **Customer Search** area. This setting allows the program to conduct customer record searches properly at the POS. The program cannot search the frequent diner customer records unless you select this check box.

You should also review the **Forced Entries** area. If any of the check boxes in this area are selected, then the program will require that information when you try to enter new customer records. For this tutorial, you only want to select the **Name** box so that you will only have to enter the first and last name of the customer.

To Set the POS Entries Window for Frequent Diner.

1 On the **Setup** menu, click **POS Entries**.

2 Click the **Main** tab.



3 In the **New Entries** area, click **Quick Entry**.

4 In the **Customer Search** area, click the **Frequent Dining** check box.

5 In the **Forced Entries** area, click the **Name** check box. Clear any of the other boxes in the **Forced Entries** area if they are selected.

6 Click **Save** to save the changes and keep the current window open and active.

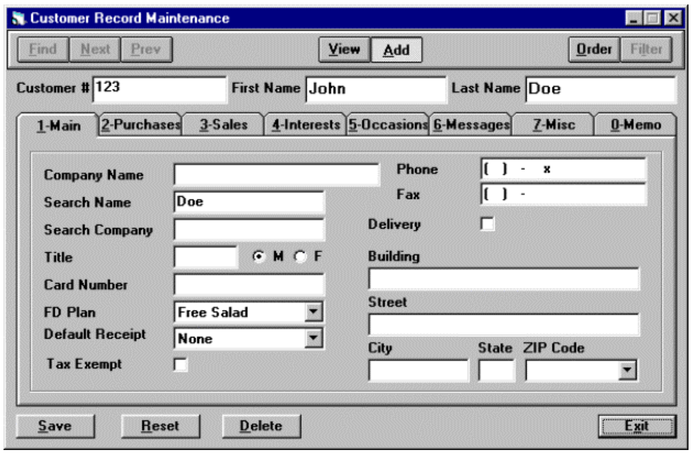
OR Click **Exit** to save the change(s) and close the current window.

Creating Customer Records

You can now enroll new customers in your "Free Salad" frequent dining plan. You can enter new customer information either at the POS or in the Back Office by way of the Customer Record Maintenance window.

To Add a Customer Record

1 On the **Customers** menu, click **Customer Records**.



2 Click **Add**.

3 Type a customer ID number in the **Customer #** box, then press the TAB key.

4 In the **First Name** box, type “John” and press the TAB key.

5 In the **Last Name** box, type “Doe” and press the TAB key.

6 In the **FD Plan** list, click **Free Salad**.

7 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

You have just created a customer record for “John Doe” and enrolled him in the “Free Salad” frequent dining plan.

Digital Dining Setup Requirements

You have successfully created a new frequent dining plan, created a new reward coupon for the plan, and enrolled a new customer into the plan. But you still can’t use the Frequent Diner/Delivery program at the POS. To do that, you must create a Frequent Diner check option in the Digital Dining Setup program and then add that check option to a window of check options.

Frequent Diner Check Option

Like all Digital Dining check options, you must create the Frequent Diner check option in the Check Option Maintenance window of the Digital Dining Setup program (for more information on check options, see the *Digital Dining Setup User's Guide*).

To Open the Setup Program

1. On the Taskbar, click **Start** and point to **Programs**.
2. Point to **Digital Dining** and then click **Setup**.
3. In the **Name** box, type your Digital Dining access name.
4. Press the TAB key and then type your password.
5. Click **OK**.

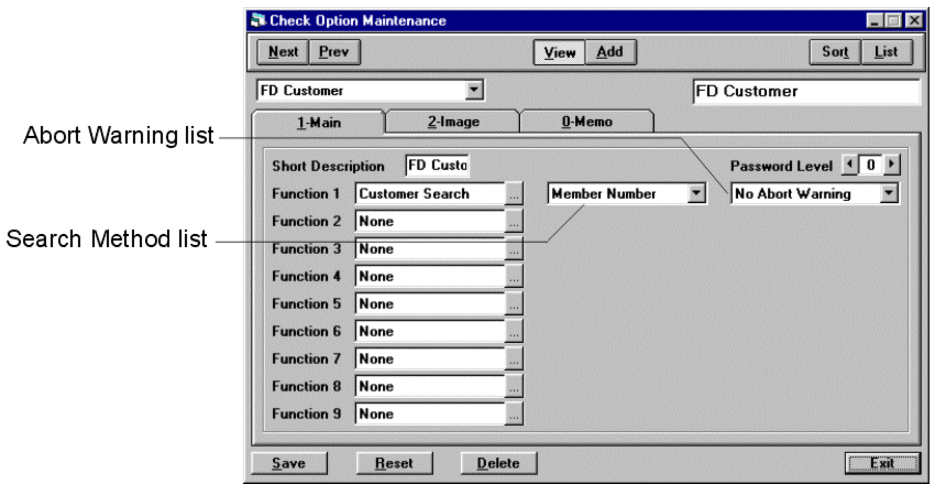
Note

Your System Administrator assigns passwords based upon your position title. Access rights to the program are defined by position titles. For more information, please refer to the *Digital Dining Setup User's Guide* or your System Administrator.

To Add a Frequent Diner Check Option

1 On the **Misc** menu, click **Check Options**.

2 Click **Add**.



3 In the **Item Description** box, type "FD Customer" and then press the TAB key. The first eight letters of this description will automatically appear in the **Short Description** box.

4 In the **Function 1** list, click ....

5 In the Find Function window, click **Customer Search**, then click **OK**.

6 In the **Search Method** list, click **Member Number**.

7 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

You have just created a check option with a customer search function. Thanks to this search function, when you (or your staff) use the Frequent Diner/Delivery program at the POS, you can run a search for an existing customer file. By selecting **Member Number** in the **Search Method** list, you have told the program to search for customer member ID numbers when running a search. At the POS, you will enter a customer's member number, and the program will search for a record with that member number. If the program cannot find the customer's member number, it will assume that the customer is new and will prompt you to create a new customer record. Had you selected a different search method (such as phone number), then you would enter a customer's phone number at the POS .

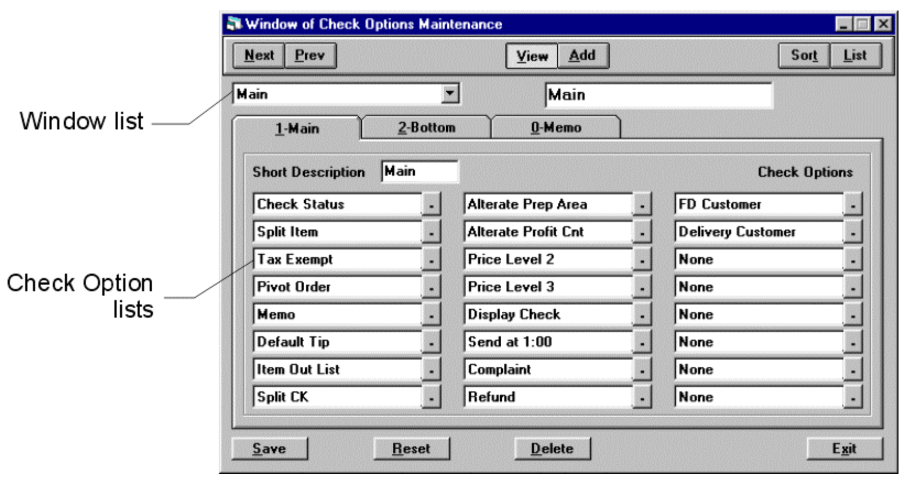
Frequent Diner Window of Check Options

Now that you have created a Frequent Diner check option, you must add it to a window of check options. You can either add it to an existing window of check options or create a new window of check options. For this tutorial, you will simply add the Frequent Diner check option to an existing window of check options.

Most restaurants will have a primary window of check options, typically named "Main." In this tutorial, you will add the Frequent Diner check option to a "Main" window of check options. You can use this procedure to add the Frequent Diner check option to any existing window of check options in the Digital Dining Setup program (for more information on editing windows of check options, see the *Digital Dining Setup User's Guide*).

To Add a Frequent Diner Check Option to a Window of Check Options

1 On the **Windows** menu, click **Check Option Window**.



2 In the **Window** list, click **Main**.

3 Find a **Check Option** list set to **None**, and click .

4 In the Find Check Options window, click **FD Customer** and then click **OK**.

5 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

The POS will now display “Frequent Diner” as one of your check options.

Frequent Diner Customer check option

You can now use the Frequent Diner/Delivery program to create and/or update customer records at the POS (for more information, see “Frequent Diner at the POS” on page 191).

Delivery Basics

Overview

In addition to providing frequent diner rewards to your customers, you can also use the Digital Dining Frequent Diner/Delivery program to provide prompt and efficient delivery service to your customers. Whether your business is primarily delivery-based (such as a pizza delivery service) or both dine-in and delivery, our program can help you organize and operate your deliveries with a maximum of efficiency and a minimum of confusion.

In essence, the Frequent Diner/Delivery program is a single tool that you can use in two different ways. In spite of their obvious differences, both frequent diner and delivery services have one critical feature in common: a customer database. Both services require that you record individual customer information, but each service uses that information for very different purposes. A frequent diner service uses this information primarily for marketing, whereas a delivery service uses it to reduce delivery time as much as possible. For either service, you use the same maintenance windows to create your customer and setup records. However, these two services function very differently at the Point of Sale.

While you can use the Frequent Diner/Delivery program for very different purposes, the frequent diner and delivery services are not mutually exclusive. Since both of them use the same database, you can use the Frequent Diner/Delivery program to offer frequent diner service, delivery service, or both together.

In this chapter, we will discuss the basic concepts behind a delivery service. If you already offer delivery service to your customers or are considering offering such a service, this chapter will suggest how to make your service as efficient as possible. We will also discuss the general process of setting up a delivery service, as well as some of the different ways you might use it.

Delivery Order Life Cycle

The "life cycle" of a delivery order usually follows a typical pattern:

- The order taker (or dispatcher) takes a customer's call and records the order and, if it is a new customer, the telephone number and address.
- The order taker sends the order to the cook.
- The order taker assigns the order (or a group of orders) to a driver (unless the order taker is also the driver).
- The driver takes the order and address and makes the delivery.
- The driver returns and pays the register.

In a delivery business, the priority is speed and accuracy. Any tool that reduces the time between taking the call and delivering the order is valuable. Digital Dining reduces the necessary time at several phases of the delivery order cycle. We will discuss these phases in order and suggest methods to speed your deliveries without compromising your efficiency.

Take the Order

The cycle begins when a customer calls your restaurant and places an order. Your dispatcher takes the customer's order, telephone number, address, and any other important information. Digital Dining offers several ways to quicken this process.

If this call is from a first-time customer, the dispatcher must enter this data into the program, creating a new customer record. The dispatcher usually types this information manually at the Point of Sale, but the Frequent Diner/Delivery program can accelerate this task by assigning default area codes, phone exchanges, and/or delivery zones. You can also associate cities, states, and zip codes to specific phone exchanges.

If this customer calls again, the dispatcher will already have their telephone number and address, and can perform a quick search based on the customer's phone number. The program will immediately display the customer's record, which the dispatcher can simply verify.

You might prefer to use an even quicker tool, a Caller ID unit. With a Caller ID unit, you have the caller's telephone number immediately. You can set your program to take the telephone number directly from your Caller ID, saving the dispatcher the time and effort of entering the data. The dispatcher can simply confirm that the information is accurate.

If a previous customer calls again, the program can run a search immediately when your dispatcher takes the call. You will already have the contact information, as well as the customer's last order. If this particular customer tends to order the same items, you can use the Reorder option to reorder the previous menu items automatically.

Note If you are interested in using Caller ID with Point of Sale, contact your dealer for more information.

The default and Caller ID features help reduce the time spent typing customer data when you or your dispatcher take a call. The sooner you have this information, the sooner you can have the order prepared and delivered.

Assign the Order to a Driver

After your cooks prepare an order, someone must deliver it. You have several ways of streamlining this process. For one, you can divide the duties. You can have one person working as a dispatcher, taking the calls, handling the POS, and assigning orders to drivers. A dispatcher can then find multiple orders in the same general area, and assign them to a single driver. This method is often more efficient than allowing drivers to decide for themselves which orders they wish to take. Overzealous drivers might choose to take orders that cover a wider area, requiring more driving time. A dispatcher can prevent this.

You can also give the dispatcher the power to print checks only after assigning them to a certain driver. You can set your register to print a prep ticket to the kitchen immediately after the order is taken, but print the check only upon assignment. By using such a system, the drivers cannot take an order that is not assigned to them by the dispatcher.

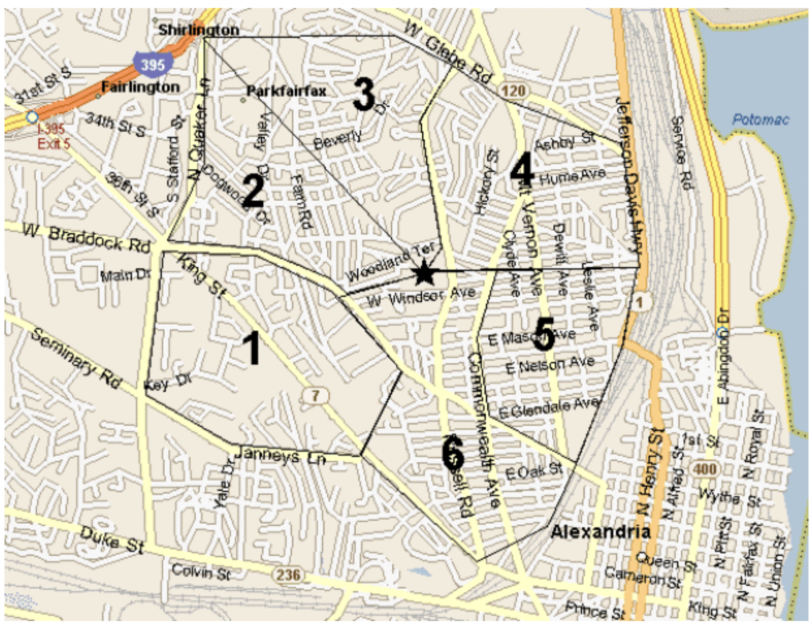
Delivery Zones

Typically, the most time-consuming element of the delivery cycle is the actual delivery of the order. You can diminish wasted delivery time by using delivery zones.

A delivery zone is a geographic area, defined by you before using the program. A driver can deliver multiple orders within a single delivery zone in a reasonable amount of time. You must do some preliminary work to create and use delivery zones, but by doing so, you can maximize your drivers' efficiency.

To define your delivery zones, take a map of the area surrounding your business. Draw a rough circle designating the limits of your delivery service. Most businesses define their limits by estimated drive time, rather than strict distance. For instance, you might offer delivery service only to customers within an eight-minute driving range. These limits will vary, of course, but most businesses limit their service to a five-to-ten minute drive radius. You may need to send drivers to different locations, timing their runs, to better decide the limits of your service.

After you draw the limits of your service area on your map, divide this circle into maybe six or eight smaller zones. You can divide them by specific subdivisions, neighborhoods, city blocks, or however is most effective for your needs. You should also label these separate zones, by name or number. Once you define your zones and label them on a map, you can enter them in the Frequent Diner/Delivery program. You should probably display this map in your work area, where your drivers can refer to it easily.



Once you define your delivery zones and enter them into the program, you can associate them with new customer files. When new customers call, you can record their phone number and address, and then assign a delivery zone to them. In the future, you will know exactly which zone they are in.

You can view a list of all the orders going to a single zone and assign those orders to a single driver. Your drivers will no longer need to drive to different parts of town to deliver multiple orders. If business is slower, with few orders assigned to any individual zones, you can widen your scope. You can view a list of orders going to several adjacent zones (for example, Zones 2, 3, and 4) and assign all of those orders to a single driver.

Pay the Register

When your drivers return from delivering their orders, they must eventually cash in at the Point of Sale. If they have just delivered many orders, they may have many checks to cash in, requiring a lot of time on the POS to do so.

You can speed this process by using the Pay Driver Run function. With the Pay Driver Run function, the POS can tally a sum for a driver's orders. The driver can then pay this single sum to the POS. This feature effectively combines a driver’s multiple checks into a single check, while still storing information on the separate checks. Drivers can now pay the POS for a batch of checks in a fraction of the time required to pay for each check individually.

Furthermore, you could use the Pay Driver Run feature to total some, but not all, of a driver’s checks. For instance, drivers can total all their orders paid by cash and check, pay that single total, and then individually pay all their credit card orders. If you require your drivers to pay their checks or credit card orders separately, they can pay their cash orders at once. They can select from a list of their orders which to total and which to exclude.

Setting Up a Delivery Service

Overview

Before you begin setting up a delivery service, we suggest that you read “Delivery Basics” so that you have a better understanding of the different methods of using the delivery service.

You can modify the POS to use the Delivery service in one of two general ways. You can modify an existing quick service register to include a delivery check option, allowing you to designate some—but not all—of your orders as delivery. Or you can create a delivery register definition, which uses the Delivery register type, to designate all of your orders as delivery.

In this chapter, we discuss the basic steps of adding a delivery check option to an existing quick service register. This process includes the following tasks:

- setting the POS Entries window properly
- creating a delivery check option and adding it to an appropriate window of check options
- adding delivery register options to a window of register options
- creating a delivery staff department
- assigning a staff member to a delivery staff department

We will describe these steps in more detail in subsequent chapters. In this chapter, you will walk through a simple tutorial and set up a delivery service.

We will not describe the elaborate process of creating a delivery-only register definition here. If you wish to add a delivery-only register definition to your POS, you should either consult your dealer (who probably created your restaurant’s existing register definitions) or review the *Digital Dining Setup User’s Guide* (which describes how to set up register definitions in more detail).

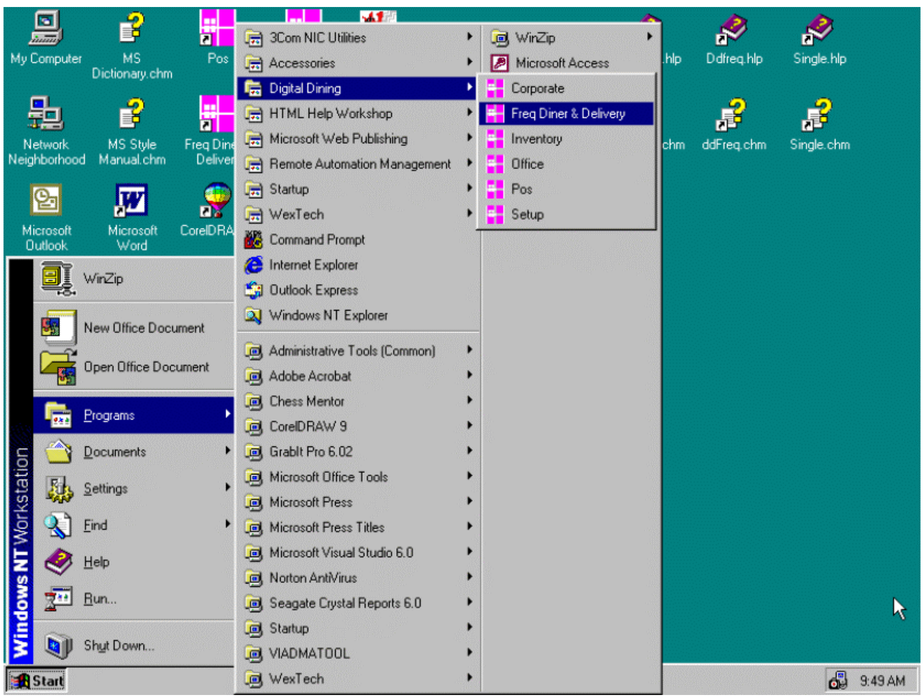
Opening the Frequent Diner/Delivery Program

As with most programs, you can open the Digital Dining programs from the **Start** menu on the Taskbar. Once you open the Frequent Diner/Delivery program, you can set up a delivery system to create and edit customer records.

To Open the Frequent Diner/Delivery Program

1 On the Taskbar, click **Start** and point to **Programs**.

2 Point to **Digital Dining** and then click **Freq Diner & Delivery**.



3 In the **Name** box, type your Digital Dining access name.

4 Press the TAB key and then type your password.

5 Click **OK.**

Note

Your System Administrator assigns passwords based upon your position title. Access rights to the program are defined by position titles. For more information, please refer to the *Digital Dining Setup User's Guide* or your System Administrator.

Setting Up POS Entries for Delivery

The first step in creating a delivery service is to set the POS Entries window properly. The POS Entries window helps you to control how the Frequent Diner/Delivery program functions at the Point of Sale (POS). Most of the POS Entries settings are optional, but a few of them are required for the Frequent Diner/Delivery program to function properly.

The POS Entries window includes two required settings for a delivery service. The first is in the **New Entries** area. You must select one of the three **Entry** options:

- **Full Entry**. If you select this option, the program will require you to enter all of the forced entries when creating a new customer record. You must also manually enter a new member ID at the POS.
- **Quick Entry**. If you select this option, the program will automatically generate a member ID number at the POS.
- **None.** If you select this option, you will not be able to create new customer records at the POS. (This option applies chiefly to frequent diner service, and you should not use it for delivery.)

While you have the option to create customer records either at the POS or the Back Office, delivery service requires that you create and maintain most of your delivery customer records directly at the POS. For this tutorial, you will set the program for Quick Entry.

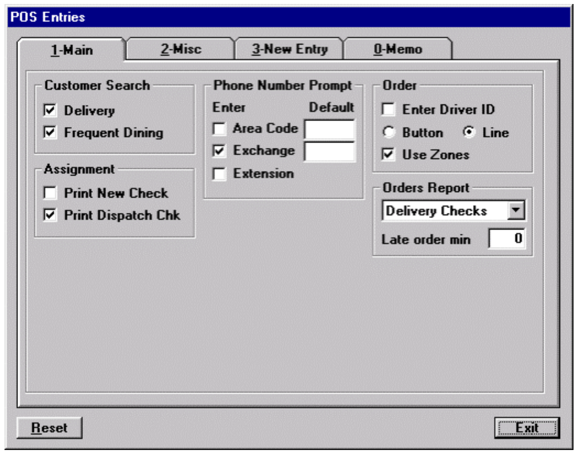
You must also select the **Delivery** check box in the **Customer Search** area. This setting allows the program to conduct customer record searches properly at the POS. The program cannot search the delivery customer records unless you select this check box.

You should also review the **Forced Entries** area. If any of the check boxes in this area are selected, then the program will require that information when you try to enter new customer records. For this tutorial, you should select the **Name, Street Address,** and **Phone Number** boxes, since this information is indispensable for most delivery orders.

To Set the POS Entries Window for Delivery

1 On the **Setup** menu, click **POS Entries**.

2 Click the **Main** tab.



3 In the **New Entries** area, click **Quick Entry**.

4 In the **Customer Search** area, click the **Delivery** check box.

5 In the **Forced Entries** area, click the **Name** check box. Clear any of the other boxes in the **Forced Entries** area if they are selected.

6 Click **Save** to save the changes and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

Digital Dining Setup Requirements

Now that you have set up the POS Entries window for delivery service, you must modify the Digital Dining Setup program to use the delivery service at the POS. To do that, you must first create a Delivery check option in the Digital Dining Setup program and then add that check option to your main window of check options. You must also add two Delivery register options to your main window of register options.

Delivery Check Option

Like all Digital Dining check options, you must create the Delivery check option in the Check Option Maintenance window of the Digital Dining Setup program (for more information on check options, see the *Digital Dining Setup User's Guide*).

To Open the Setup Program

1. On the Taskbar, click **Start** and point to **Programs**.
2. Point to **Digital Dining** and then click **Setup**.
3. In the **Name** box, type your Digital Dining access name.
4. Press the TAB key and then type your password.
5. Click **OK**.

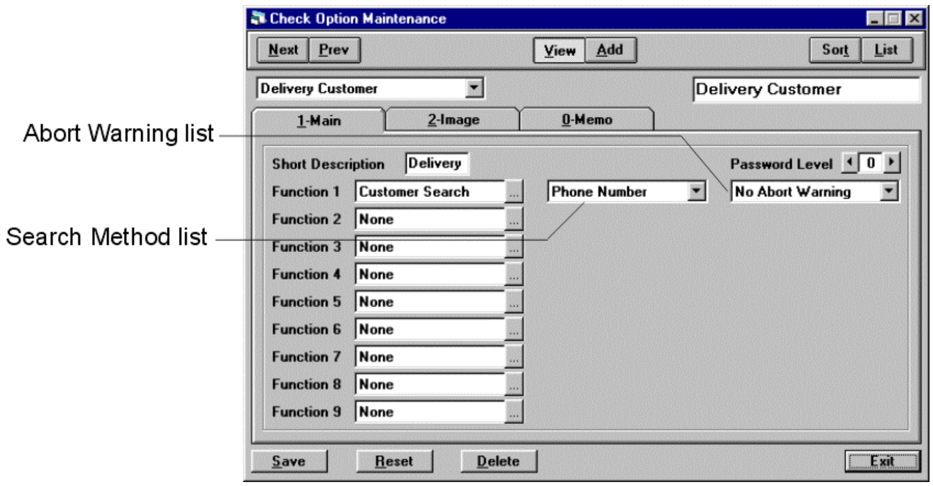
Note

Your System Administrator assigns passwords based upon your position title. Access rights to the program are defined by position titles. For more information, please refer to the *Digital Dining Setup User's Guide* or your System Administrator.

To Add a Delivery Check Option

1 On the **Windows** menu, point to the **Check Options Maintenance** submenu, then click **Check Option Definition**.

2 Click **Add**.



3 In the **Item Description** box, type "Delivery Customer" and then press the TAB key. The first eight letters of this description will automatically appear in the **Short Description** box.

4 In the **Function 1** list, click ....

5 In the Find Function window, click **Customer Search**, then click **OK**.

6 In the **Search Method** list, click **Phone Number**.

7 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

You have just created a check option with a customer search function. Thanks to this search function, when you (or your staff) use the Frequent Diner/Delivery program at the POS, you can run a search for an existing customer file. By selecting **Phone Number** in the **Search Method** list, you have told the program to search for a telephone number when running a search. At the POS, you will enter a customer's telephone number, and the program will search for a record with that phone number. If you enter the customer's phone number and the program cannot find it, the program will assume the customer is new and will prompt you to create a new customer record. Had you selected a different search method (such as search name), then you would enter a customer's search name at the POS.

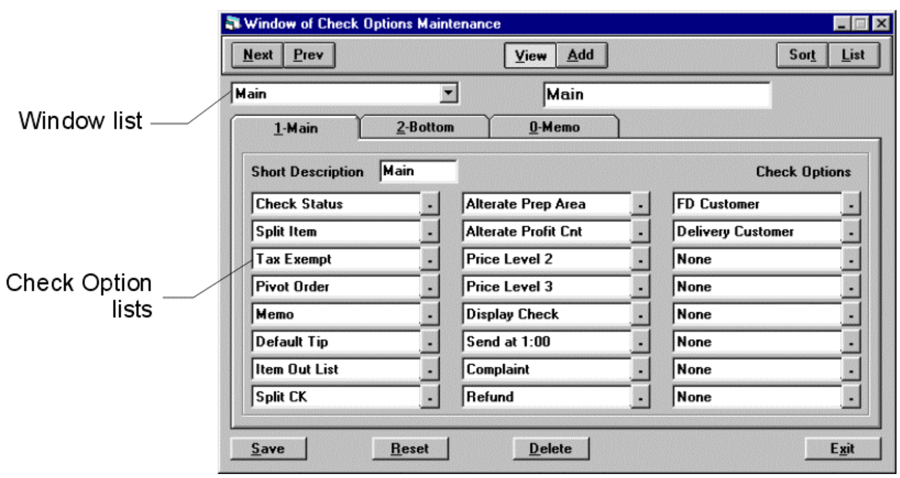
Delivery Window of Check Options

Now that you have created a Delivery check option, you must add it to a window of check options. You can either add it to an existing window of check options or create a new window of check options. For this tutorial, you will add the Delivery check option to a new window of check options.

Most restaurants will have a primary window of check options, typically named "Main." In this tutorial, you will add the Delivery check option to a "Main" window of check options. You can use this procedure to add the Delivery check option to any existing window of check options in the Digital Dining Setup program (for more information on editing windows of check options, see the *Digital Dining Setup User's Guide*).

To Add a Delivery Check Option to a Window of Check Options

1 On the **Windows** menu, point to the **Check Options Maintenance** submenu, then click **Check Option Window**.



2 In the **Window** list, click **Main**.

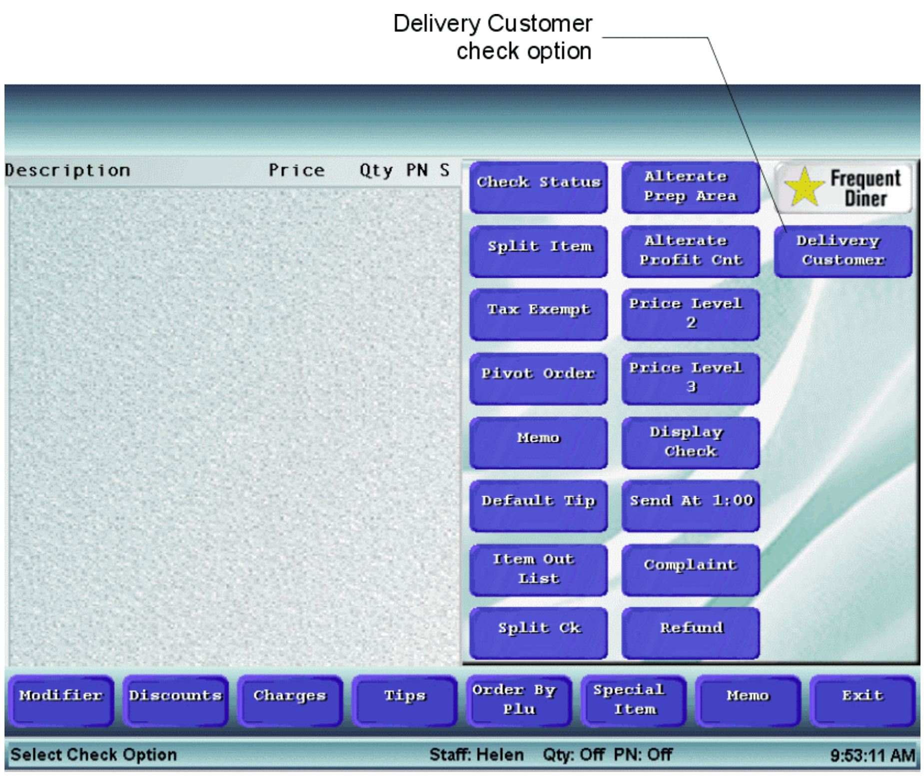
3 Find a **Check Option** list set to **None**, and click .

4 In the Find Check Options window, click **Delivery Customer** and then click **OK**.

5 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

The POS will now display "Delivery Customer" as one of your Check Options.



Delivery Window of Register Options

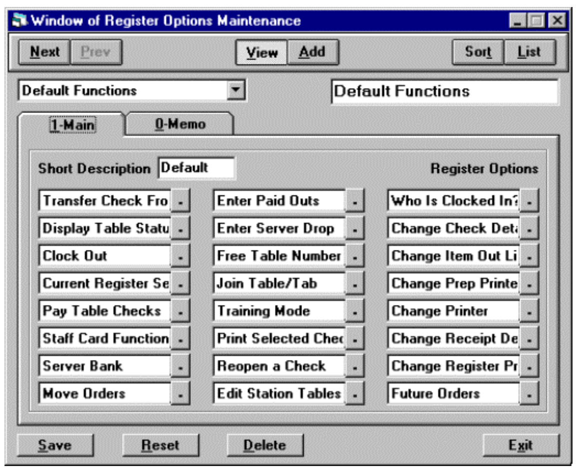
You also need to create a new window of register options devoted to your delivery service. Unlike the Frequent Diner program, Delivery includes many special register options. Of the various Delivery-specific register options, we will discuss the two that are indispensable to any delivery service: **Driver Select** and **Pay Driver Run**. The **Driver Select** register option allows a server or dispatcher to assign an order to a driver. The **Pay Driver Run** register option allows returning drivers to pay their check(s) quickly at the POS (for more information, see "Pay Driver Run" on page 187).

In this tutorial, we will add the required Delivery register options to an existing window of register options. You could also create a new window of register options. If your restaurant is not primarily delivery-oriented and you have a dine-in area, you might wish to create a register devoted to your dine-in business and another devoted to delivery. However, most restaurants use a main register, and will add Delivery register options to a main window of general register options.

To Add a Delivery Window of Register Options

1 On the **Windows** menu, point to the **Register Options Maintenance** submenu, then click **Register Option Window**.

2 Click **View**, and select your main window of register options.



3 Find a **Register Option** list set to **None**, and click

4 In the Find Register Options window, click **Driver Select** and then click **OK**.

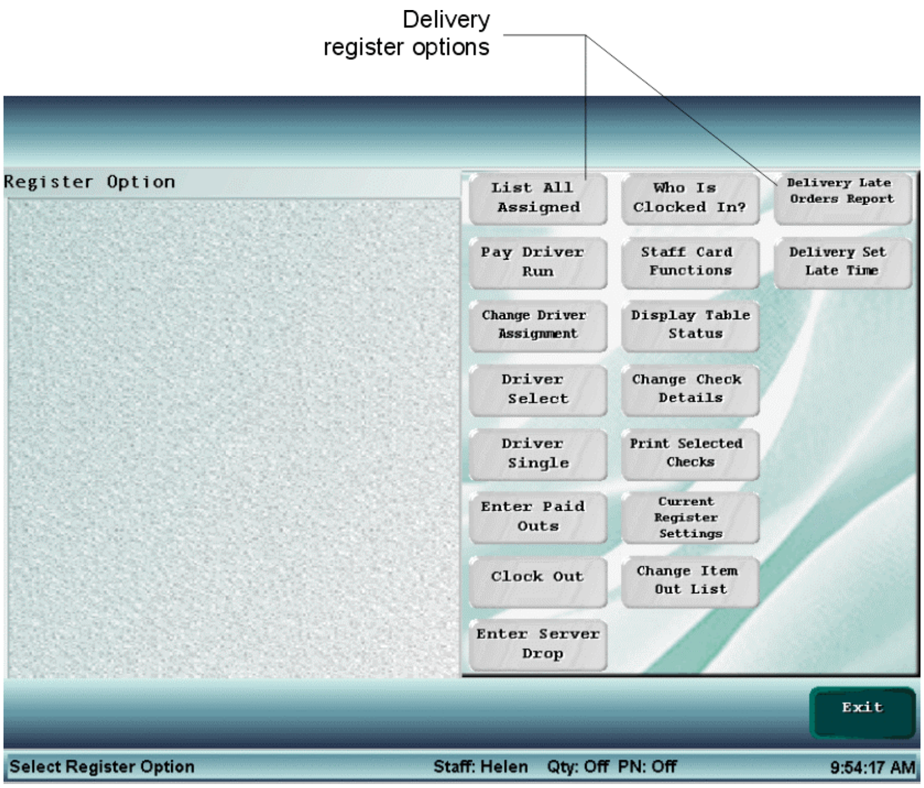
5 Find another **Register Option** list set to **None**, and click .

6 In the Find Register Options window, click **Pay Driver Run** and then click **OK.**

7 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

You have now added both the **Driver Select** and **Pay Driver Run** register options to your main window of register options. When you access this window of register options at the POS, the **Driver Select** and **Pay Driver Run** buttons will appear.



Digital Dining Back Office Requirements

To use the delivery service at the POS, you must also modify the Digital Dining Back Office program. You must create a staff department for your drivers, and you must assign one or more members of your staff to that department.

Staff Department Maintenance

You have two ways of creating a driver staff department. You can create a new staff department and designate it as a driver department, or you can modify an existing staff department and designate it as a driver department. For this tutorial, you will simply create a new staff department. You can modify any of your other staff departments later, if you wish (for more information on staff departments, see the *Digital Dining Back Office User's Guide*).

The Staff Department Maintenance window of the Digital Dining Back Office program features a **Driver Department** check box. Using this check box, you can designate any staff department as a driver department. If your restaurant is primarily a delivery service (such as a pizza delivery service), you will probably want to create a driver department and a dispatcher (or order-taker) department. However, if your restaurant offers delivery as a sideline service, you may wish to designate other non-delivery staff departments as driver departments. By doing so, you can assign delivery orders to staff members whose duties are not *primarily* delivering orders.

To Open the Back Office Program

1 On the Taskbar, click **Start** and point to **Programs**.

2 Point to **Digital Dining** and then click **Office**.

3 In the **Name** box, type your Digital Dining access name.

4 Press the TAB key and then type your password.

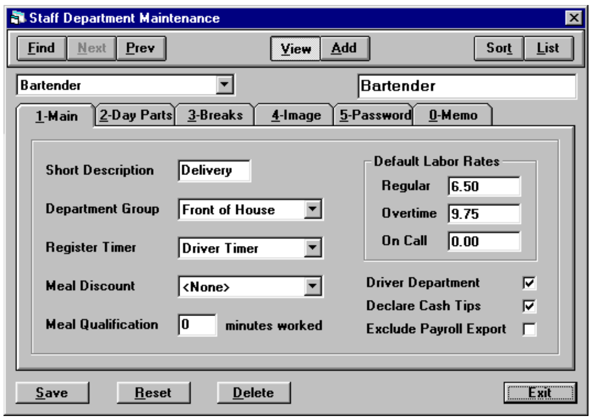
5 Click **OK**.

Note Your System Administrator assigns passwords based upon your position title. Access rights to the program are defined by position titles. For more information, please refer to the *Digital Dining Setup User's Guide* or your System Administrator.

To Add a Delivery Staff Department

1 On the **Staff** menu, point to **Staff Setup**, then click **Staff Departments**.

2 Click **Add**.



3 In the **Item Description** box, type "Delivery Driver" and then press the TAB key. The first eight letters of this description will automatically appear in the **Short Description** box.

4 Click the **Driver Department** check box.

5 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

Staff Member Maintenance

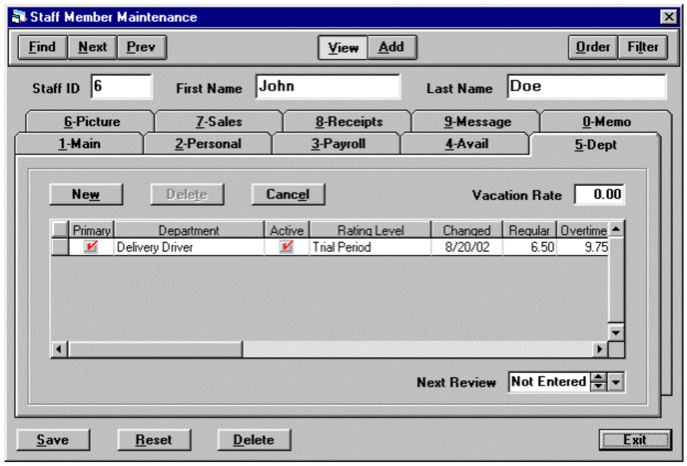
You have just created a new staff department devoted to delivery drivers. Now you can assign staff members to this department. To do so, you must access the Staff Member Maintenance window in the Digital Dining Back Office program and assign staff members to any department which you have designated as a "Driver Department." In this tutorial, you will create a new staff member and assign him to the "Delivery Driver" staff department that you have just created (for more information, see the *Digital Dining Back Office User's Manual*).

To Assign Staff Members as Delivery Drivers

1 On the **Staff** menu, click **Staff Members**.

2 Select an existing staff member from the **Staff Member** list.

3 Click the **Dept** tab.



4 In any of the **Department ID** lists, click **Delivery Driver**.

5 Click **Save** to save the change(s) and keep the current window open and active.

OR Click **Exit** to save the change(s) and close the current window.

You have just assigned one of your staff members to the "Delivery Driver" staff department. Now, at the POS, when you or your dispatcher access a list of available drivers, this staff member's name will appear on the list.

Complaints

Overview

The Frequent Diner/Delivery program includes a series of windows that allow you to record and track customer complaints, as well as offer compensation to dissatisfied customers. You can use these complaint functions with either frequent diner or delivery service.

The Frequent Diner/Delivery program includes three complaint windows, each of them featured in a different menu:

- Complaint Reason Maintenance window (featured in the **Setup** menu)
- Complaint Coupon Maintenance window (featured in the **Layouts** menu)
- Complaints Reports Maintenance window (featured in the **Reports** menu)

We will briefly discuss how the different complaint windows relate to one another, and what modifications you must make to the Digital Dining Setup program to use complaints at the Point of Sale (POS). We discuss each of these windows in more detail in the chapters devoted to their respective menus.

How Complaints Work

The relationship between the complaint windows is fairly simple. You can create several general complaint reasons, such as "overcooked food" or "poor service," in the Complaint Reason Maintenance window. You can then create a complaint coupon for each of your complaint reasons in the Complaint Coupon Maintenance window. You can associate one or more complaint reasons to a single complaint coupon. You can then create a new check option (featuring the "Customer Complaint" function) in the Digital Dining Setup program, enabling you and your staff to access the complaint reasons from the POS.

At the POS, if a customer has a complaint, the server can select the check option containing the "Customer Complaint" function to access a list of all your complaint reasons. The server can then select the appropriate complaint reason, and the POS will print its associated complaint coupon for the customer.

You can use the complaint features with either frequent diner or delivery service, but you can only record complaints and generate complaint coupons for frequent diner and/or delivery customers (that is, customers who have records in your data files). You can review any customer's complaint history in the Customer Record Maintenance window. You can also generate complaint reports that allow you to analyze your complaint information in a variety of ways.

Complaint Reasons

A complaint reason is any reason for customer dissatisfaction. You can create a record for each complaint reason that you want to add to the POS. These files should represent general complaints that are relatively common, such as "overcooked food" or "poor service." Once you create a complaint reason, you can then create a coupon customized to that specific complaint reason. You can also collect information in a complaints reports regarding this complaint reason and the customers making the complaint. You can create complaint reasons in the Complaint Reason Maintenance window, featured in the **Setup** menu (for more information, see "Complaint Reason Maintenance" on page 64).

Complaint Coupons

A complaint coupon is a reward given to a customer as compensation for a complaint. The Complaint Coupon Maintenance window allows you to create layouts for complaint coupons, which you can then associate with a particular complaint reason. If a customer ever makes a complaint that matches one of your complaint reasons, the server can select that complaint reason and the program will automatically print the appropriate complaint coupon.

For instance, if you create a complaint reason for "overcooked food," you could then create a complaint coupon and include a specific apology for overcooked food. Later, if a customer makes this complaint, the staff member handling the order can tap the "overcooked food" complaint button at the POS, and the program will print the "overcooked food" complaint coupon. You can create complaint coupons in the Complaint Coupon Maintenance window, featured in the **Layouts** menu (for more information, see "Complaint Coupon Maintenance" on page 83).

Complaints Reports

Once you have created and used complaints at the POS, you can create a series of complaint reports to help analyze your customer complaint information. Using these reports, you can create detailed lists of complaints to determine if certain complaints are more common than other complaints, or if particular customers are complaining more than other customers. You can also create a list of customers who have made complaints, along with their contact information. These reports can help you pinpoint possible problems, as well as help you decide which complaints are valid and which are not.

You can preview or print complaint reports in the Complaints Reports window, and you can define new complaints reports in the Complaints Report Maintenance window, featured in the **Reports** menu (for more information, see “Complaints Report Maintenance” on page 132).

Digital Dining Setup Requirements

Just like the other check option functions of the Frequent Diner/Delivery program, you must modify the Digital Dining Setup program in order to use the Customer Complaint check option function at the POS. You must create a “Complaints” check option with the Customer Complaint check option function, and then add that check option to a register definition. You and your staff can then record customer complaints and print complaint coupons as compensation.

Customer Complaint Check Option Function

To use the Customer Complaint check option function at the POS, you must create a “Complaints” check option in the Digital Dining Setup program. In the Setup program, open the Check Option Maintenance window of the Digital Dining Setup program. Click **Add** to create a new check option, and then click in any of the **Function** boxes to open the Find Function window. In this window, select **Customer Complaint** and click **OK**. Then click **Save** to save the check option (for more information on check options, see “Check Options and Check Option Functions” in the *Digital Dining Setup User’s Guide*).

Window of Check Options

Once you have created a “Complaint” check option, you can add it to a window of check options. You can either add it to an existing window of check options or create a new window of check options. In the Setup program, open the Window of Check Option Maintenance window of the Digital Dining Setup program. Select the window of check options to which you wish to add the complaint check option. Find an available **Check Option** box and click to open the Find Check Options window. In this window, select the “Complaints” check option that you created in the Check Options Maintenance window and then click **OK**. Then click **Save** to save the window of check options (for more information, see “Window of Check Options” in the *Digital Dining Setup User’s Guide*).

When you or your staff open the Check Options screen in the POS, the “Complaints” check option will display as one of the available check options. Most restaurants will have a primary window of check options, typically named “Main.” You can add a complaints check option to a “Main” window of check options or any other appropriate window of check options in the Digital Dining Setup program.

Setup Menu

Overview

The **Setup** menu contains several maintenance windows which allow you to create files that you can then associate with customer files. Some of these maintenance windows are specific to either frequent diner or delivery service, while some of them are used by both.

The Frequent Diner/Delivery program includes six different maintenance windows:

- Special Occasion Maintenance (Frequent Diner only)
- Special Interest Maintenance (Frequent Diner only)
- Complaint Reason Maintenance (both)
- Phone Exchange Maintenance (both)
- Delivery Zone Maintenance (Delivery only)
- ZIP Code Maintenance (both)

The **Setup** menu also includes the POS Entries window, which can help you control how your staff enters customer information at the POS. The POS Entries also allows you to modify how delivery orders display at the POS. In this chapter, we will discuss each of these windows in detail.

Special Occasion Maintenance

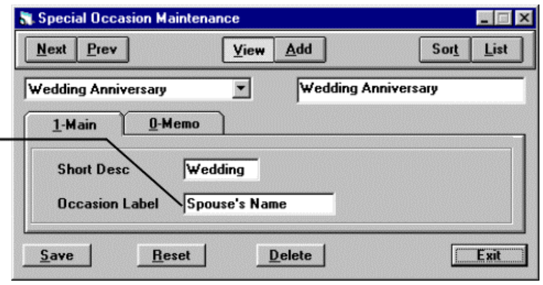
A special occasion is a personal day of celebration, such as a birthday or an anniversary. The Special Occasion Maintenance window allows you to create a list of special occasions, which will appear in the Customer Record Maintenance window. You can create a general special occasion (such as “Birthday”), which you can then associate with multiple customers. The Customer Record Maintenance window can also store specific customer information (such as a precise date) with a general occasion. For example, you can create a special occasion called “Birthday” in the Special Occasion Maintenance window, apply it to several new customer records, and then record their individual birth dates.

Special Occasion Maintenance Window: Main Tab

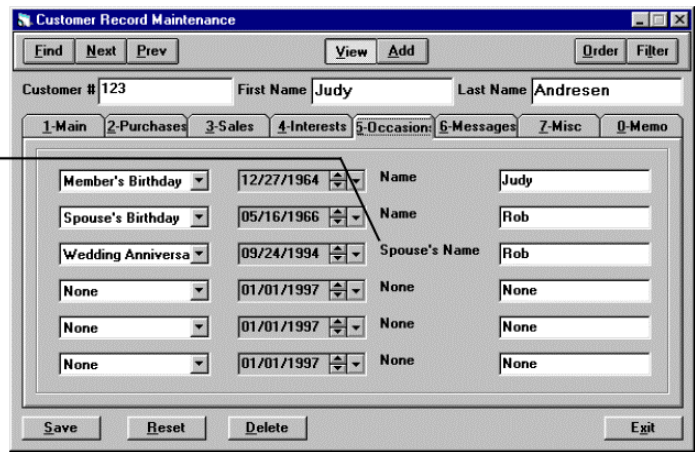
Using the **Main** tab of the Special Occasion Maintenance window, you can create up to 50 special occasions (including “None”). When you enter a special occasion name in the **Item Desc** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Desc** box.

You can also enter a label for a special occasion in the **Occasion Label** box. Later, this label will display when you select this occasion from the **Special Occasions** list in the **Occasions** tab of the Customer Record Maintenance window. This label should specify additional data unique to the customer. For instance, if the special occasion is “Wedding Anniversary,” you might enter an occasion label such as “Spouse’s Name.” Then, when you select “Wedding Anniversary” from the **Special Occasion** list, “Spouse’s Name” will display beside the **Name** box.

The text you enter in the Occasion Label box ...



... will appear as a label with that Special Occasion in the Customer Record Maintenance window.



Special Occasion Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number "0" as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Special Interest Maintenance

A special interest is a social club or organization that you can target for special promotions, such as a Little League team, a Bowling Club, or a local Elk's Club. Using the Special Interest Maintenance window, you can create a list of special interests which will appear in the Customer Record Maintenance window. Using the

Special Interest Maintenance window, you can associate new customer files to specific groups. You could then print a list of all your frequent diner customers associated with that group. With such information, you might wish to mail special promotional material to these specific customers or offer them specialized frequent dining plans.

Special Interest Maintenance Window: Main Tab

Using the **Main** tab of the Special Interest Maintenance window, you can create up to 24 special interests (including "None"). When you enter a special interest name in the **Item Desc** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Desc** box.

Special Interest Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number "0" as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

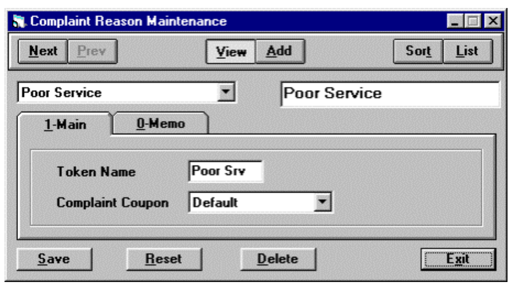
Complaint Reason Maintenance

A complaint reason is any reason for customer dissatisfaction. You can create multiple complaint reasons in the Complaint Reason Maintenance window. Each complaint reason should represent a general complaint, such as "overcooked food" or "poor service."

Complaint Reason Maintenance Window: Main Tab

Using the **Main** tab of the Complaint Reason Maintenance window, you can create up to 24 complaint reasons. When you enter a complaint reason name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Token Name** box.

You can also associate your complaint reasons with specific complaint coupons by selecting an appropriate complaint coupon from the **Complaint Coupon** list. If you do not see a complaint coupon that you want to use for a particular complaint reason, then you can double-click the “Complaint Coupon” label to open the Complaint Coupon Maintenance window. With the Complaint Coupon Maintenance window open and active, you can add or modify your complaint coupons. After you save and close the Complaint Coupon Maintenance window, Digital Dining will make the new or modified complaint coupon available in the **Complaint Coupon** list.



Complaint Reason Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number “0” as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Phone Exchange Maintenance

A phone exchange is the first three digits of a telephone number, following the area code. (For instance, in the telephone number 123-456-7890, "456" is the exchange.) Most telephone companies restrict their telephone exchanges to specific areas. All residents with a common phone exchange will live in the same city, state, and ZIP Code. Therefore, if you know a customer's phone exchange, you can also determine that customer's city, state, and ZIP Code. Typically, you can find a list of local exchanges in any standard telephone directory.

The Phone Exchange Maintenance window is an optional feature, like the ZIP Code Maintenance window. Using it, you can create a list of the phone exchanges most common to your customers. You can associate a phone exchange to a particular city, state, and ZIP Code. Later, if you enter that phone exchange while creating new customer files, the **City**, **State**, and **ZIP Code** boxes will fill in automatically. You will save time and reduce the likelihood of errors. You might find this feature particularly valuable in a Delivery scenario, where quick data entry is essential.

Phone Exchange Maintenance Window: Main Tab

Using the **Main** tab of the Phone Exchange Maintenance window, you can create up to 99 phone exchanges. Type a new phone exchange in the **Phone Exchange** box, and then type the appropriate address information in the **Default City**, **Default Area Code**, and **Default State** boxes.

You can also select an appropriate ZIP Code from the **Default ZIP Code** list. If you do not see a ZIP Code that you want to use for a particular phone exchange, then you can double-click the "ZIP Code" label to open the ZIP Code Maintenance window. With the ZIP Code Maintenance window open and active, you can add or modify your ZIP Codes. After you save and close the ZIP Code Maintenance window, Digital Dining will make the new or modified ZIP Code available in the **ZIP Code** list.

Phone Exchange Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number "0" as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Delivery Zone Maintenance

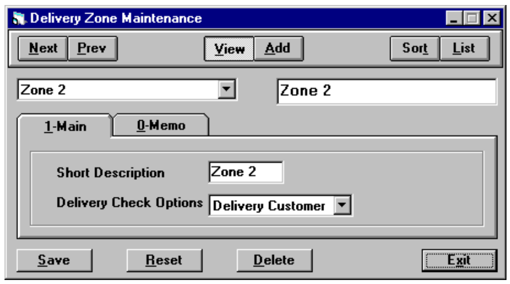
Before using delivery zones, you must plan and create them. First, you should take a map of the area surrounding your business, draw a rough circle outlining the limit of your delivery area (usually equivalent to a drive-time of five-to-ten minutes), and then divide the total delivery area into smaller zones. You should then label these zones (such as "Zone 1," "Zone 2").

By dividing your delivery area into smaller zones, you can maximize your drivers' efficiency. Your dispatcher can assign various orders going to a single delivery zone to a single driver. Or, if there are fewer orders, your dispatcher can assign orders from several adjacent delivery zones (for example, Zones 2, 3, and 4) to a single driver.

Once you have created your delivery zones, you can associate them to customer records. When new customers call your restaurant, you can take their name, telephone number, and address. Based on their address, you can determine which delivery zone they live in. In the future, when these customers call again, you will immediately know which zone they are in (for more information on using delivery zones, see "Delivery Zones" on page 39).

Delivery Zone Maintenance Window: Main Tab

Using the **Main** tab of the Delivery Zone Maintenance window, you can create up to 24 delivery zones. When you enter a delivery zone name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.



Delivery Check Options list

The **Delivery Check Options** list allows you to associate a delivery zone with a check option. If you associate a delivery zone with a check option, the POS automatically associates new customer records with the check option associated with their delivery zones.

For instance, you might associate a delivery zone (“Zone 1”) with a delivery check option (“Delivery Charge”). At the POS, if you create a new customer record and select Zone 1, the POS will automatically associate that customer record with the “Delivery Charge” check option. Furthermore, the POS will run the “Delivery Charge” immediately after you create the new record.

To associate a delivery zone with a check option, select an appropriate check option in the **Delivery Check Options** list. The **Delivery Check Options** list includes all the check options associated with the check option window selected in the **Delivery Check Option Window** list on the **Misc** tab of the POS Entries window (for more information, see “POS Entries Window: Misc Tab” on page 75).

Delivery Zone Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number “0” as its shortcut key.

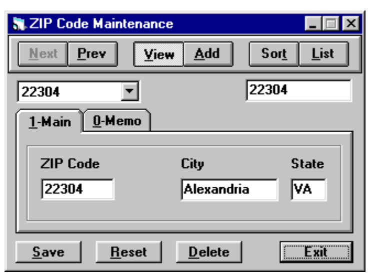
You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

ZIP Code Maintenance

Using the ZIP Code Maintenance window, you can create a list of ZIP Codes that appear in the **ZIP Code** boxes of the Phone Exchange Maintenance and Customer Record Maintenance windows. You can save time entering customer information and reduce the possibility of errors. This feature also allows you to generate reports that sort or filter customer information by ZIP Code. For example, you could print a list of all your frequent diner or delivery customers within a specific ZIP Code. The ZIP Code Maintenance window is an optional feature.

ZIP Code Maintenance Window: Main Tab

Using the **Main** tab of the ZIP Code Maintenance window, you can create up to 24 ZIP Codes. When you type a ZIP Code in the **Item Description** box, the system displays it in the **ZIP Code** box.



You can associate each ZIP Code with a city and state by typing an appropriate city name in the **City** box and state abbreviation in the **State** box. Later, when you create new customer records (either in the Customer Record Maintenance window or at the POS) and select this ZIP Code, the program will automatically add the city and state associated with the ZIP Code to the new customer record without prompting the staff member.

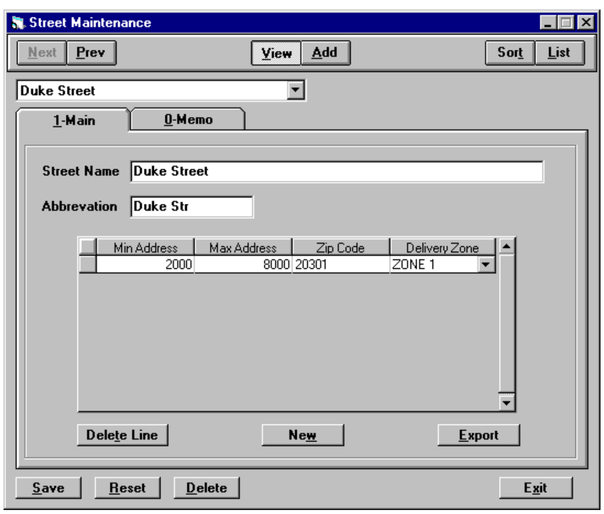
ZIP Code Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number “0” as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Street Maintenance Window

The Street Maintenance window allows you to create records that represent streets within your delivery area. You can also associate these street records with a range of street numbers, a ZIP code, and a delivery zone. Later, when you create new customer records at the POS, you can select a street from a list of street records. When you select a street record, the POS will automatically add the street's associated delivery zone and ZIP code to the new customer record. Furthermore, if you have also associated the ZIP code with a city and state, the POS will also add the city and state to the new customer record. (In other words, when you select a street record at the POS, the POS automatically adds the appropriate delivery zone, city, state and ZIP code to the customer's record.)



To create a street record, click **Add** and then type the street's name in the **Street Name** box. When you enter a street name in the **Street Name** box, the system captures the first eight characters of the name (including spaces) and adds these characters in the **Abbreviation** box.

Street Maintenance Window: Main Tab

The **Main** tab features a grid listing information about the street. In each row, you can set a range of address numbers and select an appropriate delivery zone and ZIP code. (You can add more than one row to a grid if necessary.) To add a row to the grid, click **New**. To remove a row from the grid, select the row you wish to remove and then click **Delete Line**. You can also export the contents of the grid to a report, which you can then print or export in MS Excel or MS Word format, by clicking **Export**.

Min Address box

Type the minimum address number within the delivery area of your restaurant. For instance, you might create a street record called "Main Street", but only deliver from the 2000 block to the 8000 block. In such a case, you would type "2000" in the **Min Address** box.

Max Address box

Type the maximum address number within the delivery area of your restaurant. For instance, you might create a street record called "Main Street", but only deliver from the 2000 block to the 8000 block. In such a case, you would type "8000" in the **Max Address** box.

ZIP Code list

Select the ZIP code of the street. If you do not see the appropriate ZIP code, then you can double-click the "ZIP Code" label to open the ZIP Code Maintenance window. With the ZIP Code Maintenance window open and active, you can add or modify your ZIP codes. After you save and close the ZIP Code Maintenance window, Digital Dining will make the new or modified rating level available in the **ZIP Code** list.

Delivery Zone list

Select the delivery zone of the street. If you do not see the appropriate delivery zone, then you can double-click the "Delivery Zone" label to open the Delivery Zone Maintenance window. With the Delivery Zone Maintenance window open and active, you can add or modify your delivery zones. After you save and close the Delivery Zone Maintenance window, Digital Dining will make the new or modified rating level available in the **Delivery Zone** list.

Street Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text automatically wraps to the next line, just as in most text and word processing programs. The **Memo** tab always has the number "0" as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

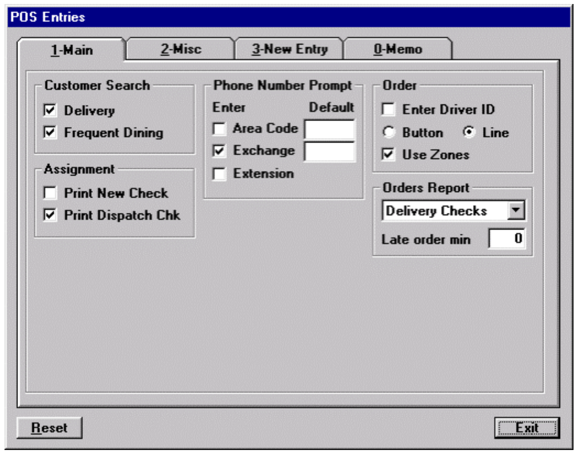
POS Entries Window

The POS Entries window allows you to define how the Frequent Diner/Delivery program operates at the POS. In this window, you will set the program for either frequent diner service, delivery service, or both. You will determine if you or your staff can create new customer records at the POS and (if so) what customer information is required. You can also set several defaults from this window.

The POS Entries window also includes additional functions specific to delivery service. To use delivery zones, you must set the POS Entries window properly. You can set the program to require a driver ID before accepting an order. You can modify the appearance of unassigned orders in the POS. You can set the system to print a copy of each check for the driver. You can set the program to display a list of late orders, which have not been assigned to any available drivers for a certain period of time.

POS Entries Window: Main Tab

The **Main** tab is divided into different areas, and we will examine each of them separately. The **Order**, **Assignment**, and **Order Reports** areas apply only to delivery service and do not affect frequent diner service.



Customer Search area

When you create new customer files, you should designate them as frequent diner customers, delivery customers, or both. You can set the program to search only frequent diner or delivery customers when searching for existing customer files at the POS. If you are only using frequent diner or delivery, then you should select the box that represents the system you are using. If you are using both, then you can select both or exclude either group.

Assignment area

The check boxes in the **Assignment** area allow you to set the program to print additional copies of each check for the driver. The **Assignment** area applies only to delivery service, and does not effect frequent diner service. If you select the **Print New Check** check box, the program will print a new check for your driver when you (or your dispatcher) assigns an order. The program will print two checks: one for the restaurant and one for the driver. If you select the **Print Dispatch Chk** check box, the program will print a dispatch check based on the layout you select in the **Dispatch Check Layout** list (on the **Misc** tab).

Phone Number Prompt area

By using the options in the **Phone Number Prompt** area, you can set the program to require any part of a telephone number when you create new customer files. Also, you can set a default area code or exchange to help save time at the POS.

To set the program to require the area code, exchange, and/or extension, select their respective check boxes. To set a default area code, enter it in the **Area Code Default** box. To set a default exchange, enter it in the **Exchange Default** box.

Note

You can create phone exchange files in the Phone Exchange Maintenance screen that will automatically fill in the **City**, **State**, and **ZIP Code** boxes when you enter a particular phone exchange at the POS or in the Customer Record Maintenance window (for more information, see "Phone Exchange Maintenance" on page 66).

Order area

The **Button** and **Line** options determine how unassigned delivery orders will display at the POS. You must select one of these options. These settings only pertain to delivery service, and do not affect frequent diner service.

Enter Driver ID. If you select this box, the program will require that you (or your dispatcher) assign a driver to each order. The program will display a list of available drivers, from which you can choose. You must select a driver ID from this list before placing the order.

Button. If you select this option, unassigned delivery orders will display as buttons on the Selection panel of the POS. The dispatcher can tap these buttons and then tap the **Assign** button to assign the orders to available drivers.

Line. If you select this option, unassigned delivery orders will display as lines of text in the display area of the POS. The dispatcher can tap these lines and then tap the **Assign** button to assign the orders to available drivers.

Use Zones. You must select this check box to use delivery zones. If you do not wish to use delivery zones, you should verify that this box is not selected. This check box affects the appearance of both the POS Entries and Customer Record Maintenance windows.

Orders Report area

The **Orders Report** area allows you to set up a Delivery Late Orders Report, which you can view at the POS. A Late Orders Report is a list of orders that have not been assigned to a driver for a specified amount of time. To use a Late Orders Report at the POS, you must

- Select your delivery check layout in the **Orders** list of the POS Entries window,
- Decide how many minutes an order must go unassigned before being considered late and enter that number in the **Late Order Min** box of the POS Entries window,
- Add the Delivery Late Orders Report register option to your primary window of register options in the Digital Dining Setup program.

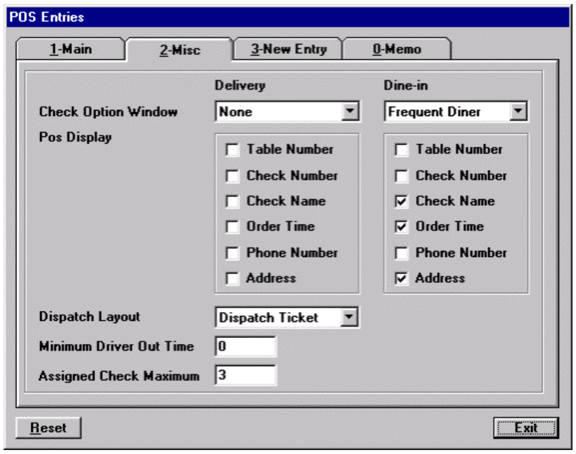
Once you have set up your Delivery Late Orders Report, you can view the Late Orders Report at the POS whenever necessary. The report will list any unassigned orders that are older than the designated time limit.

Orders Report. You should select the layout of your delivery check in the **Orders Report** list. By doing so, you will be able to view the checks of late orders appearing in the Late Orders Report. All of the check layouts created in the Digital Dining Setup program will appear in this list (for more information, see “Check Layouts” in the *Digital Dining Setup User’s Guide*).

Late Order Min. You should enter the number of minutes that must pass before an order is considered late. For instance, you might enter a **Late Order Min** of “10” (ten minutes). Later, at the POS, if you select the Late Orders Report option, the program will display a list of all orders that have been unassigned for ten or more minutes.

POS Entries Window: Misc Tab

The **Misc** (Miscellaneous) tab of the POS Entries window allows you associate special check options with individual customer records, as well as set a minimum driver delivery time and a maximum number of orders assigned to a driver. You can also select a check layout that will print at the POS specifically for delivery drivers.



The **Delivery Check Option Window** and **Dine In Check Option Window** lists allow you to associate special check options with individual customer records. You can create special check options in the Digital Dining Setup program to use with the Frequent Diner/Delivery program. You can then put these new check options into one or more windows of check options. Having created a window of special check options, you can then select this window of check options in either the **Delivery** or **Dine In Check Option Window** lists.

If you select a window of check options in the **Delivery Check Option Window** list, all of the check options in that window of check options will appear in the **Delivery Check Option** list of the **Misc** tab of the Customer Record Maintenance window. Likewise, if you select a window of check options in the **Dine In Check Option Window** list, all of the check options in that window of check options will appear in the **Dine In Check Option** list of the **Misc** tab of the Customer Record Maintenance window. The **Delivery** and **Dine In Check Option** lists allow you to associate certain check options to specific Delivery and/or Frequent Diner customers. If you associate a customer record with a check option, the program will perform this check option when you take an order from this customer at the POS (for more information, see “Customer Record Maintenance Window: Misc Tab” on page 107).

POS Display area

The **POS Display** area allows you to customize how unassigned delivery orders display at the POS by selecting what information displays on the buttons that represent unassigned orders. The **POS Display** area includes six check boxes, each representing different information about an order. You can select up to three of these check boxes. Later, at the POS, the program will label each button representing an unassigned order with the information you have selected.

You can add any of the following selections:

- Table Number (the table number associated with the order)
- Check Number (the check number associated with the order)
- Check Name (the name of the customer)
- Order Time (the time that the order was taken)
- Phone Number (the phone number of the customer)
- Address (the address of the customer)

Dispatch Layout list

If you select a layout from the **Dispatch Layout** list, the POS will print this check for your delivery drivers. The **Dispatch Layout** list contains all of the check layouts you create in the Check Layout Maintenance window of the Setup program. This list allows you to create and print a customized dispatch check specifically for your delivery drivers. To set the Frequent Diner/Delivery program to print this dispatch check at the POS, click the **Print Dispatch Chk** check box in the **Assignment** area of the **Main** tab.

Minimum Driver Out Time box

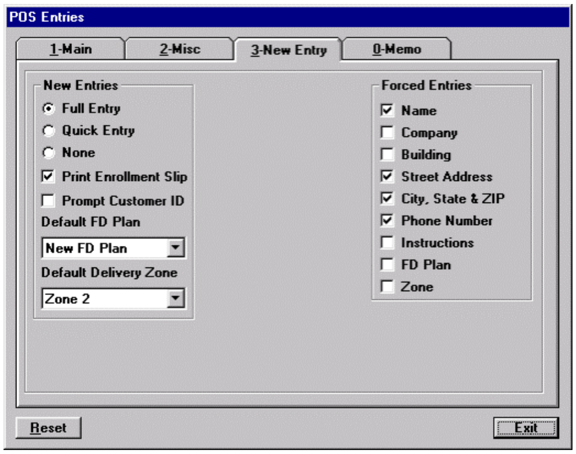
You can also set a minimum delivery time for your drivers by typing a number of minutes in the **Minimum Driver Out Time** box. If a driver returns from a delivery and logs in before the time specified in the **Minimum Driver Out Time** box, the POS will ask the driver if the orders were delivered.

Assigned Check Maximum box

You can set a maximum number of orders to be assigned to a single driver by typing the maximum number in the **Assigned Check Maximum** box. If a dispatcher tries to assign more than this maximum number of items to a single driver, the POS will prompt for a manager's password.

POS Entries Window: New Entry Tab

The **New Entry** tab allows you to set how staff members create new customer records at the POS and what information the new customer records require.



New Entries area

The **New Entries** area allows you to determine how staff members create new customer records. The **Full Entry**, **Quick Entry**, and **None** options determine if you (or your staff members) can create new customer records at the POS. If you select the **Full Entry** option, you can create new customer records at the POS. The POS will require any information that you have set as "forced" in the **Forced Entries** area. The POS will also select an available customer ID number, which you can accept or replace. If you select the **Quick Entry** option, you can create new customer records at the POS. When you tap the **New Customer** button in the POS, the program will automatically create a new customer record with an available customer ID number, without any information about the customer. You can edit the record at the POS, as needed. If you select the **None** option, the POS won't allow you to create new customer records at the POS. You can create new customer records exclusively in the back office (in the Frequent Diner/Delivery program).

Note

If you select the **Quick Entry** option, the program will *not* require any information set as "forced" in the **Forced Entries** area when you create new customer records in the POS. However, the program will still require "forced" information if you create new records in the Customer Record Maintenance window.

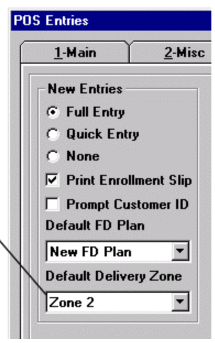
The **Print Enrollment Slip** check box allows you to set the POS to print enrollment slips for new enrollees. If you select the **Print Enrollment Slip** check box, the POS will print an enrollment slip when you create a new customers record at the POS. You can then give this slip to the newly enrolled frequent diner customer.

The **Prompt Customer ID** check box allows you to set the POS program to prompt staff members for customer ID numbers for new enrollees. If you select the **Prompt Customer ID** check box, the POS will prompt the staff member to enter a customer ID number when creating a new customer record. If you clear the **Prompt Customer ID** check box, the POS does not prompt the staff member to enter a customer ID number. (Regardless of the **Prompt Customer ID** setting, the POS does not prompt for a customer ID number if you select the **Quick Entry** option.)

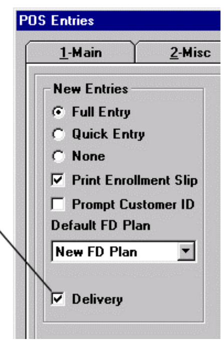
The **Default FD Plan** list allows you to set a default frequent dining plan for new enrollees. Select a default plan from the **Default FD Plan** list, which includes all the frequent dining plans you've created in the Frequent Dining Plan Maintenance window.

The **Delivery** check box and **Default Delivery Zone** list allow you to set the POS to designate new enrollees as delivery customer by default. The **Default Delivery Zone** list only appears if you set the program to use delivery zones (by selecting the **Use Zones** check box on the **Main** tab). The **Delivery** check box only appears if you set the program to not use delivery zones (by clearing the **Use Zones** check box on the **Main** tab).

If you select the Use Zones check box on the Main tab, the Default Delivery Zone list displays.



If you clear the Use Zones check box on the Main tab, the Delivery check box displays.



If you use delivery zones, you can use the **Default Delivery Zone** list to set the POS program to offer a default delivery zone when you create new customer records at the POS. You can select the default zone from this list, which will include all the delivery zones you've created in the Delivery Zone Maintenance window.

If you do not use delivery zones, you can use the **Delivery** check box to set the POS program to automatically designate new customer records as delivery customers. If your restaurant is a delivery service (such as a pizza delivery restaurant), then all of your records will be delivery customers and you should probably check this box.

Forced Entries area

The **Forced Entries** area features a list of many of the boxes from the Customer Record Maintenance window. By selecting any of these check boxes, you are setting the program to demand this information whenever you create new customer files, either in the POS or in the Back Office. For instance, if you select the **Phone Number** check box and then try to save a new customer file without entering a phone number, the program will display an error message and require that you enter a phone number for the customer.

You can force any of the following information:

- Name
- Company
- Building
- Street Address
- City, State, & ZIP Code (the POS will require all three)
- Phone Number
- (Delivery) Instructions
- Frequent Dining Plan
- Delivery/Delivery Zone

POS Entries Window: Memo Tab

POS Entries also has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number “0” as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Layouts Menu

Overview

A layout is a template for printed items, such as checks, receipts, prep tickets, coupons, or status reports. If you have been using the Digital Dining Setup program, then you are probably familiar with using layouts for more common documents (checks, receipts, prep tickets).

The **Layouts** menu includes three layout maintenance windows:

- Reward Coupon Maintenance (Frequent Diner only)
- Complaint Coupon Maintenance (both)
- Status Report Maintenance (Frequent Diner only)

In this chapter, we will discuss each of these windows in detail. For information on the tokens relating specifically to the Frequent Diner/Delivery layouts, see the *Digital Dining Setup User's Guide*.

Reward Coupon Maintenance

To encourage customers to join your frequent dining plans, you must offer them some incentive. You must give them some reward for their repeat business. One of the easiest and most effective rewards you can offer is a reward coupon.

If you use frequent dining plans that offer reward coupons at the Point of Sale (POS), you must associate each plan with a reward coupon layout. Frequent diner customers earn reward coupons when they accumulate a required number of points. You determine the number of required points and the value of the reward in the Frequent Dining Plan Maintenance window, but you create the accompanying reward coupon in the Reward Coupon Maintenance window. Once you create a reward coupon, you can then associate it with a frequent dining plan.

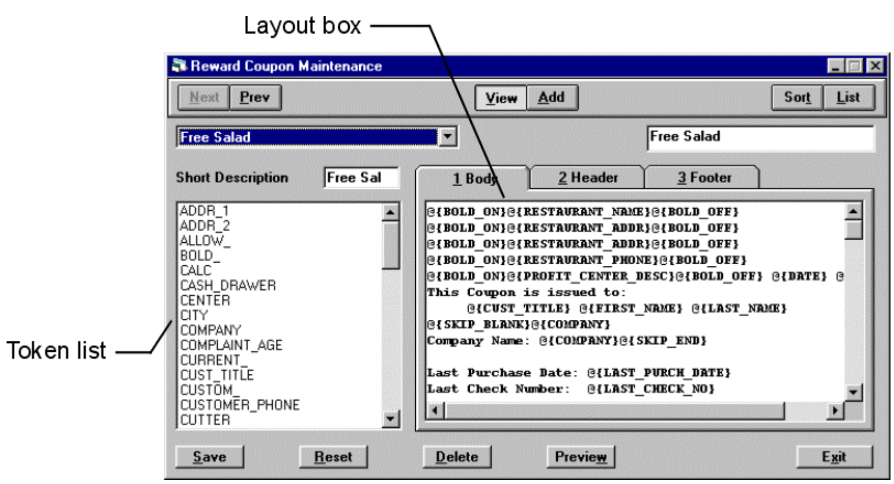
If you plan to print immediate reward coupons at the POS, you must create them in the Reward Coupon Maintenance window. However, if you plan to print batch coupons and mail them to your frequent diner customers, you do not need to create them in the Reward Coupon Maintenance window. Instead, you should print your batch coupons with some other application or outsource the print job to a professional print shop.

Reward Coupon Maintenance Window

You can add, view, edit, or delete reward coupons from the Reward Coupon Maintenance window. When you enter a reward coupon in the **Item Description** box, the program captures the first eight characters of the description (including spaces), and displays these characters in the **Short Description** box. You can change the Short Description or you can keep the system-defined, eight-character description. If this description is not clear enough for you, specify a Short Description of your own.

We have included a default coupon template in the Reward Coupon Maintenance window, which you can use to create new coupons. Our template includes most of the information you might need to appear on a reward coupon. You can remove any unnecessary information and customize the text for your restaurant.

The Reward Coupon Maintenance window features three tabs: **Body**, **Header**, and **Footer**. Each tab contains a **Layout** box. Any text you enter in the **Layout** box of the **Header** tab will print immediately above the text of the **Body** tab. Any text you enter in the **Layout** box of the **Footer** tab will print immediately below the text of the **Body** tab.



Complaint Coupon Maintenance

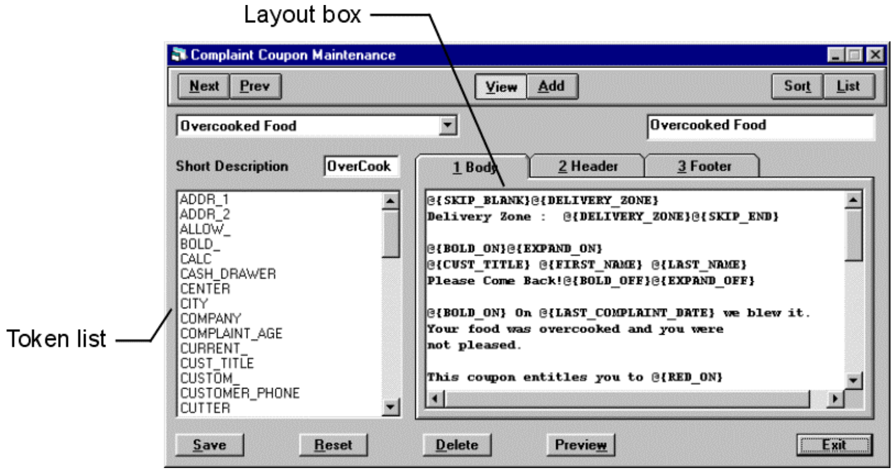
A complaint coupon is a reward given to a customer as compensation for some complaint. You can create a complaint coupon and associate it with a particular complaint reason. If a customer ever makes a complaint that matches one of your complaint reasons, the server can select that complaint reason, and the program will automatically print the appropriate complaint coupon.

Complaint Coupon Maintenance Window

You can add, view, edit, or delete complaint coupons from the Complaint Coupon Maintenance window. When you enter a complaint coupon in the **Item Description** box, the program captures the first eight characters of the description (including spaces), and displays these characters in the **Short Description** box. You can change the Short Description or you can keep the system-defined, eight-character description. The text that appears in the **Short Description** box is the description that will show on reports. If this description is not clear enough for you, specify a Short Description of your own.

We have included a default coupon template in the Complaint Coupon Maintenance window, which you can use as a general starting point in creating new coupons. Our template includes most of the information you might need to appear on a complaint coupon. You can remove whatever information is unnecessary, and customize the text as appropriate to your restaurant.

The Complaint Coupon Maintenance window features three tabs: **Body**, **Header**, and **Footer**. Each tab contains a **Layout** box. Any text/token(s) you enter in the **Layout** box of the **Header** tab will print above the text/token(s) of the **Body** tab. Any text/token(s) you enter in the **Layout** box of the **Footer** tab will print below the text/token(s) of the **Body** tab.



Status Report Maintenance

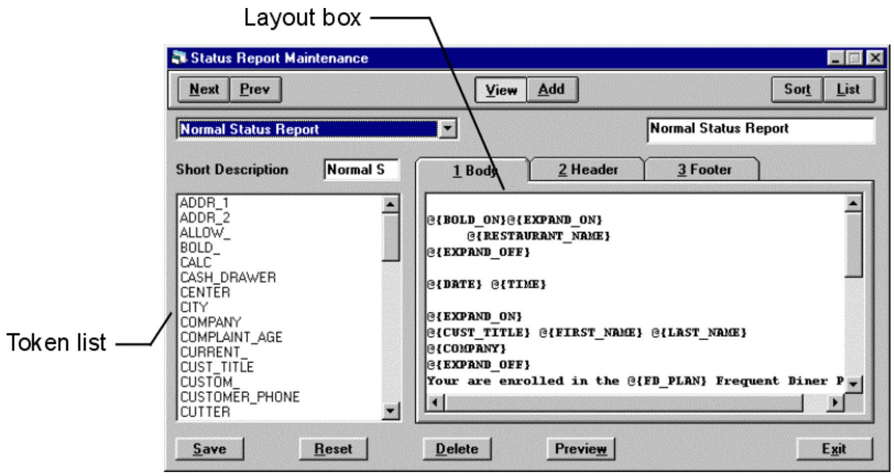
A status report contains information on the status of a customer's Frequent Diner account. You can set up a status report displaying the customer's name, the name of the plan they are enrolled in, their current point count, or any other information you need. You can then print it at the POS, whenever necessary. You can offer this status report to customers who want to know their current point count.

Status Report Maintenance Window

You can add, view, edit, or delete status reports from the Status Report Maintenance window. When you enter a status report in the **Item Description** box, the program captures the first eight characters of the description (including spaces), and displays these characters in the **Short Description** box. You can change the Short Description or you can keep the system-defined, eight-character description. The text that appears in the **Short Description** box is the description that will show on reports. If this description is not clear enough for you, specify a Short Description of your own.

We've included a default report template in the Status Report Maintenance window, which you can use as a general starting point in creating new coupons. Our template includes most of the information you might need to appear on a status report. You can remove any unnecessary information and customize the text as appropriate to your restaurant.

The Status Report Maintenance window features three tabs: **Body**, **Header**, and **Footer**. Each tab contains a **Layout** box. Any text you enter in the **Layout** box of the **Header** tab will print above the text of the **Body** tab. Any text you enter in the **Layout** box of the **Footer** tab will print below the text of the **Body** tab.



Plans Menu

Overview

The **Plans** menu includes one maintenance window and two utilities devoted to creating and maintaining frequent dining plans:

- Frequent Dining Plan Maintenance (window)
- Deduct Batch Rewards (utility)
- Frequent Dining PTD (Period-To-Date) Reset (utility)

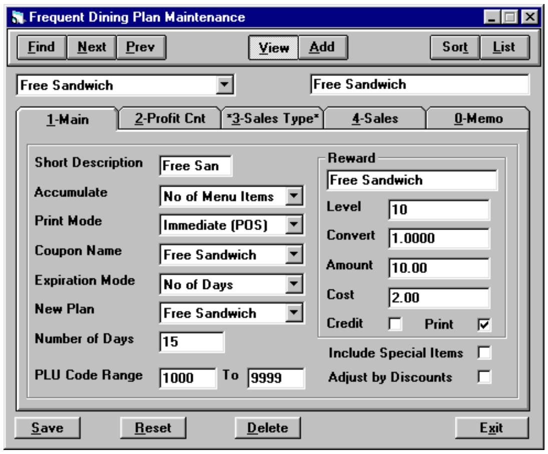
Using them, you can create new plans, edit or delete existing plans, reset the batch reward points for all your customers, or reset the sales information for your reports. These functions only pertain to frequent diner service, and do not effect delivery service.

Frequent Dining Plan Maintenance

Before you can enroll customers in a frequent dining plan, you must define all the features of the plan in the Frequent Dining Plan Maintenance window, which contains five tabs: Main, Profit Center, Sales Type, Sales, and Memo.

Frequent Dining Plan Maintenance Window: Main Tab

Using the **Main** tab of the Frequent Dining Plan Maintenance window, you can create the bulk of the settings for each of the 99 frequent dining plans you can create. When you enter a frequent dining plan name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.



Accumulate list

You must select the method by which customers will earn frequent diner points for this plan. The frequent diner program offers four methods of accumulating points:

Method Name	Method
Number of Purchases	For each visit, the customer earns one point.
Value of Purchases	For every dollar spent, the customer earns one point.
Number of Frequent Diner Points	For any menu item with a special point value, the customer earns that number of points.
Number of Menu Items	For each individual menu item purchased, the customer earns one point.

If you select **FD Points** as your accumulation method, you must assign a frequent diner point value to each eligible menu item. You can assign different point values to different menu items. By doing so, customers can earn points only by purchasing certain eligible items. However, customers will earn no points for purchasing items having no frequent diner point value. You can assign point values to menu items in the Menu Item Maintenance window of the Digital Dining Back Office program.

Print Mode list

If your plan features a reward coupon rather than a reward credit, you can set the program to print this coupon immediately at the Point of Sale (POS) or to print it as part of a batch of coupons in the Back Office. If you want customers to receive their reward coupons immediately as they earn them, you should select **Immediate (POS)**. If you plan to process batches of coupons and mail them to customers, you should select **Batch (Back Office)**.

If you select **Immediate (POS)**, the program will automatically deduct reward points from a customer's record when it prints the reward coupon at the POS. However, if you select **Batch (Back Office)**, the program will not automatically deduct reward points from your customer records. You must manually deduct these reward points by using the Deduct Batch Rewards utility (for more information, see "Deduct Batch Rewards" on page 95).

Coupon Name list

If your plan features a reward coupon rather than a reward credit, you must select a coupon to print when a customer earns the required points. You must select which reward coupon is associated with this plan in the **Coupon Name** list. To add a new coupon to this list, you must create it in the Reward Coupon Maintenance window.

Note

You can drill through to the Reward Coupon Maintenance window by double-clicking **Coupon Name**, create a new reward coupon for your frequent dining plan, save the coupon, and return to the Frequent Dining Plan Maintenance window. The new coupon will then appear in the **Coupon Name** list.

Expiration Mode list

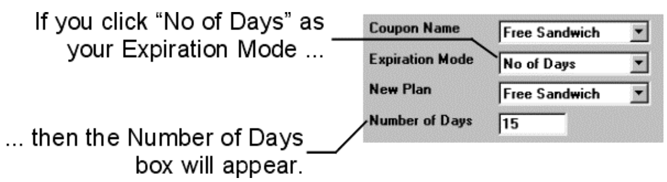
You must select an expiration mode for the reward. You can set a coupon to expire within a certain number of days or on an exact date. If you select **No of Days**, then the **Number of Days** box will appear below. If you select **Selected Date**, then the **Date of Expiration** box will appear below. If you do not want the reward to expire, you can select **No of Days**, then type "0" in the **Number of Days** box.

New Plan list

A customer can enroll in only one plan at a time. However, you can set a plan to escalate (that is, to switch to another plan automatically) after the customer reaches the reward level. If you want this plan to escalate to a new frequent dining plan, select the new plan from the **New Plan** list.

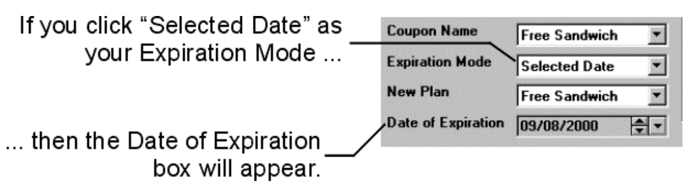
Number of Days box

If you select **No of Days** as the Expiration Mode, then you must enter the number of days that the coupon will be valid.



Date of Expiration box

If you select **Selected Date** as the Expiration Mode, then you must enter the date that the coupon will expire. You can type the date directly into the **Date of Expiration** box, click the scrolling arrows to select a date, month, or year, or click the calendar arrow to select the date from a calendar box.

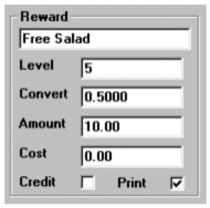


PLU Code Range boxes

You can specify a range of eligible menu items by entering a PLU ("Price Look Up") Code range in these two boxes. The program will exclude any menu item whose PLU Code is outside of this range, and the customer will not earn any points for them (for more information regarding PLU Codes, see "PLU Code box" in the *Digital Dining Back Office User's Guide*).

Reward area

In the **Reward** area of the Frequent Dining Plan Maintenance window, you define a plan's reward, including its type (coupon or credit), level, and amount.



Reward Description. You can enter a description of the reward in this box. (For example, "Free Sandwich" or "Buy one dessert, get one free.")

Level, **Convert**, and **Amount.** These boxes allow you to define the value of a particular reward. However, the program treats the data differently, depending on whether the reward is a credit or a coupon.

	If the reward is a coupon…	If the reward is a credit…
Level	…enter the number of points the customer must accumulate to earn the coupon.	…enter the number of points the customer must accumulate to earn the credit amount.
Convert	The conversion factor fills in automatically. Do not edit it.	The conversion factor fills in automatically. Do not edit it.
Amount	You *can* enter the amount of the coupon here, if the coupon is for a specific monetary amount ("$2.00 off any purchase"). If the coupon is for a free item, you should not enter an amount.	You *must* enter the monetary amount of credit the customer will earn for accumulating the specified point level.

If you are offering a reward coupon, the customer must accumulate the points specified in the **Level** box before earning the coupon. However, if you are offering a reward credit, the customer will earn credit for *any* accumulated points. By setting the **Level** and **Amount** boxes, you determine the rate at which a customer will earn credit.

For example, if you set the **Level** box to "50" and the **Amount** box to "$5.00", then the customer will earn a $5 credit for every 50 points accumulated. However, if the customer accumulates only 25 points, the customer will earn a credit of $2.50. In other words, the amount of credit a customer earns is proportional to the amount of points the customer accumulates. The program automatically calculates the points-to-credit ratio.

Level. You must enter the number of points a customer must accumulate to receive the reward. Customers will earn the reward when they accumulate this number of points, but the type of points they earn depends on which accumulation method you select. For example, if you select an accumulation method of Number of Items and a point level of “10”, then the customer will earn the reward after purchasing 10 menu items. If you select an accumulation method of Value of Purchases, then you should enter a monetary amount in the **Level** box, such as “30.00”.

Convert. This box fills automatically, calculated from the **Level** and **Amount** boxes (**Level** / **Convert** = **Amount**). The program uses this formula to calculate the amount of a credit reward. The program does not use this calculation for reward coupons.

Amount. You must enter the monetary amount of a reward credit in this box. You can also enter an amount for reward coupons of specific monetary amounts (“$2.00 off any purchase”), but you are not required to do so.

Cost. You can enter the cost of the reward to the restaurant. This should be the actual cost, rather than the sale price of the particular item. For instance, if you are offering a coupon for a dessert that typically sells for three dollars, but costs your restaurant two dollars to prepare, you should enter “2.00” in the **Cost** box. You can then use this information in your frequent dining plan reports to analyze the cost and effectiveness of your plan.

Credit. You must select either the **Credit** check box or the **Print** check box for the program to give any reward to customers. You should select the **Credit** check box if you are offering a reward credit with this plan. The customer will earn credit on each visit and can redeem that credit at the POS or save it to use on a later visit. If you select a reward credit, you do not need to create a reward coupon for the plan.

Print. You must select the **Print** check box if you are offering a reward coupon with this plan. The customer will earn points on each visit and when they earn a sufficient level of points (determined by you in the **Level** box) the program will print a reward coupon (either at the POS or the Back Office, depending on how you set the Print Mode). If you select the **Print** check box, you need to select a reward coupon for the plan in the **Coupon Name** list or create a new coupon in the Reward Coupon Maintenance window.

If you clear both the **Credit** and **Print** check boxes, customers cannot earn frequent diner points from the plan. If you try to save the plan without checking one of these boxes, the program will display an error message . Click **Yes** if you still wish to save the plan or click **No** to cancel the operation. If you click **Yes**, the plan will be effectively inactive until you edit it again and select **Credit** or **Print** check boxes.

Include Special Items check box

If you want Digital Dining to give customers reward points when they buy special items, click the **Include Special Items** check box. If you want Digital Dining to exclude special items from the plan, clear this check box.

Adjust by Discounts check box

If you want the Frequent Diner/Delivery program to adjust reward points by any discounts used, select the **Adjust by Discounts** check box. For instance, you might create a plan with an accumulation method set to **Value of Purchases**. Later, a customer enrolled in this frequent dining plan might purchase a meal for $50, but use a 10% discount. If you want the Frequent Diner/Delivery program to ignore the discount and reward points for the original total of $50, do not select the **Adjust by Discounts** check box. If you do want the Frequent Diner/Delivery program to adjust the reward points for the discount (that is, to calculate reward points for a $45 purchase, rather than $50), then select the **Adjust by Discounts** check box.

If you create frequent dining plans with other accumulation methods (such as **Number of Purchases**, **Number of Menu Items**, or **Number of Frequent Diner Points**), you can use the **Adjust by Discounts** check box to set the frequent dining plan to ignore discounted items. If you select the **Adjust by Discounts** check box, the program will not give reward points to customers for items “purchased” with a 100% discount. This method allows you to control if frequent diner customers receive reward points for free or complimentary items.

Frequent Dining Plan Maintenance Window: Profit Cnt Tab

The **Profit Center** tab features a filter that allows you to include or exclude specific profit centers from your frequent dining plan. You can include all your profit centers or only certain ones. Using this feature, you can use frequent dining plans to encourage business in particular profit centers. For instance, you might not wish to give customers points for carryout purchases or purchases from the bar. If you have established different profit centers for different times of the day (such as breakfast, lunch, and dinner), you could use this filter to exclude breakfast purchases from your frequent dining plan.

Frequent Dining Plan Maintenance Window: Sales Type Tab

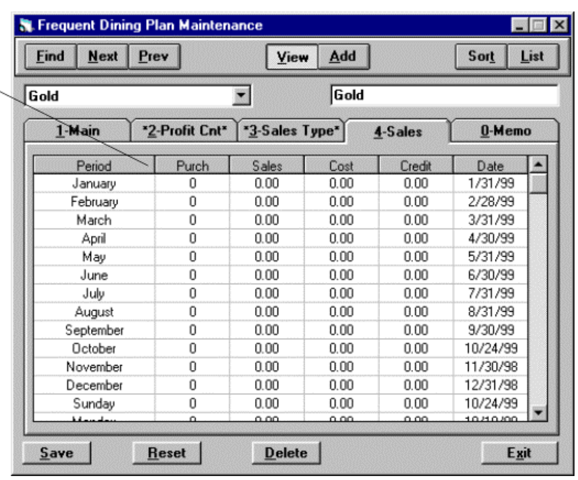
The **Sales Type** tab features a filter that allows you to include or exclude sales types from your frequent dining plan. You can include all your sales types or only certain ones. Using this feature, you can use frequent dining plans to promote menu items of particular sales types. For instance, if you were promoting a “Free Dessert” plan, you could choose to give points for dessert purchases only. If you were promoting a “Wine Taster’s” club, you might give points for wine purchases only. You might also wish to exclude inappropriate items, such as liquor or seafood.

Frequent Dining Plan Maintenance Window: Sales Tab

The **Sales** tab displays a list of sales totals for the plan. The report includes total purchases, sales, cost and credit amounts. The report also lists totals for each of the past 12 months, each of the past 7 days, week to date, month to date, year to date, and the period to date. You can modify the width of a column by clicking the edge of a column heading and dragging it left or right.

> **Note**
>
> You can reset the period-to-date for all your frequent dining plans by using the Frequent Dining Plan PTD Reset utility (for more information, see “Frequent Dining Plan PTD Reset” on page 95).

Column Heading



Frequent Dining Plan Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number "0" as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Frequent Dining Plan Utilities

The Frequent Dining Plan utilities allow you to reset reward points and sales information for all your customer records. You can use them to help manage your frequent dining plans and customer records.

Deduct Batch Rewards

By using the Deduct Batch Rewards utility, you can deduct the reward points from your customer records after printing a batch of reward coupons. The program will only deduct the appropriate points from customers who have earned a reward coupon. For instance, if you have a customer enrolled in a frequent dining plan which rewards a coupon after 10 points and the customer has earned 25 points, the Deduct Batch Rewards utility will deduct 10 points from this customer's record and leave 15 points. This utility will only adjust the reward point totals of customers associated with frequent dining plans set to print reward coupons in batches.

Frequent Dining Plan PTD Reset

By using the Frequent Dining Plan PTD Reset utility, you can clear the period-to-date sales totals on the **Sales** tab of the Frequent Dining Plan Maintenance window. This utility will reset all of your frequent dining plans simultaneously. It will not clear any of the other sales information. After you reset it, the program will add the PTD sales totals from that point.

Customers Menu

Overview

The **Customer** menu includes two maintenance windows and one utility devoted to creating and maintaining customer records:

- Customer Record Maintenance (window)
- Customer Label Maintenance (window)
- Customer PTD (Point-to-Date) Reset (utility)

You can enter customer records by way of the Customer Record Maintenance window at any time. However, if you wish to enter or edit customer records at the Point of Sale (POS), you cannot do so until setting the Check Options and Register Options properly in the Digital Dining Setup program.

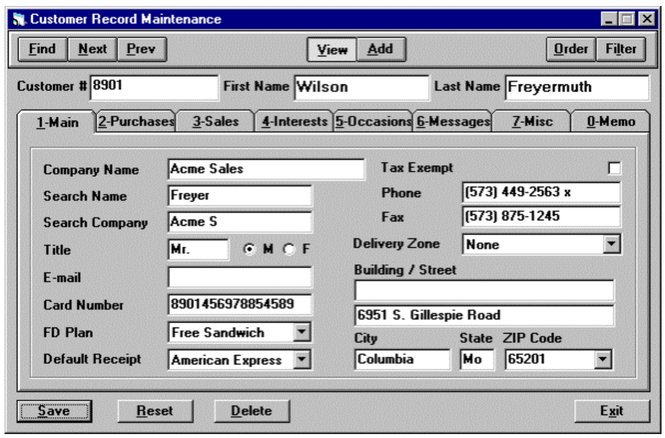
If you are using the Frequent Diner/Delivery program for frequent diner service, you can create customer records either at the POS or in the Back Office, depending on how you choose to collect customer information. If you are using the Frequent Diner/Delivery program for delivery service, you will create customer records primarily at the POS. We will discuss the process of creating customer records at the POS in a later chapter.

Customer Record Maintenance

The Customer Record Maintenance window allows you to create and edit frequent diner and delivery customer records. When you create new records, the Customer Record Maintenance window only requires the information set as “Forced Entries” by you in the POS Entries window. If you wish to change the forced entries, you can return to the POS Entries window and modify them at any time.

Customer Record Maintenance Window: Main Tab

You can add, view, edit, or delete customer records from the **Main** tab. The program will only require the information you have specified as "forced entries" in the POS Entries window. If you selected **Full Entry** in the **New Entries** area of the POS Entries window, you must manually enter a customer number in this box. If you selected **Quick Entry** in the **New Entries** area of the POS Entries window, the program will automatically generate a new customer number. You can then enter the customer's first name in the **First Name** box, and the customer's last name in the **Last Name** box.



Company Name box

The name of the company the customer works for, if any.

Search Name box

The first eight letters of the customer's last name automatically fill in this field, but you can edit it. If you perform a search at the POS using the customer's name, the program will look for this search name.

Search Company box

The first eight letters of the company name automatically fill in this field, but you can edit it. If you perform a search at the POS using the customer's name, the program will look for this search name.

Title box

The customer’s title (Mr., Mrs., Ms.).

E-mail box

If a frequent diner customer has an e-mail account, you can type the e-mail address in the **E-mail** box.

Card Number box

If a customer prefers to use a particular credit card to pay for his or her meal, you can store that credit card number in this box.

FD (Frequent Diner) Plan list

If you are enrolling a frequent diner customer, you can select the appropriate plan from this list. If you do not see a frequent dining plan that you want to use for a particular customer record, then you can double-click the “FD Plan” label to open the Frequent Dining Plan Maintenance window. With the Frequent Dining Plan Maintenance window open and active, you can add or modify your frequent dining plans. After you save and close the Frequent Dining Plan Maintenance window, Digital Dining will make the new or modified frequent dining plan available in the **FD Plan** list.

Default Receipt list

You can set a default receipt for a particular customer. This feature can help speed the payment process, particularly if the customer frequently uses a particular credit card or an A/R account to pay out checks. (This feature is not yet implemented.)

Tax Exempt check box

If the customer has a tax exempt status, you can select this check box. The program will not charge tax to this customer’s checks.

Phone box

The customer’s telephone number.

Fax box

The customer's fax number, if any.

Delivery check box

You should select this check box for delivery customers.

Delivery Zone list

If you are using delivery zones, you should select the customer's zone from this list.

Building/Street boxes

The Building and Street boxes allow you to store the customer's street address. If you are entering a delivery customer, you can enter some descriptive information about the customer's location in the **Building** box.. For instance, if the customer is ordering a delivery to a particular office building in an industrial park, you could specify the specific building where the customer was located. You can also type the customer's street address in the **Street** box.

City box

The customer's city of residence.

State box

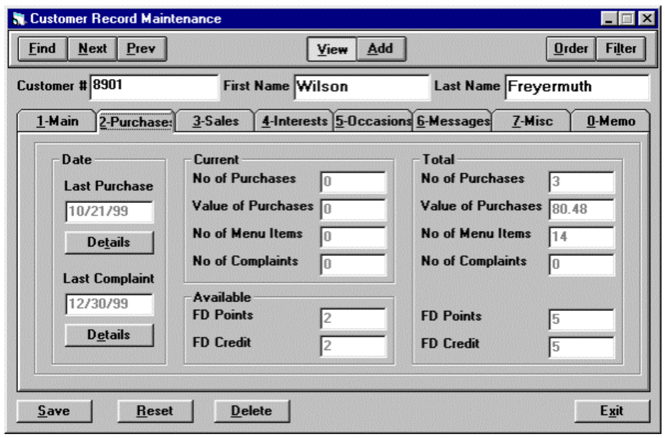
The customer's state of residence.

Zip Code list

The customer's zip code of residence.

Customer Record Maintenance Window: Purchases Tab

The **Purchases** tab displays purchasing information regarding the customer, including any reward credit or reward points the customer may have. You cannot enter or edit any information from the **Purchases** tab.



Date area

The **Last Purchase** box displays the date of the customer's last purchase. By clicking **Details**, you can view the customer's last order. The **Last Complaint** box displays the date of the customer's last complaint, if any. By clicking **Details**, you can view the customer's last complaint.

Current area

The program will adjust all of the totals in the **Current** area if a customer receives a coupon or if you use the Deduct Batch Rewards utility.

No of Purchases	The customer's current number of purchases.
Value of Purchases	The customer's current value of purchases, in monetary terms.
No of Menu Items	The customer's current number of purchased menu items.
No of Complaints	The customer's current number of complaints.

Available area

The **Available** area includes the two boxes, the **FD Points** box and the **FD Credit** box, displays The **FD Points** box displays the customer's current amount of available frequent diner points. The **FD Credit** box displays the customer's current amount of available frequent diner credit. Digital Dining adjusts the totals in the **Available** area if a customer receives a coupon, uses a reward credit, or if you use the Deduct Batch Rewards utility. However, you can adjust these totals manually.

Total area

The program records all of the frequent diner points and reward credit totals in the **Total** area, and does not reset them. These numbers represent the total frequent diner points the customer has ever earned since first enrolling in *any* of your frequent dining plans.

No of Purchases	The customer's total number of purchases.
Value of Purchases	The customer's total value of purchases, in monetary terms.
No of Menu Items	The customer's total number of purchased menu items.
No of Complaints	The customer's total number of complaints.
FD Points	The customer's total amount of accumulated frequent diner points. (You can adjust these totals manually.)
FD Credit	The customer's total amount of accumulated frequent diner credit. (You can adjust these totals manually.)

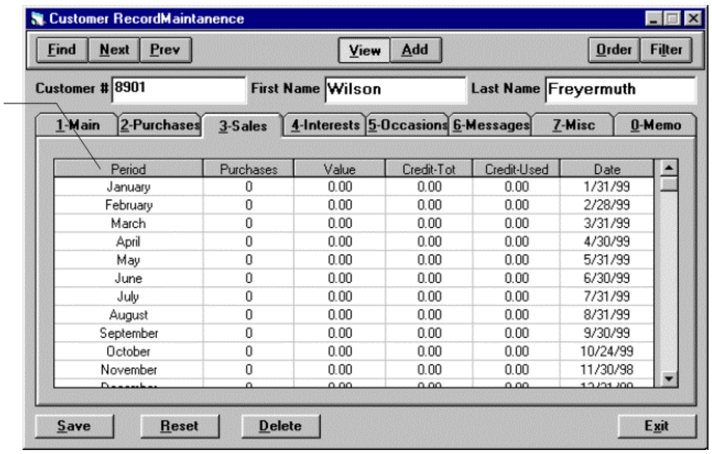
Customer Record Maintenance Window: Sales Tab

The **Sales** tab displays a sales report listing sales totals for the customer. The report includes total purchases, value, credit-total and credit-used. The report also lists totals for each of the past 12 months, each of the past 7 days, week to date, month to date, year to date, and the period to date. You can modify the width of a column by clicking the edge of a column heading and dragging it left or right.

Note

You can reset the period-to-date for all your customers by using the Customer PTD Reset utility (for more information, see "Customer PTD Reset" on page 110).

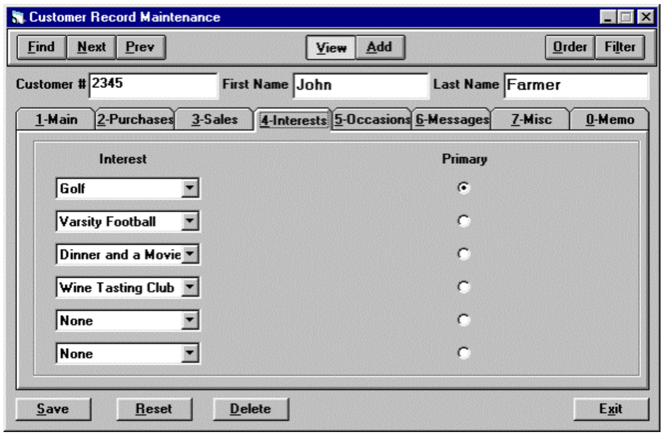
Column Heading



Customer Record Maintenance Window: Interests Tab

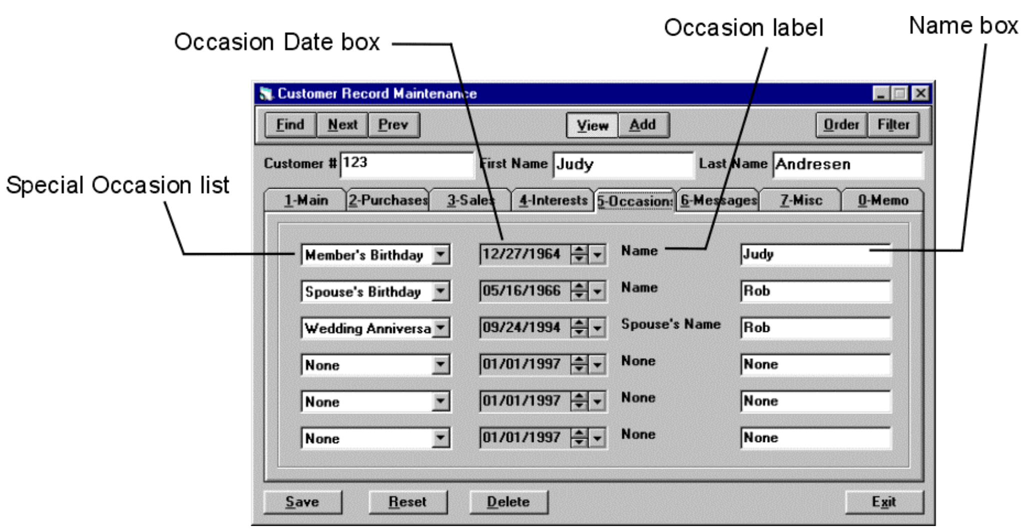
The **Interests** tab allows you to associate each customer record with up to six special interests. You can also designate one of these six special interests as the customer's primary interest by selecting the **Primary** button beside the appropriate special interest. You can only designate one interest as primary.

Each of the six **Interest** lists will display any special interests that you have entered in the Special Interest Maintenance window. You can drill through to the Special Interest Maintenance window by double-clicking the **Interest** label (for more information, see "Special Interest Maintenance" on page 63).



Customer Record Maintenance Window: Occasions Tab

You can associate customer records with special occasions in the **Occasions** tab of the Customer Record Maintenance window. You can select up to six special occasions for a customer.



Special Occasion lists

The **Occasions** tab features six **Special Occasion** lists, from each of which you can select a special occasion to associate with the customer. The **Special**

Occasion lists will display all the special occasions you have created in the Special Occasion Maintenance window.

Occasion Date boxes

Each **Special Occasion** list has an accompanying **Occasion Date** box. Here you can enter the date of the customer's special occasion. You can type the date directly into the **Occasion Date** box, click scrolling arrows to select a date, month, or year, or click the calendar arrow to select the date from a calendar box. By entering the date of the first occurrence of the occasion here, the program can automatically determine the age of the recurring dates. For instance, if you enter a customer's wedding anniversary as "11/15/90", then the program can calculate that the "11/15/00" is the customer's 10th anniversary.

Note

To display this information on a check or coupon layout, you should use the Special Occasion Age tokens, such as @{OCSN_AGE_NUMERAL_1}, @{OCSN_AGE_ORDINAL_1}, or @{OCSN_AGETEXT_ORDINAL_1}.

Occasion labels

Each **Special Occasion** list also has an accompanying **Occasion** label, which should label the content's of the **Name** box. You can rename the **Occasion** label in the Special Occasion Maintenance window. For instance, if you create a special occasion named "Wedding Anniversary," you might rename the **Occasion** label to display as "Spouse's Name."

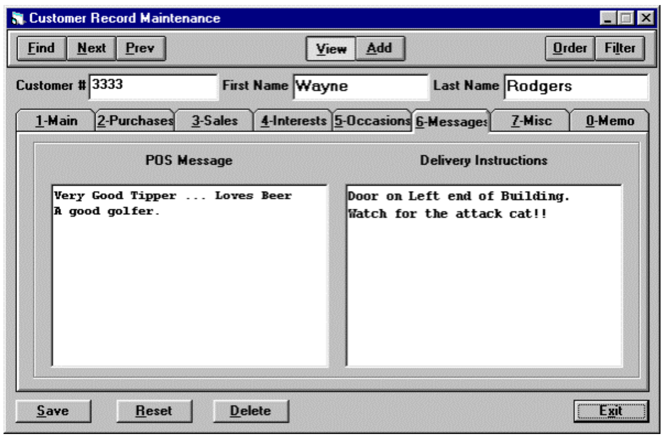
You can drill through to the Special Occasion Maintenance window by double-clicking the **Occasion** label (for more information, see "Special Occasion Maintenance" on page 61).

Name boxes

Each **Special Occasion** list also has an accompanying **Name** box. You can also enter an additional name in the **Name** box for special occasions involving persons other than the customer. For example, if the special occasion is "Wedding Anniversary," you can enter the name of the customer's spouse in the **Name** box.

Customer Record Maintenance Window: Messages Tab

The **Messages** tab of the Customer Record Maintenance window features two text boxes: **POS Message** and **Delivery Instructions**. Both of these text boxes offer you a place to record additional information regarding an individual customer.



Any message you enter into the **POS Message** box will appear at the POS when a server searches for the frequent diner customer record. Using this tool, you can store special instructions regarding customers.

Any message you enter in the **Delivery Instructions** box will appear at the POS when a dispatcher searches for a delivery customer record. Using this tool, you can store special delivery instructions for that customer, which can help the driver deliver the order.

Note

You can add Delivery Instructions to a delivery check layout. By doing so, you can include these special delivery instructions with the customer's address on the driver's copy of the check.

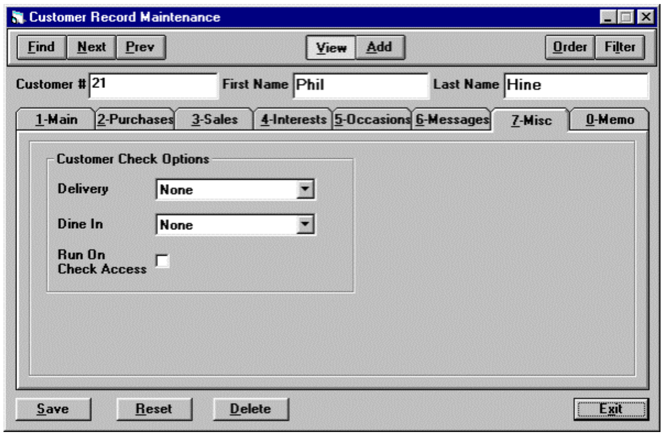
Customer Record Maintenance Window: Misc Tab

The **Misc** (Miscellaneous) tab of the Customer Record Maintenance window allows you to associate special check options with specific customer records. You can create special check options in the Digital Dining Setup program to use with individual customers in the Frequent Diner/Delivery program. To do this, you must follow these general steps:

What step?	In which window?	Of which program?
Create a new check option…	…in the Check Option Maintenance window…	…of the Digital Dining Setup program.
Add your new check option to a window of check options…	…in the Window of Check Options Maintenance window…	…of the Digital Dining Setup program.
Select this window of check options in the **Delivery Check Option Window** list or the **Dine In Check Option Window** list…	…in the POS Entries window…	…of the Frequent Diner/Delivery program.
Select the new check option in the **Delivery** list or the **Dine In** list…	…in the Customer Record Maintenance window…	…of the Frequent Diner/Delivery program.

By performing these steps, you can set specific check options to perform their functions when a specific customer places an order or pays a check. You can use these specialized check options in several ways. For instance, if you are using the program for delivery service, you can create a series of check options that charge different rates for delivery (based on distance and/or varying delivery times). You can then associate these check options to your various delivery customers. Then, when a customer calls and places a delivery order, the program will automatically add the appropriate delivery charge to that customer, based on the special check option you've assigned.

Just as POS Entries includes two window of check option lists (one for Delivery and one for Dine In), the Customer Record Maintenance window includes two check option lists. The check options selected in the **Delivery** list will function for delivery customers only. The check options selected in the **Dine In** list will function for non-delivery customers (presumably Frequent Diner customers). We have included both lists to allow you to use this option for both delivery and frequent diner service simultaneously.



If you select a check option from the **Delivery** list, the check option will perform its functions at the POS when you enter an order for this customer. This list includes all the check options within the window of check options selected in the **Delivery Check Option Window** list in the POS Entries window. If you select a check option from the **Dine In** list, the check option will perform its functions at the POS when you enter an order for this customer. This list includes all the check options within the window of check options selected in the **Dine In Check Option Window** list in the POS Entries window.

The **Run On Check Access** check box allows you to control when the POS runs the check option(s) selected in the **Delivery** and/or **Dine In** lists. If you select the **Run On Check Access** check box, the POS will run the check option(s) each time the server opens the check. If you clear the **Run On Check Options** check box, the POS will run the check option(s) when the server creates the check (or assigns the check to the customer).

Customer Record Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number “0” as its shortcut key.

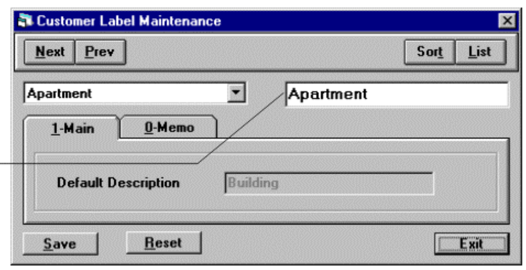
You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Customer Label Maintenance

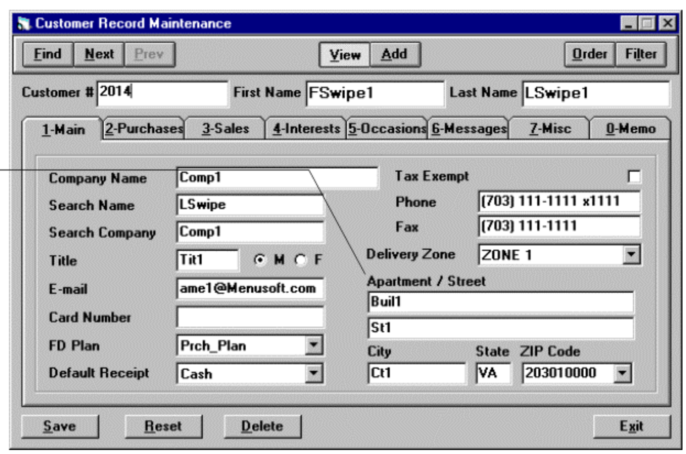
Using the Customer Label Maintenance window, you can customize the labels that appear on the Customer Record Maintenance window. You can rename labels to better fit your restaurant's needs. Such modified labels will also appear when you create new customer records at the POS.

For instance, if you are using the program for frequent diner service only, you might not need a box devoted to "Building." You might prefer to use this box to store a customer's apartment number. In such a case, you could rename the "Building" label to "Apartment".

By renaming the "Building" label to "Apartment" ...

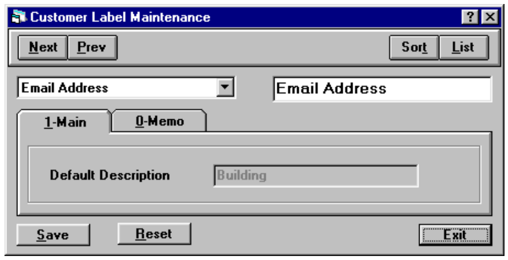


... the new renamed label appears in the Customer Record Maintenance window.



Customer Label Maintenance Window: Main Tab

You can view or edit customer labels from the **Main** tab. The Customer Label Maintenance window features a **Default Description** box, which displays the default description of each label. You cannot edit the default description; this is Digital Dining's original label and we have included it if you should ever wish to edit the label back to its original setting.



Customer Label Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number "0" as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Customer Utilities

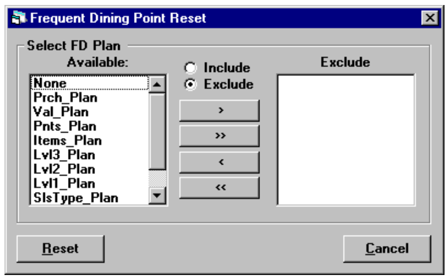
The Customer menu features two customer utilities, the Customer PTD Reset utility and the Frequent Dining Point Reset utility. The Customer PTD Reset utility allows you to reset period-to-date sales information for all your customer records. The Frequent Dining Point Reset utility allows you to reset frequent diner point totals for all of the customers enrolled in one or more frequent dining plans. Together, these utilities can help you manage your customer records.

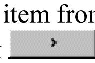
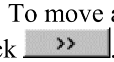
Customer PTD Reset

By using the Customer Period-to-Date Reset utility, you can clear the Period-to-Date sales totals on the **Sales** tab of the Customer Record Maintenance window. After you reset it, the program will add the PTD sales totals from that point on. This utility will reset all of your customer records simultaneously. It will not clear any of the other sales information.

Frequent Dining Point Reset

The Frequent Dining Point Reset utility allows you to reset the frequent diner point totals and credit totals for all of the customers associated with one or more frequent dining plans.



The Frequent Dining Point Reset window features a filter that allows you to include or exclude specific frequent dining plans. You can set the program to include or exclude frequent dining plans by adding plans to the **Include/Exclude** list. To move an item from the **Available** list to the **Include/Exclude** list, select that item and click . To move an item from the **Include/Exclude** box to the **Available** list, select the item and click . To move all items from the **Available** list to the **Include/Exclude** box, click . To move all items in the **Include/Exclude** box to the **Available** list, click .

You can set the program to either include or exclude the frequent dining plans in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include frequent dining plans in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all items associated with the frequent dining plans in the **Include/Exclude** list.

Customer Import

The Customer Import utility allows you to import frequent diner customer records exported from the Digital Dining for DOS data files into the Digital Dining for Windows data files. Before importing customer records from the Digital Dining for DOS data files, your dealer must first export the customer records from the Digital Dining for DOS data files into a file named CusFil.exp and then modify the file in Microsoft Visual FoxPro into a file named FDCusImp.dbf.

After your dealer creates the FDCusImp.dbf file, you can import the data from that file to the active data files by using the Customer Import utility. To run the Customer Import utility, run the Digital Dining for Windows Frequent Diner/Delivery program, click the **Customers** menu, point to **Customer Utilities**, and click

Customer Import. The program will import any customer records it finds in the FDCusImp.dbf file. It will add the new records to the customer records that already exist (if any) in the data files.

Reports Menu

Overview

The **Reports** menu includes five report maintenance windows:

- Customer Reports (both)
- Complaints Reports (both)
- Frequent Dining Plan Reports (Frequent Diner only)
- Menu Item Sales Reports (both)
- No Sale Reports (both)

Using them, you can create reports for a variety of purposes, such as collecting information on specific groups of customers, printing mailing labels for specific groups of customers, printing lists of customer complaints, or examining sales trends of specific customers and/or menu items.

We will first discuss some features that are common to all the reports in the Frequent Diner/Delivery program. We will then discuss the individual reports and how to define them.

Using Reports

Every report in the **Reports** menu has two windows: a Reports window and a Report Maintenance window. Most of the seven Reports windows are identical, but their Report Maintenance windows are quite different. You will create and define your reports in the Report Maintenance windows.

Reports Windows

You can preview and print a report from its Reports window, and you can preview all of your reports of a particular type from the Reports window of that particular type. For instance, you can preview or print any of your Customer Reports from the Customer Reports window.

Click **Define** to access the Report Maintenance window for this particular report, where you can create new report definitions or edit existing report definitions. Click **Print** to generate either a preview or a printed copy of the report, or click **Exit** to close the Report window.

Report list

This list displays all of the reports you have created for that particular group (for example, the **Report** list of the Customer Reports window will list all of your different receipts reports). You can select the one you wish to view, print, or edit.

Range list

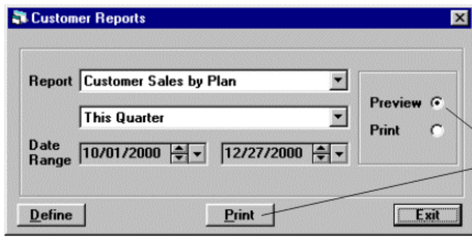
This list features a variety of general time periods, such as any day of the week, any month of the year, the preceding pay period, and so on. If you wish to set an irregular date range, you can click **Custom** and then type the specific date range in the **Date Range** boxes.

Date Range boxes

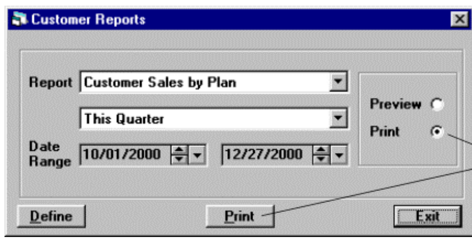
If you wish to view a report with a specific date range, you can type the dates in the two **Date Range** boxes or select them from the calendar boxes. For example, if you wish to view a Customer Report for the months of June, July, and August, you would type “06/01/00” in the first box and “08/31/00” in the second box. Click  to select a date from each calendar box.

Print area

In the **Print** area, you can set the program to print your report or preview a report before printing. You can preview a report by clicking the **Preview** option and then clicking the **Print** command. The program will display a preview of the report, which you can then print or save (that is, export as a file). You can print your report without previewing it by clicking the **Print** option and then clicking the **Print** command.



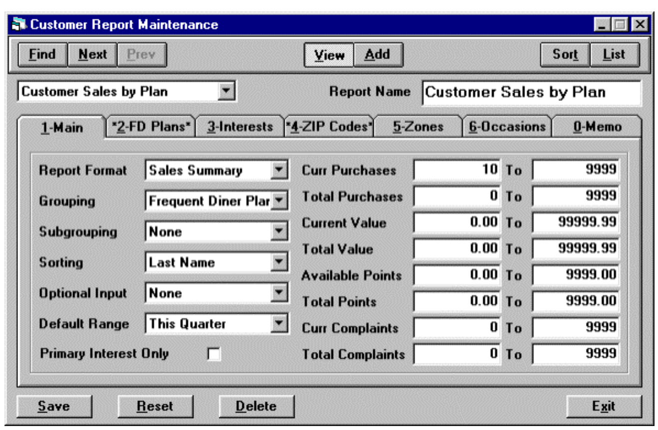
If you click the Preview option and then click the Print command, the program will display a preview of the report.



If you click the Print option and then click the Print command, the program will print the report.

Report Maintenance Windows

Every type of report (such as a Customer Report) also has a Report Maintenance window. You can define (that is, create) new reports from the Reports Maintenance window. In a Report Maintenance window, you decide the format of a new report. You also decide which records to include or exclude from the report and how to organize the information. You must define all of your reports of a particular type from the Reports Maintenance window of that particular type. For instance, you must define all of your Customer Reports in the Customer Report Maintenance window.



Report Format list

Some of the register reports are available in different formats, each producing a report with different information and/or arrangement. Different reports feature different kinds of formats, so you should review the formats specific to the report you define.

Grouping list

You can control how the program organizes the information in a report by selecting a grouping option from the **Grouping** list (or **Group By 1** list). The program will list each group alphabetically and list all the items in that group together. For instance, if you are defining a customer report and you select a grouping of **Frequent Diner Plan**, the report will alphabetically list all the customers enrolled in the first frequent dining plan together. After that group, the program will list all of the customers in the next frequent dining plan:

Frequent Dining Plan A

  Customer A

  Customer D

Frequent Dining Plan B

  Customer B

  Customer C

Subgrouping list

Some of the Report Maintenance windows feature a **Subgrouping** list (or **Group By 2** list), allowing you to group records by a second level. You can use the **Subgrouping** list to group the data in a report by a second level. This list allows you to create subgroups of items within groups. For instance, if you are defining a customer report and you select a grouping of **Frequent Diner Plan** and a subgrouping of **Special Interest**, the report will group all the customers enrolled in the same frequent dining plan together and then list those customers in subgroups by special interest:

Frequent Dining Plan A

Special Interest A

Customer A

Customer D

Special Interest B

Customer B

Customer C

Frequent Dining Plan B

Special Interest A

Customer E

Customer G

Special Interest B

Customer F

Customer H

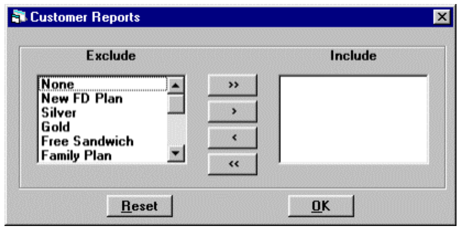
If you set the **Grouping** list to **None**, the **Subgrouping** list will not appear.

Sorting list

You can also control how the program organizes the information in a report by selecting a sorting option from the **Sorting** list. The program will sort records in alphabetical and/or numerical order by whatever item you select in the sorting list. For instance, you can create a customer report and select **Last Name** in the **Sorting** list. When the program prints the report, it will list customer records in alphabetical order by last name.

Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Reports window. For instance, if you were defining a customer report, you could select an optional input of **Frequent Diner Plan**. The next time you print this customer report at the Customer Reports window, a filter window will open, allowing you to include or exclude customers from particular frequent dining plans.



Default Range list

If you select a default range from this list, this default range will appear in the **Range** list of the Report window. For instance, you could define a customer report and select a default range of **This Quarter**. From then on, whenever you open the Customer Records window and select that report, the **Range** list will default to **This Quarter**. You can still select a new range, if necessary.

Report Preview

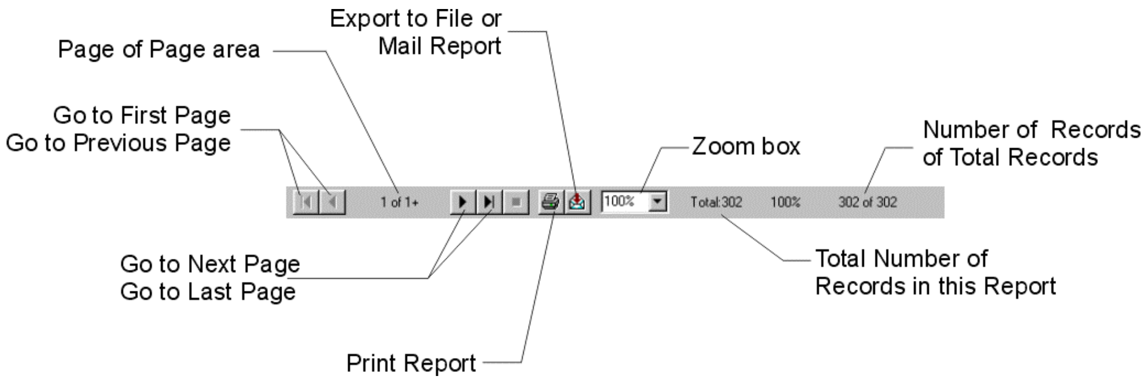
You can preview any report by opening its Report window, selecting the report in the **Report** list, clicking **Preview,** and then clicking **Print**. In the preview window, you can choose to print or export (that is, save) the report. You can also choose to enclose the report in an email message.

Report Preview Window

What can you expect to see in the preview report window? In the upper left hand corner, you will see the date and time you previewed the report and the name of the current operator; in the upper right hand corner, you will see the current page; in the middle of the page under the report's title, you will see the Sorting option (for example, "Frequent Dining Plan" or "Special Interest") that you chose for this report. Below this, is the actual report, which gathers the information based on the definition you have created.

Report Preview Toolbar

When you click **Preview,** the program displays the report with a Print Preview toolbar. The Print Preview toolbar allows you to manipulate the report: you can view different pages, print, export, or enlarge the details of the report.



Note

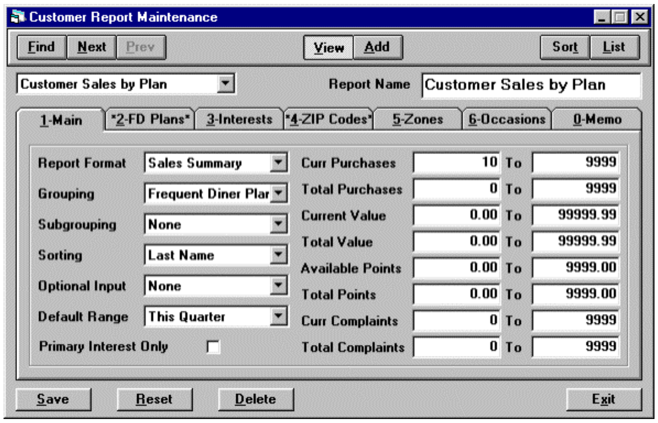
When you first open any multipage report, the "Page of Page area" will display "1 of 1+". If you move forward one page at a time, this area will change to "2 of 2+" or "3 of 3+" and so on. You can quickly see how many pages are in your report by clicking Go to Last Page.

Customer Report Maintenance

Customer Reports allow you to analyze information about your frequent diner and/or delivery customers in a variety of ways. You can list customer records grouped and sorted by frequent dining plan, special interest, special occasion, zip code, or delivery zone. You can also analyze sales of individuals or special groups, collect addresses and telephone numbers of customers, or print mailing labels to customers.

Customer Report Maintenance Window: Main Tab

In the **Main** tab, you will determine the format of your new report, as well as decide how the program will organize and sort your records. The **Main** tab also allows you to filter customer records based on accumulated frequent diner points and complaints.



Report Format list

You can select one of five different report formats. Each format will produce a report with different information and/or arrangement:

Report Format	Contains
Name and Address	Name, address, and telephone number of each customer record.
Sales Summary	Sales totals of each customer record.
Interest and Occasion	Special interests and special occasions of each customer record.
Mailing Labels	Name and mailing address of each customer record, printed as mailing labels.
Batch Report	The name, address, and frequent diner point totals of each customer record.

Grouping list

You can control how the program organizes the information in your report by selecting a grouping option from the **Grouping** list. The program will list the customer records alphabetically by the grouping option you select. You can group your customer records by any of the following criteria:

Frequent Dining Plan	Click **Frequent Dining Plan** to group your records by the frequent dining plans of the customers.
Special Interest	Click **Special Interest** to group your records by the special interests of the customers.
Zip Code	Click **Zip Code** to group your records by the zip codes of the customers.
Delivery Zone	Click **Delivery Zone** to group your records by the delivery zones of the customers.
Day of Week	Click **Day of Week** to group your records by the days of the week that the transactions took place. (This option is only available for reports in the Sales Summary format.)
Special Occasion	Click **Special Occasion** to group your records by the special occasions of the customers.

Label Type list

If you select a report format of **Mailing Labels**, the **Label Type** list will appear instead of the **Grouping** list. You should select the brand and product number of the labels you are using.

Subgrouping list

You can group your data to a second level by selecting a subgrouping option from the **Subgrouping** list. The **Subgrouping** list is identical to the **Grouping** list.

Sorting list

You can also control how the program organizes the information in a report by selecting a sorting option from **Sorting** list. The program will sort records in alphabetical and/or numerical order by whatever item you select in the **Sorting** list. You can sort your customer records by any of the following criteria:

Last Name	Click **Last Name** to sort your report by the last name of each customer.
Sort Name	Click **Sort Name** to sort your report by the search name of each customer.
Company Name	Click **Company Name** to sort your report by the name of each customer's company.
Last Purchase Date	Click **Last Purchase Date** to sort your report by the last purchase date of each customer.
PTD Purchases	Click **PTD Purchases** to sort your report by the purchases of each customer for the present period-to-date.
PTD Value of Purchases	Click **PTD Value of Purchases** to sort your report by the value of purchases of each customer for the present period-to-date.
PTD Points	Click **PTD Points** to sort your report by the frequent diner points of each customer for the present period-to-date.
PTD Complaints	Click **PTD Complaints** to sort your report by the number of complaints of each customer for the present period-to-date.
Total Purchases	Click **Total Purchases** to sort your report by the total purchases of each customer.
Total Value of Purchases	Click **Total Value of Purchases** to sort your report by the total value of purchases of each customer.
Total Points	Click **Total Points** to sort your report by the total frequent diner points of each customer.
Total Complaints	Click **Total Complaints** to sort your report by the total number of complaints of each customer.

Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print this report at the Customer Reports window. You can select one of the following optional input criteria:

Frequent Dining Plan	Click **Frequent Dining Plans** to filter your report by the frequent dining plan of the customers.
Special Interest	Click **Special Interest** to filter your report by the special interests of the customers.
Zip Code	Click **Zip Code** to filter your report by the zip codes of the customers.
Delivery Zone	Click **Delivery Zone** to filter your report by the delivery zones of the customers.
PTD Purchases	Click **PTD Purchases** to filter your report by the purchases of the customers for the present period-to-date.
PTD Value of Purchases	Click **PTD Value of Purchases** to filter your report by the value of purchases of the customers for the present period-to-date.
PTD Points	Click **PTD Points** to filter your report by the frequent diner points of the customers for the present period-to-date.
PTD Complaints	Click **PTD Complaints** to filter your report by the number of complaints of the customers for the present period-to-date.
Total Purchases	Click **Total Purchases** to filter your report by the total purchases of the customers.
Total Value of Purchases	Click **Total Value of Purchases** to filter your report by the total value of purchases of the customers.
Total Points	Click **Total Points** to filter your report by the total frequent diner points of the customers.
Total Complaints	Click **Total Complaints** to filter your report by the total number of complaints of the customers.

Default Range list

If you select a default range from this list, this default range will appear in the **Range** list of the Customer Report window.

Primary Interest Only check box

The program will use only the primary special interest for sorting and/or grouping purposes. The program will disregard any non-primary special interests when printing this report.

Curr Purchases boxes

You can enter a range of current purchases. The program will not include any records in the report if their current purchases are outside of this range. For instance, if you set a range from “10” to “20”, then any customer records with current purchases of less than 10 or greater than 20 will be excluded from the report.

Total Purchases boxes

You can enter a range of total purchases. The program will not include any records in the report if their total purchases are outside of this range.

Current Value boxes

You can enter a range of current value. The program will not include any records in the report if their current value are outside of this range.

Total Value boxes

You can enter a range of total value. The program will not include any records in the report if their total value are outside of this range.

Available Points boxes

You can enter a range of available frequent diner points. The program will not include any records in the report if their frequent diner points are outside of this range.

Total Points boxes

You can enter a range of total points. The program will not include any records in the report if their total points are outside of this range.

Curr Complaints boxes

You can enter a range of current complaints. The program will not include any records in the report if their number of current complaints are outside of this range.

Total Complaints boxes

You can enter a range of total purchases. The program will not include any records in the report if their number of total purchases are outside of this range.

Customer Report Maintenance Window: FD Plans Tab

The **FD Plans** tab features a filter that allows you to include or exclude customers associated with specific frequent dining plans. The program will only print customers associated with frequent dining plans in the **Include** list and will not print any customers associated with frequent dining plans in the **Exclude** list.

Customer Report Maintenance Window: Interests Tab

The **Interests** tab features a filter that allows you to include or exclude customers associated with specific special interests. The program will only print customers associated with special interests in the **Include** list and will not print any customers associated with special interests in the **Exclude** list. If you have associated any customers with special interests in both the **Include** list and **Exclude** list, the program will include them in the report.

Customer Report Maintenance Window: Zip Codes Tab

The **Zip Code** tab features a filter that allows you to include or exclude customers living in specific zip codes. The program will only print customers living in zip codes in the **Include** list and will not print any customers living in zip codes in the **Exclude** list.

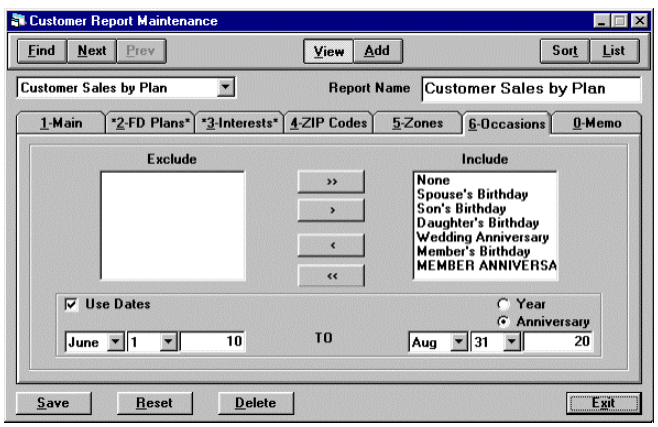
If you wish to include customer records with any zip code, you can select the **Include Any** check box. The report will include customers living in any zip code, even if they appear in the **Exclude** list.

Customer Report Maintenance Window: Zones Tab

The **Zones** tab features a filter that allows you to include or exclude customers living in specific delivery zones. The program will only print customers living in delivery zones in the **Include** list and will not print any customers living in delivery zones in the **Exclude** list.

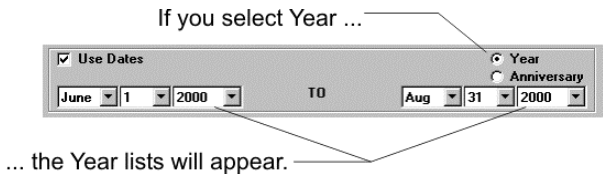
Customer Report Maintenance Window: Occasions Tab

The **Occasions** tab features a filter that allows you to include or exclude customers associated with specific special occasions. The program will only print customers associated with special occasions in the **Include** list and will not print any customers associated with special occasions in the **Exclude** list. If you have associated any customers with special occasions in both the **Include** list and **Exclude** list, the program will include them in the report.

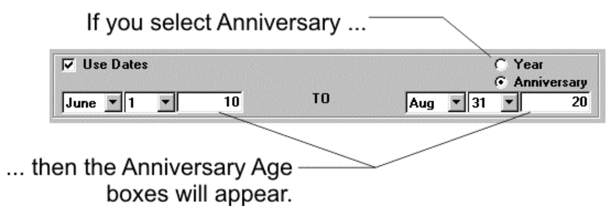


You can filter your report further by clicking the **Use Dates** check box and then entering a date range in the **Date Range** lists. You can use the **Date Range** boxes to filter your report by year or by anniversary.

If you select **Year**, the two sets of **Date Range** lists will each include a **Year** list. You can select an appropriate date, month, and year for your starting and ending date range. For example, if you wish to view a report of customer records with special occasions in the months of June, July, and August (that is, from June 1st, 2000 to August 31st, 2000), you would enter "June", "01", and "2000" in the first set of boxes and "August", "31", and "2000" in the second set of lists. The report will then include only customer records with special occasions with dates that fall within that three-month period.



If you select **Anniversary**, the two sets of **Date Range** lists will each include an **Anniversary Age** box. You can select an appropriate date and month for your starting and ending date range, but you can also enter the anniversary age in the starting and ending **Anniversary Age** boxes. For example, if you wish to view a report of customer records with special occasions in the months of June, July, and August (that is, from June 1st to August 31st), but only special occasions that are 10 to 20 years old, you would enter "June", "01", and "10" in the first set of boxes and "August", "31", and "20" in the second set of boxes. The report will then include only customer records with special occasions whose 10th to 20th anniversary fall within June 1st and August 31st.



Customer Report Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number "0" as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Customer Report Examples

You can use Customer Reports to analyze frequent dining/delivery sales figures and generate mass or marketing mailings based on points, interests, or occasions. Digital Dining provides six different report formats for this report. You can customize how and what reports show by defining reports (for more information, see "Customer Report Maintenance Window: Main Tab" on page 119).

Customer Report: Name and Address Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Customer Report Maintenance Window. The **Name and Address** format of the Customer Report allows you to generate a report that lists the name and address of each frequent dining/delivery customer.

DD CAFE

Date 2/4/03 15:41:09 **Page 1**
Operator: Wizard

Customer List by Plan

Last Purchase Date Range: 01/01/2002 to 02/04/2003
Sorted By: Last Name Grouped By: Frequent Diner Plan
Filtered By: Total Purchase Count, Total Purchase Value, Total Points Value

Member No.	Name	Company	Street /Building	City	State	Zip Code	Phone Number
Family							
123	Ms. Judy Andersen	Menusoft Systems	916 Clopper Road, Apt B-2	Rockville	Md	20878	(703) 912-3000x
Hall 16, Room 101							
FamilyTotal	**1**						
Free Sandwich							
5555	Mr. Ric Beccari	Menusoft	7370 Steel Mill Dr	Springfield	Md	23508-1234	(703) 912-3000x
4444	Pres Graham Granger	Menusoft	7370 Steel Mill Dr	Springfield	Md	22150	(703) 912-3000x
Building 16, Room 101							
Free SandwichTotal	**2**						
Gold							
2345	Mr. John Farmer	Acme Sales	3703 Ridge Road	Columbia	Mo	65203	(703) 912-3000x
GoldTotal	**1**						
New FD PlanTotal	**1**						
Silver							
7777	Mr. Rob Miller	Menusoft Systems	916 Clopper Road, B-2	Gaithersburg	Md	20878	(703) 912-3000x
Building 1							
3333	Mr. Wayne Rodgers	Menusoft Corporation	7500 Steel Mill Dr	Springfield	Md	20215	(703) 912-3000x
SilverTotal	**2**						
Grand Total	7						

***** End of Report *****

You can customize how and what reports show by defining reports (for more information, see “Customer Report Maintenance Window: Main Tab” on page 119).

Customer Report: Sales Summary Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Customer Report Maintenance Window. The **Sales Summary** format of the Customer Report allows you to generate a report that summarizes the purchasing history of each frequent dining/delivery customer.

DD CAFE

Date 2/4/03 15:42:10 Page 1
Operator: Wizard

Customer List by Plan

Last Purchase Date Range: 01/01/2002 to 02/04/2003
Sorted By: Last Name Grouped By: Frequent Diner Plan
Filtered By: Total Purchase Count, Total Purchase Value, Total Points Value

		Purchases			Sales Value		Items Count		Credit		Points		Complaints		
Member No.	Name	Last	PTD	Total	PTD	Total	PTD	Total	Current	Total	Current	Total	Last	PTD	Total
Family															
3456	Ms. Julie Wilson	12/20/02	0	5	.00	386.25	0	44	36.13	36.13	386.25	386.25	12/30/99	0	0
FamilyTotals:			**0**	**10**	**.00**	**772.50**	**0**	**88**	**72.26**	**72.26**	**772.50**	**772.50**		**0**	**0**
Gold															
2345	Mr. John Farmer	12/20/02	0	302	.00	12858.56	0	2186	149.00	98.00	8.00	1844.0	12/30/99	0	4
9012	Ms. Lynn Mcintosh	2/11/02	0	5	.00	296.84	0	39	17.00	37.00	.00	37.00	12/30/99	0	0
GoldTotals:			**0**	**614**	**.00**	**26310.80**	**0**	**4450**	**332.00**	**270.00**	**16.00**	**3762.0**		**0**	**8**
New FD Plan															
JJJJJJJ	Jjj J	8/7/02	0	94	.00	1691.98	0	236	20.37	1167.40	.00	860.70	12/30/99	0	3
NC39	John H Johnson	1/22/03	0	1	.00	33.50	0	2	.00	.00	.00	.00	12/30/99	0	0
787532588522365	Tony Jones	3/1/02	0	1	.00	18.95	0	2	.00	.00	.00	.00	12/30/99	0	0
NC38	L	11/12/02	0	1	.00	27.50	0	2	.00	.00	.00	.00	12/30/99	0	0
New FD PlanTotals:			**0**	**194**	**.00**	**3543.86**	**0**	**484**	**40.74**	**2334.80**	**.00**	**1721.4**		**0**	**6**
Silver															
7777	Mr. Rob Miller	11/14/02	0	94	.00	1705.70	0	235	23.70	1214.70	.00	907.70	12/30/99	0	3
3333	Mr. Wayne Rodgers	11/14/02	0	126	.00	5308.00	0	594	219.00	2570.00	28.00	2305.0	2/10/03	0	3
NC13TOM SMITH	Bob Thomas	2/11/02	0	7	.00	193.25	0	30	20.29	73.30	.00	73.30	12/30/99	0	0
4567	Ms. Anne Wilder	3/6/02	0	14	.00	462.20	0	69	.00	18.00	.00	18.00	12/30/99	0	0
SilverTotals:			**0**	**482**	**.00**	**15338.30**	**0**	**1856**	**525.98**	**7752.00**	**56.00**	**6608.0**		**0**	**12**
Grand Totals:			**0**	**2600**	**.00**	**91930.92**	**0**	**13756**	**1941.96**	**20858.12**	**1689.00**	**25727.**		**0**	**52**

*** End of Report ***

You can customize how and what reports show by defining reports (for more information, see “Customer Report Maintenance Window: Main Tab” on page 119).

Customer Report: Interest and Occasion Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Customer Report Maintenance Window. The **Interest and Occasion** format of the Customer Report allows you to generate a report that lists each interest and occasion for each frequent dining/delivery customer.

DD CAFE

Date 2/4/03 15:42:56 Page 1

Operator: Wizard

Customer List by Plan

Last Purchase Date Range: 01/01/2002 to 02/04/2003

Sorted By: Last Name   Grouped By: Frequent Diner Plan

Filtered By: Total Purchase Count, Total Purchase Value, Total Points Value

Customer No.	Customer	Plan	Occassions	Name	Date	Years
Family						
123	Ms. Judy Andersen	Family	None	None	1/1/97	6
			Wedding Anniversary	Rob	9/24/94	8
			Spouse's Birthday	Rob	5/16/66	36
			None	None	1/1/97	6
			Member's Birthday	None	12/27/64	38
			None	None	1/1/97	6
			Spouse's Birthday	Rob	5/16/66	36
			None	None	1/1/97	6
FamilyTotal	**1**					
Free Sandwich						
4444	Pres Graham Granger	Free Sandwich	Wedding Anniversary	Tia Leone	10/24/92	10
			None	None	12/30/99	103
				None	12/30/99	
				None	12/30/99	
				None	12/30/99	
			Member's Birthday	None	1/30/00	
			Wedding Anniversary	Tia Leone	10/24/92	10
			None	None	12/30/99	103
5555	Mr. Ric Beccari	Free Sandwich	None	None	12/30/99	103
				None	12/30/99	
Free SandwichTotal	**2**					
Grand Total	**7**					

*** End of Report ***

You can customize how and what reports show by defining reports (for more information, see "Customer Report Maintenance Window: Main Tab" on page 119).

Customer Report: Mailing Labels Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Customer Report Maintenance Window. The **Mailing Labels** format of the Customer Report allows you to generate a report that allows you to print the name and address of each frequent dining/delivery customer on mailing label sheets.

Ms. Judy Andersen 916 Clopper Road, Apt B-2 Hall 16, Room 101 Rockville, MD 20878	Mr. Paul Speckman 456 Main St. New York, MD 11221	Mr. John Farmer 3703 Ridge Road Columbia, MO 65203
Mr. Wayne Rodgers 7500 Steel Mill Dr Springfield, VA 22015	Ms. Julie Wilson 1471 E. Broadway St. Columbia, MO 65203	Ms. Anne Wilder 1759 Iris Drive Columbia, MD 65201

You can customize how and what reports show by defining reports (for more information, see "Customer Report Maintenance Window: Main Tab" on page 119).

Customer Report: Batch Report Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Customer Report Maintenance Window. The **Batch Report** format of the Customer Report allows you to generate a report that lists purchase history of each frequent dining/delivery customer who is associated with a plan that has **Batch (Back Office)** selected from the **Print Mode** list on the **Main** tab of the Frequent Dining Plan Maintenance window.

DD CAFE

Date 2/10/03 11:33:35 Page 1
Operator: Wizard

Customer List by Plan

Last Purchase Date Range: 01/01/2002 to 02/04/2003
Sorted By: Last Name Grouped By: Frequent Diner Plan
Filtered By: Total Purchase Count, Total Purchase Value, Total Points Value

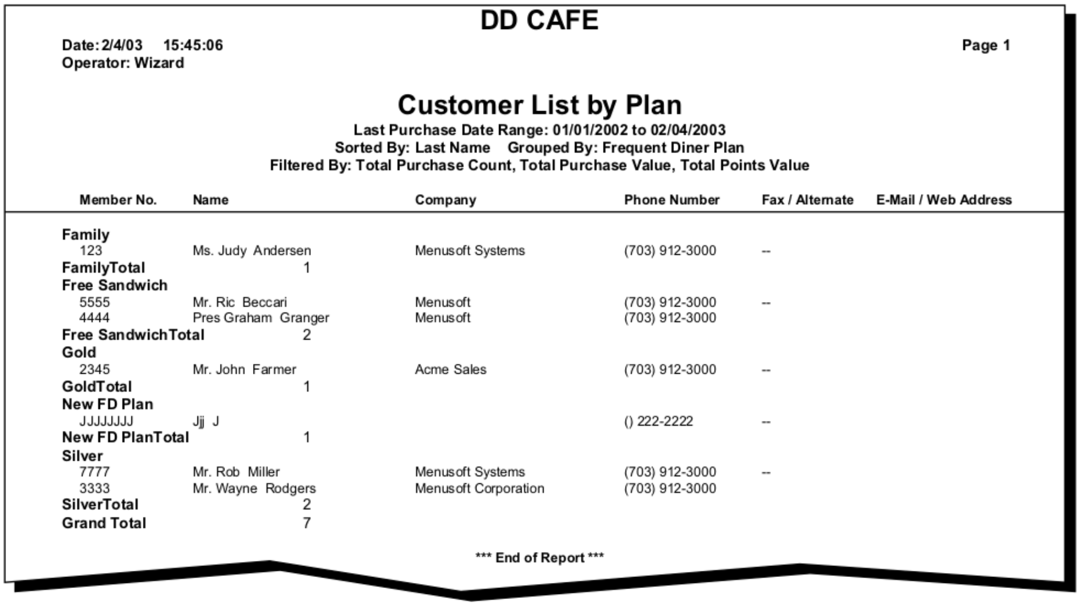
Member No.	Last Name	First Name	Building	Street Address	City	State	Zip	Plan	Reward	Required Points	Accum. Points	Exp. Date
Family												
123	Andersen	Judy	Hall 16, Room 101	916 Clopper Road, Apt B-2	Rockville	Md	20878	Family	Menusoft Bucks	1.00	5.50	5/11/03
FamilyReward	1											

*** End of Report ***

You can customize how and what reports show by defining reports (for more information, see “Customer Report Maintenance Window: Main Tab” on page 119).

Customer Report: Contact List Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Customer Report Maintenance Window. The **Contact List** format of the Customer Report allows you to generate a report that lists the contact information for each frequent dining/delivery customer.



DD CAFE

Date: 2/4/03 15:45:06 Page 1

Operator: Wizard

Customer List by Plan

Last Purchase Date Range: 01/01/2002 to 02/04/2003

Sorted By: Last Name Grouped By: Frequent Diner Plan

Filtered By: Total Purchase Count, Total Purchase Value, Total Points Value

Member No.	Name	Company	Phone Number	Fax / Alternate	E-Mail / Web Address
Family					
123	Ms. Judy Andersen	Menusoft Systems	(703) 912-3000	--	
FamilyTotal	1				
Free Sandwich					
5555	Mr. Ric Beccari	Menusoft	(703) 912-3000	--	
4444	Pres Graham Granger	Menusoft	(703) 912-3000		
Free SandwichTotal	2				
Gold					
2345	Mr. John Farmer	Acme Sales	(703) 912-3000	--	
GoldTotal	1				
New FD Plan					
JJJJJJJJ	Jjj J		() 222-2222	--	
New FD PlanTotal	1				
Silver					
7777	Mr. Rob Miller	Menusoft Systems	(703) 912-3000	--	
3333	Mr. Wayne Rodgers	Menusoft Corporation	(703) 912-3000		
SilverTotal	2				
Grand Total	7				

*** End of Report ***

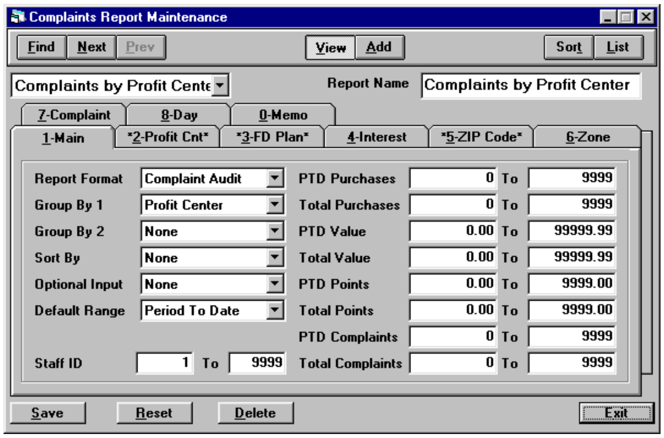
You can customize how and what reports show by defining reports (for more information, see “Customer Report Maintenance Window: Main Tab” on page 119).

Complaints Report Maintenance

Complaints Reports allow you to analyze your customers’ complaints in a variety of ways. You can create detailed lists of complaints or lists of customers who have made complaints, with their contact information.

Complaints Report Maintenance Window: Main Tab

In the **Main** tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The **Main** tab also allows you to filter customer records based on accumulated frequent diner points and complaints.



Report Format list

You can select one of three different report formats. Each format will produce a report with different information or arrangement:

Report Format	Contains
Name and Address	A list of customers who have made one or more complaints within the date range, with addresses.
Complaint Audit	A list of complaints made within the date range, including details.
Complaint Summary	A total of all the complaints made within the date range.

Group By 1 list

You can control how the program organizes the information in your report by selecting a grouping option from the **Group By 1** list. The program will list the data alphabetically by the grouping option you select. You can group your data by any of the following criteria:

Profit Center	Click **Profit Center** to group your data by the profit centers within which the customers made the complaints.
Frequent Dining Plan	Click **Frequent Dining Plan** to group your data by the frequent dining plans of the customers.
Special Interest	Click **Special Interest** to group your data by the special interests of the customers.
Zip Code	Click **Zip Code** to group your data by the zip codes of the customers.
Delivery Zone	Click **Delivery Zone** to group your data by the delivery zones of the customers.
Day of Week	Click **Day of Week** to group your data by the days of the week that the customers made the complaints.
Customer	Click **Customer** to group your data by each customer.
Staff	Click **Staff** to group your data by the ID numbers of the staff members who took the complaints from the customers.
Complaint Type	Click **Complaint Type** to group your data by the each complaint reason.

Group By 2 list

You can group your data to a second level by selecting a subgrouping option from the **Group By 2** list. The **Group By 2** list includes the same options as the **Grouping** list.

Sort By list

You can also control how the program organizes the information in a report by selecting a sorting option from the **Sort By** list. The program will sort records in alphabetical and/or numerical order by whatever item you select in the sorting list. You can sort your data by any of the following criteria:

Last Name	Click **Last Name** to organize your report by the last name of each customer.
Sort Name	Click **Sort Name** to organize your report by the search name of each customer.
Company Name	Click **Company Name** to organize your report by the name of each customer's company.
Last Purchase Date	Click **Last Purchase Date** to organize your report by the last purchase date of each customer.
PTD Purchases	Click **PTD Purchases** to organize your report by the purchases of each customer for the present period-to-date.
PTD Value of Purchases	Click **PTD Value of Purchases** to organize your report by the value of purchases of each customer for the present period-to-date.
PTD Points	Click **PTD Points** to organize your report by the frequent diner points of each customer for the present period-to-date.
PTD Complaints	Click **PTD Complaints** to organize your report by the number of complaints of each customer for the present period-to-date.
Total Purchases	Click **Total Purchases** to organize your report by the total purchases of each customer.
Total Value of Purchases	Click **Total Value of Purchases** to organize your report by the total value of purchases of each customer.
Total Points	Click **Total Points** to organize your report by the total frequent diner points of each customer.
Total Complaints	Click **Total Complaints** to organize your report by the total number of complaints of each customer.
Complaint Time	Click **Complaint Time** to organize your report by the time that each complaint was made.
Complaint Date/Time	Click **Complaint Date/Time** to organize your report by the date and time that each complaint was made.
Complaint Type	Click **Complaint Type** to organize your report by each complaint reason.

Optional Input list

If you select an optional input, the program will display a filter for the selected data each time you print this report in the future. You can select one of the following optional input criteria:

Profit Center	Click **Profit Center** to filter your report by the profit centers within which the customers made the complaints.
Frequent Dining Plan	Click **Frequent Dining Plans** to filter your report by the frequent dining plan of the customers.
Special Interest	Click **Special Interest** to filter your report by the special interests of the customers.
Zip Code	Click **Zip Code** to filter your report by the zip codes of the customers.
Delivery Zone	Click **Delivery Zone** to filter your report by the delivery zones of the customers.
Day of Week	Click **Day of Week** to filter your report by the days of the week that the customers made the complaint.
Staff ID	Click **Staff ID** to filter your report by the ID numbers of the staff members who took the complaints from the customers.
PTD Purchases	Click **PTD Purchases** to filter your report by the purchases of the customers for the present period-to-date.
PTD Value of Purchases	Click **PTD Value of Purchases** to filter your report by the value of purchases of the customers for the present period-to-date.
PTD Points	Click **PTD Points** to filter your report by the frequent diner points of the customers for the present period-to-date.
PTD Complaints	Click **PTD Complaints** to filter your report by the number of complaints of the customers for the present period-to-date.
Total Purchases	Click **Total Purchases** to filter your report by the total purchases of the customers.
Total Value of Purchases	Click **Total Value of Purchases** to filter your report by the total value of purchases of the customers.
Total Points	Click **Total Points** to filter your report by the total frequent diner points of the customers.
Total Complaints	Click **Total Complaints** to filter your report by the total number of complaints of the customers.

Default Range list

If you select a date range from this list, this default range will appear in the **Range** list of the Complaints Reports window.

Staff ID boxes

You can enter a range of staff ID numbers. The report will only include complaints made to staff members whose ID number are within this range.

PTD Purchases boxes

You can enter a range of current purchases. The report will only include complaint information from customers whose period-to-date purchases are within this range.

Total Purchases boxes

You can enter a range of total purchases. The report will only include complaint information from customers whose total purchases are within this range.

PTD Value boxes

You can enter a range of current value. The report will only include complaint information from customers whose period-to-date value of purchases are within this range.

Total Value boxes

You can enter a range of total value. The report will only include complaint information from customers whose total value of purchases are within this range.

PTD Points boxes

You can enter a range of period-to-date frequent diner points. The report will only include complaint information from customers whose period-to-date frequent diner points are within this range.

Total Points boxes

You can enter a range of total frequent diner points. The report will only include complaint information from customers whose total frequent diner points are within this range.

PTD Complaints boxes

You can enter a range of current complaints. The report will only include complaint information from customers whose period-to-date complaints are within this range.

Total Complaints boxes

You can enter a range of total complaints. The report will only include complaint information from customers whose total complaints are within this range.

Complaints Report Maintenance Window: Profit Cnt Tab

The **Profit Cnt** (profit center) tab features a filter that allows you to include or exclude complaints associated with specific profit centers. The program will only print complaints associated with profit centers in the **Include** list and will not print any complaints associated with profit centers in the **Exclude** list.

Complaints Report Maintenance Window: FD Plan Tab

The **FD Plan** tab features a filter that allows you to include or exclude complaints associated with customers enrolled in specific frequent dining plans. The program will only print complaints associated with customers enrolled in frequent dining plans in the **Include** list and will not print any complaints associated with customers enrolled in frequent dining plans in the **Exclude** list.

Complaints Report Maintenance Window: Interest Tab

The **Interest** tab features a filter that allows you to include or exclude complaints from customers with specific special interests. The program will only print complaints from customers with special interests in the **Include** list and will not print any complaints from customers with special interests in the **Exclude** list. The report will include any complaints from customers with special interests in both the **Include** list and **Exclude** list.

Complaints Report Maintenance Window: Zip Code Tab

The **Zip Code** tab features a filter that allows you to include or exclude complaints associated with customers living in specific zip codes. The program will only print complaints associated with customers living in zip codes in the **Include** list and will not print any complaints associated with customers living in zip codes in the **Exclude** list.

If you wish to include complaints from customers with any zip code, you can select **All Zip Codes**. The program will include complaints from customers with any zip code in the report, even if they appear in the **Exclude** list.

Complaints Report Maintenance Window: Zone Tab

The **Zone** tab features a filter that allows you to include or exclude complaints from customers living in specific delivery zones. The program will only print complaints from customers living in delivery zones in the **Include** list and will not print any complaints from customers living in delivery zones in the **Exclude** list.

Complaints Report Maintenance Window: Complaint Tab

The **Complaint** tab features a filter that allows you to include or exclude specific complaints. The program will only print complaints from the **Include** list and will not print any complaints from the **Exclude** list.

Complaints Report Maintenance Window: Day Tab

The **Day** tab features a filter that allows you to include or exclude complaints made by customers on specific days of the week. The program will only print complaints made on days of the week in the **Include** list and will not print any complaints made on days of the week in the **Exclude** list.

Complaints Report Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number “0” as its shortcut key.

You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Complaints Report Examples

You can use Complaints Reports to analyze complaints your frequent dining/delivery customers have submitted. You can use this information to redesign frequent dining programs, assess staff training needs (both front and back of the house), or gauge frequent dining/delivery customer satisfaction. Digital Dining provides three different report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Complaints Report Maintenance Window: Main Tab” on page 132).

Complaints Report: Name and Address Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Complaints Report Maintenance Window. The **Name and Address** format of the Complaints Report allows you to generate a report that lists the name and address of each frequent dining/delivery customer who submitted a complaint for the date range or period you provide.

DD CAFE

Date 2/13/03 17:30:56 | Page 1

Operator: Wizard

Complaints

Name And Address

Sorted By: Last Name Grouped By: Customer

Filtered By: Staff ID

Member No.	Name	Building	Street	City	ST	Zip Code	Phone Number	Complaint Type	Complaint Detail
Anders									
123	Ms. Judy Andersen	Hall 16, Room 1	916 Clopper Road, Apt B-2	Rockville	Md	20878	(703)912-3000-	Overcooked Food	Steak Tough
123	Ms. Judy Andersen	Hall 16, Room 1	916 Clopper Road, Apt B-2	Rockville	Md	20878	(703)912-3000-	Waited too long	
Anders Total	1								
Speck									
1234	Mr. Paul Speckman		456 Main St.	New York	Md	11221	(703)912-3000-	Overcooked Food	Steak Tough
1234	Mr. Paul Speckman		456 Main St.	New York	Md	11221	(703)912-3000-	Overcooked Food	
1234	Mr. Paul Speckman		456 Main St.	New York	Md	11221	(703)912-3000-	Poor Service	Waited 45
Minutes									
1234	Mr. Paul Speckman		456 Main St.	New York	Md	11221	(703)912-3000-	Poor Service	
Speck Total	1								
Rodger									
3333	Mr. Wayne Rodgers		7500 Steel Mill Dr	Springfield	Md	20215	(703)912-3000-	Overcooked Food	
3333	Mr. Wayne Rodgers		7500 Steel Mill Dr	Springfield	Md	20215	(703)912-3000-	Waited too long	
3333	Mr. Wayne Rodgers		7500 Steel Mill Dr	Springfield	Md	20215	(703)912-3000-	Waited too long	
Rodger Total	1								
Grange									
4444	Pres Graham Granger	Building 16, Ro	7370 Steel Mill Dr	Springfield	Md	22150	(703)912-3000-	Overcooked Food	Dry Meat
4444	Pres Graham Granger	Building 16, Ro	7370 Steel Mill Dr	Springfield	Md	22150	(703)912-3000-	Overcooked Food	Pizza Was Cold
4444	Pres Graham Granger	Building 16, Ro	7370 Steel Mill Dr	Springfield	Md	22150	(703)912-3000-	Waited too long	60 Min Wait
Grange Total	1								
Farmer									
2345	Mr. John Farmer		3703 Ridge Road	Columbia	Mo	65203	(703)912-3000-	Poor Service	Waited Too Long
2345	Mr. John Farmer		3703 Ridge Road	Columbia	Mo	65203	(703)912-3000-	Overcooked Food	
2345	Mr. John Farmer		3703 Ridge Road	Columbia	Mo	65203	(703)912-3000-	Overcooked Food	Steak Tough
2345	Mr. John Farmer		3703 Ridge Road	Columbia	Mo	65203	(703)912-3000-	Overcooked Food	Steak Tough
Farmer Total	1								
Grand Total	5								

*** End of Report ***

You can customize how and what reports show by defining reports (for more information, see “Complaints Report Maintenance Window: Main Tab” on page 132).

Complaints Report: Complaint Audit Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Complaints Report Maintenance Window. The **Complaint Audit** format of the Complaints Report allows you to generate a report that lists each complaint that a frequent dining/delivery customer submitted for the date range or period you provide.

DD CAFE

Date 2/13/03 17:31:36 **Page 1**
Operator: Wizard

Complaints
Audit
Sorted By: Last Name Grouped By: Customer
Filtered By: Staff ID

Complaint Type	Complaint Detail	Customer	FD Plan	Zone	Staff POS	Profit Center	Check No	Date	Time
Anders									
Overcooked Food	Steak Tough	Ms. Judy Andersen	Silver	Zone 3	Kay	Main Dining Room	1,472.00	4/2/98	15:43
Waited too long		Ms. Judy Andersen	Family	Zone 3	Rob	Main Dining Room	8,854.00	2/10/03	14:34
Anders Total	1								
Speck									
Overcooked Food	Steak Tough	Mr. Paul Speckman	Silver	None	Kay	Main Dining Room	2,020.00	7/22/98	10:43
Overcooked Food		Mr. Paul Speckman	Silver	None	Kay	Main Dining Room	3,181.00	6/8/99	16:53
Poor Service	Waited 45 Minutes	Mr. Paul Speckman	Silver	None	Kay	Main Dining Room	3,401.00	10/18/99	16:05
Poor Service		Mr. Paul Speckman	Silver	None	Rob	Main Dining Room	8,855.00	2/10/03	15:39
Speck Total	1								
Rodger									
Overcooked Food		Mr. Wayne Rodgers	New FD Plan	Zone 2	Kay	Main Dining Room	1,462.00	4/2/98	11:36
Waited too long		Mr. Wayne Rodgers	New FD Plan	Zone 2	Kay	Main Dining Room	1,462.00	4/2/98	11:38
Waited too long		Mr. Wayne Rodgers	Silver	Zone 2	Rob	Main Dining Room	8,856.00	2/10/03	16:38
Rodger Total	1								
Grange									
Overcooked Food	Dry Meat	Pres Graham Granger	Free Sandwich	Zone 3	Julie	Counter	0.00	2/15/00	13:02
Overcooked Food	Pizza Was Cold	Pres Graham Granger	Free Sandwich	Zone 3	Kay	Main Dining Room	4,547.00	9/18/00	10:11
Waited too long	60 Min Wait	Pres Graham Granger	Free Sandwich	Zone 3	Susan	Delivery	4,879.00	1/9/01	16:57
Grange Total	1								
Farmer									
Poor Service	Waited Too Long	Mr. John Farmer	Gold	None	Kay	Main Dining Room	2,030.00	7/22/98	15:28
Overcooked Food		Mr. John Farmer	Gold	None	Kay	Main Dining Room	2,575.00	11/11/98	14:32
Overcooked Food	Steak Tough	Mr. John Farmer	Gold	None	Kay	Main Dining Room	4,285.00	7/27/00	12:43
Overcooked Food	Steak Tough	Mr. John Farmer	Gold	None	Kay	Main Dining Room	4,946.00	2/6/01	09:41
Farmer Total	1								
Grand Total	5								

***** End of Report *****

You can customize how and what reports show by defining reports (for more information, see “Complaints Report Maintenance Window: Main Tab” on page 132).

Complaints Report: Complaint Summary Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Complaints Report Maintenance Window. The **Complaint Summary** format of the Complaints Report allows you to generate a report that summarizes the number of complaints from frequent dining/delivery customers based on the complaint for the date range or period you provide.

DD CAFE

Date 2/13/03 17:32:35 **Page 1**
Operator: Wizard

Complaints
Summary
Sorted By: Last Name Grouped By: Customer
Filtered By: Staff ID

Anders	
Anders Total	1
Speck	
Speck Total	1
Rodger	
Rodger Total	1
Grange	
Grange Total	1
Farmer	
Farmer Total	1
Grand Total	5

***** End of Report *****

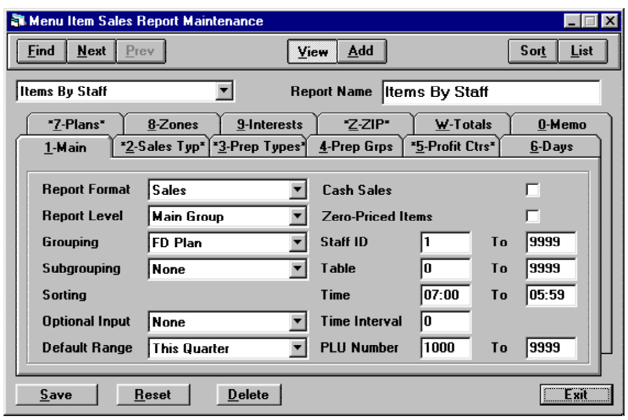
You can customize how and what reports show by defining reports (for more information, see “Complaints Report Maintenance Window: Main Tab” on page 132).

Menu Item Sales Report Maintenance

Menu Item Sales Reports allow you to analyze information about your specific menu items. For instance, you can analyze sales of certain items to gauge how well they are selling. You can also analyze which items specific customers have been ordering.

Menu Item Sales Report Maintenance Window: Main Tab

In the **Main** tab, you determine the format of your new report, as well as decide how the program organizes and sorts your menu item records. The **Main** tab also allows you to filter the sales information of menu item records based on the staff ID number, table number and time of the transactions. You can also include or exclude cash sales and/or zero-priced items.



Report Format list

You can select one of three different report formats. Each format will produce a report with different information and/or arrangement:

Report Format	Contains
Audit	Detailed sales history of each menu item.
Sales	Sales totals for individual menu items.
Customer	Detailed purchasing history of individual customers.

Report Level list

You can select one of six different report levels. By selecting a report level, you control how the program will subtotal sales information. For instance, if you define a sales report with a level of **Main Group**, the report will include sales totals for each main group.

Report Level	Contains
Grand Totals	No subtotals.
Menu Items	Sales information for each individual menu item.
Sales Type	Subtotals for each sales type.
Main Group	Subtotals for each main group.
Main Group Type	Subtotals for each main group type.
Audit	No subtotals. Includes details of each transaction, including time.

Grouping list

You can control how the program organizes the information in your report by selecting a grouping option from the **Grouping** list. The program will list the menu items alphabetically by the grouping option you select. You can group your items by any of the following criteria:

Staff Member	Click **Staff** to group your records by the ID numbers of the staff members who handled the transactions.
Prep Type	Click **Prep Type** to group your records by their prep type.
Profit Center	Click **Profit Center** to group your records by their profit center.
Weekday	Click **Weekday** to group your records by the days of the week that the sales took place.
Time Interval	Click **Time Interval** to group your records by whatever time interval you have entered in the **Time Interval** box, if any.
FD Plan	Click **FD Plan** to group your records by the frequent dining plans of the customers.
Primary Interest	Click **Primary Interest** to group your records by the primary special interests of the customers.
Zip Code	Click **Zip Code** to group your records by the zip codes of the customers.
Delivery Zone	Click **Delivery Zone** to group your records by the delivery zones of the customers.
Customer	Click **Customer** to group your records by each customer.

Subgrouping list

You can group your data to a second level by selecting a subgrouping option from the **Subgrouping** list. The **Subgrouping** list is identical to the **Grouping** list.

Sorting list

You can also control how the program organizes the information in a report by selecting a sorting option from **Sorting** list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the **Sorting** list. You can sort your items by any of the following criteria:

PLU Number	Click **PLU Number** to sort your report by the PLU number of each menu item.
Check Description	Click **Check Description** to sort your report by the check description of each transaction.
Check Number	Click **Check Number** to sort your report by the check number of each transaction.
Last Name	Click **Last Name** to sort your report by the last name of each customer.
Search Name	Click **Search Name** to sort your report by the search name of each customer.
Company	Click **Company** to sort your report by the name of each customer's company.
Purchase Date	Click **Purchase Date** to sort your report by the purchase date of each transaction.
PTD Purchase Value	Click **PTD Purchase Value** to sort your report by the value of purchases of each customer for the present period-to-date.
Total Purchase Value	Click **Total Value of Purchases** to sort your report by the total value of purchases of each customer.
PTD Number of Purchases	Click **PTD Number of Points** to sort your report by the number of frequent diner points of each customer for the present period-to-date.
Total Number of Purchases	Click **Total Number of Purchases** to sort your report by the total number of purchases of each customer.
PTD Number of Complaints	Click **PTD Number of Complaints** to sort your report by the number of complaints of each customer for the present period-to-date.
Total Number of Complaints	Click **Total Number of Complaints** to sort your report by the total number of complaints of each customer.
Current Credit	Click **Current Credit** to sort your report by the reward credit of each customer for the present period-to-date.
Total Credit	Click **Total Credit** to sort your report by the total reward credit of each customer.

Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print this report at the Menu Item Sales Reports window. You can select one of the following optional input criteria:

Profit Center	Click **Profit Center** to filter your report by the profit centers within which the transactions took place.
Sales Type	Click **Sales Type** to filter your report by the sale types of the menu items.
PTD Purchase Value	Click **PTD Purchase Value** to filter your report by the value of purchases of the customers for the present period-to-date.
Total Purchase Value	Click **Total Purchase Value** to filter your report by the total value of purchases of the customers.
PTD Number of Purchases	Click **PTD Number of Purchases** to filter your report by the number of purchases of the customers for the present period-to-date.
Total Number of Purchases	Click **Total Purchases** to filter your report by the total number of purchases of the customers.
Current Credit	Click **Current Credit** to filter your report by the reward credit of the customers for the present period-to-date.
Total Credit	Click **Total Credit** to filter your report by the total reward credit of the customers.
PTD Number of Complaints	Click **PTD Number of Complaints** to filter your report by the number of complaints of the customers for the present period-to-date.
Total Number of Complaints	Click **Total Number of Complaints** to filter your report by the total number of complaints of the customers.
Main Interest	Click **Main Interest** to filter your report by the primary special interests of the customers.
FD Plan	Click **FD Plans** to filter your report by the frequent dining plans of the customers.
Zip Code	Click **Zip Code** to filter your report by the zip codes of the customers.
Delivery Zone	Click **Delivery Zone** to filter your report by the delivery zones of the customers.

Default Range list

If you select a default range from this list, this default range will appear in the **Range** list of the Menu Item Sales Report window.

Cash Sales check box

You should select **Cash Sales** if you wish to include cash sales in your report.

Zero-Priced Items check box

You should select **Zero-Priced Items** if you wish to include zero-priced items in your report.

Staff ID boxes

You can enter a range of staff ID numbers. The program will only include sales information from transactions handled by staff members whose ID falls within this range.

Table boxes

You can enter a range of table numbers. The program will only include sales information from transactions from tables that fall within this range.

Time boxes

You can enter a time range. The program will only include sales information from transactions that took place within this time range. For instance, if you enter a time range of “6:00” to “9:00”, the program will only include information from transactions that took place between 6:00 and 9:00 of each day within the date range.

Time Interval box

You can enter a time interval by which the program will group the records in the report. The program will group sales information from transactions by whatever number of minutes you enter in the **Time Interval** box. For instance, if you enter “30”, the program will collect information for transactions occurring within each 30-minute interval of the specified time range. If you enter a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: transactions occurring from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00.

PLU Number boxes

You can enter a range of PLU numbers. The program will only include sales information from menu items whose PLU number falls within this range.

Menu Item Sales Report Maintenance Window: Sales Typ Tab

The **Sales Typ** (sales types) tab features a filter that allows you to include or exclude menu items associated with specific sales types. The program will only print menu items associated with sales types in the **Include** list and will not print any menu items associated with sales types in the **Exclude** list.

Menu Item Sales Report Maintenance Window: Prep Types Tab

The **Prep Types** tab features a filter that allows you to include or exclude menu items associated with specific prep types. The program will only print menu items associated with prep types in the **Include** list and will not print any menu items associated with prep types in the **Exclude** list.

Menu Item Sales Report Maintenance Window: Prep Grps Tab

The **Prep Grps** (prep groups) tab features a filter that allows you to include or exclude menu items associated with specific prep groups. The program will only print menu items associated with prep groups in the **Include** list and will not print any menu items associated with prep groups in the **Exclude** list.

Menu Item Sales Report Maintenance Window: Profit Ctrs Tab

The **Profit Ctrs** (profit centers) tab features a filter that allows you to include or exclude sales information from menu items sold within specific profit centers. The program will only include sales information of menu items sold in profit centers in the **Include** list and will not include sales information of menu items sold in profit centers in the **Exclude** list.

Menu Item Sales Report Maintenance Window: Days Tab

The **Days** tab features a filter that allows you to include or exclude sales information from menu items sold on specific days of the weeks. The program will only include sales information of menu items sold on days of the weeks in the **Include** list and will not include sales information of menu items sold on days of the weeks in the **Exclude** list.

Menu Item Sales Report Maintenance Window: Plans Tab

The **Plans** tab features a filter that allows you to include or exclude sales information from menu items sold to customers enrolled in specific frequent dining plans. The program will only print sales information from menu items sold to customers enrolled in frequent dining plans in the **Include** list and will not print any sales information from menu items sold to customers enrolled in frequent dining plans in the **Exclude** list.

Menu Item Sales Report Maintenance Window: Zones Tab

The **Zones** tab features a filter that allows you to include or exclude sales information from menu items sold to customers living in specific delivery zones. The program will only print sales information from menu items sold to customers living in delivery zones in the **Include** list and will not print any sales information from menu items sold to customers living in delivery zones in the **Exclude** list.

Menu Item Sales Report Maintenance Window: Interests Tab

The **Interests** tab features a filter that allows you to include or exclude sales information from menu items sold to customers associated with specific special interests. The program will only print sales information from menu items sold to customers associated with special interests in the **Include** list and will not print any sales information from menu items sold to customers associated with special interests in the **Exclude** list.

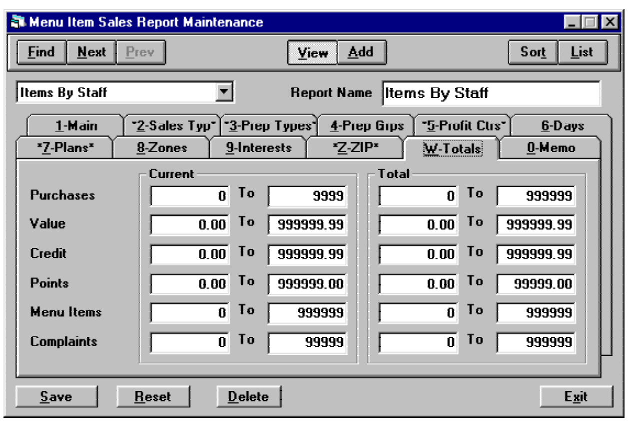
Menu Item Sales Report Maintenance Window: Zip Tab

The **Zip** tab features a filter that allows you to include or exclude sales information from menu items sold to customers living in specific zip codes. The program will only print sales information from menu items sold to customers living in zip codes in the **Include** list and will not print any sales information from menu items sold to customers living in zip codes in the **Exclude** list.

If you wish to include customer records with any zip code, you can select the **Include Any** check box. The program will not exclude records with any zip code, even if it appears in the **Exclude** list.

Menu Item Sales Report Maintenance Window: Totals Tab

The **Totals** tab features a filter that allows you to include or exclude customer records based on their number of current (period-to-date) or total frequent diner points, reward credit, or complaints. You can enter a range of current or total purchases, value of purchases, reward credit, frequent diner points, number of menu items, and/or number of complaints. Any customers outside of any of these ranges will not appear in the report. For instance, if you set a range from “10” to “20” in the **Purchases** row, **Current** column, then the report will exclude any customer records with current purchases of less than 10 or greater than 20.



	Current	Total
Purchases	Number of purchases within the present period-to-date.	Total number of purchases.
Value	Value of purchases within the present period-to-date.	Total value of purchases.
Credit	Amount of reward credit within the present period-to-date.	Total amount of reward credit.
Points	Number of frequent diner points within the present period-to-date.	Total number of frequent diner points.
Menu Items	Number of purchased menu items within the present period-to-date.	Total number of purchased menu items.
Complaints	Number of complaints within the present period-to-date.	Total number of complaints.

Menu Item Sales Report Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number "0" as its shortcut key.

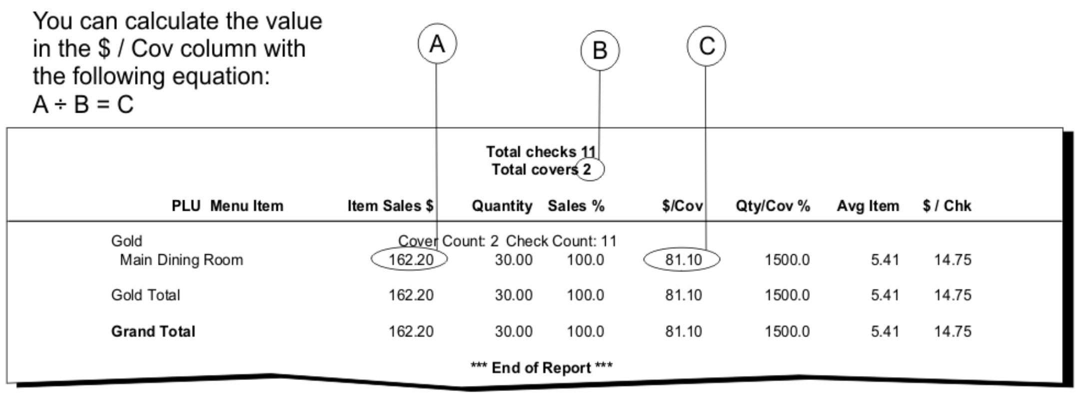
You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Menu Item Sales Report Examples

You can use Menu Item Sales Reports to analyze menu sales figures based on frequent dining/delivery information. Digital Dining provides three different report formats for this report. You can customize how and what reports show by defining reports (for more information, see "Menu Item Sales Report Maintenance Window: Main Tab" on page 144).

The **Price** column displays the total sales divided by the value in the Quantity column.

The **$/Cov** column displays the value of the Item Sales $ column divided by the Total Covers.

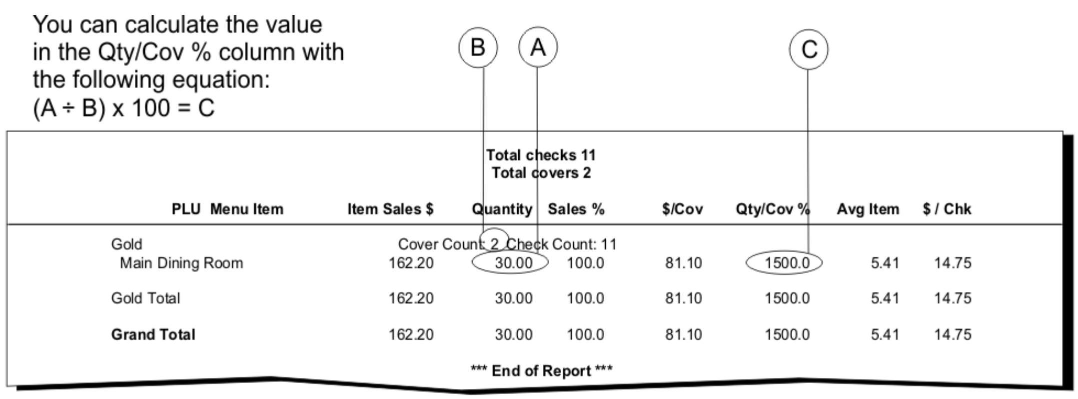


Total checks 11
Total covers 2

PLU Menu Item	Item Sales $	Quantity	Sales %	$/Cov	Qty/Cov %	Avg Item	$ / Chk
Gold	Cover Count: 2 Check Count: 11						
Main Dining Room	162.20	30.00	100.0	81.10	1500.0	5.41	14.75
Gold Total	162.20	30.00	100.0	81.10	1500.0	5.41	14.75
Grand Total	162.20	30.00	100.0	81.10	1500.0	5.41	14.75

*** End of Report ***

The **Qty/Cov %** column displays the value of the total from the Quantity column divided by the value of the cover count from the Items Sales $ column. The value is a percentage rounded to two decimal places. To calculate the values in the Grand Total row, you can divide the value in the Quantity column by the Total Covers value (at the top of the report).



Total checks 11
Total covers 2

PLU Menu Item	Item Sales $	Quantity	Sales %	$/Cov	Qty/Cov %	Avg Item	$ / Chk
Gold	Cover Count: 2 Check Count: 11						
Main Dining Room	162.20	30.00	100.0	81.10	1500.0	5.41	14.75
Gold Total	162.20	30.00	100.0	81.10	1500.0	5.41	14.75
Grand Total	162.20	30.00	100.0	81.10	1500.0	5.41	14.75

*** End of Report ***

The **Avg Item** column displays the value of the Sales column divided by the value of the Quantity column, rounded to two decimal places (Sales column ÷ Quantity column).

The **$/Chk** column displays the value of the total Item Sales $ column divided by the check count from the Quantity column. To calculate the values in the Grand Total row, you can divide the value in the Item Sales $ column by the Total Checks value (at the top of the report).

You can calculate the value in the $/Cov column with the following equation:
A ÷ B = C

A B C

Total checks 11
Total covers 2

PLU Menu Item	Item Sales $	Quantity	Sales %	$/Cov	Qty/Cov %	Avg Item	$ / Chk
Gold	Cover Count: 2 Check Count: 11						
Main Dining Room	162.20	30.00	100.0	81.10	1500.0	5.41	14.75
Gold Total	162.20	30.00	100.0	81.10	1500.0	5.41	14.75
Grand Total	162.20	30.00	100.0	81.10	1500.0	5.41	14.75

*** End of Report ***

Menu Item Sales Report: Audit Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Menu Item Sales Report Maintenance Window. The **Audit** format of the Menu Item Sales Report allows you to generate a report that lists the sales totals for menu items purchased by frequent dining/delivery customers for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Menu Item Sales Report Examples” on page 153.

DD CAFE

2/4/03 Date 15:54:25 Date Range: 01/01/2002 to 02/04/2003 Page 1
Operator: Wizard

Items By Staff

Report Level: Totals Only
Grouped By: FD Plan SubGrouped By: Profit Center
Filtered By: Cash Sales, Zero Priced Items, Plu, Sales Type, Prep Type, Profit Center, Days, Total Points Value, Total Purchase Value, Zip Codes
Total checks 13

PLU Menu Item	Staff	Check No	Table	Sales Type	Prep Grp	Profit Ctr	Qty	Price	Time
Gold									
Main Dining Room							30.00	5.41	
Gold Total							30.00	5.41	
Grand Total							30.00	5.41	

*** End of Report ***

You can customize how and what reports show by defining reports (for more information, see “Menu Item Sales Report Maintenance Window: Main Tab” on page 144).

Menu Item Sales Report: Sales Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Menu Item Sales Report Maintenance Window. The **Sales** format of the Menu Item Sales Report allows you to generate a report that lists the total sales for all items purchased for the frequent dining/delivery plan. For more information on what the columns of this report contain or how to calculate their values, see “Menu Item Sales Report Examples” on page 153.

DD CAFE

2/4/03 Date 15:56:33 Date Range: 01/01/2002 to 02/04/2003 Page 1
Operator: Wizard

Items By Staff

Report Level: Totals Only
Grouped By: FD Plan SubGrouped By: Profit Center
Filtered By: Cash Sales, Zero Priced Items, Plu, Sales Type, Prep Type, Profit Center, Days, Total Points Value, Total Purchase Value, Zip Codes
Total checks 11
Total covers 2

PLU Menu Item	Item Sales $	Quantity	Sales %	$/Cov	Qty/Cov %	Avg Item	$ / Chk
Gold	Cover Count: 2 Check Count: 11						
Main Dining Room	162.20	30.00	100.0	81.10	1500.0	5.41	14.75
Gold Total	162.20	30.00	100.0	81.10	1500.0	5.41	14.75
Grand Total	162.20	30.00	100.0	81.10	1500.0	5.41	14.75

***** End of Report *****

You can customize how and what reports show by defining reports (for more information, see “Menu Item Sales Report Maintenance Window: Main Tab” on page 144).

Menu Item Sales Report: Customer Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Menu Item Sales Report Maintenance Window. The **Customer** format of the Menu Item Sales Report allows you to generate a report that lists the sales total for each frequent dining/delivery customer for the date range or period you provide.

DD CAFE

2/4/03 Date 15:57:00 Date Range: 01/01/2002 to 02/04/2003 Page 1
Operator: Wizard

Items By Staff

Report Level: Totals Only
Grouped By: Customer SubGrouped By: Profit Center
Filtered By: Cash Sales, Zero Priced Items, Plu, Sales Type, Prep Type, Profit Center, Days, Total Points Value, Total Purchase Value, Zip Codes
Total checks 11
Total covers 2

Name	Company	Address	Item Sales $	Quantity	Avg Item	
Farmer John	Acme Sales	3703 Ridge Road , Columbia , Mo-65203		Cover Count: 2	Check Count:11	
Main Dining Room			162.20	30.00	5.41	
Farmer John Total			162.20	30.00	5.41	
Grand Total			162.20	30.00	5.41	100.0

*** End of Report ***

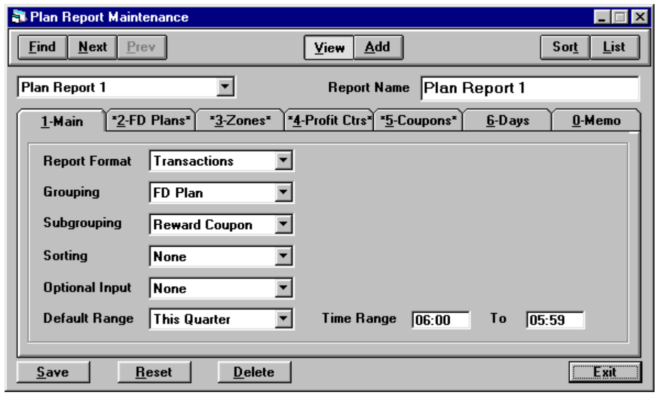
You can customize how and what reports show by defining reports (for more information, see “Menu Item Sales Report Maintenance Window: Main Tab” on page 144).

Frequent Dining Plan Report Maintenance

Frequent Dining Plan Reports allow you to analyze sales information about your specific frequent dining plans. For instance, you can collect a list of all sales transactions by customers within a specific plan. You can analyze the sales of certain plans to gauge their effectiveness.

Plan Report Maintenance Window: Main Tab

In the **Main** tab, you determine the format of your new reports, as well as decide how the program organizes and sorts your transactions. The **Main** tab also allows you to filter sales information based on the time of each transaction.



Report Format list

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

Report Format	Contains
Transactions	A detailed list of transactions by customers enrolled frequent dining plans, including the amount of each transaction and the amount of reward points or credit earned.
Transaction Summary	A list of sales information for each frequent dining plan, including totals and averages for sales, reward points, and/or credit.

Grouping list

You can control how the program organizes the information in your report by selecting a grouping option from the **Grouping** list. The program will list the customer records alphabetically by the grouping option you select. You can group your customer records by any of the following criteria:

Profit Center	Click **Profit Center** to group your transactions by the profit centers in which the transactions took place.
FD Plan	Click **FD Plan** to group your transactions by the frequent dining plans of the customers.
Delivery Zone	Click **Delivery Zone** to group your transactions by the delivery zones of the customers.
Reward Coupon	Click **Reward Coupon** to group your transactions by the reward coupons they produced, if any. (For instance, the program will group all of the transactions that produced a "free sandwich" coupon.)

Subgrouping list

You can group your data to a second level by selecting a subgrouping option from the **Subgrouping** list. The **Subgrouping** list is identical to the **Grouping** list.

Sorting list

You can also control how the program organizes the information in a report by selecting a sorting option from the **Sorting** list. The program will sort records in alphabetical and/or numerical order by whatever item you select in the **Sorting** list. You can sort your customer records by any of the following criteria:

Check Number	Click **Check Number** to sort your report by the check number of each transaction.
Customer	Click **Customer** to sort your report by each customer.
Staff ID	Click **Staff ID** to sort your report by the ID numbers of the staff members who handled each transaction.
Sales	Click **Sales** to sort your report by the amount of sales of each transaction, from highest to lowest.
Cost	Click **Cost** to sort your report by the amount of cost of each transaction, from highest to lowest.

Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print this report at the Plan Reports window. You can select one of the following optional input criteria:

Frequent Dining Plan	Click **Frequent Dining Plan** to filter your transactions by the frequent dining plans of the customers.
Profit Center	Click **Profit Center** to filter your transactions by the profit centers within which the transactions took place.
Reward Coupon	Click **Reward Coupon** to filter your transactions by the reward coupons they produced, if any.
Delivery Zone	Click **Delivery Zone** to filter your transactions by the delivery zones of the customers.

Default Range list

If you select a default date range from this list, this range will appear in the **Range** list of the Plan Reports window.

Time Range boxes

You can enter a time range. The program will only include transactions that took place within this time range. For instance, if you enter a time range of “6:00” to “9:00”, the program will only include information from transactions that took place between 6:00 and 9:00 of each day within the date range.

Plan Report Maintenance Window: FD Plans Tab

The **FD Plans** tab features a filter that allows you to include or exclude transactions from customers enrolled in specific frequent dining plans. The program will only print transactions from customers enrolled in frequent dining plans in the **Include** list and will not print any transactions from customers enrolled in frequent dining plans in the **Exclude** list.

Plan Report Maintenance Window: Zones Tab

The **Zones** tab features a filter that allows you to include or exclude transactions from customers living in specific delivery zones. The program will only print transactions from customers living in delivery zones in the **Include** list and will not print any transactions from customers living in delivery zones in the **Exclude** list.

Plan Report Maintenance Window: Profit Ctrs Tab

The **Profit Ctrs** (profit centers) tab features a filter that allows you to include or exclude transactions within specific profit centers. The program will only print transactions from profit centers in the **Include** list and will not print any transactions from profit centers in the **Exclude** list.

Plan Report Maintenance Window: Coupons Tab

The **Coupons** tab features a filter that allows you to include or exclude transactions associated with specific reward coupons. The program will only print transactions that produced reward coupons listed in the **Include** list and will not print any transactions that produced reward coupons listed in the **Exclude** list.

Plan Report Maintenance Window: Days Tab

The **Days** tab features a filter that allows you to include or exclude transactions that took place on specific days of the weeks. The program will only print transactions that took place on days of the weeks in the **Include** list and will not print any transactions that took place on days of the weeks in the **Exclude** list.

Plan Report Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number "0" as its shortcut key.

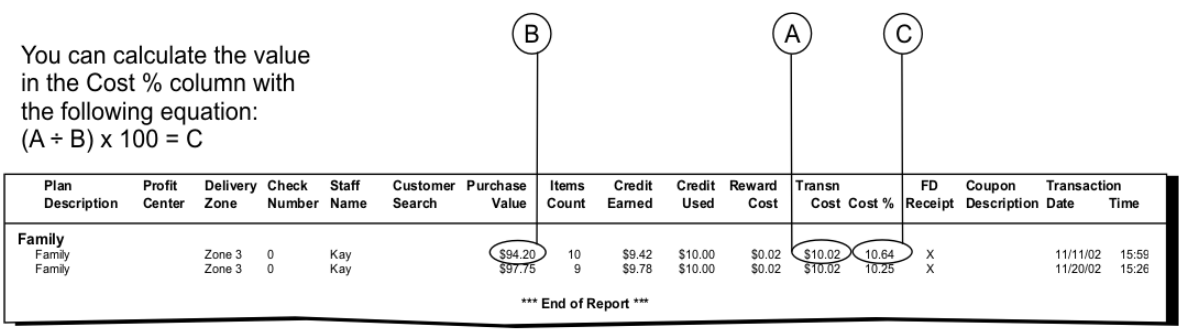
You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Frequent Dining Plan Report Examples

You can use Frequent Dining Plan Reports to analyze the volume of activity for each frequent dining plan. Digital Dining provides two different report formats for this report. You can customize how and what reports show by defining reports (for more information, see "Plan Report Maintenance Window: Main Tab" on page 157).

The **Transn Cost** column displays the sum of the values in the Credit Used and Reward Cost columns (Credit Used + Reward Cost).

The **Cost %** column displays the value in the Transn Cost column divided by the Transn Cost subtotal.



Plan Description	Profit Center	Delivery Zone	Check Number	Staff Name	Customer Search	Purchase Value	Items Count	Credit Earned	Credit Used	Reward Cost	Transn Cost	Cost %	FD Receipt	Coupon Description	Transaction Date	Time
Family																
Family		Zone 3	0	Kay		$94.20	10	$9.42	$10.00	$0.02	$10.02	10.64	X		11/11/02	15:59
Family		Zone 3	0	Kay		$97.75	9	$9.78	$10.00	$0.02	$10.02	10.25	X		11/20/02	15:26

*** End of Report ***

Frequent Dining Plan Report: Transactions Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Plan Report Maintenance Window. The **Transactions** format of the Frequent Dining Plan Report allows you to generate a report that lists each frequent dining/delivery transaction for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Frequent Dining Plan Report Examples” on page 162.

DD CAFE

2/4/03 Date 15:59:45 DateRange: 10/01/2002 to 12/31/2002 Page 1
Operator: Wizard

Plan Report 1

Sorted By: Customer Grouped By: FD Plan Subgrouped By: Profit Center
Filtered By: FD Plans, Profit Center, Reward Coupon

Plan Description	Profit Center	Delivery Zone	Check Number	Staff Name	Customer Search	Purchase Value	Items Count	Credit Earned	Credit Used	Reward Cost	Transn Cost	Cost %	FD Receipt	Coupon Description	Transaction Date	Time
Family																
Family		Zone 3	0	Kay		$94.20	10	$9.42	$10.00	$0.02	$10.02	10.64	X		11/11/02	15:59
Family		Zone 3	0	Kay		$97.75	9	$9.78	$10.00	$0.02	$10.02	10.25	X		11/20/02	15:26
Family		Zone 3	0	Kay		$79.20	8	$7.92	$10.00	$0.02	$10.02	12.65	X		11/20/02	18:49
Family		Zone 3	0	Kay		$73.20	10	$7.32	$10.00	$0.02	$10.02	13.69	X		11/21/02	13:39
Family		Zone 3	0	Kay		$77.25	9	$7.73	$10.00	$0.02	$10.02	12.97	X		12/12/02	10:56
Family		Zone 3	0	Kay		$90.75	9	$9.08	$10.00	$0.02	$10.02	11.04	X		12/17/02	11:24
Family		Zone 3	0	Kay		$60.30	8	$6.03	$10.00	$0.02	$10.02	16.62	X		12/18/02	09:35
Family		Zone 3	0	Kay		$51.45	11	$5.15	$34.03	$0.07	$34.10	66.28	X		12/18/02	09:45
Family		Zone 3	0	Kay		$18.52	1	$0.85	$5.12	$0.01	$5.13	27.70	X		12/18/02	09:49
Family		Zone 3	0	Kay		$40.60	14	$4.06	$0.00	$0.00	$0.00	0.00			12/18/02	09:51
Family		Zone 3	0	Kay		$10.50	6	$1.05	$1.00	$0.00	$1.00	9.52	X		12/18/02	09:53
Family		Zone 3	0	Kay		$7.00	4	$0.70	$4.05	$0.01	$4.06	58.00	X		12/18/02	09:54
Family		Zone 3	0	Kay		$277.60	40	$27.76	$0.00	$0.00	$0.00	0.00			12/18/02	09:57
					Total	$978.32	139	$96.85	$114.20	$0.23	$114.43	11.70				
					Quantity:	13										
					Average:	$75.26	11	$7.45	$8.78	$0.02	$8.80					
					Total	$978.32	139	$96.85	$114.20	$0.23	$114.43	11.70				
					Quantity:	13										
					Average:	$75.26	11	$7.45	$8.78	$0.02	$8.80					

*** End of Report ***

You can customize how and what reports show by defining reports (for more information, see “Plan Report Maintenance Window: Main Tab” on page 157).

Frequent Dining Plan Report: Transactions Summary Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Plan Report Maintenance Window. The **Transactions Summary** format of the Frequent Dining Plan Report allows you to generate a report that summarizes the total sales associated with frequent dining/delivery customers by the frequent dining/delivery plan for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Frequent Dining Plan Report Examples” on page 162.

DD CAFE

2/4/03 Date 16:00:30 DateRange: 10/01/2002 to 12/31/2002 Page 1
Operator: Wizard

Plan Report 1

Sorted By: <None> Grouped By: FD Plan Subgrouped By: Profit Center
Filtered By: FD Plans, Profit Center, Reward Coupon

		Purchase Value	Items Count	Credit Earned	Credit Used	Reward Cost	Transn Cost	Cost %
Family								
	Total	$1,683.91	220	$160.43	$174.72	$0.29	$175.01	10.39
	Quantity:	28						
	Average:	$60.14	8	$5.73	$6.24	$0.01	$6.25	10.39
Family	Total	$1,683.91	220	$160.43	$174.72	$0.29	$175.01	10.39
	Quantity:	28						
	Average:	$60.14	8	$5.73	$6.24	$0.01	$6.25	
Free Sandwich								
	Total	$378.16	47	$0.00	$0.00	$0.00	$0.00	0.00
	Quantity:	11						
	Average:	$34.38	4	$0.00	$0.00	$0.00	$0.00	0.00
Free Sandwich	Total	$378.16	47	$0.00	$0.00	$0.00	$0.00	0.00
	Quantity:	11						
	Average:	$34.38	4	$0.00	$0.00	$0.00	$0.00	

*** End of Report ***

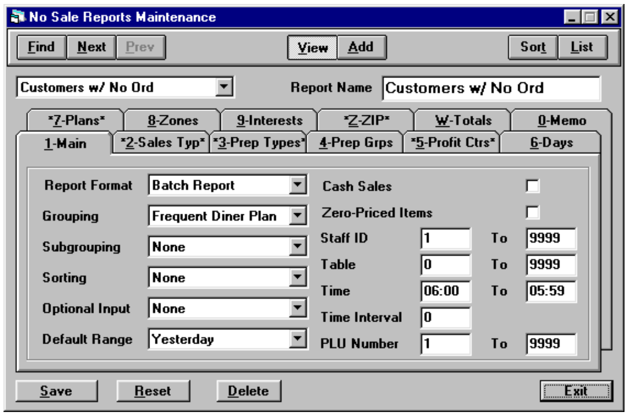
You can customize how and what reports show by defining reports (for more information, see “Plan Report Maintenance Window: Main Tab” on page 157).

No Sale Reports Maintenance

No Sale Reports allow you to analyze information about frequent diner and/or delivery customers who have not purchased certain menu items from your restaurant within a specific amount of time. You can also analyze the sales history of individuals or special groups, collect addresses and telephone numbers of customers, or print mailing labels of customers.

No Sale Reports Maintenance Window: Main Tab

In the **Main** tab, you determine the format of your new report, as well as decide how the program organizes and sorts your customer records. The **Main** tab also allows you to filter the sales information of customer records based on the staff ID number, table number, the time of the transactions, and the PLU code of the items purchased. You can also include or exclude cash sales and/or zero-priced items.



Report Format list

You can select one of four different report formats. Each format will produce a report with different information and/or arrangement:

Report Format	**Contains**
Name and Address	Name, address, and telephone number of each customer record.
Sales Summary	Sales totals of each customer record.
Mailing Labels	Mailing address of each customer record, printed as mailing labels.
Batch Report	The name, address, and frequent diner point totals of each customer record.

Grouping list

You can control how the program organizes the information in your report by selecting a grouping option from the **Grouping** list. The program will list the menu items alphabetically by the grouping option you select. You can group your customer records by any of the following criteria:

Frequent Dining Plan	Click **Frequent Dining Plan** to group your records by the frequent dining plans of the customers.
Special Interest	Click **Special Interest** to group your records by the special interests of the customers.
Zip Code	Click **Zip Code** to group your records by the zip codes of the customers.
Delivery Zone	Click **Delivery Zone** to group your records by the delivery zones of the customers.
Day of Week	Click **Day of Week** to group your records by the days of the week that the transactions took place.
Special Occasion	Click **Special Occasion** to group your records by the special occasions of the customers.

Subgrouping list

You can group your data to a second level by selecting a subgrouping option from the **Subgrouping** list. The **Subgrouping** list is identical to the **Grouping** list.

Sorting list

You can also control how the program organizes the information in a report by selecting a sorting option from the **Sorting** list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the **Sorting** list. You can sort your items by any of the following criteria:

Last Name	Click **Last Name** to sort your report by the last name of each customer.
Sort Name	Click **Sort Name** to sort your report by the search name of each customer.
Company Name	Click **Company Name** to sort your report by the name of each customer's company.
Last Purchase Date	Click **Last Purchase Date** to sort your report by the last purchase date of each customer.
PTD Purchases	Click **PTD Purchases** to sort your report by the number of purchases of each customer for the present period-to-date.
PTD Value of Purchases	Click **PTD Value of Purchases** to sort your report by the value of purchases of each customer for the present period-to-date.
PTD Points	Click **PTD Points** to sort your report by the frequent diner points of each customer for the present period-to-date.
PTD Complaints	Click **PTD Complaints** to sort your report by the number of complaints of each customer for the present period-to-date.
Total Purchases	Click **Total Purchases** to sort your report by the total number of purchases of each customer.
Total Value of Purchases	Click **Total Value of Purchases** to sort your report by the total value of purchases of each customer.
Total Points	Click **Total Points** to sort your report by the total frequent diner points of each customer.
Total Complaints	Click **Total Complaints** to sort your report by the total number of complaints of each customer.

Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print this report at the No Sale Reports window. You can select one of the following optional input criteria:

Frequent Dining Plan	Click **Frequent Dining Plan** to filter your report by the frequent dining plan of the customers.
Special Interests	Click **Special Interests** to filter your report by the special interests of the customers.
Zip Code	Click **Zip Code** to filter your report by the zip codes of the customers.
Delivery Zone	Click **Delivery Zone** to filter your report by the delivery zones of the customers.
PTD Purchases	Click **PTD Purchases** to filter your report by the purchases of the customers for the present period-to-date.
PTD Value of Purchases	Click **PTD Value of Purchases** to filter your report by the value of purchases of the customers for the present period-to-date.
PTD Points	Click **PTD Points** to filter your report by the frequent diner points of the customers for the present period-to-date.
PTD Complaints	Click **PTD Complaints** to filter your report by the number of complaints of the customers for the present period-to-date.
Total Purchases	Click **Total Purchases** to filter your report by the total purchases of the customers.
Total Value of Purchases	Click **Total Value of Purchases** to filter your report by the total value of purchases of the customers.
Total Points	Click **Total Points** to filter your report by the total frequent diner points of the customers.
Total Complaints	Click **Total Complaints** to filter your report by the total number of complaints of the customers.

Default Range list

If you select a default range from this list, this default range will appear in the **Range** list of the No Sale Reports window.

Cash Sales check box

You should select **Cash Sales** if you wish to include cash sales in your report.

Zero-Priced Items check box

You should select **Zero-Priced Items** if you wish to include zero-priced items in your report.

Staff ID boxes

You can enter a range of staff ID numbers. The program will only include sales information from transactions handled by staff members whose ID falls within this range.

Table boxes

You can enter a range of table numbers. The program will only include sales information from transactions from tables that fall within this range.

Time boxes

You can enter a time range. The program will only include sales information from transactions that took place within this time range. For instance, if you enter a time range of “6:00” to “9:00”, the program will only include information from transactions that took place between 6:00 and 9:00 of each day within the date range.

Time Interval box

You can enter a time interval by which the program will group the data in the report. The program will group the data by whatever number of minutes you enter in the **Time Interval** box. For instance, if you enter “30”, the program will collect sales information for transactions occurring within each 30-minute interval of the specified time range. If you enter a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: transactions occurring from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00.

PLU Number boxes

You can enter a range of PLU numbers. The program will only include sales information from menu items whose PLU number falls within this range.

No Sale Reports Maintenance Window: Sales Types Tab

The **Sales Types** tab features a filter that allows you to include or exclude customers who did not order menu items from specific sales types. The program will only print customers who did not order menu items from any sales type in the **Did Not Order** list, and will disregard sales type in the **Don't Care** list.

No Sale Reports Maintenance Window: Prep Types Tab

The **Prep Types** tab features a filter that allows you to include or exclude customer who did not order menu items associated with specific prep types. The program will only print customers who did not order menu items associated with prep types in the **Did Not Order** list and will disregard prep types in the **Don't Care** list.

No Sale Reports Maintenance Window: Prep Grps Tab

The **Prep Grps** (prep groups) tab features a filter that allows you to include or exclude customer who did not order menu items associated with specific prep groups. The program will only print customers who did not order menu items associated with prep groups in the **Did Not Order** list and will disregard prep groups in the **Don't Care** list.

No Sale Reports Maintenance Window: Profit Ctrs Tab

The **Profit Ctrs** (profit centers) tab features a filter that allows you to include or exclude customer who did not order menu items within specific profit centers. The program will only print customers who did not order menu items within profit centers in the **Did Not Order** list and will disregard profit centers in the **Don't Care** list.

No Sale Reports Maintenance Window: Days Tab

The **Days** tab features a filter that allows you to include or exclude customer who did not order items on specific days of the week. The program will only print customers who did not order menu items on days of the week in the **Did Not Order On** list and will disregard days of the week in the **Don't Care** list.

No Sale Reports Maintenance Window: Plans Tab

The **Plans** tab features a filter that allows you to include or exclude customers associated with specific frequent dining plans. The program will only print customers associated with frequent dining plans in the **Include** list and will not print any customers associated with frequent dining plans in the **Exclude** list.

No Sale Reports Maintenance Window: Zones Tab

The **Zones** tab features a filter that allows you to include or exclude customers living in specific delivery zones. The program will only print customers living in delivery zones in the **Include** list and will not print any customers living in delivery zones in the **Exclude** list.

No Sale Reports Maintenance Window: Interests Tab

The **Interests** tab features a filter that allows you to include or exclude customers associated with specific special interests. The program will only print customers associated with special interests in the **Include** list and will not print any customers associated with special interests in the **Exclude** list. If you have associated any customers with special interests in both the **Include** list and **Exclude** list, the program will include them in the report.

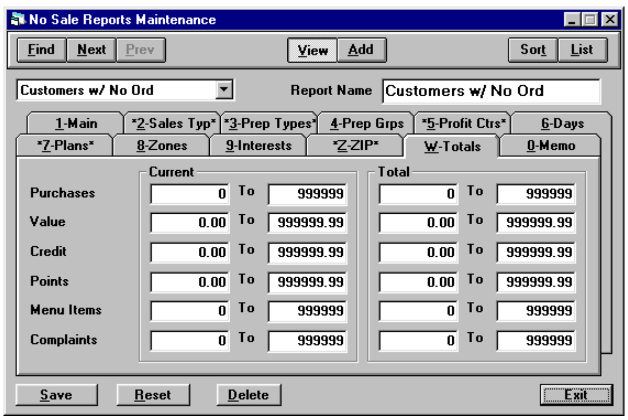
No Sale Reports Maintenance Window: Zip Tab

The **Zip** tab features a filter that allows you to include or exclude customers living in specific zip codes. The program will only print customers living in zip codes in the **Include** list and will not print any customers living in zip codes in the **Exclude** list.

If you wish to include customer records living in any zip code, you can select the **Include Any** check box. The program will include records with any zip code in the report, even if it appears in the **Exclude** list.

No Sale Reports Maintenance Window: Totals Tab

The **Totals** tab features a filter that allows you to include or exclude customer records based on their number of current (period-to-date) or total frequent diner points, reward credit, or complaints. You can enter a range of current or total purchases, value of purchases, reward credit, frequent diner points, number of menu items, and/or number of complaints. Any customer outside of any of these ranges will not appear in the report. For instance, if you set a range from "10" to "20" in the **Purchases** row, **Current** column, then any customer records with current purchases of less than 10 or greater than 20 will be excluded from the report.



	Current	Total
Purchases	Number of purchases within the present period-to-date.	Total number of purchases.
Value	Value of purchases within the present period-to-date.	Total value of purchases.
Credit	Amount of reward credit within the present period-to-date.	Total amount of reward credit.
Points	Number of frequent diner points within the present period-to-date.	Total number of frequent diner points.
Menu Items	Number of purchased menu items within the present period-to-date.	Total number of purchased menu items.
Complaints	Number of complaints within the present period-to-date.	Total number of complaints.

No Sale Reports Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. The **Memo** tab will always have the number “0” as its shortcut key.

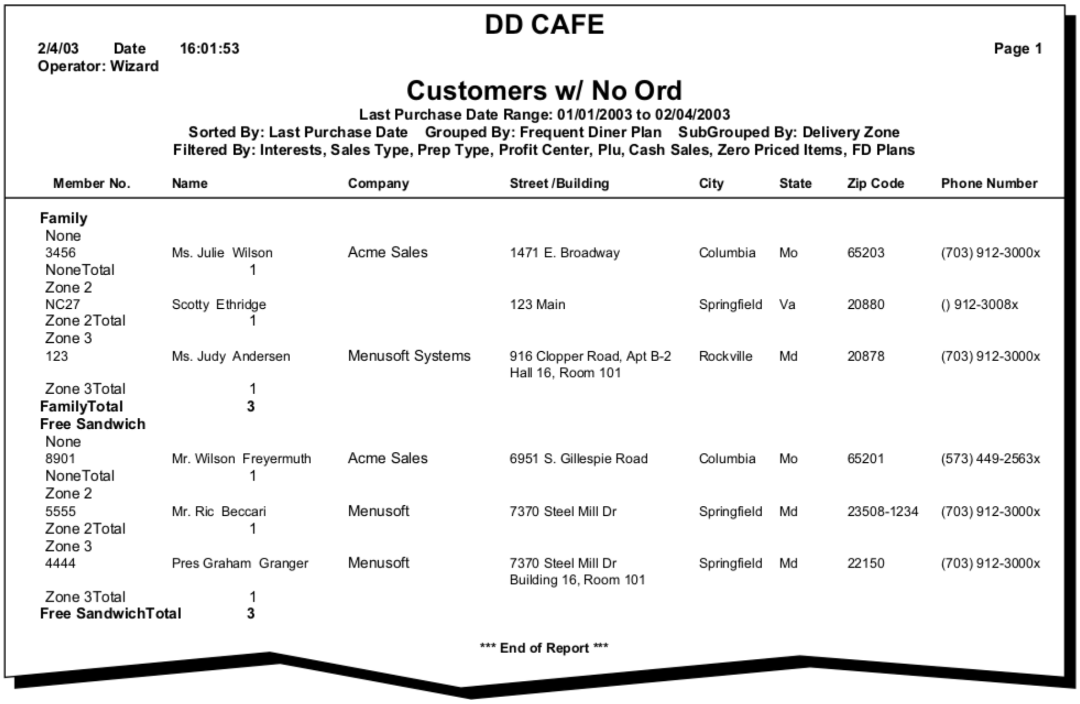
You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

No Sale Report Examples

You can use No Sale Reports to analyze the inactivity of accounts or plans. Digital Dining provides four different report formats for this report. Essentially, the No Sale Reports display a list of customers who have *not* met certain purchase criteria (that you set) , such as never bought desserts, never purchased items on Monday or Tuesday, or never bought lunch. You can then create coupons or other marketing incentives that target these customers to encourage them to extend their buying habits. You can customize how and what reports show by defining reports (for more information, see “No Sale Reports Maintenance Window: Main Tab” on page 164).

No Sale Report: Name and Address Format

You can change the report format by using the **Report Format** list on the **Main** tab of the No Sale Report Maintenance Window. The **Name and Address** format of the No Sale Report allows you to generate a report that lists the name and address of each frequent dining/delivery customer who did not make a frequent dining/delivery purchase for the date range or period you provide.



DD CAFE

2/4/03 Date 16:01:53 Page 1

Operator: Wizard

Customers w/ No Ord

Last Purchase Date Range: 01/01/2003 to 02/04/2003

Sorted By: Last Purchase Date Grouped By: Frequent Diner Plan SubGrouped By: Delivery Zone

Filtered By: Interests, Sales Type, Prep Type, Profit Center, Plu, Cash Sales, Zero Priced Items, FD Plans

Member No.	Name	Company	Street /Building	City	State	Zip Code	Phone Number
Family							
None							
3456	Ms. Julie Wilson	Acme Sales	1471 E. Broadway	Columbia	Mo	65203	(703) 912-3000x
NoneTotal	1						
Zone 2							
NC27	Scotty Ethridge		123 Main	Springfield	Va	20880	() 912-3008x
Zone 2Total	1						
Zone 3							
123	Ms. Judy Andersen	Menusoft Systems	916 Clopper Road, Apt B-2 Hall 16, Room 101	Rockville	Md	20878	(703) 912-3000x
Zone 3Total	1						
FamilyTotal	**3**						
Free Sandwich							
None							
8901	Mr. Wilson Freyermuth	Acme Sales	6951 S. Gillespie Road	Columbia	Mo	65201	(573) 449-2563x
NoneTotal	1						
Zone 2							
5555	Mr. Ric Beccari	Menusoft	7370 Steel Mill Dr	Springfield	Md	23508-1234	(703) 912-3000x
Zone 2Total	1						
Zone 3							
4444	Pres Graham Granger	Menusoft	7370 Steel Mill Dr Building 16, Room 101	Springfield	Md	22150	(703) 912-3000x
Zone 3Total	1						
Free SandwichTotal	**3**						

*** End of Report ***

You can customize how and what reports show by defining reports (for more information, see “No Sale Reports Maintenance Window: Main Tab” on page 164).

No Sale Report: Sales Summary Format

You can change the report format by using the **Report Format** list on the **Main** tab of the No Sale Report Maintenance Window. The **Sales Summary** format of the No Sale Report allows you to generate a report that lists the sales totals for those frequent dining/delivery customers who have not made a frequent dining/delivery purchase for the date range or period you provide.

DD CAFE

Date 2/4/03 16:02:27 Page 1
Operator: Wizard

Customers w/ No Ord

Last Purchase Date Range: 01/01/2003 to 02/04/2003
Sorted By: Last Purchase Date Grouped By: Frequent Diner Plan SubGrouped By: Delivery Zone
Filtered By: Interests, Sales Type, Prep Type, Profit Center, Plu, Cash Sales, Zero Priced Items, FD Plans

		Purchases			Sales Value		Items Count		Credit		Points		Complaints		
Member No.	Name	Last	PTD	Total	PTD	Total	PTD	Total	Current	Total	Current	Total	Last	PTD	Total
Family															
None															
3456	Ms. Julie Wilson	12/20/02	0	5	.00	386.25	0	44	36.13	36.13	386.25	386.25	12/30/99	0	0
1234	Mr. Paul Speckman	2/10/03	0	104	.00	3263.25	0	631	1.83	259.73	18.25	2597.2	2/10/03	0	4
NoneTotals:			0	218	.00	7299.00	0	1350	75.92	591.72	809.00	5967.0		0	8
Zone 2															
NC27	Scotty Ethridge	3/29/01	0	1	.00	47.40	0	5	4.74	4.74	.00	47.40	12/30/99	0	0
Zone 2Totals:			0	2	.00	94.80	0	10	9.48	9.48	.00	94.80		0	0
Zone 3															
123	Ms. Judy Andersen	2/10/03	0	96	.00	1886.70	0	270	1.87	79.17	18.70	791.70	12/30/99	0	5
Zone 3Totals:			0	192	.00	3773.40	0	540	3.74	158.34	37.40	1583.4		0	10
FamilyTotals:			**0**	**824**	**.00**	**22334.40**	**0**	**3800**	**178.28**	**1519.08**	**1692.80**	**15290.**		**0**	**36**
Free Sandwich															
None															
8901	Mr. Wilson Freyermuth	8/7/02	0	6	.00	241.73	0	36	2.00	5.00	.00	5.00	12/30/99	0	0
NoneTotals:			0	12	.00	483.46	0	72	4.00	10.00	.00	10.00		0	0
Zone 2															
5555	Mr. Ric Beccari	11/14/02	0	128	.00	4479.21	0	521	5.00	1103.00	.00	878.00	12/30/99	0	0
Zone 2Totals:			0	256	.00	8958.42	0	1042	10.00	2206.00	.00	1756.0		0	0
Free SandwichTotals:			**0**	**536**	**.00**	**18883.76**	**0**	**2228**	**28.00**	**4432.00**	**.00**	**3532.0**		**0**	**0**
Grand Totals:			**0**	**2720**	**.00**	**82436.32**	**0**	**12056**	**412.56**	**11902.16**	**3385.60**	**37644.**		**0**	**72**

*** End of Report ***

You can customize how and what reports show by defining reports (for more information, see “No Sale Reports Maintenance Window: Main Tab” on page 164).

No Sale Report: Mailing Labels Format

You can change the report format by using the **Report Format** list on the **Main** tab of the No Sale Report Maintenance Window. The **Mailing Labels** format of the No Sale Report allows you to generate a report that allows you to print the name and address (on mailing label sheets) of each frequent dining/delivery customer who did not make a frequent dining/delivery purchase for the date range or period you provide.

Ms. Judy Andersen 916 Clopper Road, Apt B-2 Hall 16, Room 101 Rockville, MD 20878	Mr. Paul Speckman 456 Main St. New York, MD 11221	Mr. John Farmer 3703 Ridge Road Columbia, MO 65203
Mr. Wayne Rodgers 7500 Steel Mill Dr Springfield, VA 22015	Ms. Julie Wilson 1471 E. Broadway St. Columbia, MO 65203	Ms. Anne Wilder 1759 Iris Drive Columbia, MD 65201

You can customize how and what reports show by defining reports (for more information, see “No Sale Reports Maintenance Window: Main Tab” on page 164).

No Sale Report: Batch Report Format

You can change the report format by using the **Report Format** list on the **Main** tab of the No Sale Report Maintenance Window. The **Batch Report** format of the No Sale Report allows you to generate a report that lists the purchase history of each frequent dining/delivery customer who did not make a purchase for the date range or period you provide and who is associated with a plan that has **Batch (Back Office)** selected from the **Print Mode** list on the **Main** tab of the Frequent Dining Plan Maintenance window.

DD CAFE

Date 2/10/03 12:12:11 Page 1
Operator: Wizard

Customers w/ No Ord

Last Purchase Date Range: 01/01/2002 to 02/04/2003
Sorted By: Last Purchase Date Grouped By: Frequent Diner Plan SubGrouped By: Delivery Zone
Filtered By: Interests, Sales Type, Prep Type, Profit Center, Plu, Cash Sales, Zero Priced Items, FD Plans

Member No.	Last Name	First Name	Building	Street Address	City	State	Zip	Plan	Reward	Required Points	Accum. Points	Exp. Date
Family												
None												
3456	Wilson	Julie		1471 E. Broadway	Columbia	Mo	65203	Family	Menusoft Bucks	1.00	386.25	5/11/03
NoneReward	1											
Zone 3												
123	Andersen	Judy	Hall 16, Room 101	916 Clopper Road, Apt B-2	Rockville	Md	20878	Family	Menusoft Bucks	1.00	5.50	5/11/03
Zone 3Reward	1											
FamilyReward	**2**											

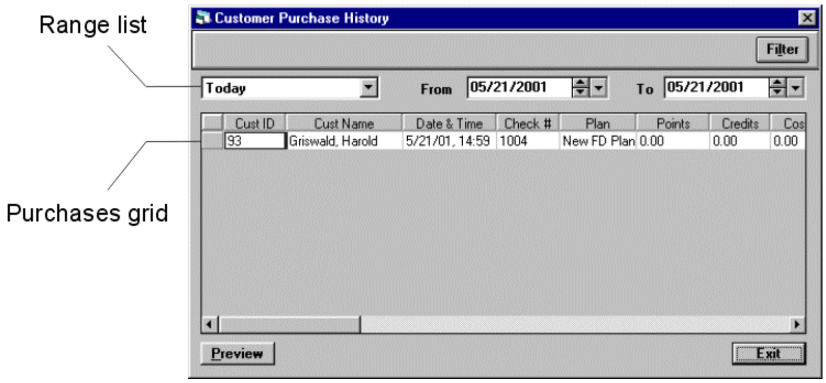
*** End of Report ***

You can customize how and what reports show by defining reports (for more information, see “No Sale Reports Maintenance Window: Main Tab” on page 164).

Customer Purchase History Window

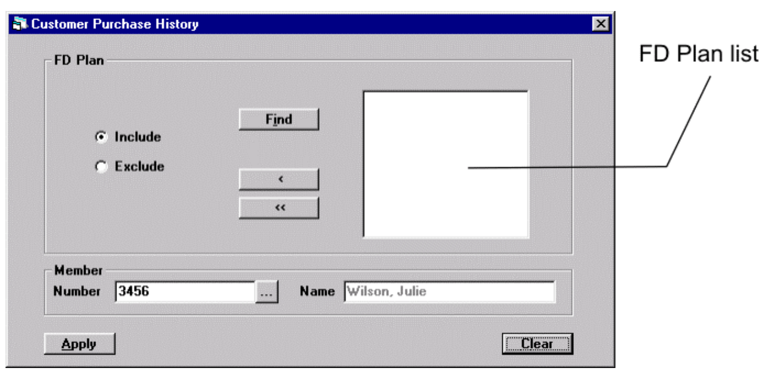
The Customer Purchase History window allows you to print or preview a list of purchases by frequent diner and/or delivery customers within a specified date range. You can specify a general time period (such as a specific day of the week or month of the year) in the **Range** list. If you wish to set an irregular date range, you can click **Custom** and then type the specific date range in the **Date Range** boxes.

The **Purchases** grid will display information on each transaction that occurred in the specified time period, including each customer’s ID number and name, the date and time of each transaction, each transaction’s check number, the customer’s frequent dining plan (if any), the customer’s total frequent diner points (if any), the customer’s total frequent diner credit (if any), the cost of the transaction, the total number of menu items the customer ordered, the amount of the transaction, and the customer’s delivery zone (if any). To view a preview of each check within the specified date range, click **Preview.**



Customer Purchase History Window: Filter Window

You can also filter your report by frequent dining plan or customer in the Customer Purchase History filter window. To access the filter window, open the Customer Purchase History Window and click **Filter**. After setting a filter for frequent dining plan and/or customer, click **Apply** to save the filter and return to the Customer Purchase History window, or click **Clear** to return to the Customer Purchase History window without saving the filter.



FD Plan area

The **FD Plan** area features a filter that allows you to include or exclude transactions from customers enrolled in specific frequent dining plans. If you click **Include**, the program will only include information from transactions from stores associated with frequent dining plans listed in the **FD Plan** list. If you click **Exclude**, the program will only include transactions from customers not associated with frequent dining plans listed in the **FD Plan** list. To add a frequent dining plan to the **FD Plan** list, click **Find** and select a frequent dining plan from the Find window. To remove a frequent dining plan from the **FD Plan** list, click the frequent dining plan and then click . To remove all frequent dining plans from the **FD Plan** list, click .

Member area

The **Member** area allows you to generate a report for a single customer. To filter a report by a single customer, click  in the **Member** box and select a customer from the Find Customer Purchase History window. (You can select a customer by name, search name, or ID number.) The customer's name will display in the **Name** box.

Setup and Back Office Features

Overview

In this chapter, we will discuss the functions of the Digital Dining Setup and Back Office programs that directly pertain to the Frequent Diner/Delivery program. In particular, we will examine the various check options and register options required for frequent diner and delivery service at the POS. We will describe what they do and how you can use them. We will also describe how to modify your check layouts for frequent diner and delivery service.

Frequent Diner

The Frequent Diner/Delivery program requires several modifications in the Digital Dining Setup program to allow frequent diner service. In the Setup program, you must create a Frequent Diner check option to use the frequent diner functions. If you plan to give reward credit to your frequent diner customers, you must also create a frequent diner receipt. You may also wish to modify your check layout to include frequent diner customer information.

Check Option Functions

The Digital Dining Setup program includes several check option functions in the Check Options Maintenance window that work exclusively with frequent diner service. You can create new check options with these functions, which you can then add to your main window of check options. By doing so, you can then use these special frequent diner check option functions at the POS. You can create new Frequent Diner check options in the Check Option Maintenance window of the Digital Dining Setup program (for more information, see “Check Option Maintenance Window” in the *Digital Dining Setup User’s Guide*).

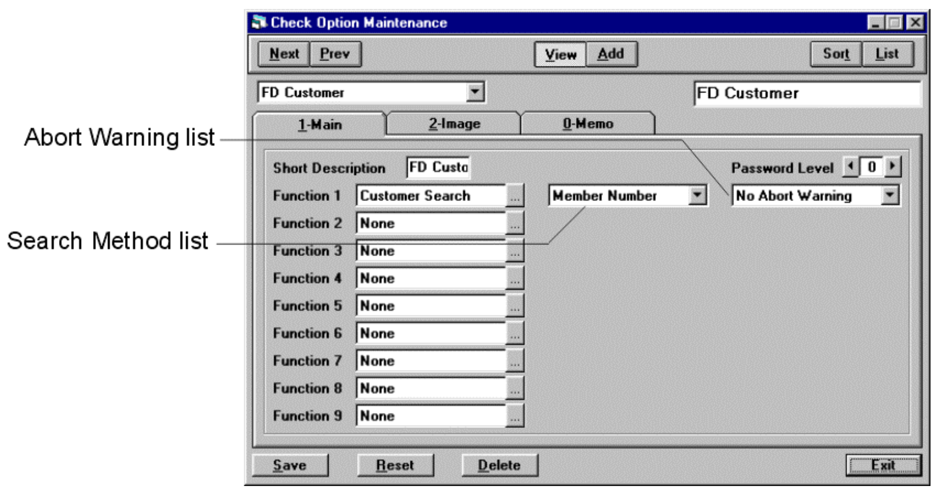
Like all check options, you can add a Frequent Diner check option to your Top Panel, so you can access it more easily in the POS (for more information, see “Top Panel Maintenance Window” in the *Digital Dining Setup User’s Guide*).

Clear Frequent Diner/Delivery (Frequent Diner)

The Clear Frequent Diner/Delivery function removes the name of any Frequent Diner customer associated to a table. You can use this function if you accidentally associate the wrong customer with a table, or if you want a split check transaction featuring more than one Frequent Diner customer. Because you will use it infrequently, you should not include this function in your standard "FD Customer" check option.

Customer Search (Frequent Diner)

The Customer Search function allows you to search for frequent diner customer records at the POS. Without this function, you cannot search for customer records at the POS. Upon selecting this function, two lists will appear with it: the **Search Method** list and the **Abort Warning** list.



Search Method. You should select the default search method that the program will use at the POS. The program will prompt you for this information first when you access the "FD Customer" check option. For instance, you might set the default **Search Method** to **Member Number**. At the POS, when you access this check option, the program will ask for the customer's member number.

You can select any of the following search methods:

- Member Number
- Phone Number
- Search Name
- Search Company
- Caller ID
- Credit Card Swipe

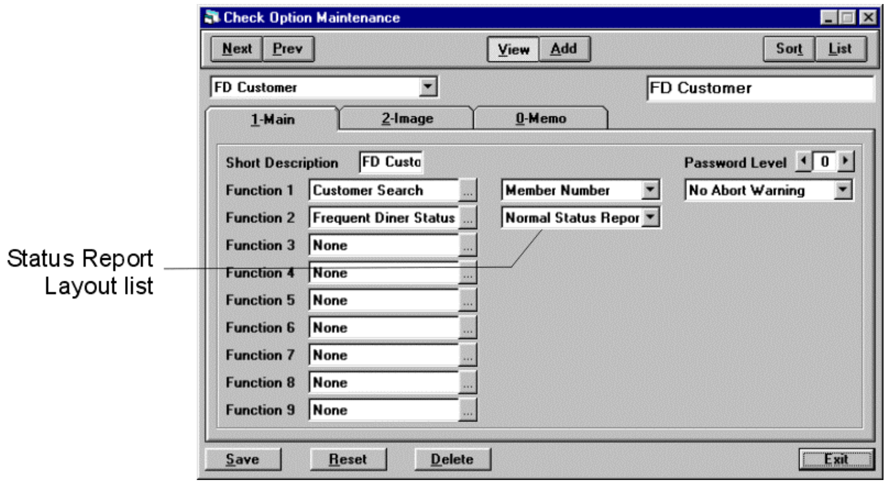
Abort Warning. If you select **Show Abort Warning**, the program will display a warning whenever you access the customer search keypad at the POS and then tap ESC without selecting a customer.

Edit Customer Points

The Edit Customer Points function will allow you to edit a frequent diner customer's amount of reward points manually at the POS. Because you will use it infrequently, you should not include this function in your standard "FD Customer" check option.

Frequent Diner Status Report

The Frequent Diner Status Report function will allow you to view a status report of a frequent diner customer's available reward points and/or reward credit. To use this function, you must create a status report layout in the Status Report Maintenance window of the Frequent Diner program (for more information, see "Status Report Maintenance" on page 84), add the Frequent Diner Status Report function to a check option in the Check Option Maintenance window, and then select the new layout in the **Status Report Layout** list that appears with the Frequent Diner Status Report function.



Check Maintenance

If you are offering a frequent diner service, you will probably want to find a handy method of giving your customers updates on their points and/or credit. You may choose to create a status report, which you can print for them on request. However, you can also simply add a status update on your standard check.

You can modify your check to include frequent diner customer information in the Check Layout Maintenance window of the Digital Dining Setup program. You can add a section to your standard check layout that will print a frequent diner customer's current point total. Using skip tokens, you can design the layout so that it will only print this information if the customer is enrolled in a frequent dining plan. For instance, you could add the following selection to the footer of your standard check:

```
@{SKIP_BLANK}@{FD_PLAN}

Good afternoon, @{FIRST_NAME} @{LAST_NAME}.

You are enrolled in the @{FD_PLAN} plan.

Your current Frequent Diner points:
@{CURRENT_POINTS}

@{SKIP_END}
```

If the customer receiving the check is enrolled in a frequent dining plan, the footer might look like this:

```
Good afternoon, John Doe.
You are enrolled in the Free Sandwich plan.
Your current Frequent Diner points: 8
```

However, if the customer is not enrolled in a frequent dining plan, this text will not print.

Frequent Diner Receipts

In order to allow frequent diner customers to use reward credit at the POS, you must add a new frequent diner receipt in the Receipts Window Maintenance window of the Digital Dining Setup program. After you do this, the Receipts window of the POS will include a new Frequent Diner receipt option. This option will allow you to deduct reward credit from a frequent diner customer's check (for more information, see the *Digital Dining Setup User's Guide*).

Delivery

To perform delivery sales at the POS, you must modify both the Digital Dining Setup and Back Office programs. The Setup program includes many check option functions and register options that work only with delivery service. We will discuss them here, as well as how to modify your check and/or prep ticket layouts for delivery service. We will also discuss how to modify your staff departments for delivery service.

We have designed the Frequent Diner/Delivery program to adapt to the needs of your business. Therefore, you can use the program in different ways. You must decide how it can best serve your needs. If your restaurant is primarily a delivery service, you will want to set up your primary register as a delivery register. If, however, you offer delivery service as well as dine-in service, you may not want your main register to be your delivery register. You may wish to create a separate delivery-only register.

If you choose to create a delivery-only register, you must create a new delivery register definition, which can include a new check layout, a new window of check options, and a new window of register options, all tailored to your delivery needs. If you do not want to create a delivery-only register, you must modify your main register to handle delivery orders. To do this, you must modify your main check layout, your main window of check options, and your main window of register options.

Check Option Functions

The Digital Dining Setup program includes several check option functions in the Check Options Maintenance window that only work with delivery service. You can create new check options with these functions, which you can then add to your main window of check options. By doing so, you can then use these special delivery functions at the POS. You can create new delivery check options in the Check Option Maintenance window of the Digital Dining Setup program (for more information, see “Check Option Maintenance Window” in the *Digital Dining Setup User’s Guide*).

Like all check options, you can add a Delivery check option to your Top Panel, so you can access it more easily in the POS (for more information, see “Top Panel Maintenance Window” in the *Digital Dining Setup User’s Guide*).

Change/Add Delivery Instructions

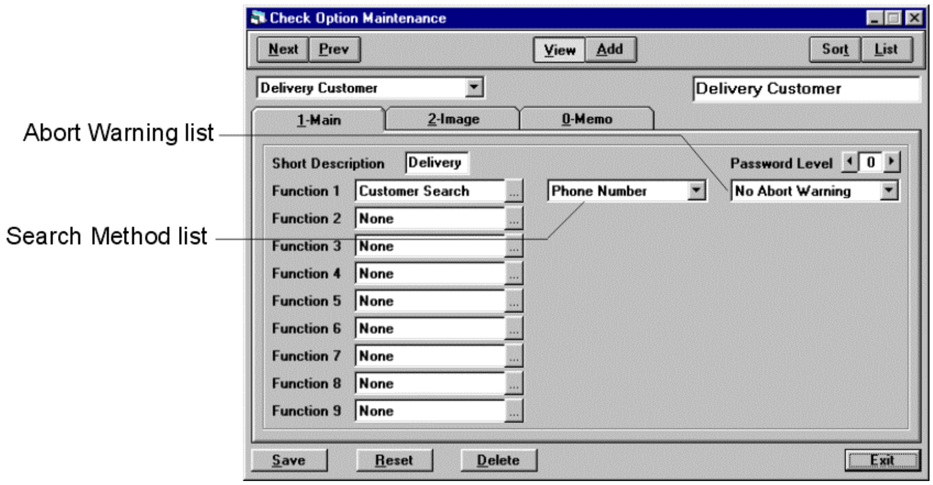
The Change/Add Delivery Instr check option function allows you to add delivery instructions to the Frequent Diner/Delivery records for a particular customer. Therefore, when the customer calls back, you will not need to enter special instructions (for example, “deliver to basement door” or “deliver to rear of house”) again.

Clear Frequent Diner/Delivery (Delivery)

The Clear Frequent Diner/Delivery check option function will clear any delivery customer associated to a check. You can use this function if you accidentally associate the wrong customer to a check. You should not include this function in your standard “Delivery” check option, since you will use it infrequently.

Customer Search (Delivery)

The Customer Search check option function allows you to search for delivery customer files at the POS. Without this function, you cannot search for customer records at the POS. Upon selecting this function, two lists will appear with it: the **Search Method** list and the **Abort Warning** list.



Search Method. You should select the default search method that the program will use at the POS. The program will prompt you for this information first when you access the “Delivery Customer” check option. For instance, you might set the default **Search Method** to **Phone Number**. At the POS, when you access this check option, the program will ask for the customer’s phone number.

If you have a Caller ID unit installed to your system, you should select **Caller ID.** By doing so, you will instruct the program to search for customer files matching the phone numbers it receives from your Caller ID unit.

You can select any of the following search methods:

- Member Number
- Phone Number
- Search Name
- Search Company
- Caller ID
- Credit Card Swipe

Abort Warning. If you select **Show Abort Warning**, the program will display a warning whenever you access the customer search keypad at the POS and then tap ESC without selecting a customer.

Display Last Order

The Display Last Order check option function displays the current customer's last order. Using this function, you can quickly reorder a customer's previous order.

Set Delivery Time

The Set Delivery Time check option function allows you to set the time that a delivery is likely to take. Typically, you will use this feature to associate the delivery time either with individual customers or with delivery zones.

Register Options

The Digital Dining Setup program includes many register options that only work with delivery service. You can add these register options to your main window of register options. By doing so, you can then use these special delivery register options at the POS. You can add new delivery register options in the Window of Register Options Maintenance window of the Digital Dining Setup program (for more information, see "Window of Register Options Maintenance Window" in the *Digital Dining Setup User's Guide*).

Change Driver Assignment

The Change Driver Assignment register option allows you to unassign delivery orders from one or more drivers and reassign them to another driver.

Delivery Late Orders Report

The Delivery Late Orders Report register option allows you to access the Late Orders Report. The report will list any orders that have not been assigned after a specified time limit (as set in the **Orders Report** area of the POS Entries window). For instance, you might enter a **Late Order Min** of ten minutes. Later, at the POS, if you select the Late Orders Report option, the program will display a list of all orders that have not been assigned for ten or more minutes (for more information, see “Orders Report area” on page 75).

Delivery Set Late Time

The Delivery Set Late Time register option allows you to reset the late time on the Late Orders Report at the POS. Using this option, you can enter the number of minutes that must pass before an unassigned order is considered late. For instance, you might reset the late time from 10 minutes to 15 minutes. Later, if you select the Late Orders Report option, the program will display a list of all orders that have not been assigned for 15 or more minutes (for more information, see “Orders Report area” on page 75).

Driver Select

The Driver Select register option allows you to assign orders to an available driver. When you select this option, the program will list all the drivers who are available. You can then assign one or more orders to a driver.

Driver Single

The Driver Single register option allows you to assign orders to an available driver. When you select this option, the program will list all the drivers who are available. You can then assign one or more orders to a driver.

List All Assigned

The List All Assigned register option allows you to view the details of any orders you have assigned to any drivers.

Pay Driver Run

The Pay Driver Run register option allows incoming drivers to quickly pay the register for their delivery orders at the POS. Your dispatcher can use this register option to take payments from any driver.

Check Maintenance

You must edit you're your check and/or prep ticket for delivery service. Unlike checks for dine-in business, a delivery check should include the name and address of the customer. The dispatcher should give the driver a copy of the check, which the driver can then use to deliver the order.

Some restaurants prefer to include the customer information on the prep ticket, rather than the check, particularly if the cook is also the driver. The Frequent Diner/Delivery program allows either method. You can set the program to print two copies of each check, one for the dispatcher and one for the driver (for more information, see "Assignment area" on page 73). Or you can add the customer delivery information to the prep ticket. In either case, the layout of the check and/or the prep ticket must be edited to include the customer information.

Driver Staff Departments

Before you can conduct delivery sales at the POS, you must create a staff department for your drivers. You have two ways of doing this. You can create a new staff department and designate it as a driver department, or you can modify an existing staff department and designate it as a driver department.

The Staff Department Maintenance window of the Digital Dining Back Office program features a **Driver Department** check box. Using this check box, you can designate any staff department as a driver department. If your restaurant is primarily a delivery service, such as a pizza delivery service, you will probably want to create a driver department and a dispatcher (or order-taker) department. However, if your restaurant offers delivery as a sideline service, you may wish to designate other non-delivery staff departments as driver departments. By doing so, you can assign delivery orders to staff members whose duties are not *primarily* delivering orders (for more information on staff departments, see "Staff Department Maintenance Window: Main Tab" in the *Digital Dining Back Office User's Guide*).

After you associate staff members to a driver department, the program can track when they are out on a delivery or available for new orders. When your staff members log in as drivers at the POS, the program will ask them if they are "going out." The program remembers which drivers are "in" and which are "out." When the dispatcher uses the **Assign Driver** register option, the program will only list the drivers that are "in." Only staff members assigned to driver staff departments will appear in the **Assign Driver** window.

Staff Member Maintenance

After you create (or edit) a staff department for your delivery drivers, you must assign staff members to this department. To do so, you must access the Staff Member Maintenance window in the Digital Dining Back Office program and assign staff members to any department which you have designated as a "Driver Department" (for more information, see the *Digital Dining Back Office User's Manual*).

Frequent Diner at the POS

Overview

In this chapter, we will describe how you will most typically use the Frequent Diner/Delivery program at the Point of Sale (POS). We will describe how to perform frequent diner functions while taking orders from new and previous customers, as well as how to use several check option functions which are specific to the Frequent Diner/Delivery program. Because you can configure your register in any way, the descriptions that we provide here may differ slightly from how your register actually performs.

Frequent Diner Service Register Design

We designed the Frequent Diner/Delivery program to operate as a supplement to your standard registers. You can add frequent diner functions to any of your registers, but most managers use it with their standard table service register. Therefore, you can create and manage checks for frequent diner customers just as you would with typical customers. In this chapter, we will give procedures and examples that assume you are using the Frequent Diner/Delivery program with a typical table service register; that you have created a frequent diner check option called “Frequent Diner,” which includes the Customer Search check option function; that you have set the Customer Search function to search for member ID numbers; and that your customers have magnetic “swipe” cards to identify themselves as frequent diner customers at the POS.

Transactions

Digital Dining has designed the Frequent Diner/Delivery program so that you can associate a frequent diner customer to a table while the check is open. So long as you have associated a frequent diner customer with a table before the customer pays the check, the customer will earn reward points for the purchase.

To Perform a Transaction with a Frequent Diner Customer

1 Open a check with one order in the POS.

2 From the Command panel, tap **Check Options,** and then tap **Frequent Diner** (or any check option that includes the Customer Search check option function) in the Selection panel.

3 Swipe the customer's ID card.

OR Tap **Manual**, and then enter the customer's member ID number manually using the keypad.

4 Tap the customer's button in the Selection panel, and then tap **Accept** on the Command panel.

To Add a Frequent Diner Customer Record at the POS

1 Open a check with one order in the POS.

2 From the Command panel, tap **Check Options,** and from the Selection panel, tap **Frequent Diner**.

3 Swipe a new customer ID card.

   OR Tap **Manual**, and then enter the customer's new member ID number manually.

4 At the New Customer window, tap **Yes**.

5 Enter the required customer information.

   The program will require any information that you have set as "forced" in the POS Entries window of the Frequent Diner/Delivery program.

6 From the Command panel, tap **Accept**.

Split Checks

When you perform a customer search and select a frequent diner customer, you associate that customer to a table, *not* a particular order. Consequently, if you associate a table with a frequent diner customer, that customer will earn points for *all* the purchases at that table.

For instance, you may have a table with three customers, one of them a frequent diner customer. If you associate the table with the appropriate frequent diner customer record and then allow all three customers to pay their checks, the frequent diner customer will receive frequent diner points and/or credit for the purchases of the other two customers (that is, all the purchases at that table).

If you do not wish to allow frequent diner customers to earn frequent diner points for other customers at their table, you have two options. First, you can associate the table with the frequent diner customer, let the customer pay his or her check first, then clear that customer from the table before paying the other customers. Or, you can let the other customers pay their checks before the frequent diner customer, associate the table with the frequent diner customer *after* the other checks have been paid, then let the frequent diner customer pay his or her check. The frequent diner customer will not earn points for the menu items bought by the other customers.

If you serve a table with more than one frequent diner customer, you should associate the table with one of the frequent diner customers, pay that check, then clear the customer from the table. You can then associate the table with the next frequent diner customer and pay that customer's check. That way, each customer will earn frequent diner points for their separate checks.

Note

To clear a frequent diner customer from a table, you must use a check option that includes the Clear Frequent Diner check option function (for more information, see "Clear Frequent Diner Customer" on page 196).

To Perform a Split Check Transaction with Multiple Frequent Diner Customers

1. In the POS, open a split check with two orders, each a frequent diner customer.
2. From the Command panel, tap **Check Options**, then from the Selection panel, tap **Frequent Diner**, and then swipe the first customer's ID card.
3. From the Selection panel, tap the customer's button, and then from the Command panel, tap **Accept**.
4. Tap **Finish**, then tap **Pay**, and then pay the first Frequent Diner customer's check.
5. After the first customer pays the check, tap **Accept Payment,** and then tap **Done** to return to the check screen.
6. Tap **Check Options** in the Command panel**,** then tap **Clear Customer** (or any check option that includes the Clear Frequent Diner check option function) in the Selection panel, and then tap **Yes** at the warning window.
7. Repeat steps 2 through 5 for the second frequent diner customer.

Reward Credit

If you are giving your frequent diner customers reward credit, they can use that credit to pay a check (in whole or in part). To allow them to use reward credit, you must add a frequent diner receipt to the Receipts Window Maintenance window in the Digital Dining Setup program (for more information, see "Frequent Diner Receipts" on page 183). When your frequent diner customers pay their checks, you can use this receipt to redeem any reward credit they may have. You can deduct all or part of their available reward credit from a check.

To Deduct a Customer’s Reward Credit from a Check

1 Open a check in the POS and associate it with a frequent diner customer, then from the Command panel, tap **Pay**.

2 From the Selection panel, tap **Frequent Diner**.

A keypad window will open, displaying the customer’s available reward credit. If the customer has no reward credit available, the program will display a message window.

3 Tap **Enter** to use all of the available credit, or enter a lower amount to use only part of the available credit and then tap **Enter**.

The check will now have the credit deducted from the total, and the customer can pay the remainder of the check (if any) by any other available method.

Check Option Functions

The Digital Dining Setup program includes several check option functions that only work for the Frequent Diner/Delivery program. You can use these functions by adding them to a check option in your main window of check options (for more information on frequent diner check options, see “Check Option Functions” on page 184). Here we will discuss how you can use these check option functions at the POS.

Clear Frequent Diner Customer

The Clear Frequent Diner Customer check option function allows you to remove a frequent diner customer from a check. If you mistakenly associate a check to the wrong frequent diner customer, you can use the Clear Frequent Diner Customer function to remove the association. Then you can associate the check to the correct customer. You can also use the Clear Frequent Diner Customer function for split checks involving more than one frequent diner customer (for more information, see “Split Checks” on page 194).

You will probably not wish to include the Clear Frequent Diner Customer function as part of your standard “Frequent Diner” check option, because you will use it infrequently. Most users will include it in a separate check option (such as “Clear Customer”) and add the check option to their standard window of check options (for more information on frequent diner check options, see “Check Option Functions” on page 184).

Customer Search

The Customer Search check option function allows you to search for customer records at the POS. Using this function, you can search for customer records by a customer's name, telephone number, member ID number, search name, search company, or credit card number.

Edit Customer Points

The Edit Customer Points check option function allows you to manually edit a Frequent Diner customer's reward points at the POS.

Frequent Diner Status Report

The Frequent Diner Status Report check option function offers you a method of updating your customers on their current frequent diner point/credit status. If you include this function to your standard "Frequent Diner" option, the program will display the status report window when you select a frequent diner customer's record at the POS. You can then print the status report for your customer.

You can create and edit the layout of status reports in the Status Report Maintenance window of the Frequent Diner/Delivery program. You can then associate a status report to your check option in the Check Option Maintenance window of the Setup program.

Delivery at the POS

Overview

In this chapter, we will describe how you will most typically use the Frequent Diner/Delivery program at the Point of Sale (POS). We will describe how to use delivery functions while taking orders from new and previous customers. We will also describe how to use the check option functions and register options that are specific to delivery service. Because you can configure your register in various ways, the descriptions that we provide here may differ slightly from how your register actually performs.

Delivery Service Register Design

Digital Dining has designed the Frequent Diner/Delivery program to adapt to the needs of your business. Therefore, you can use the program in different ways, and you must decide how it can best serve your needs. If your restaurant is primarily a delivery service, you will want to set up your primary register as a delivery register. If, however, you offer delivery service as well as dine-in service, you might prefer to either add the delivery functions to your main table service register or to create a separate delivery-only register.

If you want to create a delivery-only register definition, than you can set it to use the Delivery Assignment register type, which features an array of functions specifically designed to help delivery dispatchers assign orders to drivers quickly and efficiently. You can also include a new window of check options, a new window of register options, and at least one new check layout for your delivery register definition, all tailored to your delivery needs.

If you do not want to create a new delivery-only register definition, than you can modify your main register definition (typically using the Quick Service register type) to handle delivery orders. To do this, you can modify your main register's window of check options, window of register options, and check layout accordingly.

Delivery Assignment Register Type

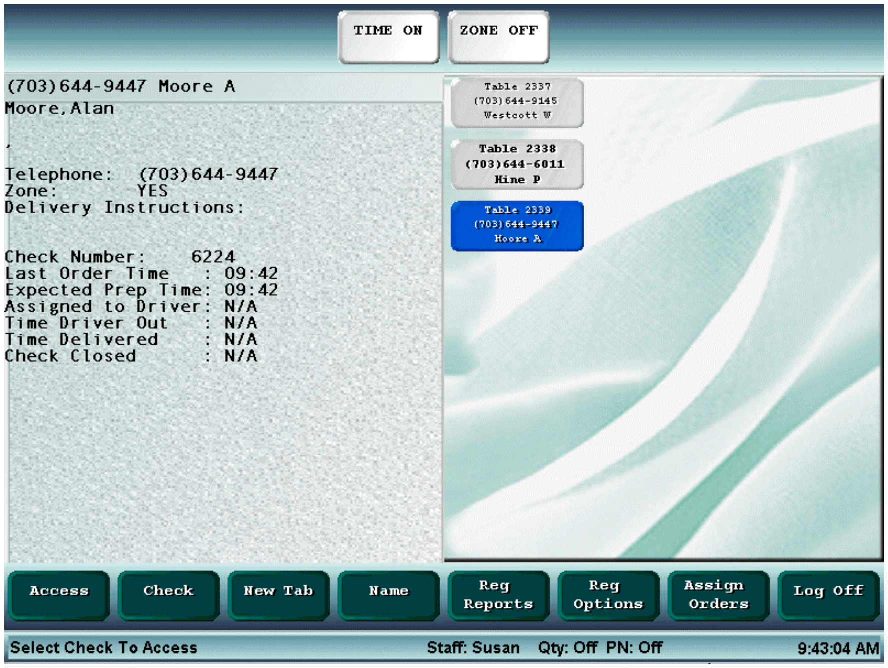
We designed the Delivery Assignment register type to help delivery dispatchers assign orders to drivers quickly and efficiently by allowing them to pay and serve in one step. To set a register definition to use the Delivery Assignment register type, open the Register Definition Maintenance window (in the Setup program), click the **Main** tab, and then click **Delivery Assignment** in the **Register Type** list.

At the POS, the Delivery Assignment register type features two primary screens: the Access Orders screen (where the dispatcher takes phone orders and creates new checks) and the Assign Orders screen (where the dispatcher assigns checks to available drivers).

Access Orders Screen

From the Access Orders screen, you can create new checks, view or modify existing checks, and create or view delivery customer records. The Selection panel of the Access Orders screen displays a button for each delivery order. If you tap an order button, the Display panel will display information regarding the order, including the customer's contact information (such as name, telephone number, street address, delivery zone, and delivery instructions), the order's check number, and assorted time status information (such as the expected prep time, the name of the assigned driver, the time the order was delivered, and so on).

To take a new order, tap **New Tab**. The POS will prompt you to type the customer’s telephone number in the keypad. If the POS cannot find that customer’s telephone number, it will invite you to create a new customer record. You can create a new customer record or cancel the check. If the POS finds an existing customer record with that telephone number, it will display the customer’s information in the Display panel. You can edit the customer’s information, perform a different search (or search for a customer record using different information, such as the customer last name), or accept the customer’s information and take the order.

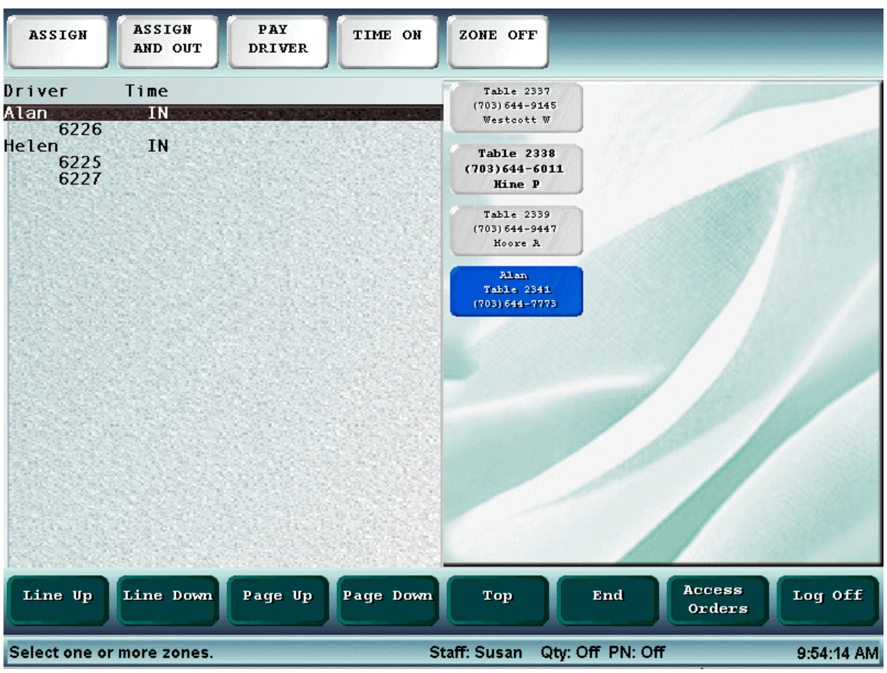


The Top panel of the Access Orders screen features two buttons, **Time On/Time Off** and **Zone On/Zone Off**. These two buttons allow you to filter the orders that display in the Selection panel of the Access Orders screen. If **you** tap **Time Off/Time On**, the POS will display the Time Filter screen. This screen features six buttons, each representing a different filter setting. If you tap **Ordered**, the Selection Panel will display orders that have been ordered but not prepped. If you tap **Prepped**, the Selection Panel will display orders that have been prepped but not assigned to drivers. If you tap Assigned, the Selection Panel will display orders that have been assigned to drivers who are currently available ("IN"). If you tap **Out**, the Selection Panel will display orders assigned to drivers who are currently delivering orders ("OUT"). If you tap **Delivered**, the Selection Panel will display orders that have been delivered. If you tap **Paid**, the Selection Panel will display orders that have been delivered and paid for. You can filter orders by one or more of these options. You can also tap **Include All** (on the Command panel) to select all of these options or tap **Exclude All** to clear all of these options. After selecting one or more appropriate options, click **Accept** on the Command panel to view the filtered orders in the Access Orders screen.

If you tap **Zone On/Zone Off**, the POS will display the Zone Filter screen. This screen features a button for each delivery zone you have defined in the Frequent Diner/Delivery program. If you tap one of these buttons (for example, **Zone 1**), the Selection Panel will display orders for customers in that zone. If you tap more than one zone button, the Selection panel will display orders for customers within all of the zones you've selected. If you tap **None**, the Selection panel will display orders associated with no delivery zones. You can also tap **Include All** (in the Command panel) to select all of these options or tap **Exclude All** to clear all of these options. After selecting one or more appropriate zones, click **Accept** on the Command panel to view the filtered orders in the Access Orders screen. To return to the Assign Orders screen, tap **Assign Orders** in the Command panel.

Driver Assignment Screen

After creating one or more orders in the Access Orders screen, you can assign them to drivers in the Assign Orders screen. Like the Access Orders screen, the Selection panel of the Access Orders screen displays a button for each delivery order. The Display panel of the Assign Orders screen lists all of the drivers currently clocked in, including each driver's status and the check number of each order assigned to them (if any). If a driver is available to deliver orders, that driver's status displays as “IN.” If the driver is out on a delivery, the driver's status displays the number of minutes the driver has been out. (For example, if a driver has been “out” for 25 minutes, that driver's status displays as “25”.)



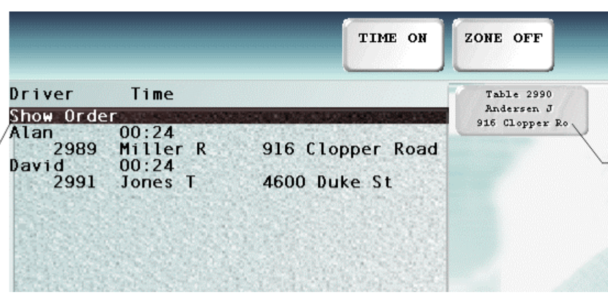
The Top panel of the Assign Orders screen features the **Assign** and **Assign And Out** buttons, which allow you to assign one or more orders to a driver. To assign orders to a driver, tap an available driver in the Display panel, then tap one or more orders in the Selection panel, and then tap **Assign**. You can also assign orders to a driver and change that driver's status from “IN” to “OUT” by tapping **Assign And**

Out. To unassign orders assigned to a driver whose status is "IN," tap the driver in the Display panel, then tap the orders you wish to unassign in the Selection panel, then tap **Assign**.

If you select a driver in the Display panel whose status is "OUT," the POS will display the **Unassign** and **In** buttons instead of the **Assign** and **Assign And Out** buttons. You can use the **Unassign** and **In** buttons to unassign orders assigned to a driver or to change a driver's status from "OUT" to "IN." To unassign orders from a driver, tap the unavailable driver in the Display panel, then tap one or more appropriate orders in the Selection panel, and then tap **Unassign**. The selected orders will then display as unassigned and undelivered. To change the status of a unavailable driver, tap the driver in the Display panel and tap **In**. To view unassigned orders in the Selection panel when all of the drivers are "OUT," tap **Show Order** in the Display panel.

The Top panel also features the **Pay Driver** button, which allows drivers to pay checks to a register for delivered orders. To use the **Pay Driver** button, select a driver in the Display panel and then tap the **Pay Driver** button. The POS displays a list of open checks that are associated with the driver. Highlight the check(s) you want to pay and tap **Select** from the Command panel. After you select the checks, tap **Accept** from the Command panel. The Command panel displays three payment options: **Pay Fast**, **Pay Cash**, and **Pay Other**. If you tap **Pay Other**, the POS will display the Payment screen, allowing you to select a payment option for each selected check. If you tap **Pay Cash**, the POS displays the Payment keypad, allowing you to enter a cash amount for each selected check. If you tap **Pay Fast**, the POS asks if you want to pay the check(s) as one transaction. If you tap **Yes**, the POS automatically pays all the checks with cash and returns you to the Register Options screen.

If you tap Show Order in the list of delivery drivers in the Display panel ...



... the POS displays all unassigned orders in the Selection panel.

Like the Access Orders screen, the Top panel of the Assign Orders screen also features the **Time On/Time Off** and **Zone On/Zone Off**, which allow you to filter the orders that display in the Selection panel. To return to the Access Orders screen, tap **Access Orders** on the Command panel.

Quick Service Register Delivery Assignment

If you want to take and assign delivery orders from a standard quick service register, you can do so by creating and adding a special delivery check option to your quick service register's window of check options. This delivery check option should include the Customer Search check option function, which allows staff members to either search for or create customer records at the POS. After finding or creating an appropriate customer record, the staff member can associate that customer record to a check at any time while the check is open. This method allows staff members to associate a check with a delivery customer any time before the check is paid. Once a staff member associates a check to a delivery customer, that staff member can then assign the order to an available delivery driver.

Check Option Functions

The Digital Dining Setup program includes several check option functions that serve the Frequent Diner/Delivery program. You can use these functions by adding them to a check option in your main window of check options (for more information, see "Check Option Functions" on page 184).

Change/Add Delivery Instructions

The Change/Add Delivery Instructions check option function allows you to review and edit delivery instructions for your individual customers. If you add this function to your standard "Delivery Customer" check option, the program will display the Delivery Instructions window after you find and accept a new delivery customer. You can edit these instructions, if necessary.

Clear Delivery Customer

The Clear Delivery Customer check option function allows you to remove a delivery customer from a check. If you mistakenly associate a check to the wrong customer, you can use the Clear Delivery Customer function to remove the association. Then you can associate the check to the correct customer.

You will probably not wish to include the Clear Delivery Customer function as part of your standard "Delivery Customer" check option, because you will use it fairly infrequently. Most users include it in a separate check option (such as "Clear Customer") and add the check option to their standard window of check options (for more information, see "Check Option Functions" on page 184).

Customer Search

The Customer Search check option function allows you to search for customer records at the POS. Using this function, you can search for customer records by a customer's name, telephone number, member ID number, search name, search company, or credit card number. If your register is set to use the Delivery Assignment register type, your dispatchers will not need to use this check option function; the POS will prompt your dispatchers to select or create a delivery customer record before creating a new check.

Display Last Order

If you add the Display Last Order check option function in your standard "Delivery Customer" check option, the program will display the customer's last order at the POS. After you select the customer, the check window will display each item of the customer's previous order as a menu item button. You can reorder the entire previous order or certain items from it.

Set Delivery Time

If you add the Set Delivery Time check option function to your standard "Delivery Customer" check option, the program will prompt you to enter a delivery time for each delivery order. A keypad will appear after you select a delivery customer, prompting you to enter a delivery time in minutes. This delivery time is associated with a layout token, which you can place on a check or coupon layout.

Register Options

The Digital Dining Setup program includes several register options that are exclusive to delivery service. You can use these register options by adding them to a window of register options (for more information, see "Register Options" on page 186). Here we will discuss how you can use these register options at the POS.

Change Driver Assignment

You can unassign the driver you have assigned to a delivery order. After you tap **Register Options** from the Command panel and **Change Driver Assignment** from the Selection panel, the POS will display all the drivers who are currently clocked in. You can tap one driver, multiple drivers, or all drivers (or you can tap

Include All from the Command panel). After you select the drivers, tap **Accept** from the Command panel. Then, the POS program will display all the delivery zones you have defined (if any). You can tap one, multiple, or all delivery zones. After you select the delivery zones, tap **Accept** from the Command panel.

At this point, the POS program will display a list of open checks that have passed through the previous two screens (you can think of them as filters). Highlight the check(s) you want to unassign from the current driver and tap **Select** from the Command panel. After you select the checks, you can tap **Unassign** from the Command panel to remove the check assignment.

After you unassign the checks, the program will display a list of the checks in the Display panel and a list of all the other available drivers in the Selection panel. You can tap the button of the driver to whom you wish to reassign the checks, or tap **Cancel** to exit the screen. If you exit the screen without reassigning the checks, the checks will remain unassigned.

Delivery Late Orders Report

You can review all delivery orders that meet the late time you have set with the Delivery Set Late Time register option (below). After you tap **Register Options** from the Command panel and **Delivery Late Orders Report** from the Selection panel, the POS will display all checks that have been opened longer than the late time you set. You can review the check(s) in the Display panel.

Delivery Set Late Time

You can set late times for your delivery orders. You will most likely use this register option with the Delivery Late Orders Report register option (above). After you tap **Register Options** from the Command panel and **Delivery Set Late Time** from the Selection panel, the POS will display a keypad so that you can type the late time setting.

Driver Select

You can assign a driver for the check(s) you have ordered. If you need to change the driver you have selected, use the Change Driver Assignment register option (for more information, see “Change Driver Assignment” on page 205).

Driver Single

You can assign a driver for the check(s) you have ordered. If you need to change the driver you have selected, use the Change Driver Assignment register option (for more information, see “Change Driver Assignment” on page 205).

List All Assigned

You can view a report of all checks that you have assigned to drivers. After you tap **Register Options** from the Command panel and **List All Assigned** from the Selection panel, the POS will display all the drivers who are currently clocked in. You can tap one driver, multiple drivers, or all drivers (or you can tap **Include All** from the Command panel). After you select the drivers, tap **Accept** from the Command panel. Then, the POS program will display all the delivery zones you have defined (if any). You can tap one, multiple, or all delivery zones. After you select the delivery zones, tap **Accept** from the Command panel.

At this point, the POS program will display a list of open checks that have passed through the previous two screens (you can think of them as filters). Highlight the check(s) you want to review and tap **Select** from the Command panel. After you select the checks, you can tap **Detail** from the Command panel to see the check information for each of the checks in the Display panel.

Pay Driver Run

When drivers return from delivering their order(s), you can have them pay the checks by using the Pay Driver Run register option. After you tap **Register Options** from the Command panel and **Pay Driver Run** from the Selection panel, the POS will display all the drivers who are currently clocked in. You can tap one driver, multiple drivers, or all drivers (or you can tap **Include All** from the Command panel). After you select the drivers, tap **Accept** from the Command panel. Then, the POS program will display all the delivery zones you have defined (if any). You can tap one, multiple, or all delivery zones. After you select the delivery zones, tap **Accept** from the Command panel.

At this point, the POS program will display a list of open checks that have passed through the previous two screens (you can think of them as filters). Highlight the check(s) you want to pay and tap **Select** from the Command panel. After you select the checks, tap **Accept** from the Command panel. You can tap **Pay Fast, Pay Cash,** or **Pay Other** from the Command panel to close the check(s). If you tap **Pay Fast,** the POS will ask if you want to pay the check(s). If you tap **Yes,** the POS program will automatically pay all the checks with cash and return you to the Register Options screen.

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