Aldelo® For Restaurants™

Training Manual

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This manual is available through Aldelo Systems Inc. and resellers worldwide. For further information about other languages that the manual may be translated into, please contact Aldelo Systems Inc. or visit our Web site at www.aldelo.com. Send comments about this manual to contact@aldelo.com.

Introduction

Congratulations on taking the major step of selecting your new Point-of-Sale (POS) system! You will soon be up and running with Aldelo® For Restaurants. You will see why Aldelo® For Restaurants is the industry leader in restaurant management software.

Aldelo® For Restaurants is not only affordable, it is also one of the most feature-rich restaurant software packages available today. It gives you the ability to automate many of the tasks associated with running your restaurant. When properly installed and setup, it will help you run your table service, take-out, delivery, pizza making, bar, kitchen, cashiers, reservations, wait lists, scheduling, inventory, accounting, and more; and it will do so with a level of security greater than ever before!

This Training Manual is designed for use either by the end user of the software or by someone who is training someone else how to install and use the software. In it, we will walk you through the procedure of setting up a fictitious restaurant, called Checkers. As you follow along, you will not only see how we install and setup the software, you will also learn why many of these settings are important. This will undoubtedly give you a greater understanding of how the system works, enabling you to operate the software with confidence. As you gain more experience with Aldelo® For Restaurants, you will come to appreciate how well it complements your business. You will wonder how you ever got along without it!

We will start the tutorial with the configuration of the hardware and network software, followed by the POS software installation and configuration, and finally, the operation of the POS software. You should take the time to read the accompanying User Manual first, and then read this Training Manual thoroughly before beginning the course. Many times, your questions are answered in the manual a few pages later. Reading these manuals ahead of time will help keep your questions to a minimum as you complete the tutorial.

So get yourself a cup of coffee, sit down, relax, and let us begin your trip into the world of Aldelo® For Restaurants!

Getting Started

Comprehensive Demonstration

If you operate a restaurant of any size, from a hot dog cart to a world famous five-star eatery, you can run it more efficiently with Aldelo® For Restaurants.

The following screen displays the main form for the fictitious restaurant we will setup in this tutorial (see Figure Intro-1). Upon completion, you will have learned how to setup and operate your own restaurant with Aldelo® For Restaurants.

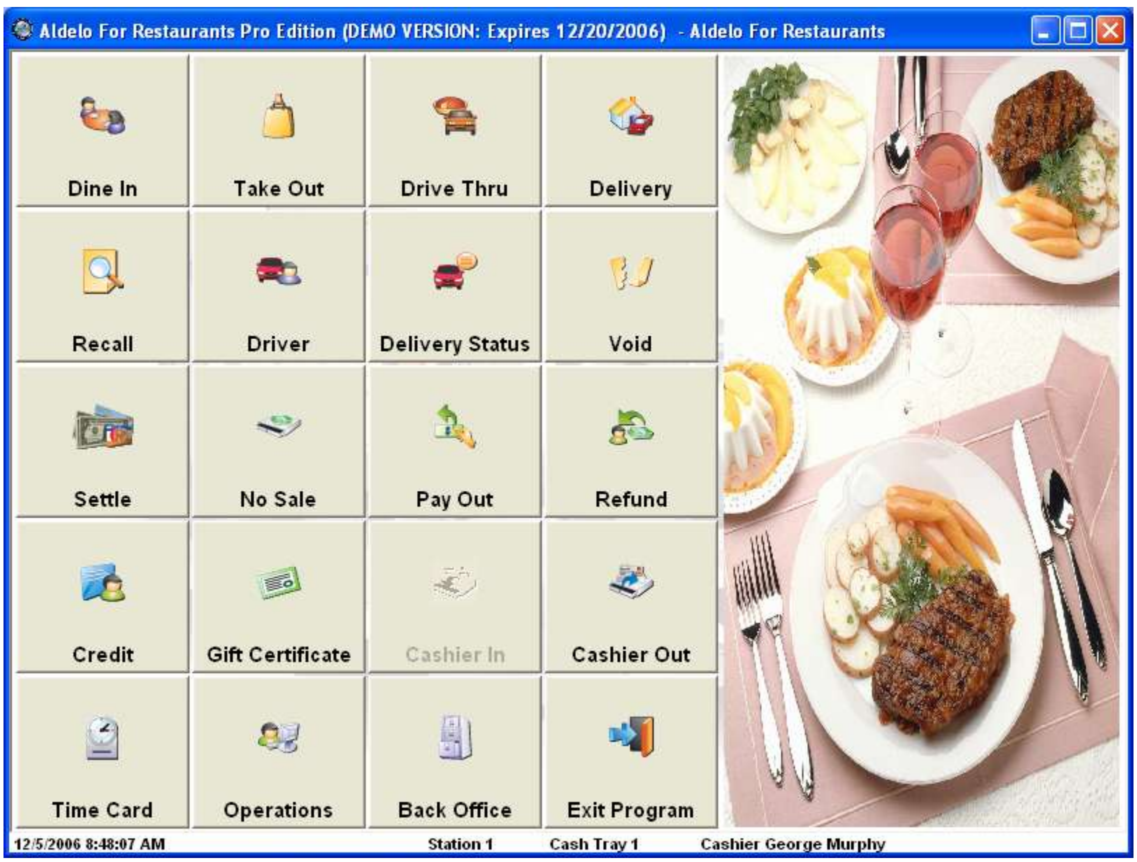


Figure Intro-1

The Aldelo® For Restaurants Setup Process

OBJECTIVES

Upon completion of this tutorial, you will be able to:

- ❑ Setup and install your network hardware and software
- ❑ Setup and install your Point of Sale (POS) hardware
- ❑ Install and configure the Aldelo® For Restaurants software
- ❑ Operate the software

THE MAJOR STEPS

There are two major parts to setting up Aldelo® For Restaurants:

- ❑ Installing the hardware
- ❑ Installing and configuring the software

The following flow chart shows the steps for setting up Aldelo® For Restaurants.

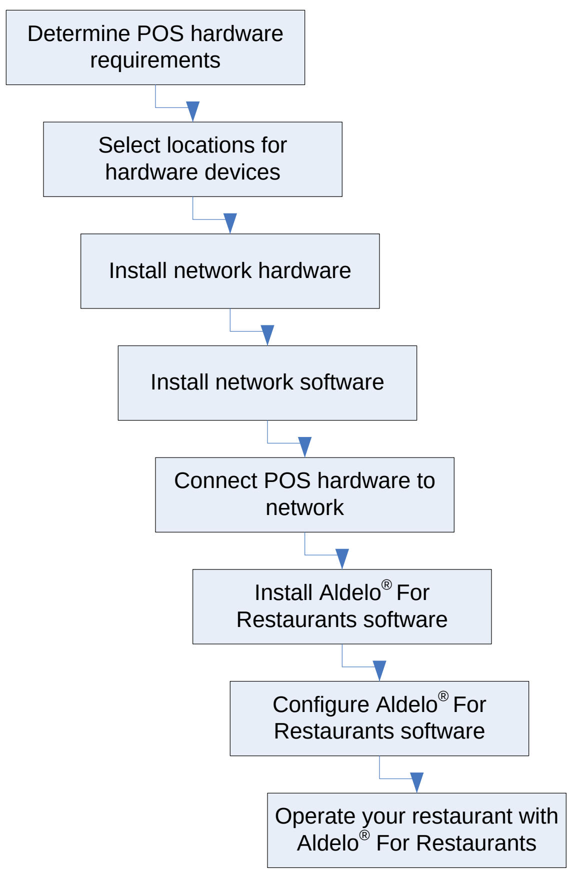


Figure Intro-2

In this manual, we will follow the sequential steps in the diagram above to setup our restaurant, Checkers. If you are setting up your own restaurant as you follow along, substitute any references to Checkers in the settings with those of your own restaurant.

Chapter 1 — POS Hardware Requirements

The first step when installing a POS system is to determine the types and locations of the hardware devices needed for operation of your restaurant.

Hardware devices can consist of:

- Server Computer
- Client Computers
- Touch Monitors
- All-in-One Terminals
- Printers
- Magnetic Stripe Readers (MSR)
- Pole Displays
- Cash Drawers
- Magnetic Ink Check Readers (MICR)
- Barcode Readers
- Weight Scales
- Caller Identification (ID) Devices
- Coin Changers

For detailed descriptions of the above types of hardware and the different network interfaces available, please see Chapter 1 of the User Manual.

Chapter 2 — Hardware Device Locations

Imagine where you need your terminals placed and where you may need terminals placed in the future. Give this step considerable thought; proper planning here can save much time and money when you expand your business. Along with the terminals, consider where to place other hardware devices. Make a diagram of your restaurant's floor plan and mark the device locations on it (see Figure 2-1). This makes the next step in the process easier to complete.

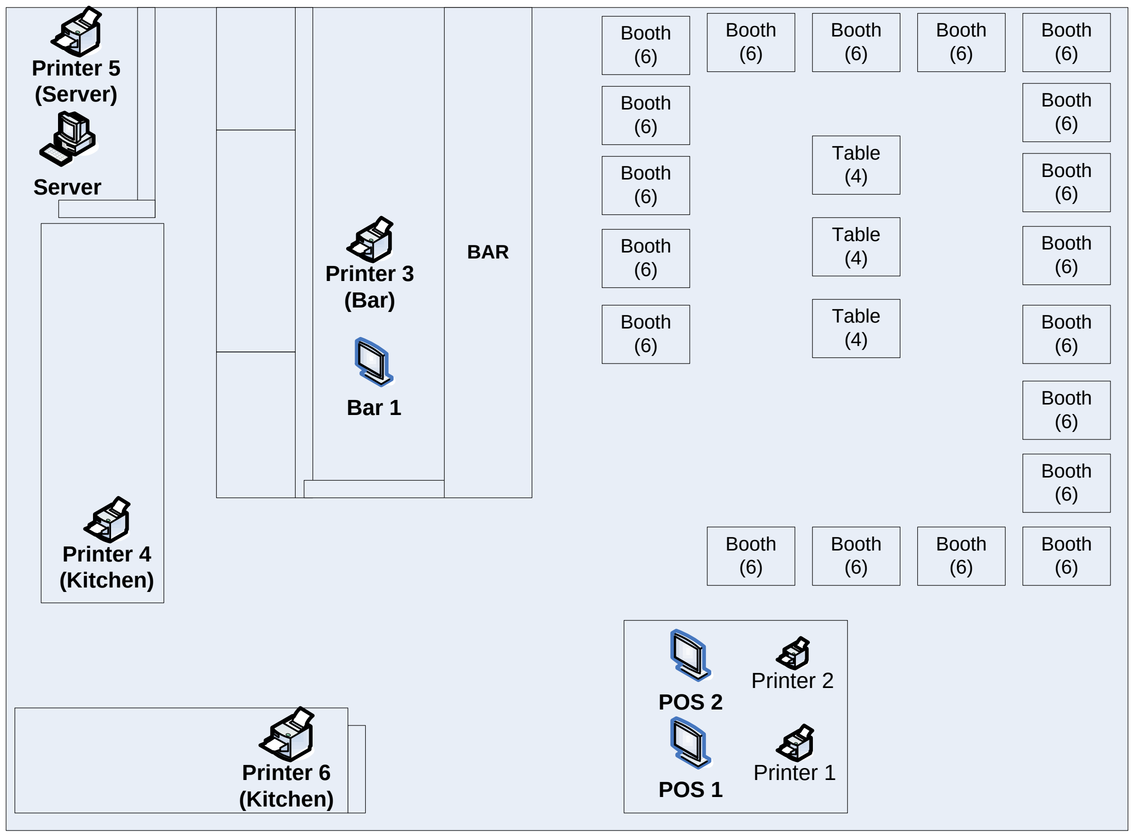


Figure 2-1

Chapter 3 — Network Hardware Installation

Take the diagram you made and figure out how you will run the cabling for your network. The cable installation is best left to a professional, especially if there are walls, ceilings, or other obstacles to go through. If you want to install the cabling yourself, please read Chapter 2 of the User Manual thoroughly. It describes how to install the cabling and explains certain pitfalls to be on the lookout for.

After completing the installation of the cabling, make sure all your terminals have Network Interface Cards (NIC) installed in them so that they can be connected to the network. This allows them to “talk” to the server computer.

Finally, choose the type of device you will use to connect all the cables from the individual devices to a central location so that each device will be able to communicate with the other devices. See Chapter 2 of the User Manual for an explanation of the pros and cons of Hubs, Switches, Routers, and Wireless Access Points before making your decision. For our Checkers restaurant, we will use a switch.

Note: Aldelo Systems Inc. does not provide any technical support whatsoever for help with installing cabling. Again, this task should be performed by a professional installer.

Assembling Your Network

We will assume you have already installed Windows® 2000 or Windows® XP on your terminals with the default configuration. Connect the terminals to the wall jacks that were installed previously by using patch cables. Connect the server computer and the system of jacks to the switch.

Chapter 4 — Network Software Configuration

For its operating system, our Checkers Restaurant will use Windows® XP Professional. For instructions on configuring Windows® 2000, please see Chapter 3 of the User Manual. Windows® XP Home and Windows® 98 are **not** recommended for use with Aldelo® For Restaurants.

The first thing to do to prepare the system for communication over the network is to change the workgroup name and computer name. This may be any name you wish. Most of the time, the restaurant name, or an abbreviation of the name is used. The default workgroup name is WORKGROUP, which may be used if desired. We will use CHECKERS for our workgroup name. Computer names are usually SERVER, POS1, POS2, POS3, BAR, TAKEOUT, DRIVETHRU, etc., and by common practice are usually written in upper case letters.

Naming your Workgroup

We will name our workgroup CHECKERS. Follow the procedure below:

1. Click “Start.”
2. Navigate to the “My Computer” icon and right click on it (if using a terminal without a mouse, click the  icon on the keyboard to perform a right click). This displays a set of options.
3. Navigate to and click on the “Properties” option at the bottom of the list. This displays the System Properties page.
4. Click the “Computer Name” tab. This takes you to the page where you can change your network settings.
5. Click on the “Change” button. This displays the Computer Name Changes page where you can change the computer name and workgroup name.
6. Change the workgroup name to CHECKERS.
7. Click OK (see Figure 4-1).

When the system prompts you to restart, accept and allow the system to restart.

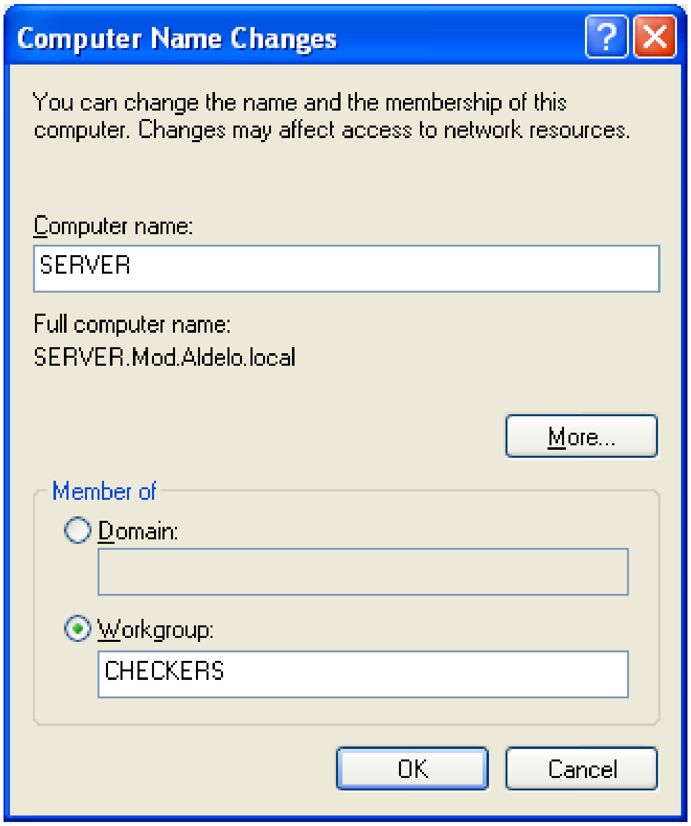


Figure 4-1

Naming Your Computers

Follow the same steps listed above but change the name of your server computer in step six to SERVER. Repeat this step for each of the terminals on your network, giving each a unique name (see Figure 4-1).

Changing the IP Addresses

1. Click “Start” on the desktop.
2. Navigate to and click the “Control Panel” icon in the menu. This displays the Control Panel where many system settings may be changed.
3. Double-click on the “Network Connections” icon.
4. Double-click on the “Local Area Connection” icon. This displays the Local Area Connection Status page.
5. Click on the “Properties” button. This displays the Local Area Connection Properties page.
6. Highlight the “Internet Protocol (TCP/IP)” item in the white box.
7. Click on the “Properties” button. This will bring you to the Internet Protocol (TCP/IP) Properties page.

8. Click “Use the following IP address:” This will activate the fields below, allowing you to edit them.
9. In the IP address field, type in the IP address you wish to use for this system. We will use 192.168.0.1. Type this number into the IP address field (see Figure 4-2).

When you hit the “Tab” key on the keyboard, the “Subnet mask” field populates automatically. The value entered in this field by Windows is usually correct.

Repeat the procedure above for each of the terminals on your network. The IP address should be incremented by one for each successive terminal. For example, if you used the number above as the IP address for your server computer, use 192.168.0.2 for POS1, 192.168.0.3 for POS2, etc. Continue this procedure until all of your terminals have an IP address assigned to them. Don’t forget to add the default subnet mask, as described above.

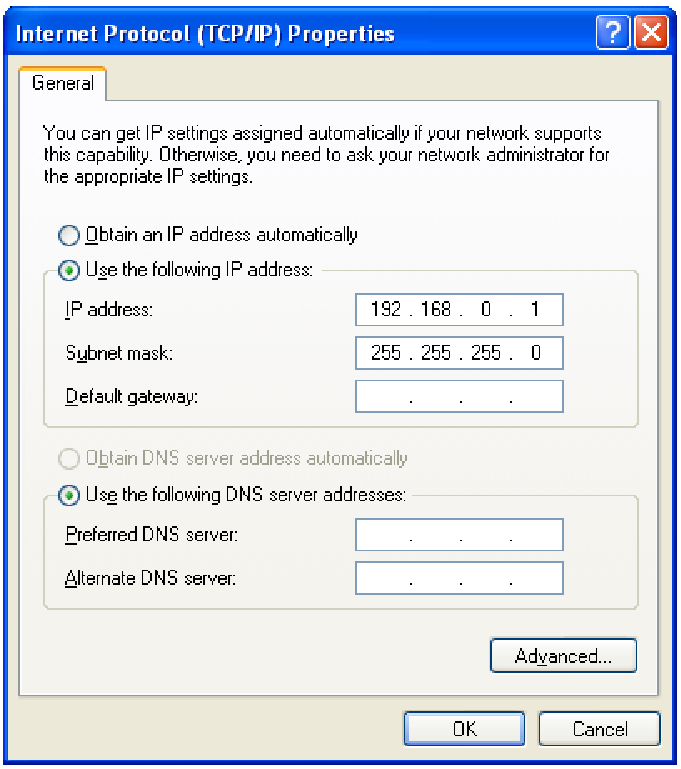


Figure 4-2

Testing Your Network

Now that we have configured the network, we are ready to test to see if the network is operational. We perform the Ping command in MS-DOS. Click on the “Start**”** button and select “Run.” Type “command” in the open field of the Run dialog screen. The MS-DOS screen appears. Enter “PING w.x.y.z,” where wxyz is the IP address of another computer that you specified earlier in the setup. For example, to test the server computer from one of the other POS stations, use “ping 192.168.0.1,” and press the Enter key to issue the command. Check to see if there are any replies. In addition, check out the **Packet Loss** information. This value should be zero to denote that your network is successfully configured. If your **PING** result indicates failure, check your cabling and settings. If the problem persists, consult with a qualified network technician to check out your problem.

Chapter 5 — POS Hardware Setup

Installing the Terminal

If you use all-in-one type terminals, setup is usually very easy (just connect the terminal and go), as most manufacturers install everything prior to shipping their product to the customer.

However, if you use a freestanding touch screen, you must install the drivers for it before it will work. For information about obtaining and installing drivers, contact the manufacturer of the device.

Printer Setup

To print in Aldelo® For Restaurants, you must setup each printer on your network in each computer on your network. For example, if you have two computers and two printers, you must setup both printers on each computer. We will setup our printers in Windows® XP Professional. See “Setting up the POS Printers” in Chapter 4 of the User Manual for instructions on setting up printers in Windows® 2000.

1. On the desktop, click the Start button.
2. Navigate to and click on “Control Panel.”
3. Double-click “Printers and Faxes.”
4. In the Printer Tasks section on the left side of the screen, click “Add a printer.” This displays the Add Printer Wizard (see Figure 5-1).
5. Click “Next” and follow the instructions to add your printer (local or network). Local printers connect directly to this computer and network printers connect directly to other computers on the network. You may need the driver disc that came with the printer. If you do not have it, contact the manufacturer to obtain one.
6. When prompted, print a test page to ensure the printer is installed correctly.

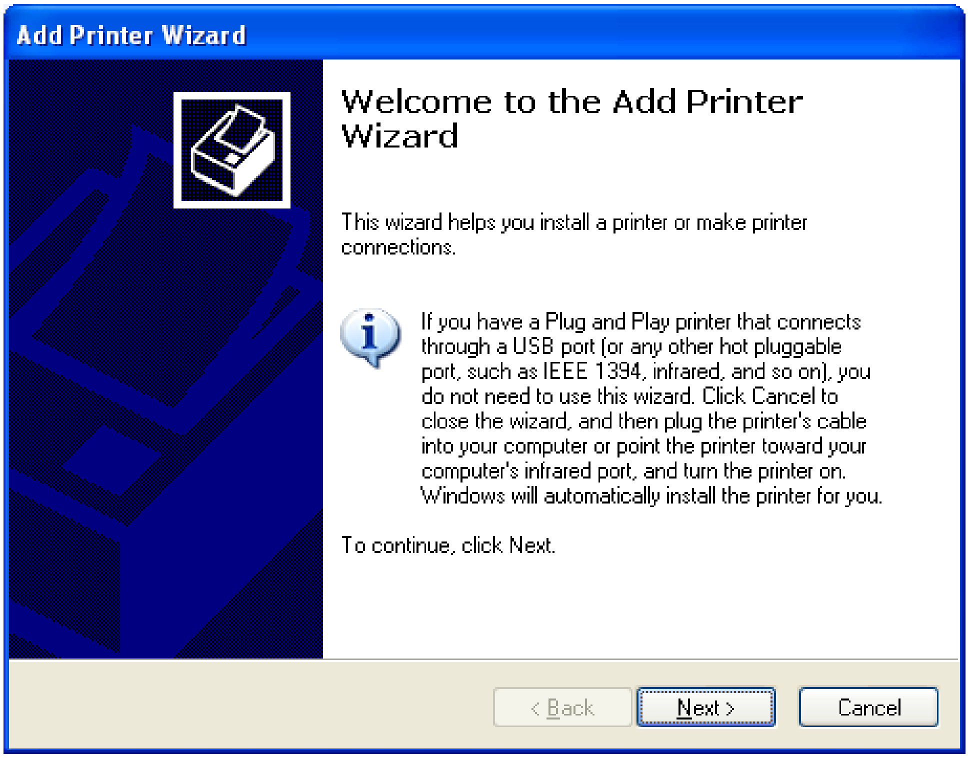


Figure 5-1

Printer Sharing

1. On the desktop, click the Start button.
2. Navigate to and click on "Control Panel."
3. Double-click "Printers and Faxes."
4. Right-click the printer to share and click on "Properties" at the bottom of the menu.
5. Click the Sharing tab.
6. Click the "Share this printer" radio button and enter a share name for this printer. We will give our printers the same names as the computers to which they are connected. We will call this printer POS1.
7. Click "Apply."
8. Click "OK" (see Figure 5-2).

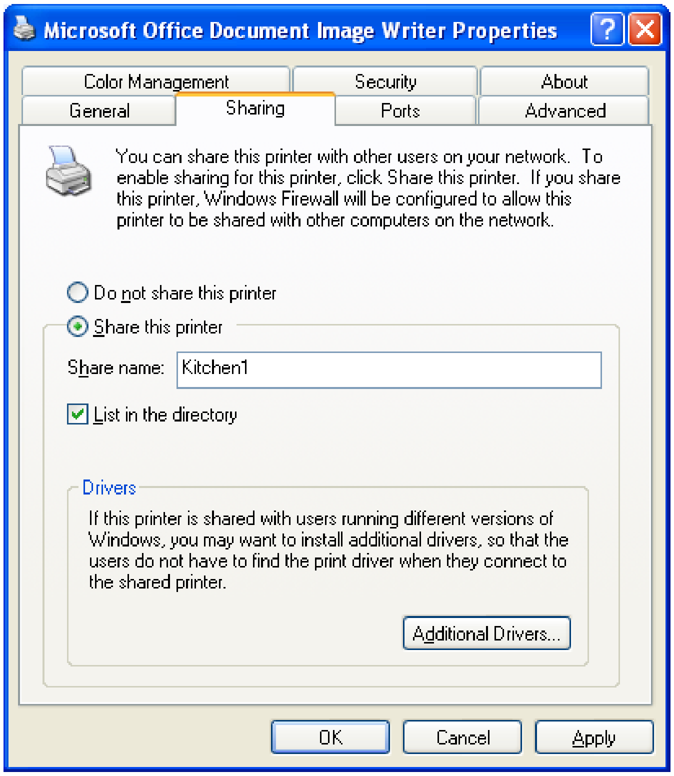


Figure 5-2

Testing Your Printers

1. On the desktop, click the Start button.
2. Navigate to and click on “Control Panel.”
3. Double-click “Printers and Faxes.”
4. Right-click the printer to share and click on “Properties” at the bottom of the menu.
5. Click the “Print Test Page” button. If a test page prints, this printer is working properly. If not, click the “Troubleshoot” button and follow the onscreen instructions of the Printing Troubleshooter (see Figure 5-3).
6. Repeat these steps for each printer on all computers.

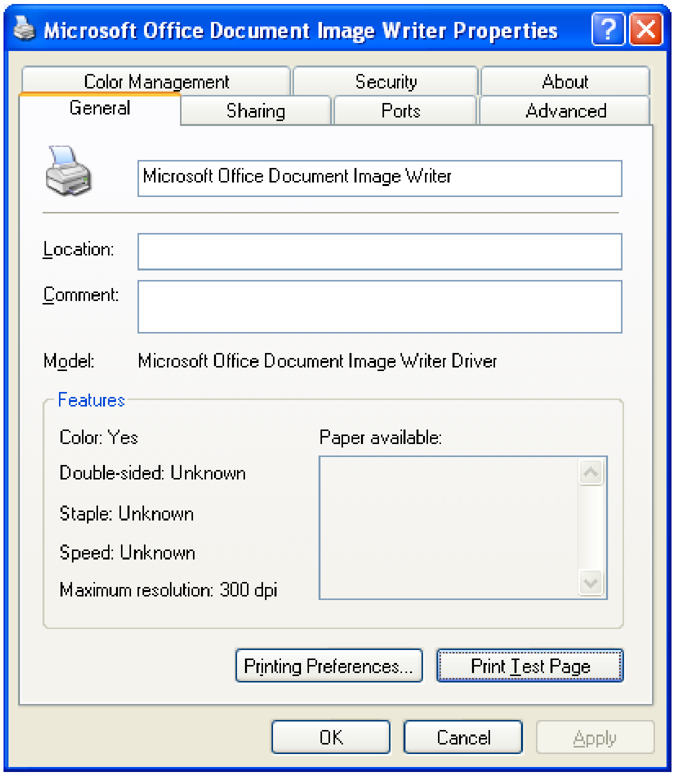


Figure 5-3

Other Hardware Devices

To install other types of hardware devices, such as those listed in Chapter 1 of this manual, please see Chapter 4 of the User Manual for detailed instructions.

Chapter 6 — POS Software Installation

Installing the Software

1. Place the Aldelo® For Restaurants CD in the CD-ROM drive. The splash screen displays automatically.
2. Select the software to install (see Figure 6-1). The install wizard launches.
3. Read the End User Licensing Agreement (EULA) very carefully. It contains important information for the end user.
4. Register and activate your copy of Aldelo® For Restaurants. You may register online or by telephone. For detailed instructions, please see “Registering & Activating Aldelo For Restaurants” in Chapter 5 of the User Manual.

Figure 6-1

Display Adjustments

To get the best possible display with Aldelo® For Restaurants, there are several adjustments to make to the system.

1. Set the screen resolution to 800 X 600 pixels.
2. Set the color quality of the display to the highest available (16 bit or higher).
3. Set your system's font size to Normal Size 96 DPI (see Figure 6-2).
4. Set the Taskbar to Auto Hide.

   For detailed instructions on how to make these adjustments, please see "Adjusting Windows" in Chapter 5 of the User Manual.

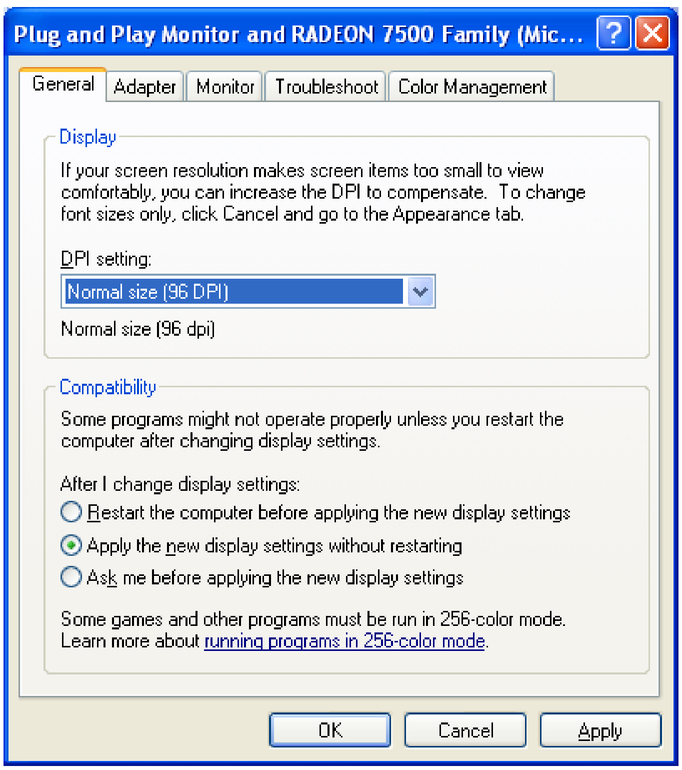


Figure 6-2

Sharing the Database Folder

All of the computers on the network must be able to connect to the database. The database folder must be shared. (For instructions on sharing in Windows® 2000, please see "Sharing the Database Folder" in Chapter 5 of the User Manual).

1. On the desktop, click the "Start" button.
2. Click on "My Computer."
3. Select the Tools menu and click on "Folder Options…"
4. Select the View tab and click on the "Show hidden files and folders" radio button.
5. **Uncheck** the "Use simple file sharing (Recommended)" checkbox.
6. Click on "Apply" and "OK."
7. On the My Computer window, double-click the C:\ drive.
8. From here, navigate to C:\Documents and Settings\All Users\Application Data\Aldelo Systems\Aldelo Data\. Here you will see the Aldelo® For Restaurants folder.
9. Right click on the folder and click "Sharing and Security…" in the drop-down menu.
10. Click the "Share this folder" radio button and change the share name to Aldelo.
11. Click the "Permissions" button. Select the group name "Everyone," and set the permissions under Allow to "Full Control."
12. Click on "Apply" and "OK."
13. Click the "Security" tab. This shows the Access Control List (ACL) for the folder security permissions. These are different from share permissions, and must also be set. In the Group or user names field, select "Everyone." If it is not listed, click "Add," type in "Everyone," and click "OK." Then, select "Everyone."
14. Make sure the "Everyone" group has "Allow" / "Modify" permissions.
15. Click on "Apply" and "OK."
16. Open Aldelo® For Restaurants.

Selecting the Database

After completion of the registration process, the database selection screen displays (if the database selection screen is not displayed, navigate to **Back Office > Data Source**) and gives you three choices: "Start with the Demo Database," "Create a New Blank Database," or "I Will Select My Own Database." **DO NOT** use the demo database as a starting point. If you want to use items from the demo database, export them and import them into your new database. ***Demo databases are deleted when the software is uninstalled!*** For our Checkers restaurant, we will create a new blank database on the Server computer.

From the main POS screen, click on the Back Office button. When prompted for the Access Code, enter "0." Under Common Tasks, click on "Data Source."

1. Click on “Create a New Blank Database” and click on the “Continue” button.
2. Enter the database name, CHECKERS, and click on “OK.”
3. Follow the onscreen prompts, enter the information requested, and click “OK” after each.
4. When you see the Store Settings screen, click “Done.”
5. When you see the Station Settings screen, click “Done.” The Back Office screen displays.
6. On the menu at the top, click on “Setup,” navigate to “Employee Setup,” and click on “Employee Files...” This displays the Employees screen.
7. On the General Tab, create an Employee File for yourself, making sure to enter the requested information in all of the fields in **bold** print, plus an Access Code. Enter “0” for your Access Code. Record this Access Code for future use. Do not forget this Access Code, or you will not be able to get into the system. Give yourself the highest Security Level (5) so that you will be able to access all features.
8. Click “Save,” then “Done.”

Finally, you must go to each computer on your network and connect it to this new database. For detailed instructions on this procedure, please see Selecting a Database – Connecting to a Database over the Network in Chapter 5 of the User Manual.

Chapter 7 — Information Data Entry

In this section, we will enter the data required for our Checkers restaurant. Just as in a real restaurant, we will not touch on every setting described in the User Manual. Follow along in the User Manual to see what settings will be different for your own specific application.

General Settings

STORE SETTINGS

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **General Settings** > **Store Settings** (this screen may also be accessed by navigating to **Back Office** and selecting **Store Settings** under Common Tasks). Notice that this screen has ten tabs under which you enter information of different categories (see Figure 7-1). For our training purposes, we will use the default values for this information. Examine these screens thoroughly to determine which settings must be changed for your own application. Detailed descriptions for each setting may be found under Store Settings in Chapter 26 of the User Manual. Note that you must click the “Hostess / Paging Setup” button on the Services tab to gain access to the Hostess / Paging Setup screen.

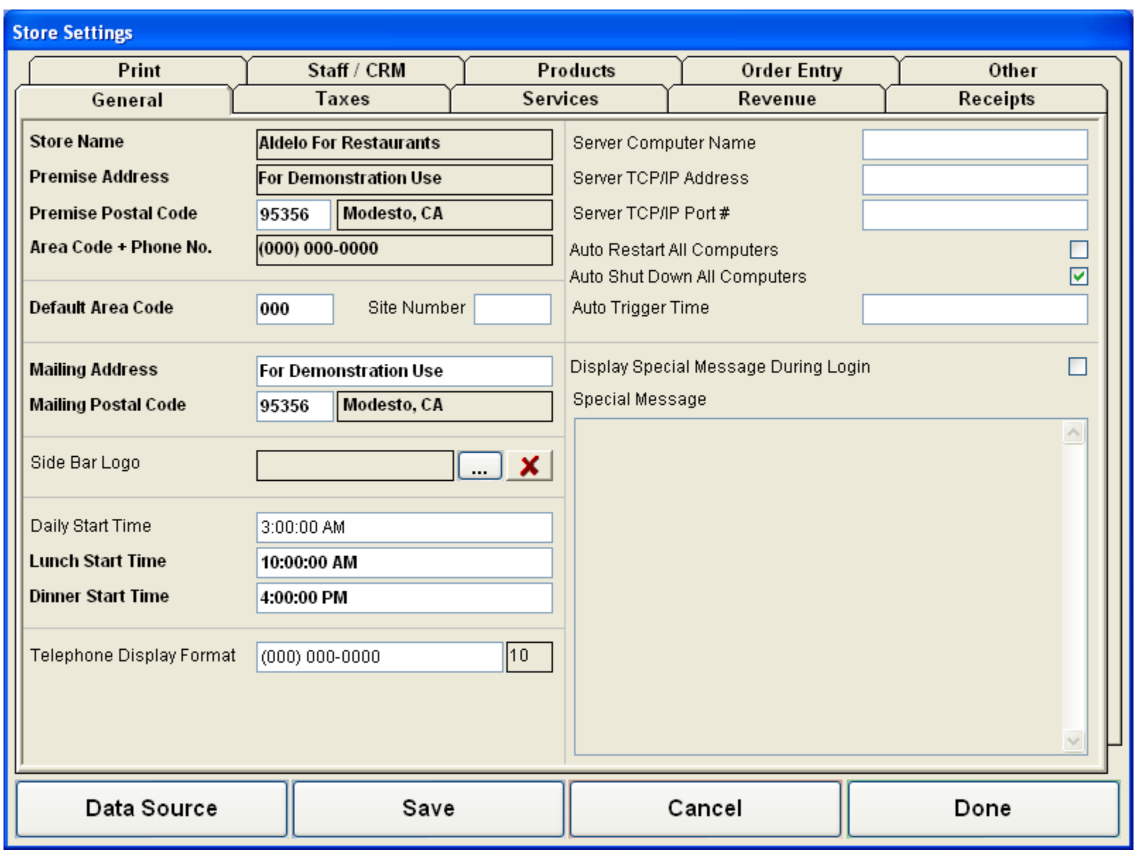


Figure 7-1

Security Settings

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **General Settings** > **Security Settings** (this screen may also be accessed by navigating to **Back Office** and selecting **Security Settings** under Common Tasks). Here you may set the security level required for access to each of the tasks listed (see Figure 7-2). For our training purposes, we will use the default values for this information. Examine this screen thoroughly to determine which settings must be changed for your own application. Detailed descriptions for each setting may be found under Security Settings in Chapter 26 of the User Manual.

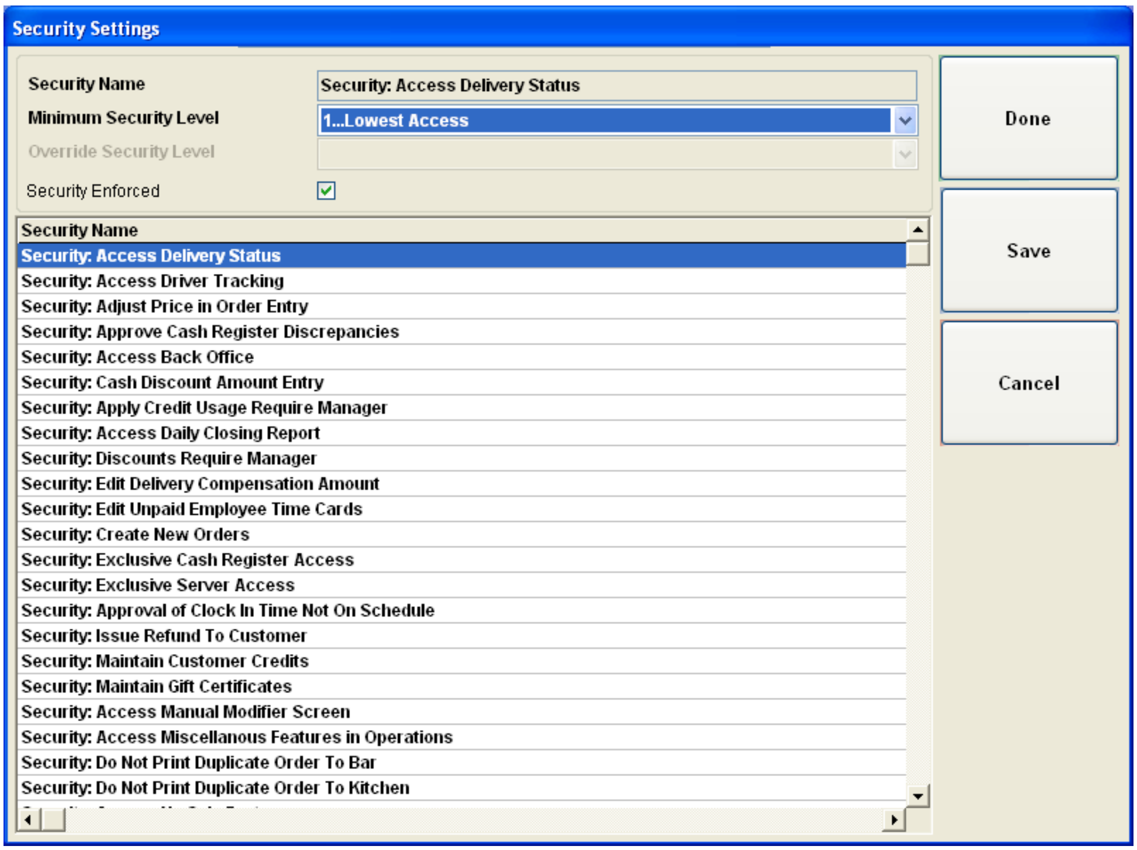


Figure 7-2

STATION SETTINGS

In Aldelo® For Restaurants, navigate to **Back Office > Setup > General Settings > Station Settings** (this screen may also be accessed by navigating to **Back Office** and selecting **Station Settings** under Common Tasks). Here you find settings related to individual POS stations (see Figure 7-3). Notice that this screen has six tabs under which you enter information. Changes to these settings are made on each individual terminal in your network. Again, for our training purposes, we will use the default values for this information. Examine these screens thoroughly to determine which settings must be changed for your own application. Detailed descriptions for each setting may be found under Station Settings in Chapter 26 of the User Manual. After setting up one station, the settings may be exported and imported by another station on the network.

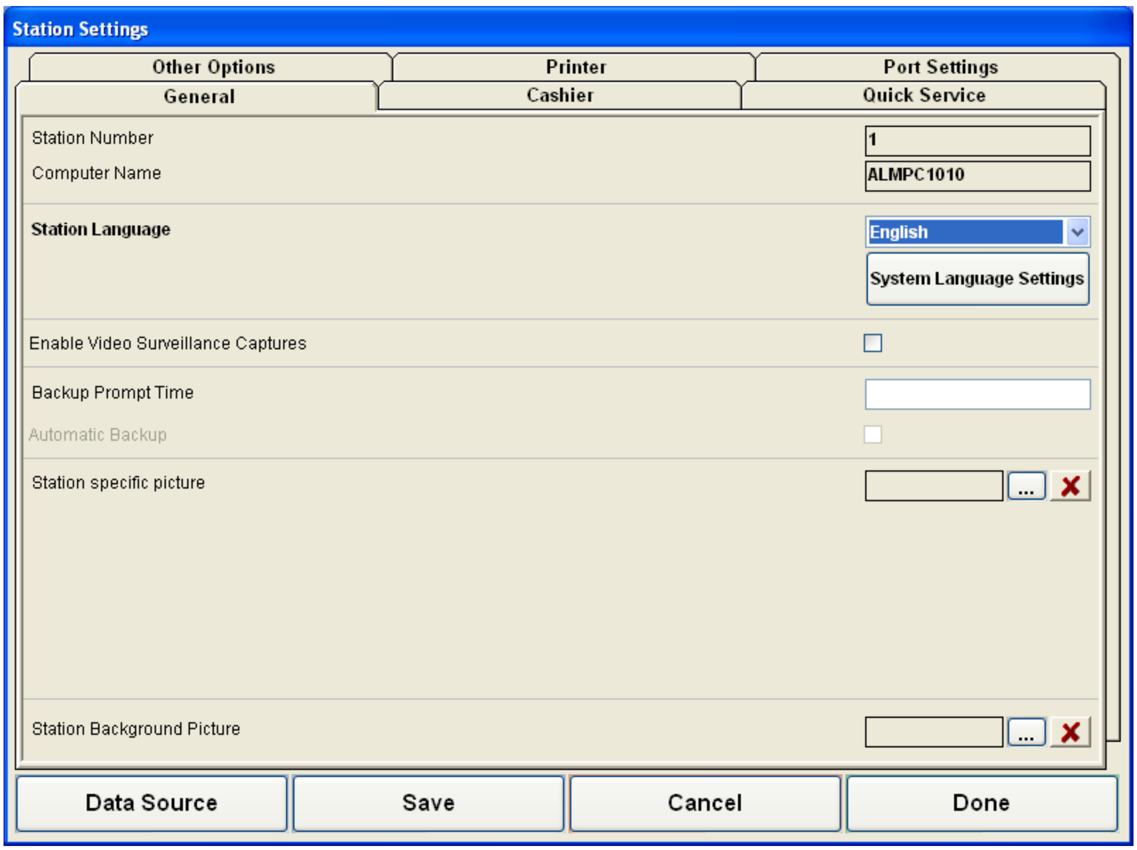


Figure 7-3

POSTAL CODES

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **General Settings** > **Postal Codes**. In the fields on the right side of the Postal Codes screen, enter the information from the table below. These are the areas our restaurant services. Since Checkers Restaurant offers delivery service, enter also the delivery charge to each area and the compensation paid to the delivery driver for delivery to this area. The Postal Codes screen should resemble the one below (see Figure 7-4).

City	State	Postal Code	Delivery Charge	Delivery Compensation
Modesto	CA	95350	$3.00	$2.00
Modesto	CA	95351	$3.00	$2.00
Modesto	CA	95352	$3.00	$2.00
Modesto	CA	95353	$3.00	$2.00
Modesto	CA	95354	$3.00	$2.00
Modesto	CA	95355	$3.00	$2.00
Modesto	CA	95356	$3.00	$2.00
Salida	CA	95368	$4.00	$2.50
Ceres	CA	95307	$4.00	$2.50
Turlock	CA	95382	$5.00	$3.00

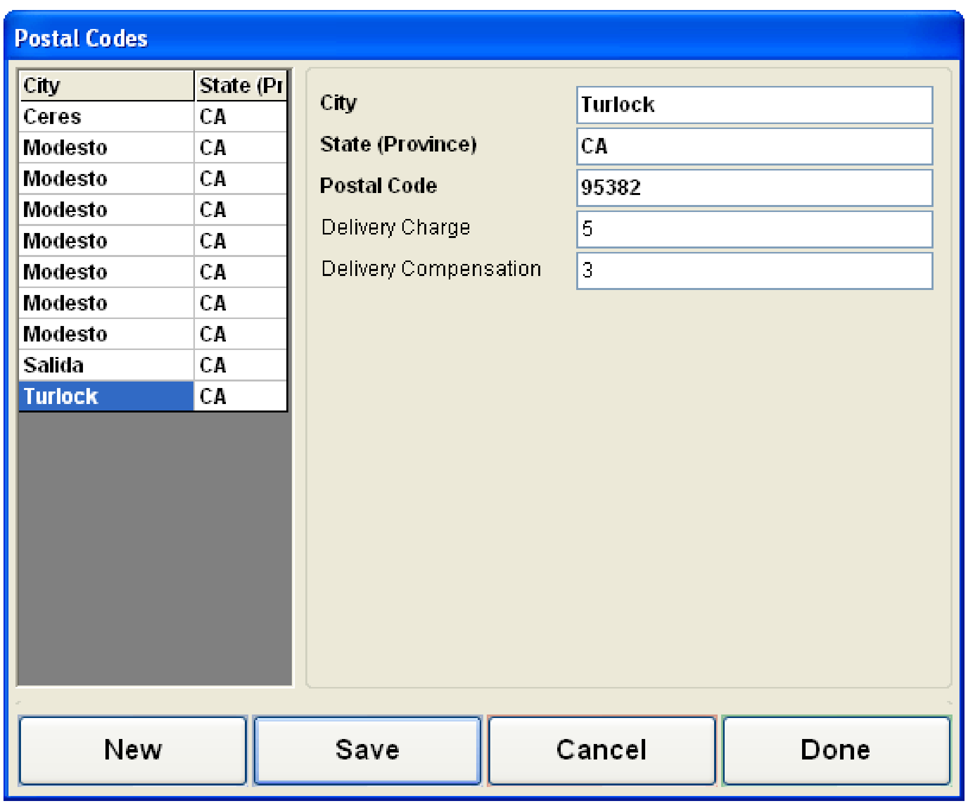


Figure 7-4

DELIVERY STREETS

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **General Settings** > **Delivery Streets**. Enter the information from the table below. These are specific streets within some of the postal codes entered previously. Any information entered here will override the information entered in Postal Codes. For example, if you entered a delivery charge of $1.00 for a certain postal code but there is a certain street within that postal code that is very far from the restaurant, you may enter a delivery charge of $2.00 for addresses on that street. If only a certain range of addresses is affected, enter the beginning and ending address numbers in their respective fields. This $2.00 delivery charge overrides the $1.00 delivery charge only for this street or these addresses on this street. You may also select "No Delivery" for these addresses (see Figure 7-5).

Street Name	Addresses From	Addresses To	Map Code	Delivery Charge	Delivery Compensation	Postal Code	No Delivery
McHenry Ave.	100	4000	C3			95356	X
Fiedler Way	2600	3000	F5	$5.00	$3.50	95355	
Pelandale Ave.	3500	4000	J6			95355	X

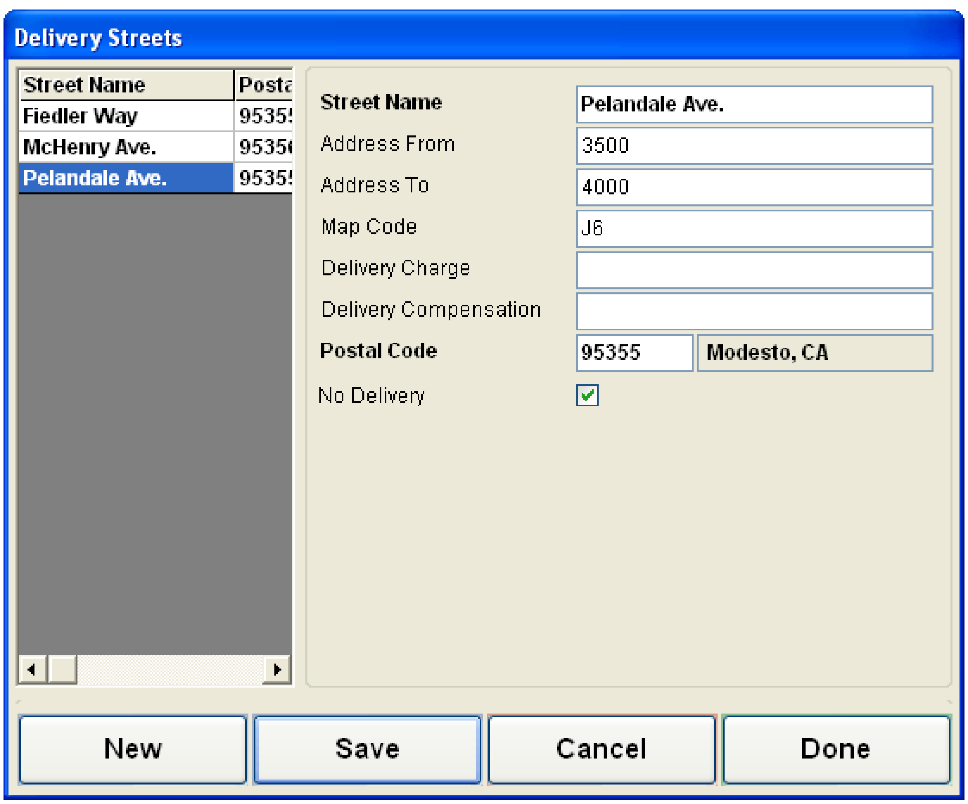


Figure 7-5

CASH TRAYS

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **General Settings** > **Cash Trays**. Here you name each cash tray used by your restaurant. You may use any names you like, such as employees' names, station names (POS1, POS2, BAR1, etc.), or shift names (POS1-AM, POS1-PM, BAR-AM, etc.). Enter the Cash Tray Names into the Cash Trays screen as seen in the figure below. Aldelo® For Restaurants generates the Cash Tray ID number automatically (see Figure 7-6). Click the "Save" and "New" buttons after each entry. Click the "Done" button when finished. Checking the "Hide Cash Tray" checkbox will prevent the cash tray from appearing in the "Select Cash Tray for Cashier Sign In" screen.

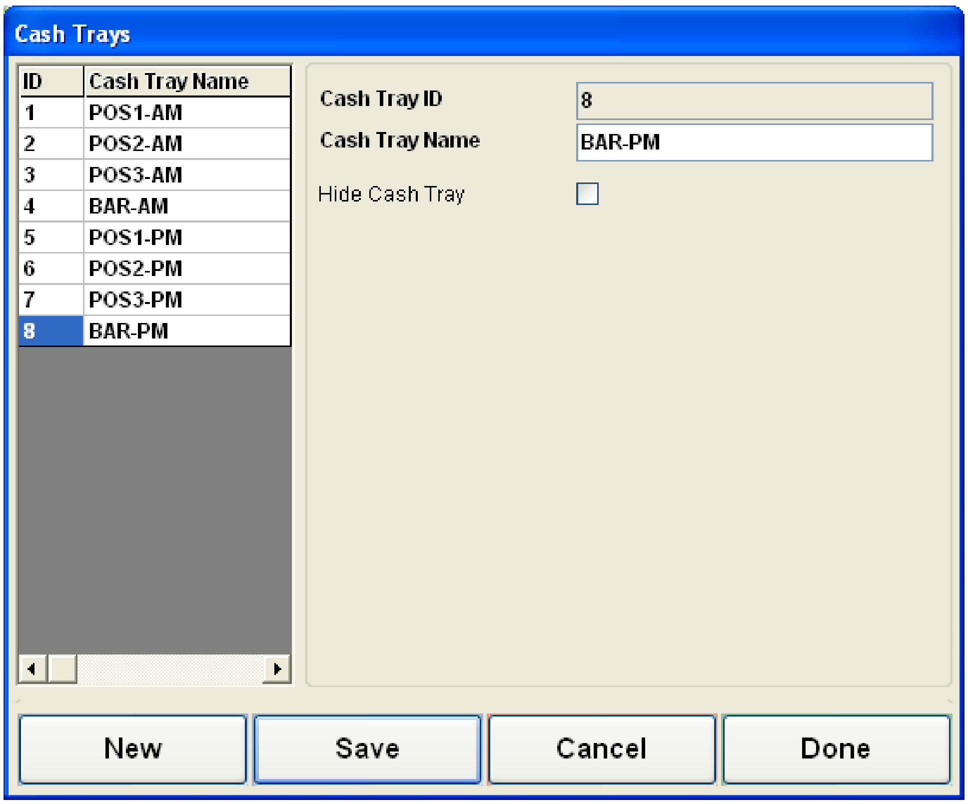


Figure 7-6

SURCHARGES

Some restaurants surcharge services that are out of their normal range of services. These surcharges may be programmed into Aldelo® For Restaurants. Navigate to **Back Office** > **Setup** > **General Settings** > **Surcharges**. Enter the information from the table below into the surcharges screen (the surcharge ID is generated automatically by Aldelo® For Restaurants). After entering the first one, click the "Save" button. To enter another, click the "New" button and repeat the entire procedure above (see Figure 7-7). When finished, click the "Done" button. If the surcharge is no longer used, click the "Hide Surcharge" checkbox and the "Save" button.

Surcharge Name	Surcharge Amount	Amount Basis	Waiver Min. Check	Surcharge Description
Party of 8 or More	18.00	Percent	-	-
Corkage Fee	5.00	Currency	-	Fee for serving wine not purchased from restaurant.
Use of Private Room	100.00	Currency	2000.00	This fee is waived if the total check exceeds $2000.00.
Customer Dessert Fee	10.00	Currency	500.00	Fee for serving desserts brought by customer (birthday cakes, etc.).

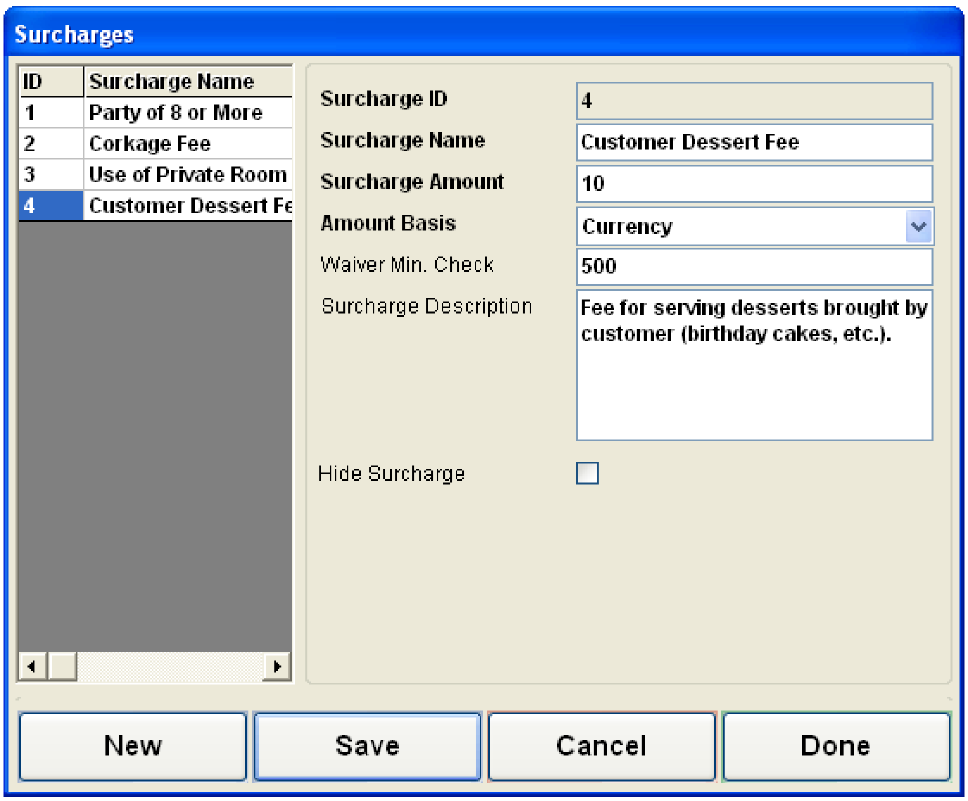


Figure 7-7

DISCOUNTS

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **General Settings** > **Discounts.** Here we setup the discounts used by our restaurant. Enter the information from the table below into the Discounts screen (see Figure 7-8). After entering each discount, click the "Save" button. To enter another discount, click the "New" button and repeat the procedure above. When finished, click the "Done" button. For more information about the remaining fields on the Discounts screen, see Information Data Entry – General Settings (Discounts) in Chapter 5 of the User Manual.

Discount Name	Discount Amount	Amount Basis	Discount Expire Date	Min. Ticket For Discount	Exclude Bar Drinks
Senior Discount	20.00	Percent	-	10.00	Yes
Student Discount	10.00	Percent	-	10.00	Yes
Employee Discount	35.00	Percent	-	-	No

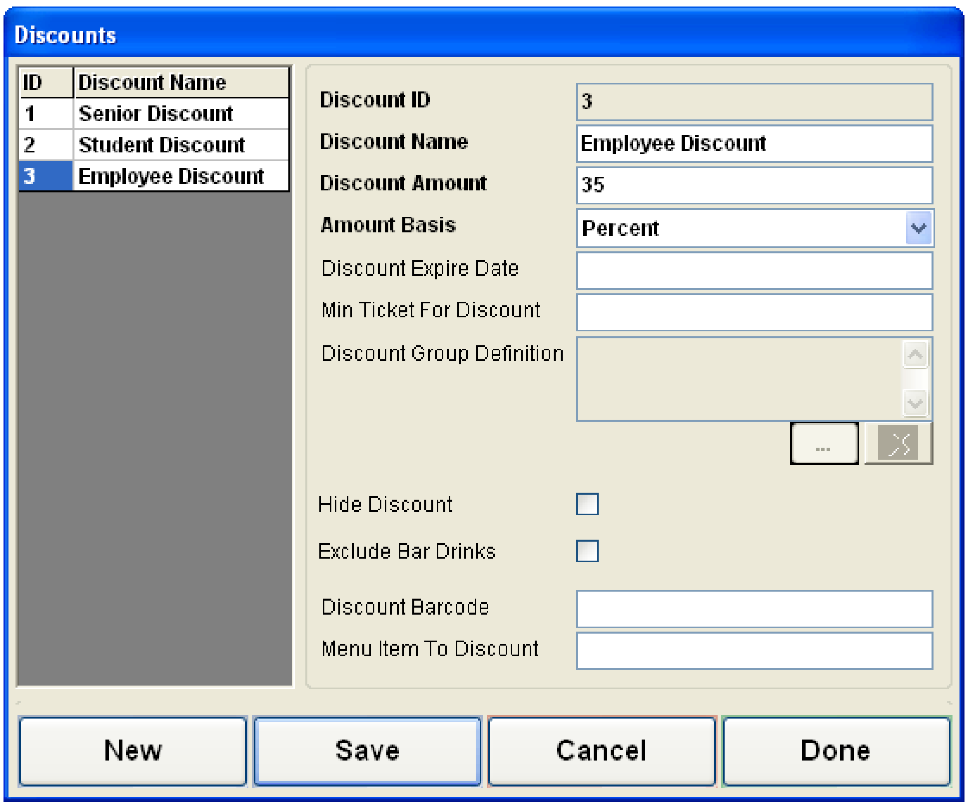


Figure 7-8

BANK CARD FILES

Aldelo® For Restaurants allows you to maintain information on the banks associated with the bad checks that your restaurant may receive. Navigate to **Back Office > Setup > General Settings > Bank Card Files.** Enter the information from the table below into the Bank Card

Files screen. After entering each bank, click the “Save” button. To enter another bank, click the “New” button and repeat the procedure above. If information about this bank is no longer used, click the “Hide Bank Card File” checkbox to remove it from the list of banks. When finished, click the “Done” button (see Figure 7-9).

Bank Name	Phone Number	Verify Funds By Phone
Bank of America	(209)555-1234	No
Washington Mutual	(209)555-5678	Yes
Wells Fargo Bank	(209)555-1379	No
Bank of the West	(209)555-2468	Yes

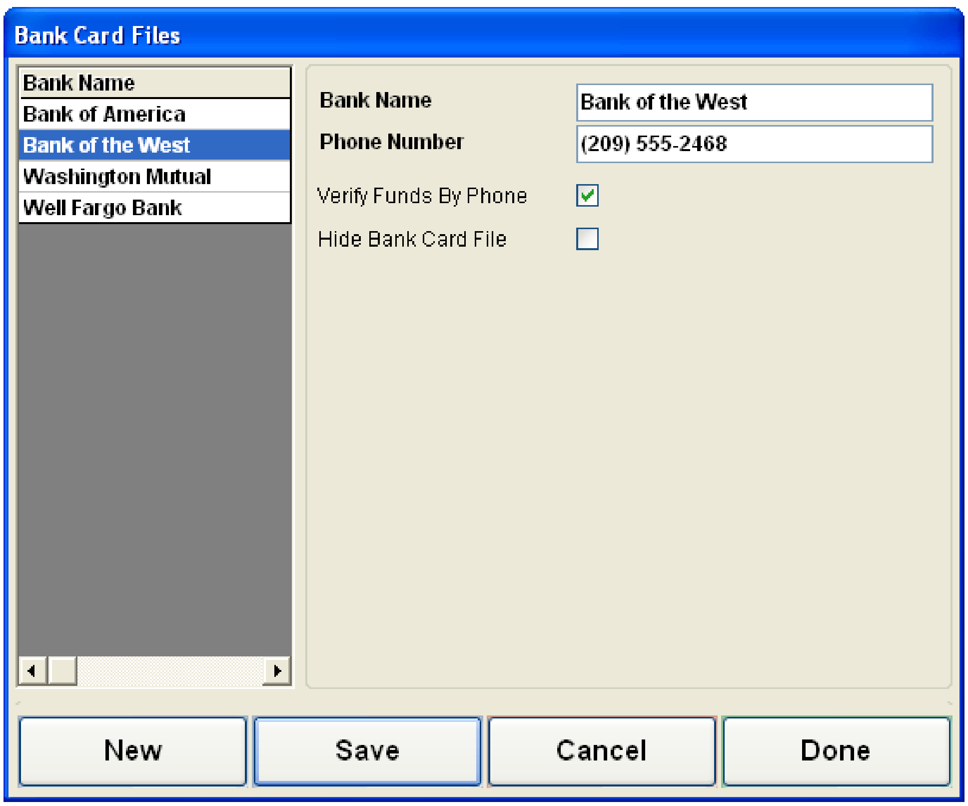


Figure 7-9

BAD CHECK REASONS

Navigate to **Back Office** > **Setup** > **General Settings** > **Bad Check Reasons.** Here we maintain a list of all the possible reasons why the bank returns a check. Enter the information as seen in Figure 7-7 into the Bad Check Reasons screen. After each entry, click the “Save” button. To enter another reason, click the “New” button and repeat the procedure above. If the reason is no longer valid, click the "Hide Reason" checkbox to prevent it from displaying in the list of reasons. When finished, click the "Done" button (see Figure 7-10).

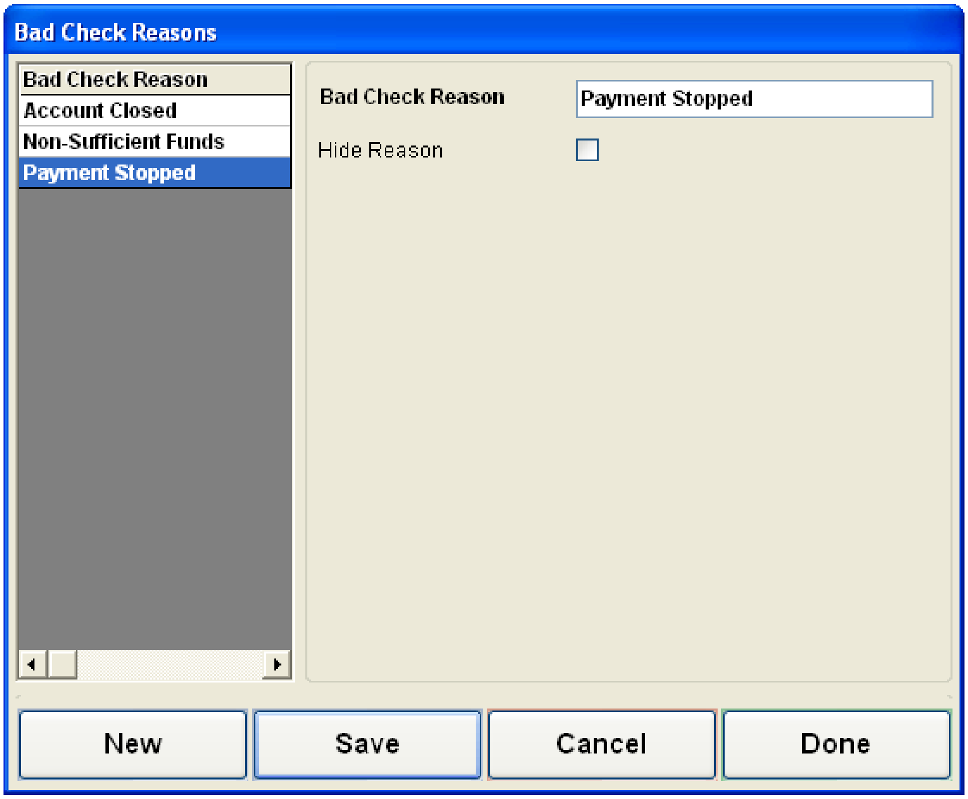


Figure 7-10

BAD CHECK PENALTIES

Aldelo® For Restaurants allows you to maintain a list of the penalties that are associated with returned checks. Navigate to **Back Office > Setup > General Settings > Bad Check Penalties.** Enter the information from the table below into the Bad Check Penalties screen. After each entry, click the "Save" button. To enter another penalty, click the "New" button and repeat the procedure above. If the penalty is no longer used, click the "Hide Penalty" checkbox to prevent it from displaying in the list of penalties. When finished, click the "Done" button (see Figure 7-11).

Bad Check Penalty	Penalty Amount
Account Closed	30.00
Non-Sufficient Funds	25.00
Payment Stopped	25.00

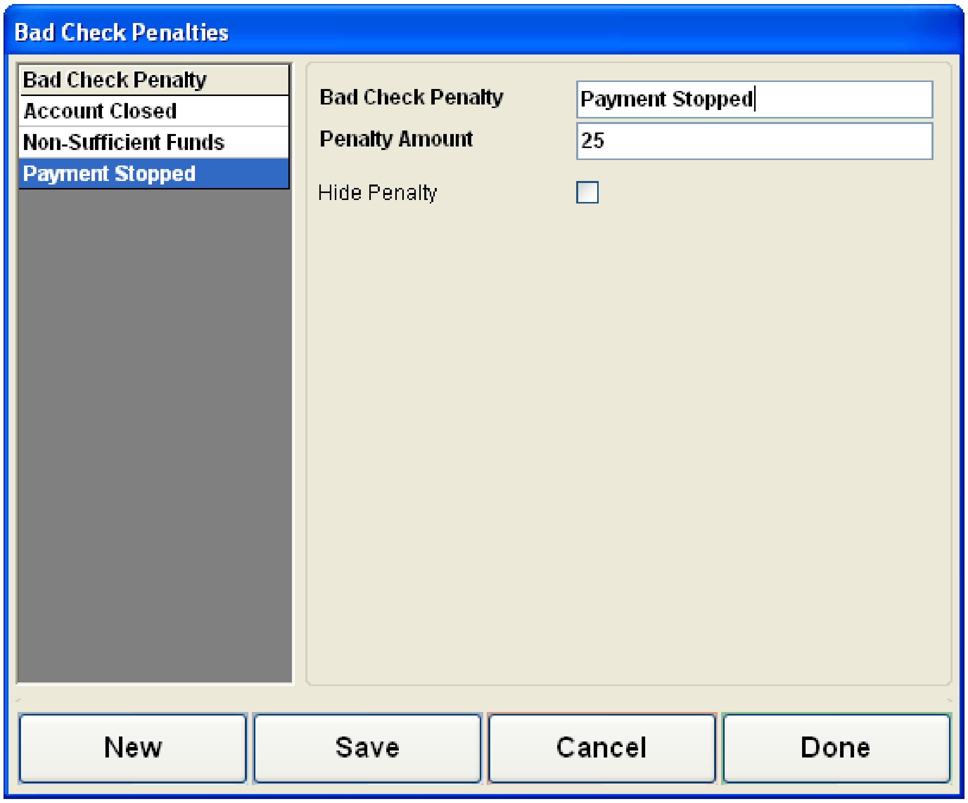


Figure 7-11

Custom Printer Types

Although Aldelo® For Restaurants supports a wide range of printers, there may be an occasion when you have a printer that is not supported. These unsupported printers can be setup in the software as long as you have access to the Escape Control Codes. These codes can be found in the printer's User Manual or by visiting the manufacturer's website. This procedure is beyond the scope of this Training Manual. For a detailed description on how to setup custom printer types in Aldelo® For Restaurants, please see Information Data Entry – Custom Printer Types in Chapter 5 of the User Manual.

Employee Setup

Job Titles

Navigate to **Back Office** > **Setup** > **Employee Setup** > **Job Titles.** Here we enter all of the different job titles that are assigned to employees. Enter the information from the table below into the Job Titles screen (see Figure 7-12). After entering all the information for a Job Title, click the "Save" button. To enter another, click the "New" button. When finished, click the "Done" button. If the job is no longer valid, check the "Hide Job Title" checkbox.

Job Title	Default Security Level	Default Pay Basis	Default Pay Rate	Default Receive Tips
Owner	5	Salaried	$80,000.00	No
General Manager	4	Salaried	$50,000.00	No
Bartender	3	Hourly	$12.00	Yes
Cashier	3	Hourly	$10.00	No
Server	3	Hourly	$9.00	Yes
Driver	3	Hourly	$10.00	Yes
Cook	2	Hourly	$15.00	No
Bus Person	2	Hourly	$8.50	No
Dishwasher	1	Hourly	$7.50	No

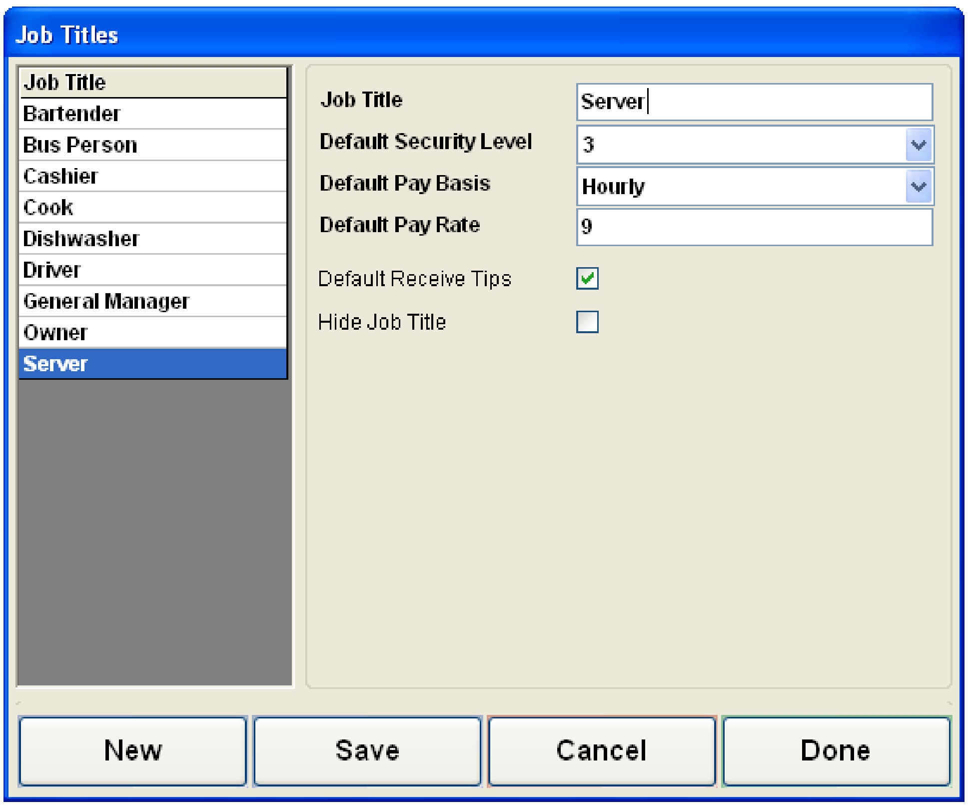


Figure 7-12

Employee Files

General Tab

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **Employee Setup** > **Employee Files.** Click on the "General" tab. Enter the information from the table below (excluding the Hired Date) into the required fields (those with the titles in **Bold** plus the Access Code). Leave the Preferred Language field set to the default value (English) for all employees. In actual use, you should enter all of the requested information. It is used primarily in reports. Notice that the

Security Level is entered automatically (when you enter the Job Title by clicking on the down arrow next to the Job Title field) based on the default Security Level entered previously in the Job Titles screen (see Figure 7-13).

First Name	Last Name	Job Title	Driver	Holiday Pay Scale	Access Code	Hired Date	Tips	Is a Server
Frederick	Austerlitz	Bus Person	No	Double Time	1	3/23/2003	No	No
James	Beard	Cook	No	Double Time	2	2/22/2005	No	No
Joan	Brodel	Cashier	No	Double Time	3	11/11/2004	No	No
Foster	Brooks	Bartender	No	Double Time	4	10/17/2005	Yes	No
Johnnie	Collier	Dishwasher	No	Double Time	5	4/9/2003	No	No
Frances	Gumm	Dishwasher	No	Double Time	6	3/19/2001	No	No
Robert	Johnson	Driver	Yes	Over Time	7	8/4/2006	Yes	No
Eugene	Kelly	General Manager	No	Regular Time	8	6/21/1999	No	No
Thomas	Mapother	Bartender	No	Double Time	9	1/8/2004	Yes	No
Virginia	McMath	Server	No	Double Time	10	2/14/2005	Yes	Yes
Julia	McWilliams	Cook	No	Double Time	11	7/9/2002	No	No
George	Murphy	Owner	No	Regular Time	12	5/5/1997	No	No
Harold	Nicholas	Bus Person	No	Double Time	13	3/31/2004	No	No
Eleanor	Powell	Server	No	Double Time	14	1/8/2004	Yes	Yes
Jeff	Smith	Cook	No	Double Time	15	9/23/2001	No	No
William	Yarborough	Driver	Yes	Over Time	16	12/21/2005	Yes	No

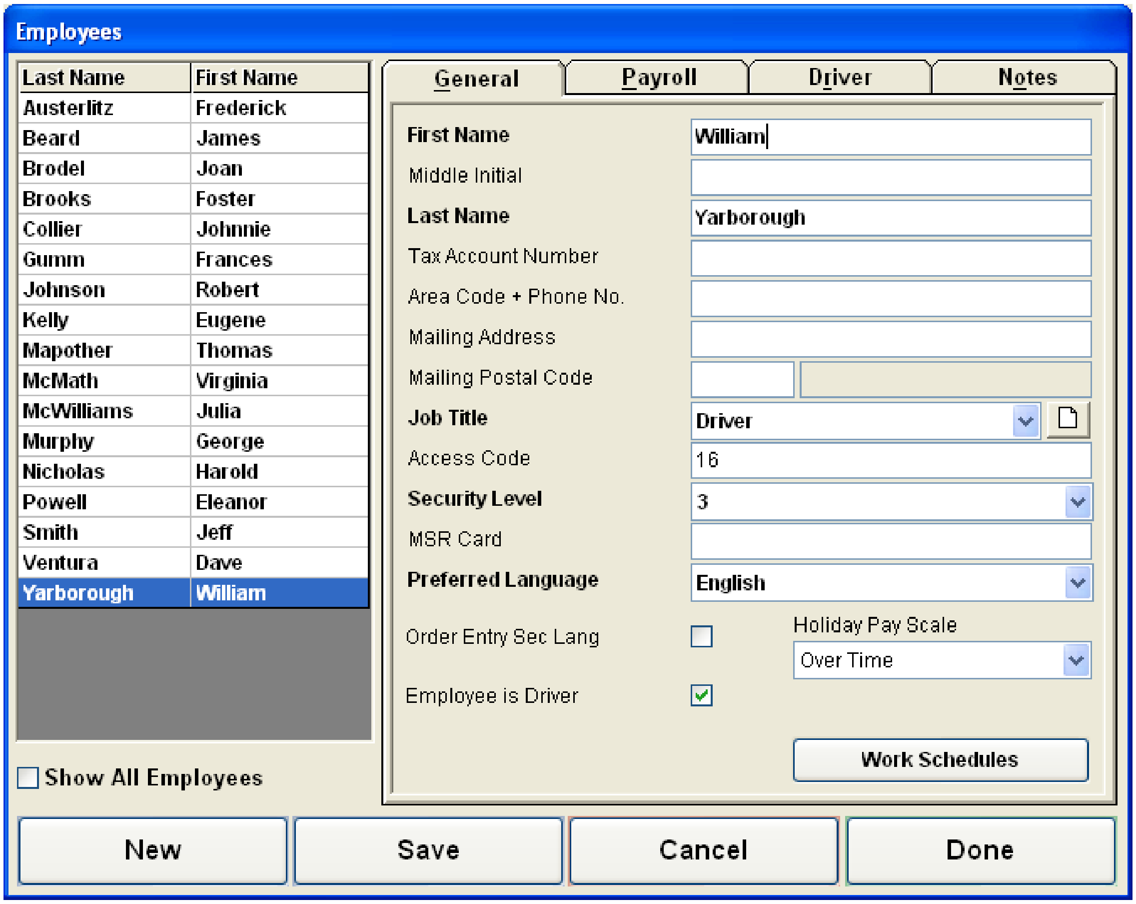


Figure 7-13

Payroll Tab

Navigate to **Back Office** > **Setup** > **Employee Setup** > **Employee Files.** Click on the "Payroll" tab. Enter the Hire Date and Tips Received status for each employee from the table on the previous page. Here you may also select other options from the list of checkboxes below the Pay Rate field. For each employee, check the "Schedule Not Enforced" checkbox and the rest of the boxes that apply (see Figure 7-14). When an employee is terminated, enter the termination date in the "Terminated Date" field and click the "Hide Employee" checkbox to prevent the employee's information from displaying in the list of active employees.

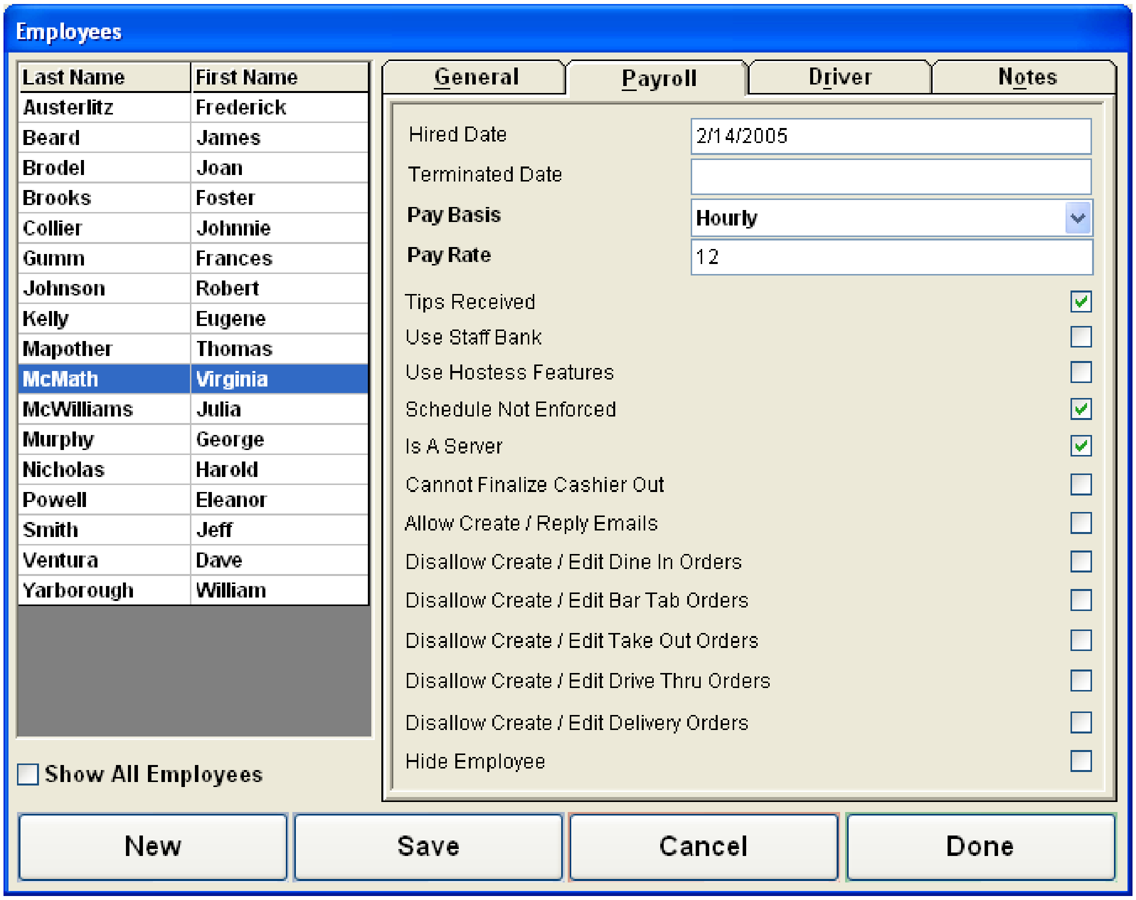


Figure 7-14

Driver Tab

Navigate to **Back Office > Setup > Employee Setup > Employee Files.** Click on the “Driver” tab. Enter the information for Robert Johnson, as seen in Figure 7-15. The employee must provide this information. It is a good idea to mark the insurance policy expiration date on your calendar so that you can ask the employee to provide proof of renewal. The “Insurance Policy Notes” field allows you to enter any information you think is important about the employee’s car insurance policy. Clicking the button with the picture of a clock on it will put a date and time stamp on the note.

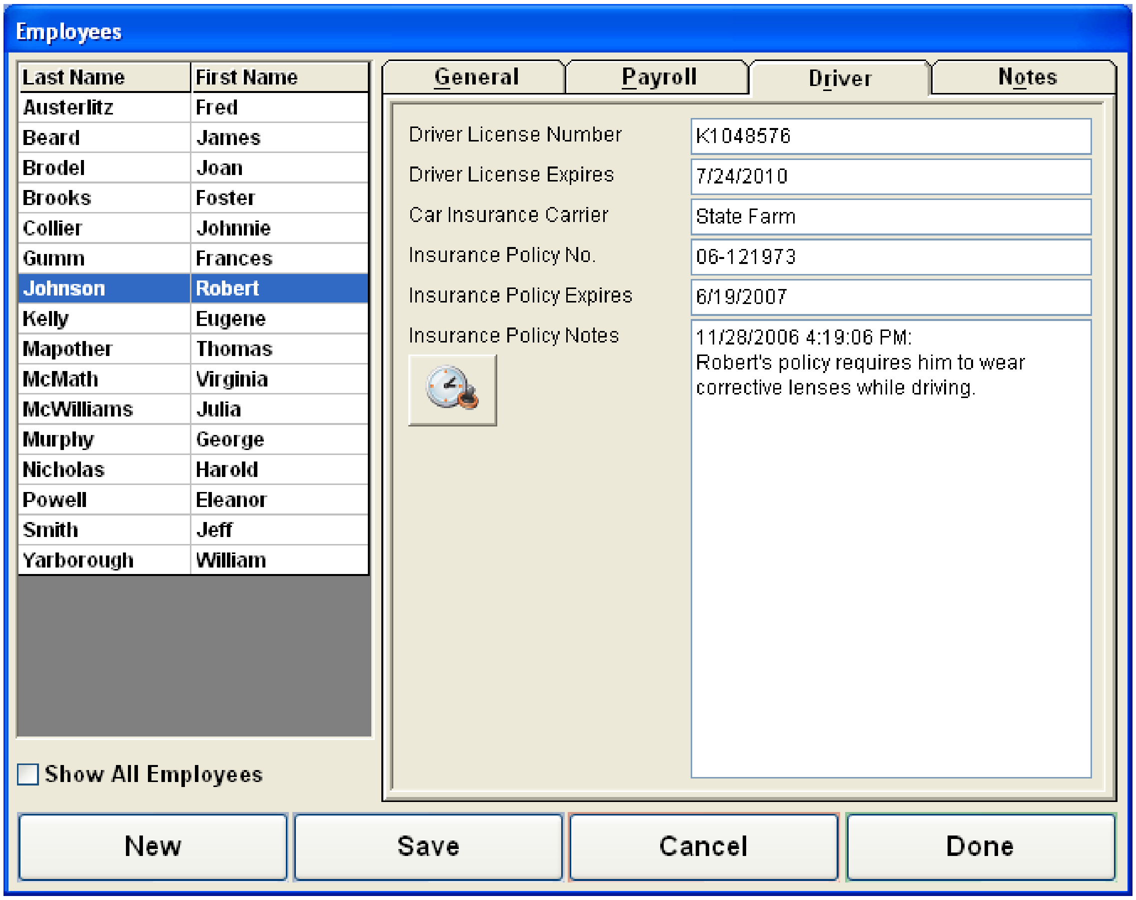


Figure 7-15

Notes Tab

Navigate to **Back Office** > **Setup** > **Employee Setup** > **Employee Files.** Click the "Notes" tab. Here you may enter general notes about a specific employee. These notes may be anything you consider important enough to record. As under the "Driver" tab, the button with the picture of a clock on it will date and time stamp the note. The button with the picture of the printer on it allows you to print a hard copy of the note (see Figure 7-16).

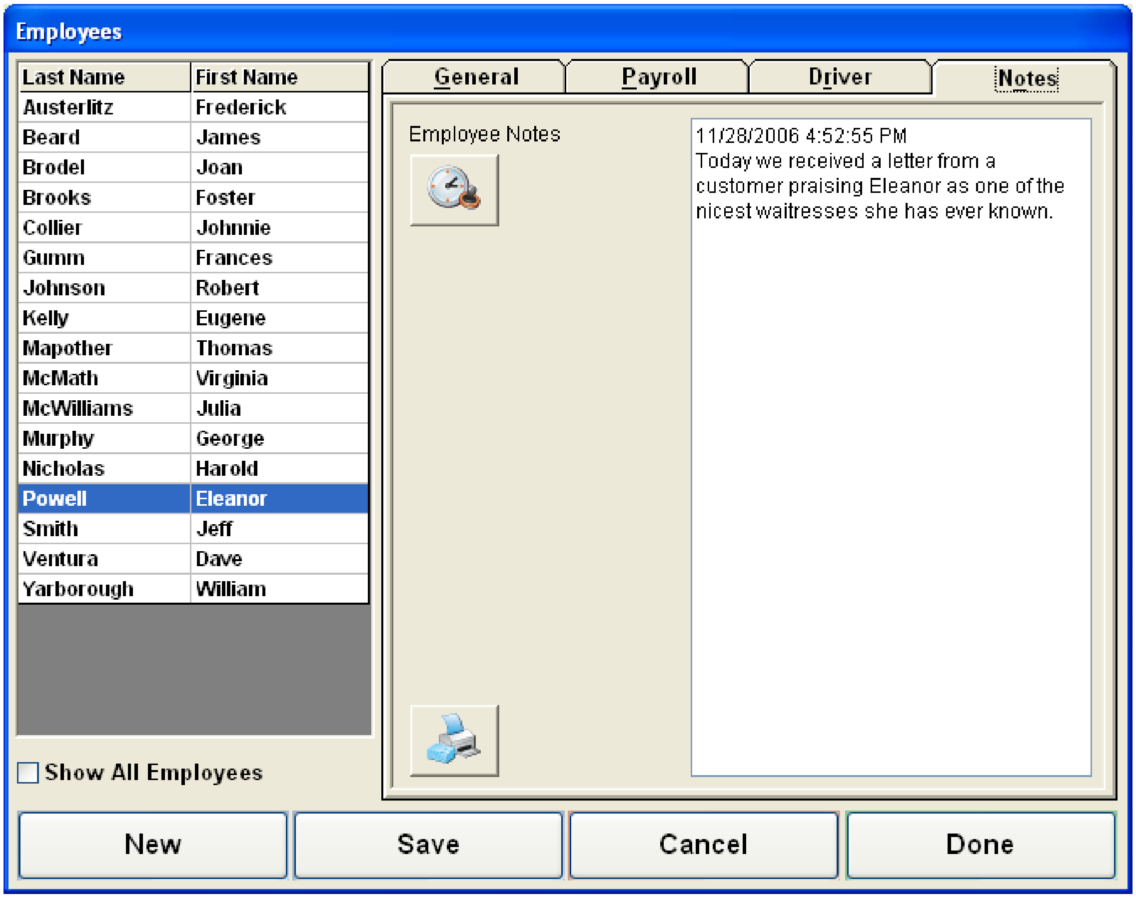


Figure 7-16

EMPLOYEE SCHEDULES

Navigate to **Back Office > Setup > Employee Setup > Employee Schedules.** This is where you create your employee work schedules for the week. You may create schedules in advance for as many weeks as necessary. In the Names column, click on “James Beard.” Next to Monday, click the “Add” button. Enter the information as seen below in Figure 7-17.

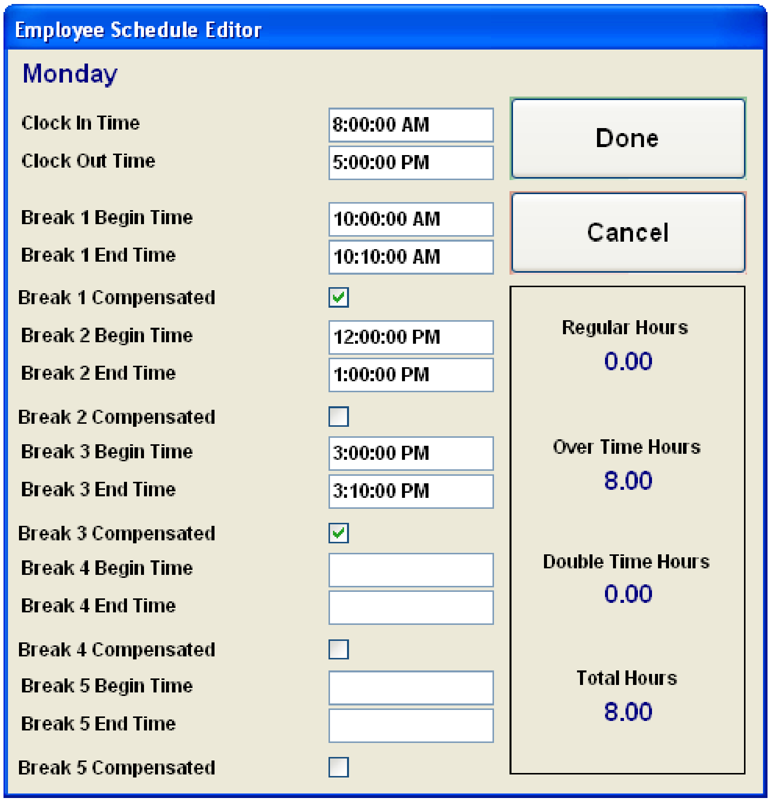


Figure 7-17

When finished, click the "Done" button. Since this employee works the same schedule all week, we will copy the information just entered to the rest of the days. Click the "Also" checkboxes next to Tuesday, Wednesday, Thursday, and Friday. Next, click the "Edit" button next to Monday. The schedule that you entered for Monday copies to the rest of the days (see Figure 7-18). To change a schedule, click the "Edit" button next to the respective day of the week. This displays the Employee Schedule Editor, allowing you the make the changes. Schedules for additional weeks may be written in advance by entering a new Week Begin Date. Click on the arrow next to the date field, select "Add," and enter a new date by using the up and down arrows for the month, day, and year. Click on "Select" and enter the new schedule.

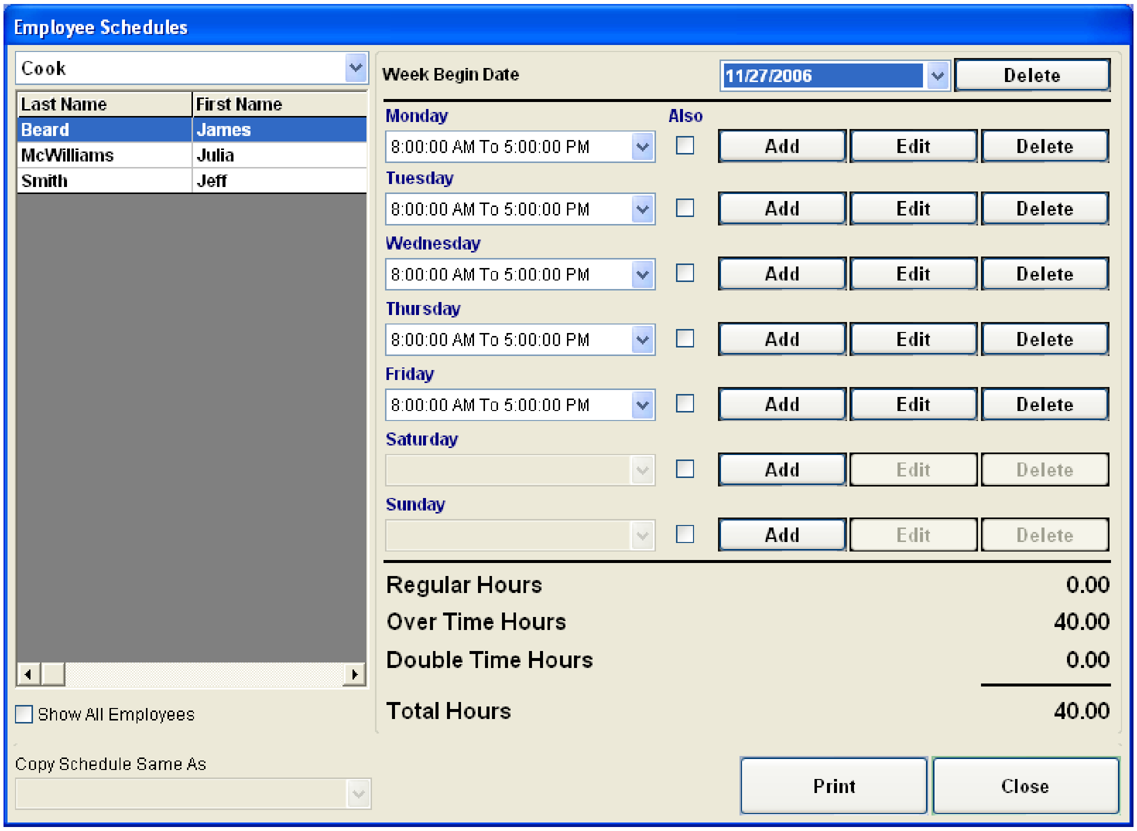


Figure 7-18

Table Setup

DINE IN TABLE GROUPS

Navigate to **Back Office > Setup > Table Setup > Dine In Table Groups.** Here you setup the groups of tables in the different sections of the restaurant. Give the table groups descriptive names such as Bar, Patio, Dining Room, etc. Add the information to the table groups screen as seen in Figure 7-19.

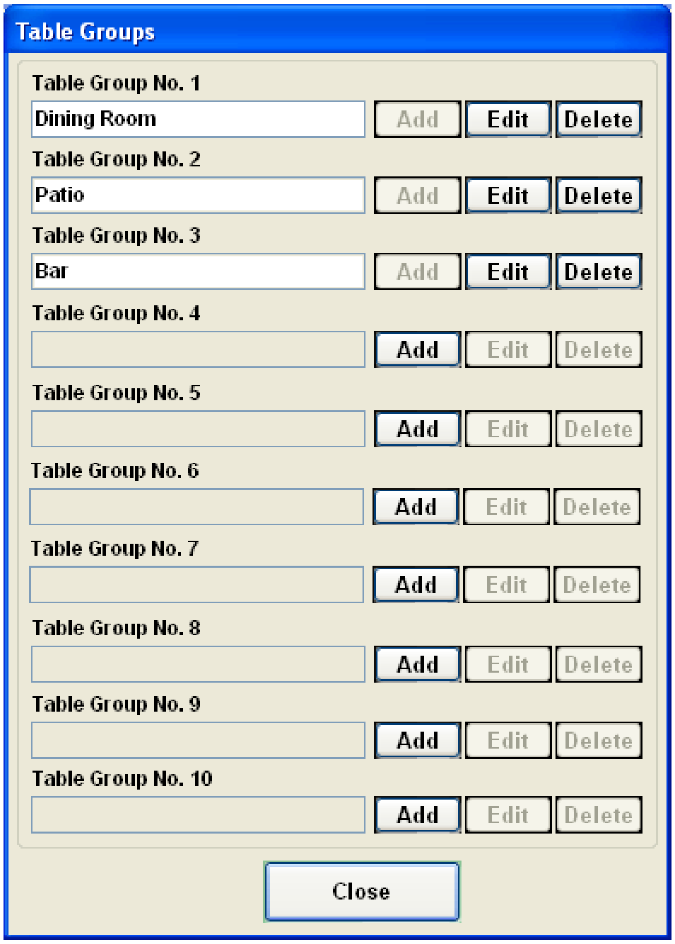


Figure 7-19

Table Group Editor

From the main screen of Aldelo® For Restaurants, navigate to **Back Office > Store Settings.** Select the “Other” tab. Place an “X” in the Setting Value field of the “Enable Table Group Tip Sharing” option. This must be done before you open the Table Group Editor, or the Table Group Tip Sharing portion of the screen will not be visible. Escape back to the main screen, then navigate to **Back Office > Setup > Table Setup > Dine In Table Groups** and select the “Edit” button for the Dining Room Table Group. Add the information to the Tip Sharing section of the Table Group Editor screen as seen in Figure 7-20. This allocates a portion of the tips received by the wait staff to other employees, such as bus persons, dishwashers, cooks, etc. You may enter up to two Tip Sharing Groups per Table Group. Click the “Done” button and enter the same information for the Patio and Bar Table Groups as well.

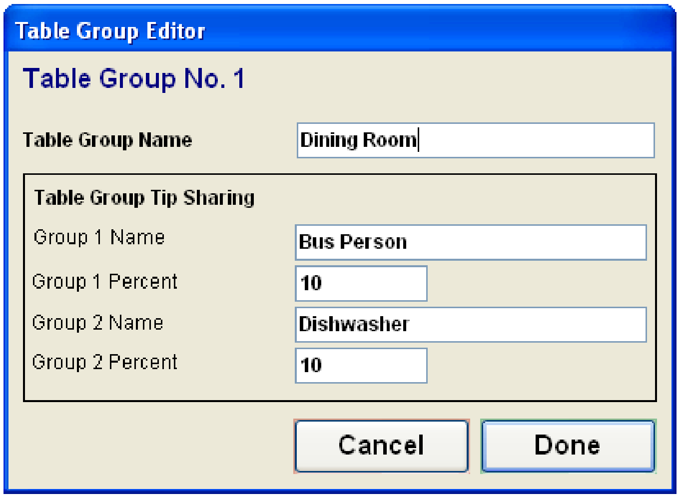


Figure 7-20

DINE IN TABLES

From the main screen of Aldelo® For Restaurants, navigate to **Back Office > Setup > Table Setup > Dine In Tables.** In the Table Groups field, select the Dining Room Table Group to edit. Refer to Diagram 2-1 of this manual. Select one of the corresponding squares on the Dine In Tables screen (see Figure 7-21).

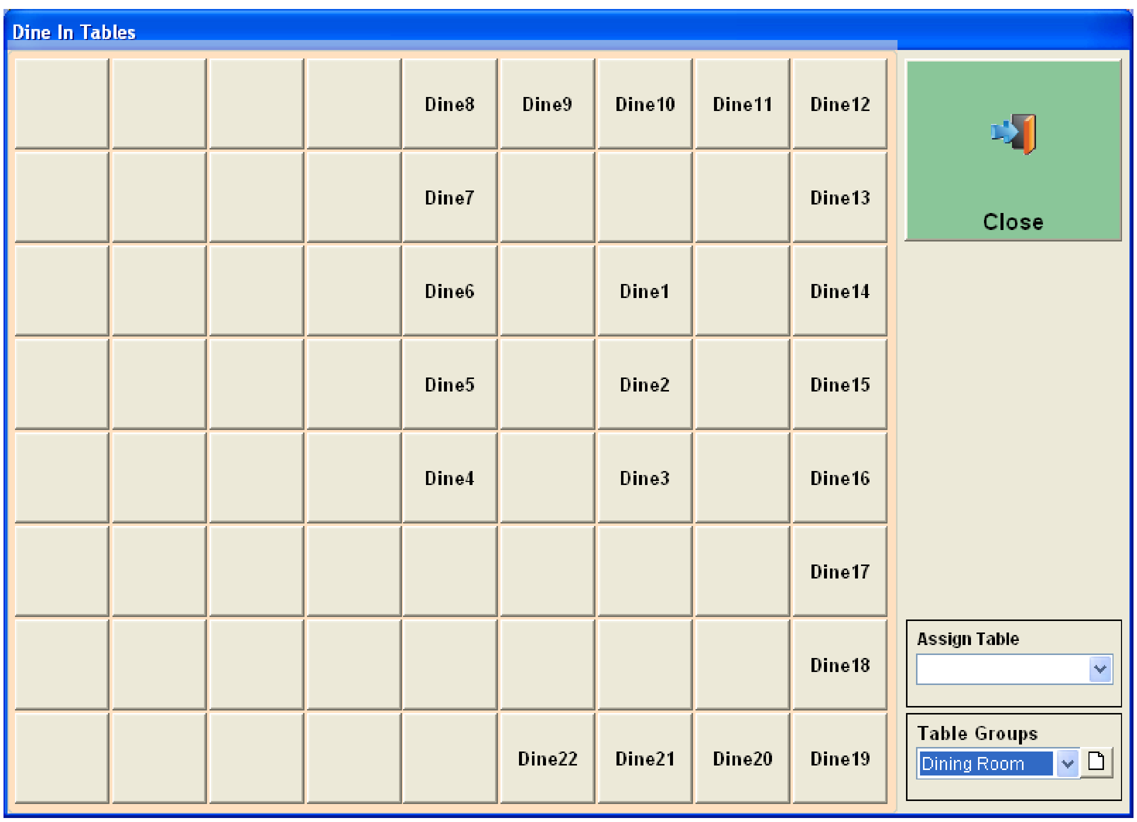


Figure 7-21

Dine In Table Editor

Upon selection of a square on the Dine In Tables screen, the Dine In Table Editor displays (see Figure 7-22). Following Figure 7-21 and the table below, enter the table names, number of seats, the average usage in minutes, etc. Click “Done” and select another square on the Dine In Tables screen. Continue repeating the procedure above until you have entered the information for all of the tables. When finished, repeat the entire procedure for the remaining Table Groups (to move to another Table Group, select it from the Table Groups dropdown list on the Dine In Tables screen) Click the “Close” button on the Dine In Tables screen when finished.

Note: It is extremely important to make sure all of this information is entered correctly or the table may not show as available when it is unoccupied.

Table Numbers	Total Seats	Average Usage (Minutes)	Smoking Section	Near Windows	Booth Seating	Private Seating
Dine 1 - 3	4	35	-	-	-	-
Dine 4 - 7	6	40	-	-	Yes	-
Dine 8 - 22	6	40	-	Yes	Yes	-
Patio (All)	4	40	Yes	-	-	-
Bar (All)	4	30	Yes	-	-	-

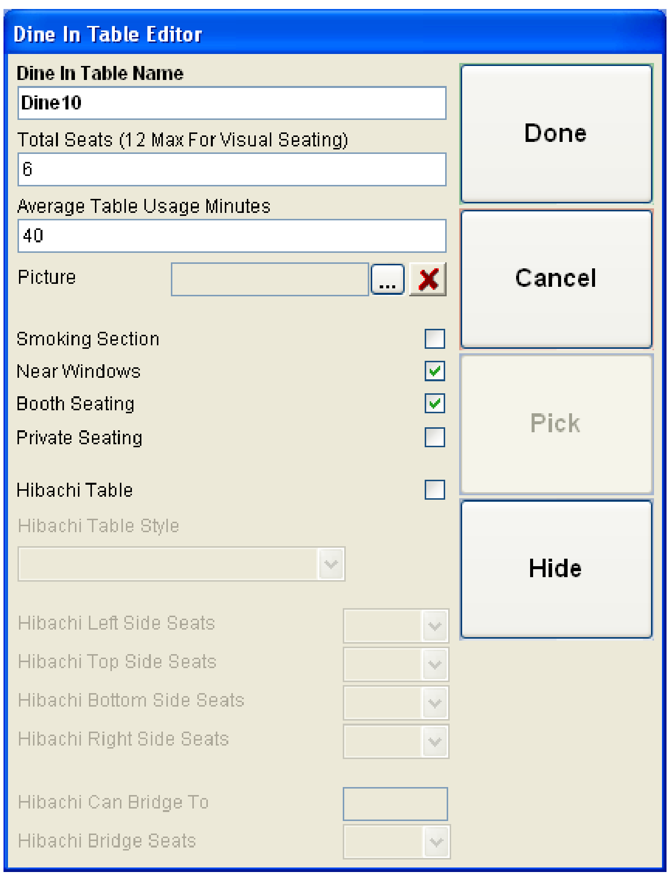


Figure 7-22

Menu Setup

MENU CATEGORIES

In Aldelo® For Restaurants, each menu item is assigned to a Menu Category for reporting purposes. These categories have nothing to do with the menu display in the Order Entry screen. These categories display when you create a sales report. For example, when you run a Sales by Category Report, you see the summary total of the sales by each category that you defined.

Navigate to **Back Office** > **Setup** > **Menu Setup** > **Menu Categories.** Enter the information as seen in the Menu Categories screen below (see Figure 7-23). Click the "Save" button after each entry. To enter another, click the "New" button. When finished, click the "Done" button.

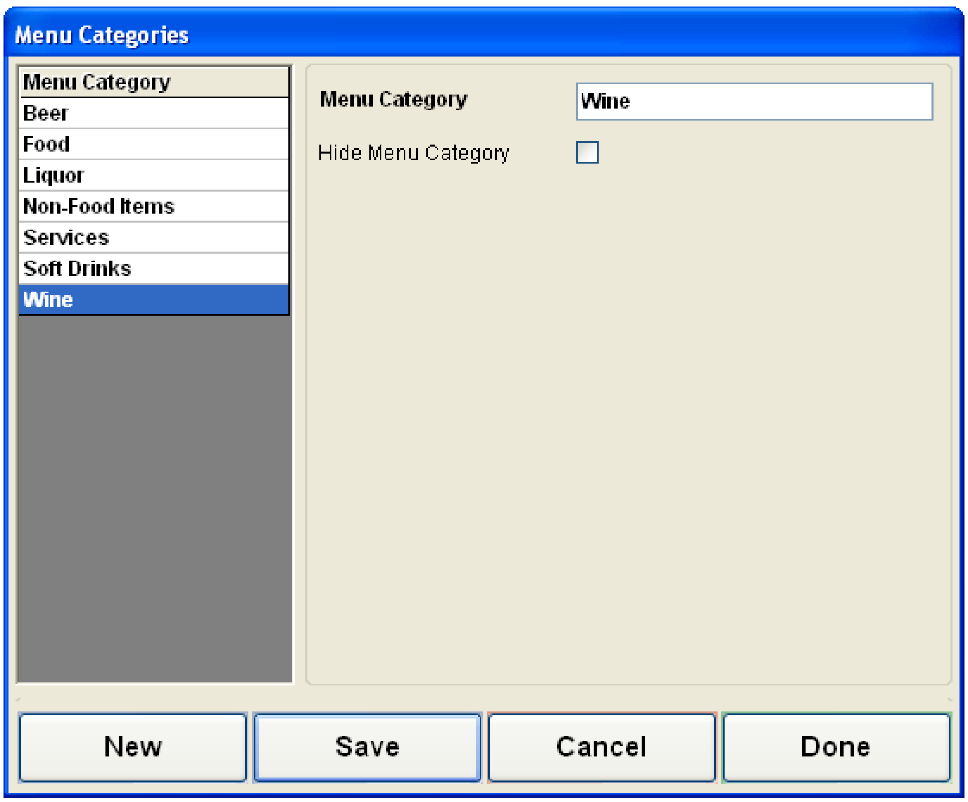


Figure 7-23

MENU GROUPS

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **Menu Setup** > **Menu Groups.** Here we build the Menu Groups we will use for our restaurant (see Figure 7-24). Click on the rectangle in the upper-left side of the screen. The Menu Group Editor displays (see Figure 7-25).

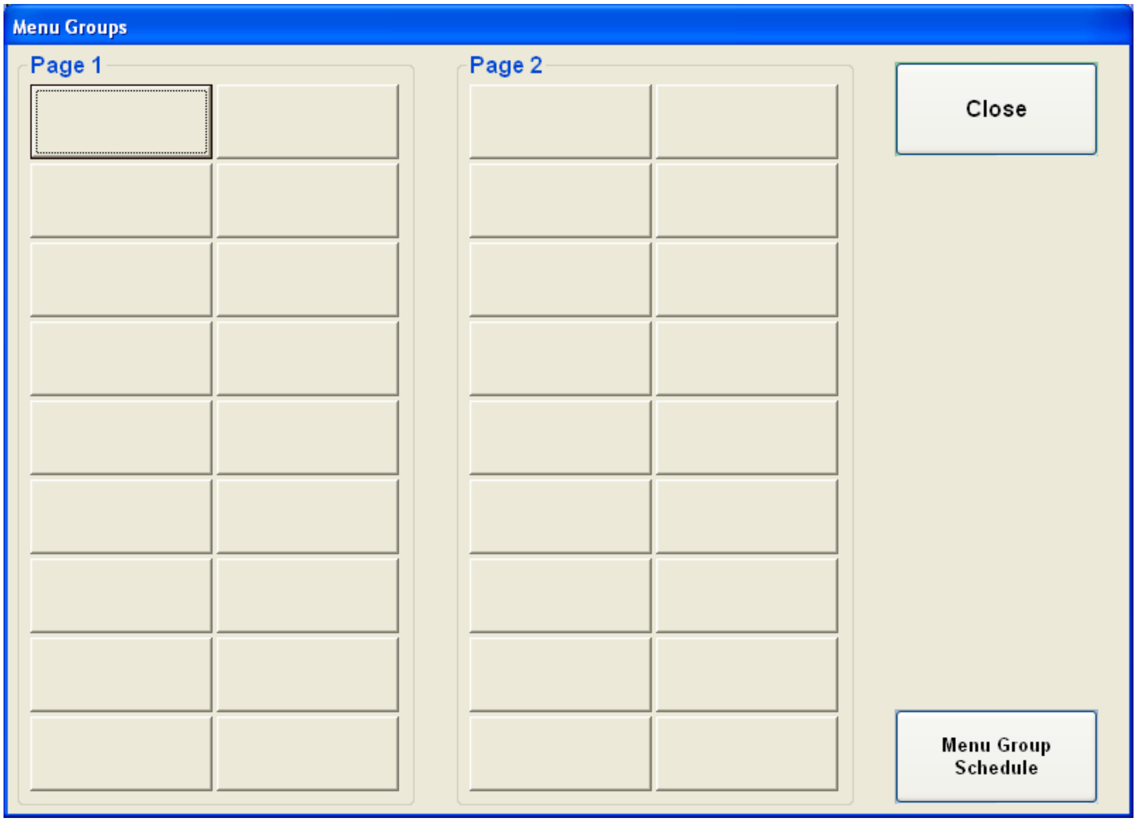


Figure 7-24

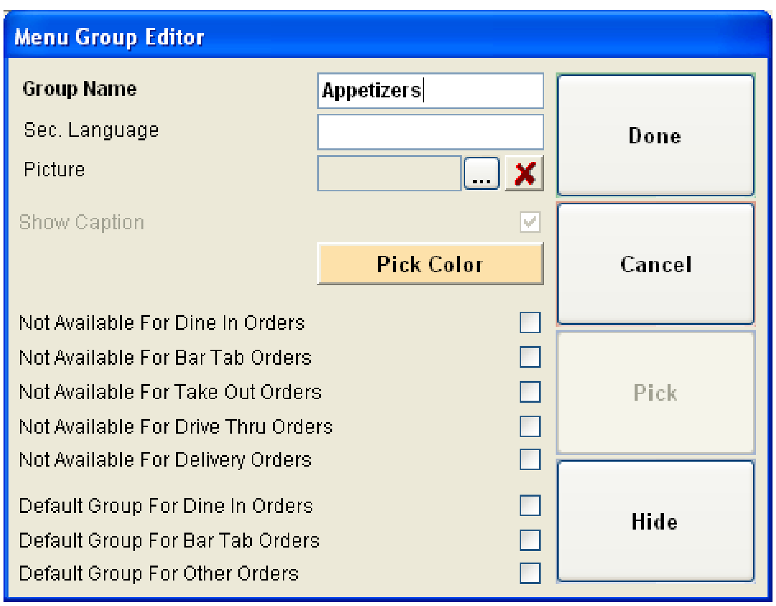


Figure 7-25

Menu Group Editor

In the Menu Group Editor, enter the information from the table below. Be sure to enter the Menu Groups on the Page 1 side of the screen, in the same arrangement as in the chart below. After each entry, click the "Done" button, select another square, and repeat the process until all of the groups are entered. When finished, the Menu Groups screen should resemble Figure 7-26.

You may also select a picture to display on the face of the button by clicking the button with three dots next the picture file field and navigating to the location of the file. The file must be on the local station and installed in the Pictures folder of the Aldelo® For Restaurants installation.

Note the options on the lower half of the screen that may be selected for this Menu Group item. For our training purposes, our Checkers restaurant will use the default values for these options.

Appetizers	Sides
Salads	Entrees
Pizzas	Desserts
Beverages	Bar

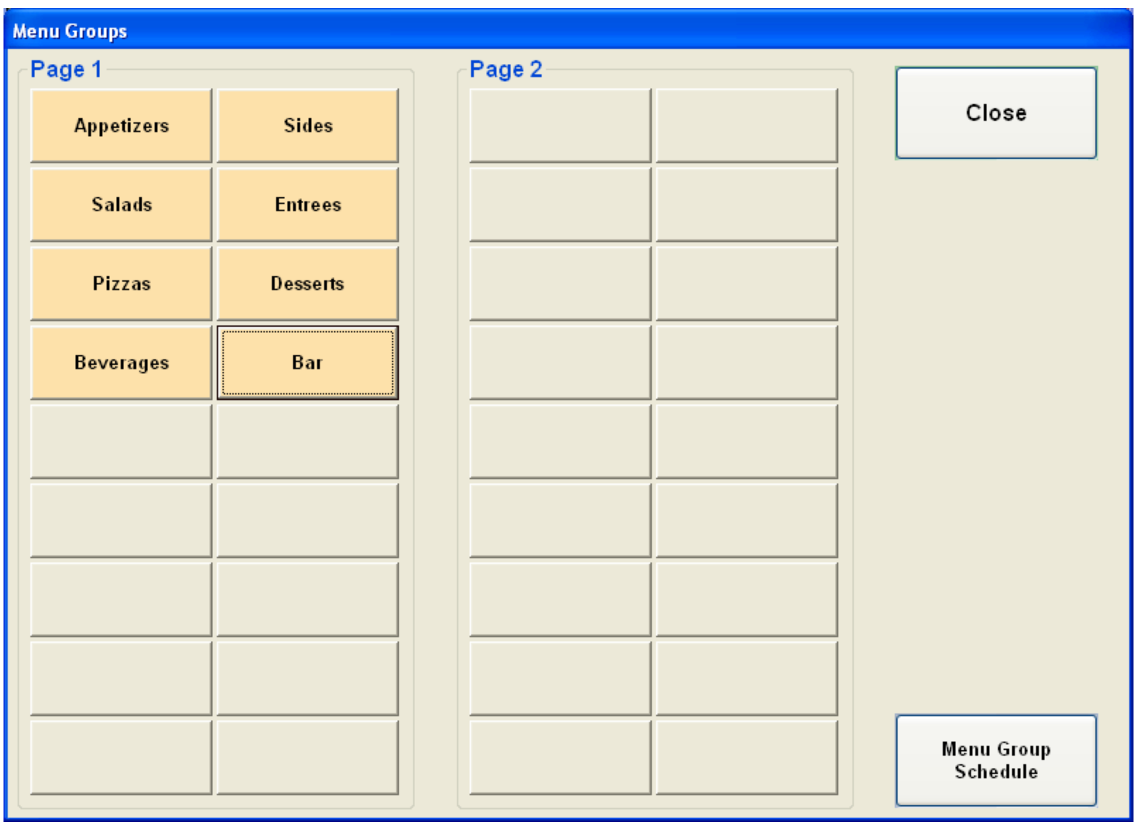


Figure 7-26

Menu Group Schedules may be created to hide Menu Groups from the display during certain hours of the day. This is useful, for example, to hide the breakfast menu from the display during the dinner hours. Click the "Menu Group Schedule" button, select a Menu Group, and click the "Add" button. Enter the times for the Menu Group to appear for each day of the week. The "Also" checkbox works identically to the one in Employee Schedules. See the Employee Schedules section for instructions.

MENU ITEMS

In Aldelo® For Restaurants, navigate to **Back Office > Setup > Menu Setup > Menu Items.** Select the Appetizers Menu Group and click on the rectangle in the upper left corner of the screen. This displays the Menu Item Editor screen. Enter the menu items from the table below (see Figure 7-27).

Menu Group	Menu Item Name	Menu Category	Default Item Price	Send to Printer At	Show Pizza Builder Screen
Appetizers					
	Buffalo Wings	Food	$5.95	Kitchen	No
	Onion Rings	Food	$3.95	Kitchen	No
	Potato Skins	Food	$3.95	Kitchen	No
	Stuffed Jalapeños	Food	$3.95	Kitchen	No
Sides					
	French Fries	Food	$2.50	Kitchen	No
	Steamed Vegetables	Food	$1.95	Kitchen	No
	Baked Potato	Food	$2.50	Kitchen	No
	Mashed Potatoes	Food	$2.50	Kitchen	No
Salads					
	Chef Salad	Food	$7.95	#2 Kitchen	No
	Tuna Salad	Food	$7.95	#2 Kitchen	No
	Chicken Salad	Food	$7.95	#2 Kitchen	No
	Pasta Salad	Food	$5.95	#2 Kitchen	No
Entrees					
	New York Steak	Food	$16.95	#3 Kitchen	No
	Maine Lobster	Food	$22.95	#3 Kitchen	No
	Roasted Chicken	Food	$12.95	#3 Kitchen	No
	Pork Chops	Food	$14.95	#3 Kitchen	No
Pizzas					
	Cheese (s)	Food	$7.99	#4 Kitchen	Yes
	Cheese (m)	Food	$9.99	#4 Kitchen	Yes
	Cheese (l)	Food	$11.99	#4 Kitchen	Yes
	Cheese (x)	Food	$13.99	#4 Kitchen	Yes
	Pepperoni (s)	Food	$9.99	#4 Kitchen	Yes
	Pepperoni (m)	Food	$11.99	#4 Kitchen	Yes
	Pepperoni (l)	Food	$13.99	#4 Kitchen	Yes
	Pepperoni (x)	Food	$15.99	#4 Kitchen	Yes
Desserts					
	Vanilla Ice Cream	Food	$1.75	#5 Kitchen	No
	Cheese Cake	Food	$2.95	#5 Kitchen	No
	Apple Pie	Food	$2.95	#5 Kitchen	No
	Chocolate Cake	Food	$2.50	#5 Kitchen	No
Beverages					
	Coca-Cola	Soft Drinks	$1.25	Bar	No
	Diet Coke	Soft Drinks	$1.25	Bar	No
	Budweiser	Beer	$2.75	Bar	No
	Heineken	Beer	$3.95	Bar	No
Bar					
	Bloody Mary	Liquor	$4.95	Bar	No
	Screwdriver	Liquor	$4.95	Bar	No
	Vodka	Liquor	$4.00	Bar	No
	Scotch	Liquor	$4.00	Bar	No

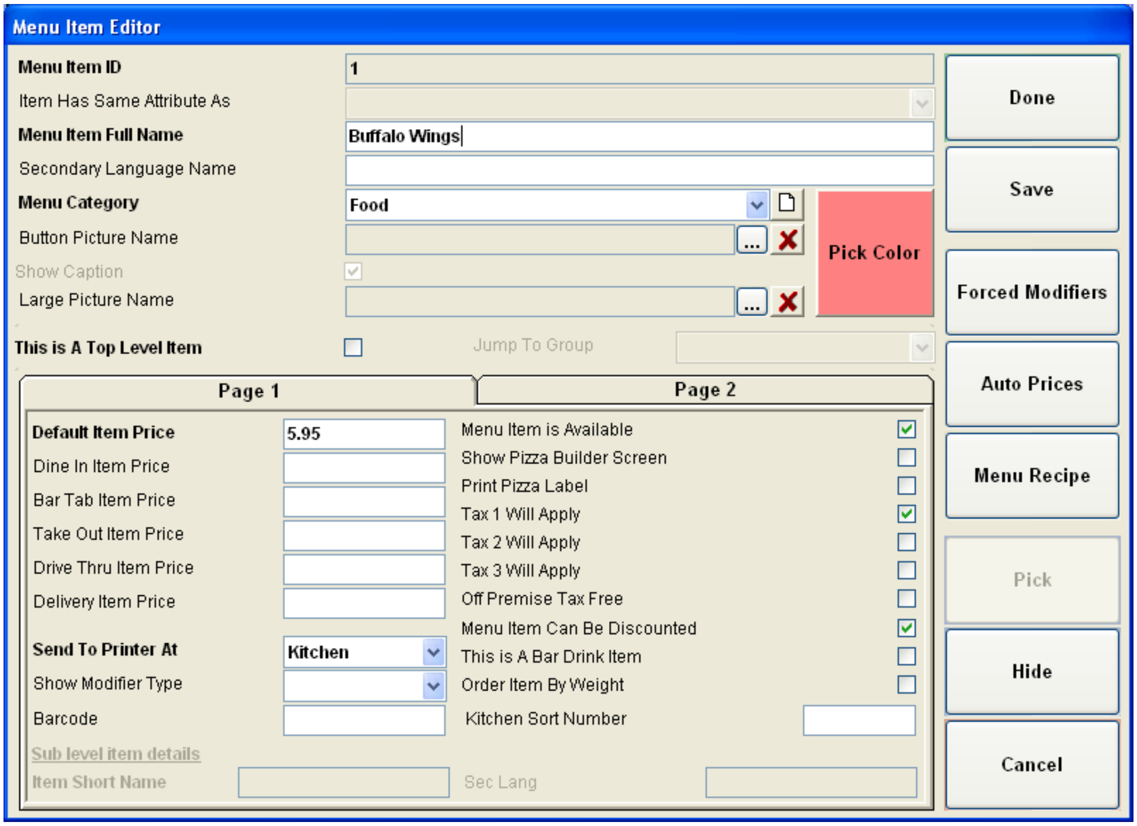


Figure 7-27

Menu Item Editor

Enter the item name and click the down-arrow next to the Menu Category field. Select the appropriate category from the drop-down list. The printer field works the same way. Click the arrow and choose the appropriate printer. Enter the default price and click the "Save" button. If the item is a pizza, select the "Show Pizza Builder Screen" checkbox. This allows you to enter only the name of the pizza and then select the size from the screen that displays automatically (size 1 = small, size 2 = medium, size 3 = large, and size 4 = extra large).

There is a "Page 2" tab on the Menu Item Editor screen. We will leave these settings at their default values. For detailed information on the settings on this tab, please see Menu Setup – Menu Item Editor in Chapter 5 of the User Manual.

MENU ITEM AUTO PRICES

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **Menu Setup** > **Menu Item Auto Prices.** This screen allows you to create automatic price changes for individual items based on the time of day and day of the week (see Figure 7-28).

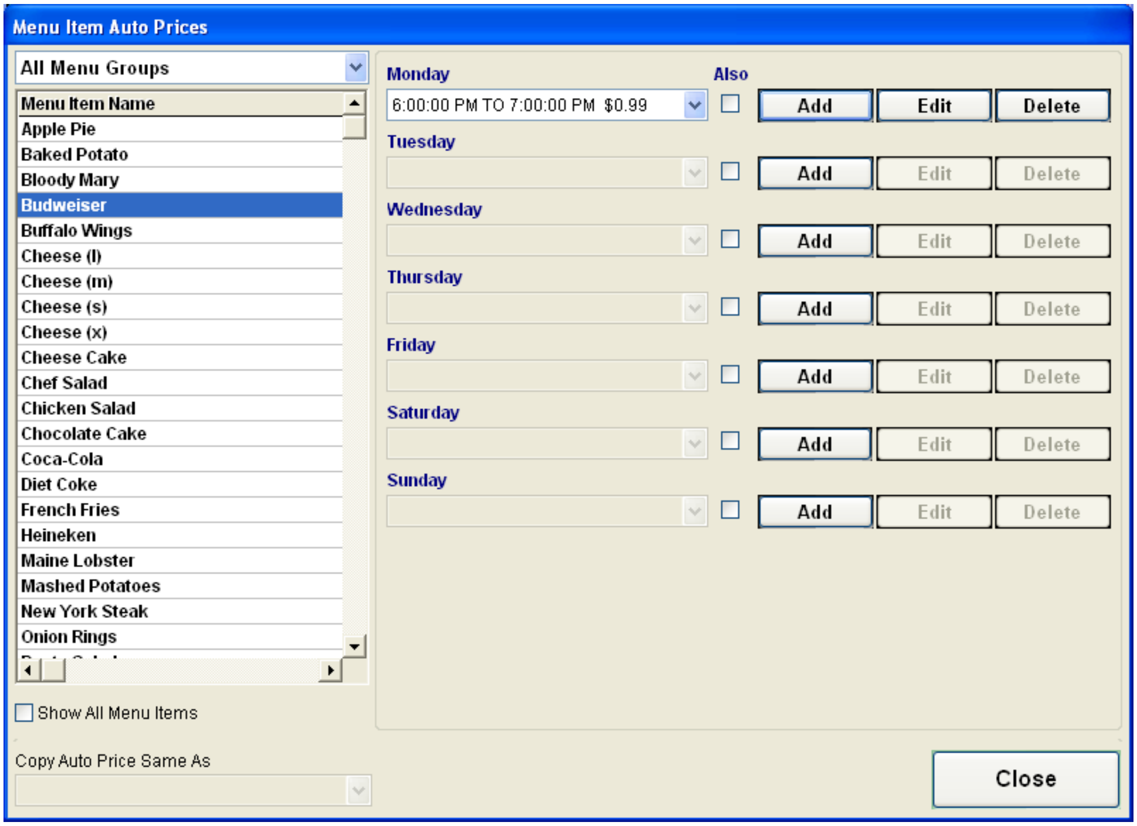


Figure 7-28

We will create a special Happy Hour for Monday Night Football. Select "Budweiser" from the Menu Item list and click the "Add" button next to Monday on the right side of the screen. The Menu Item Price Editor displays. Enter the information as seen in Figure 7-29. Click the "Done" button. The price of Budweiser will now change to 99¢ automatically every Monday evening at 6:00PM. At 7:00PM, the price will change back to the regular price, $2.75.

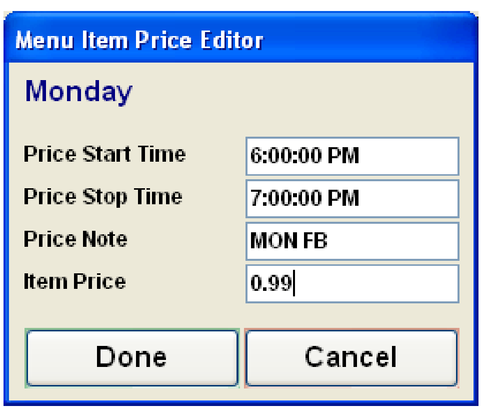


Figure 7-29

PIZZA BUILDER SETUP

Sizes Tab

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **Menu Setup** > **Pizza Builder Setup** and click on the “Sizes” tab. Here you setup the sizes of the pizzas your restaurant sells. For each size entered, check the corresponding checkbox to the left of the description.

For our Checkers restaurant, enter the information as seen in Figure 7-30, below.

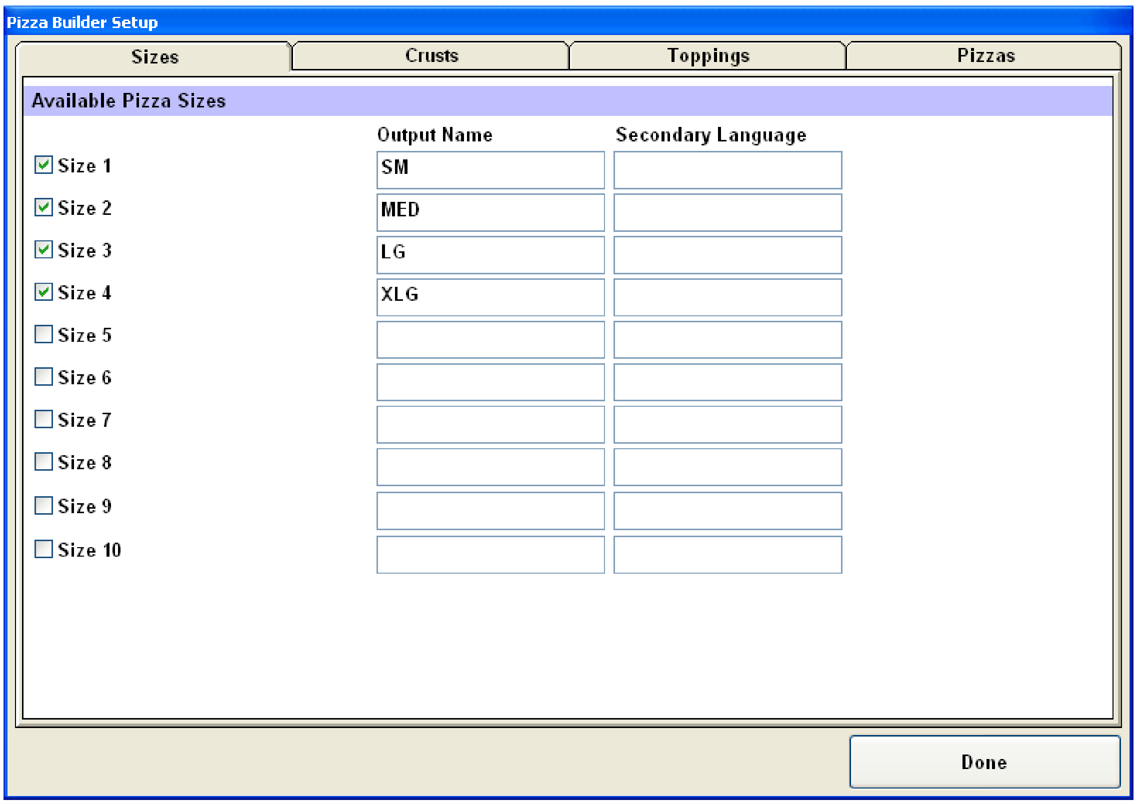


Figure 7-30

Crusts Tab

Navigate to **Back Office** > **Setup** > **Menu Setup** > **Pizza Builder Setup** and click on the “Crusts” tab. Click the “Add” button. The Pizza Crust Editor appears (see Figure 7-31). Here you enter the name of the crust and the extra charge (if any). You may also enter the crust name in a secondary language, if you are using this feature.

Enter the crust types into the Pizza Crust Editor as seen below in Figure 7-32 by clicking the “Add” button. When finished, click the “OK” button on the Pizza Crust Editor and the “Done” button on the Pizza Crust Types screen.

Figure 7-31

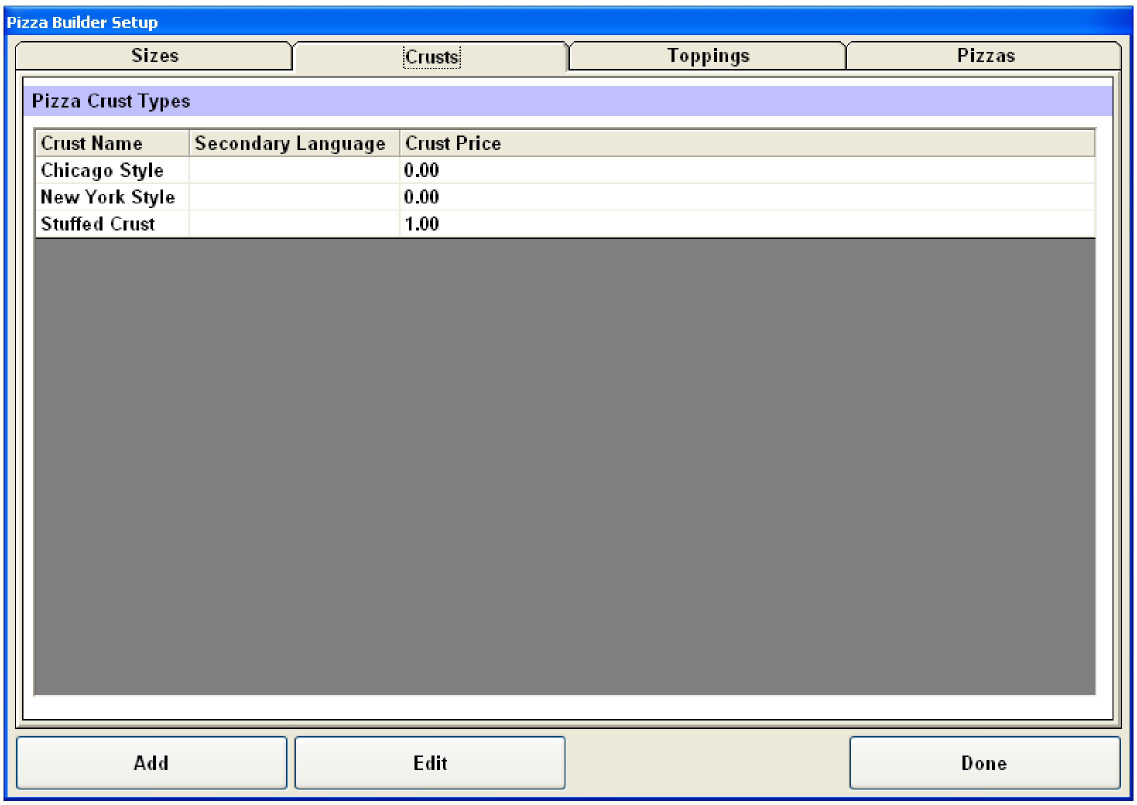


Figure 7-32

Toppings Tab

Navigate to **Back Office** > **Setup** > **Menu Setup** > **Pizza Builder Setup** and click on the "Toppings" tab. Click the "Add" button. Enter the information from the table below, clicking the "OK" button after entering each menu item. When finished, your screen should resemble Figure 7-33.

Topping Name	Size 1 Price	Size 2 Price	Size 3 Price	Size 4 Price
Pepperoni	$0.50	$0.75	$1.00	$1.25
Sausage	$0.50	$0.75	$1.00	$1.25
Anchovies	$0.50	$0.75	$1.00	$1.25
Mushrooms	$0.50	$0.75	$1.00	$1.25
Olives	$0.40	$0.65	$0.90	$1.15
Bell Peppers	$0.25	$0.50	$0.75	$1.00

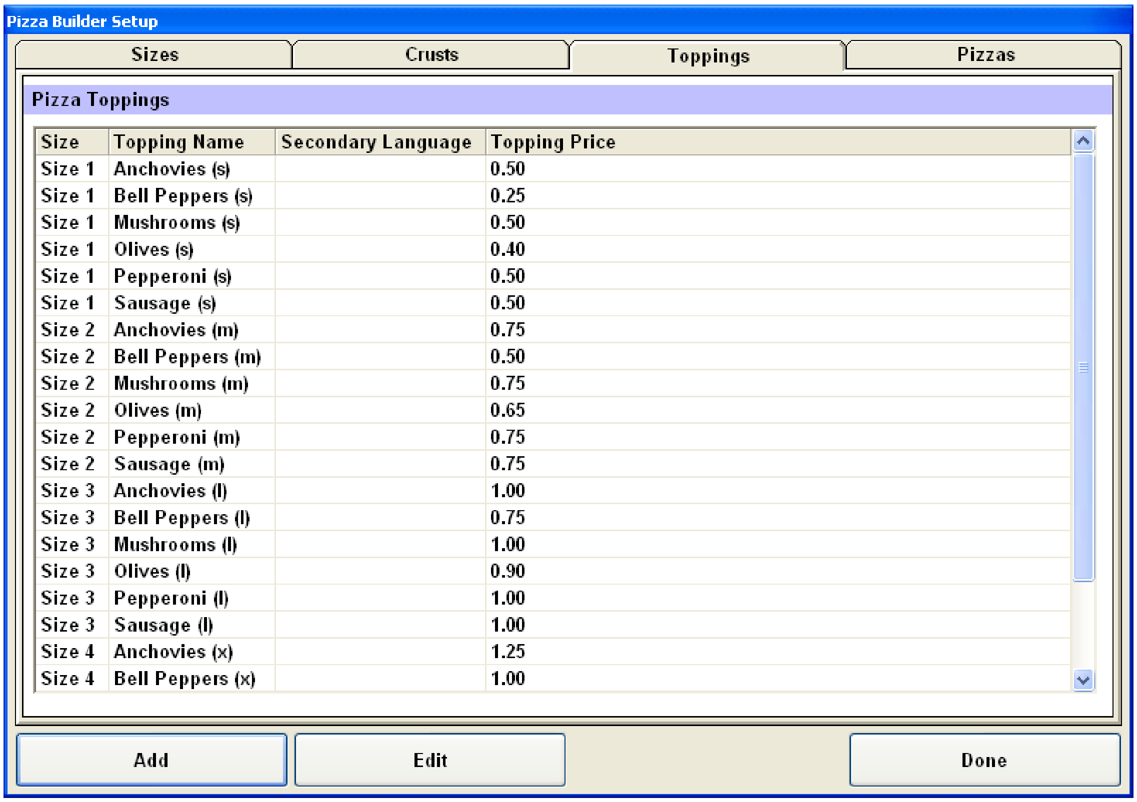
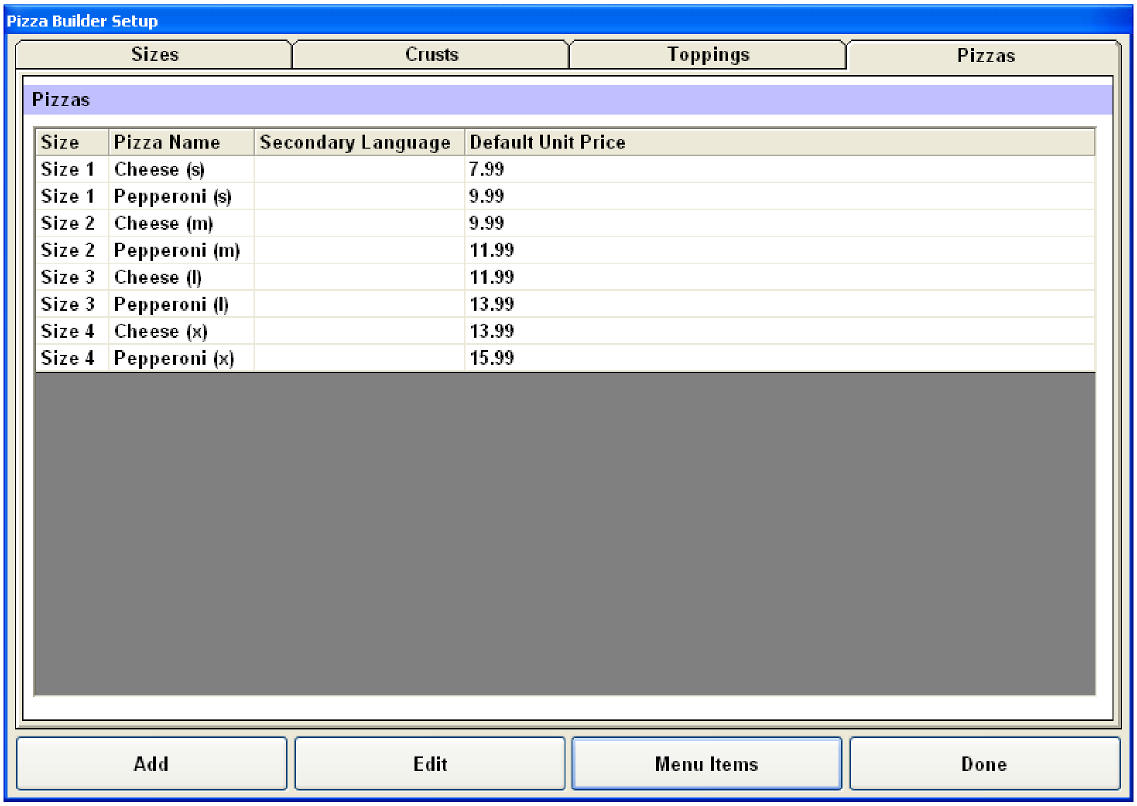


Figure 7-33

Pizzas Tab

In Aldelo® For Restaurants, navigate to **Back Office > Setup > Menu Setup > Pizza Builder Setup** and click on the "Pizzas" tab. Here we define the pizzas our restaurant sells (see Figure 7-34). Notice the fields are already populated with information since we setup the pizzas in the Menu Items section previously. Additional pizzas may be entered by clicking the "Add" button to display the Pizza Editor screen. To edit a pizza, select the pizza from the list and click the "Edit" button to display the Menu Item Editor. The "Menu Items" button is a shortcut to the Menu Items screen. When finished, click the "Done" button.



Size	Pizza Name	Secondary Language	Default Unit Price
Size 1	Cheese (s)		7.99
Size 1	Pepperoni (s)		9.99
Size 2	Cheese (m)		9.99
Size 2	Pepperoni (m)		11.99
Size 3	Cheese (l)		11.99
Size 3	Pepperoni (l)		13.99
Size 4	Cheese (x)		13.99
Size 4	Pepperoni (x)		15.99

Figure 7-34

MODIFIER BUILDER SETUP

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **Menu Setup** > **Modifier Builder Setup.** Here we create templates of modifiers that we assign to individual menu items.

In the Modifier Builder Template Setup window, click the "New" button. Enter "Baked Potato Template" into the field at the upper left of the screen. Click the "Save" button. A list of default category buttons displays. Click the button to the right of the "Taste" category. In the small screen that displays, change the Modifier Builder Type Name to "Toppings." For the Default Action, select "Add." Leave the Minimum Selections field blank (or, optionally, enter 0). This indicates that there is no minimum; the customer may order the baked potato without toppings so desired. Change the Maximum Selections field to 3. This allows the customer to choose up to three toppings for the baked potato. When finished, click the "Done" button. Since we will not use any other categories for this template, remove the names from the rest of the categories. In the Back Office, select "Store Settings" from the Common Tasks portion of the screen. Click the "Products" tab. Delete the eight Modifier Builder Type names on the lower half of the screen.

Next, click the Toppings button, and then click on the button at the upper left of the field of gray buttons. This displays the Modifier Builder Editor. As you can see, the Template Name and the Type Name are already populated from the information we entered previously. In the Modifier Name field, enter "Butter." Select the Checkboxes for "Add Butter," "Extra Butter," and "Light Butter" (see Figure 7-35). Click the "Done" button and repeat the procedure above for the rest of the toppings as seen in Figure 7-36.

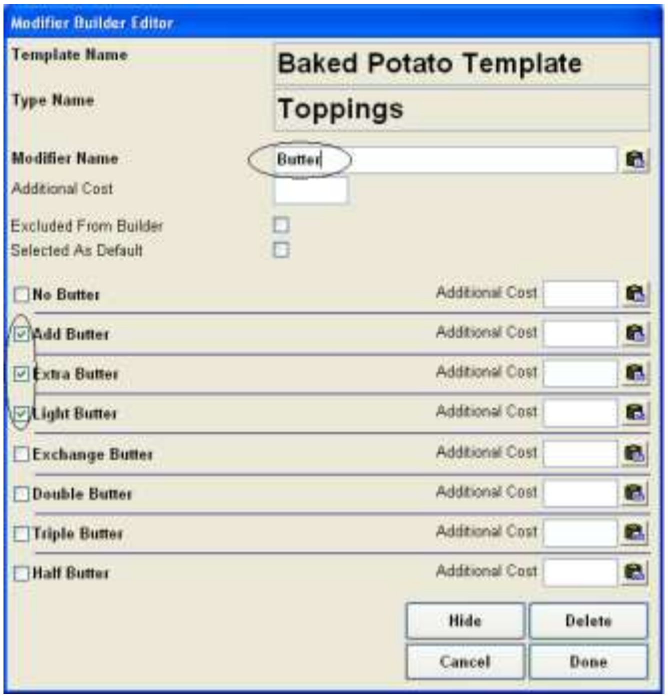


Figure 7-35

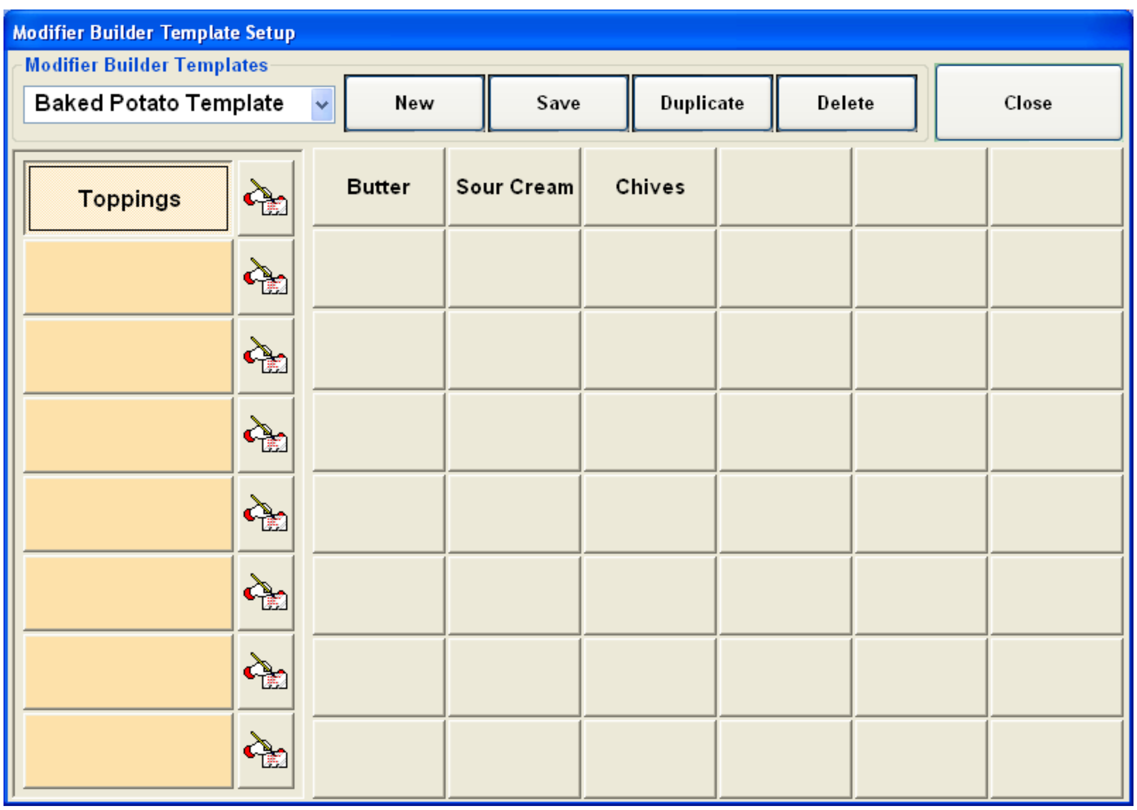


Figure 7-36

The last thing you must do is setup the baked potato item in the Menu Item Editor to use the template you just created when a customer orders a baked potato. Navigate to **Back Office > Setup > Menu Setup > Menu Items.** Select "sides" from the Menu Groups list, and then click on the "Baked Potato" button. On the lower half of the screen, select the "Page 2" tab. Click on the arrow next to the "Use Modifier Builder Template" field and select "Baked Potato Template." Click the "Save" and "Done" buttons. On the Menu Items screen, click the "Close" button.

Now we setup another modifier. In the Modifier Builder Template Setup window, name the template "Salad Toppings Template." Following the above procedure, enter the information from the following table.

Modifier Builder Type Name	Default Action	Minimum Selections	Maximum Selections	Modifier Names
Salad Toppings	(None)	(None)	3	Bacon Bits
				Slivered Alm

On the Menu Items screen, select "Salads" from the Menu Groups list and "Chef Salad" from grid. On the Menu Item Editor screen, select the "Page 2" tab, click the arrow next to the "Use Modifier Builder Template" field, and select "Salad Toppings Template." Click the "Save," "Done," and "Close" buttons.

Finally, we setup a third modifier template to allow the user to select the two side dishes that come with each entree.

In the Modifier Builder Template Setup window, name the template "Entree Sides Template" and continue entering the information from the table below. Please note that the modifier names must be unique, so even though we enter the same sides and toppings twice, we must enter modifier names that are slightly different in each case. Look in the Modifiers Names column of the chart below and you see that many of the names have underscore characters in them (some have leading underscore characters and some even have double underscore characters). This is only to indicate where you should place space characters. When entering the names, do not type the names with the underscores; substitute the underscore characters with space characters. Enter the names exactly as shown below.

Modifier Builder Type Name	Default Action	Minimum Selections	Maximum Selections	Modifier Names	Checkboxes Selected
Side 1	Add	(None)	1	Baked_Pot	(None)
				French_Fr	(None)
				Mashed_Pot	(None)
				Stmd_Vegs	(None)
Toppings 1	Add	(None)	3	Butter	Add, Extra, Light
				Sour_Cream	Add, Extra, Light
				Chives	Add, Extra, Light
Side 2	Add	(None)	1	Baked_ _Pot	(None)
				French_ _Fr	(None)
				Mashed_ _Pot	(None)
				Stmd_ _Vegs	(None)
Toppings 2	Add	(None)	3	_Butter	Add, Extra, Light
				_Sour_Cream	Add, Extra, Light
				_Chives	Add, Extra, Light

When finished, don't forget to setup each of the four entrees in the Menu Item Editor to use this template when an entree is ordered.

MENU MODIFIERS

The Menu Modifiers screen allows the user to create menu items and maintain existing menu items. As seen in Figure 7-37, the list is already populated with the menu modifiers that we created in other windows. The Menu Modifiers screen is a convenient place to find all of your modifiers in one place, allowing you to edit them without having to navigate to the individual windows where they were created to make the changes.

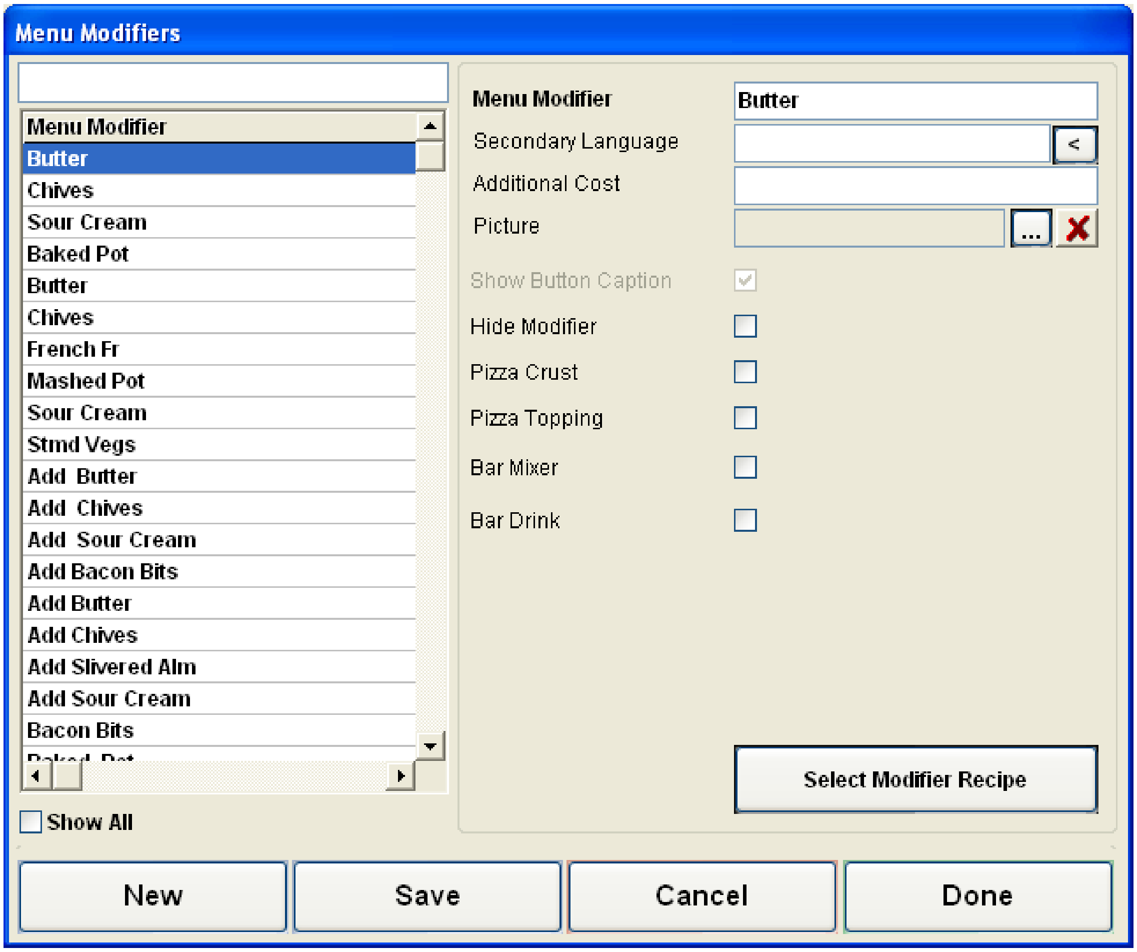


Figure 7-37

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **Menu Setup** > **Menu Modifiers.** We will setup some modifiers to use in the next section (Forced Modifiers).

Click the "New" button. The cursor appears in the Menu Modifier field at the upper right of the window. Enter "Ketchup" in the field and click the "Save" button. Ketchup is added to the Menu Modifiers list on the left side of the screen. Now click the "New" button and enter the rest of the information from the table below, clicking "Save" and "New" after each entry. After the final entry, click "Save" and "Done."

Rare	Well Done	Oil/Vinegar
Medium Rare	Ranch	Plain Croutons
Medium	1000 Island	Garlic Croutons
Medium Well	Italian	Cheese Croutons

FORCED MODIFIERS

The Forced Modifier Editor allows you to setup a modifier for an item where there is only one choice from a group of choices.

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **Menu Setup** > **Forced Modifiers.** Click the arrow next to the field that says “All Menu Groups” and select “Entrees.” From the Menu Item Name list, select “New York Steak.” Click the top “Edit” button on the right side of the screen. This opens the Forced Modifiers Editor, allowing you to edit the first level.

From the Modifier Items list, select Rare, Medium Rare, Medium, Medium Well, and Well Done, in that order. When finished, click the “Done” button and the “Close” button.

In the Back Office, select “Store Settings” from the Common Tasks portion of the screen. Click the “Products” tab. Make sure the first checkbox, “Sort Menu Sub Items / Forced Modifiers,” is **unchecked**. If this checkbox is checked, the Forced Modifiers we entered above are sorted alphabetically. Making sure it is unchecked displays them in the order in which they were entered (see Figure 7-38).

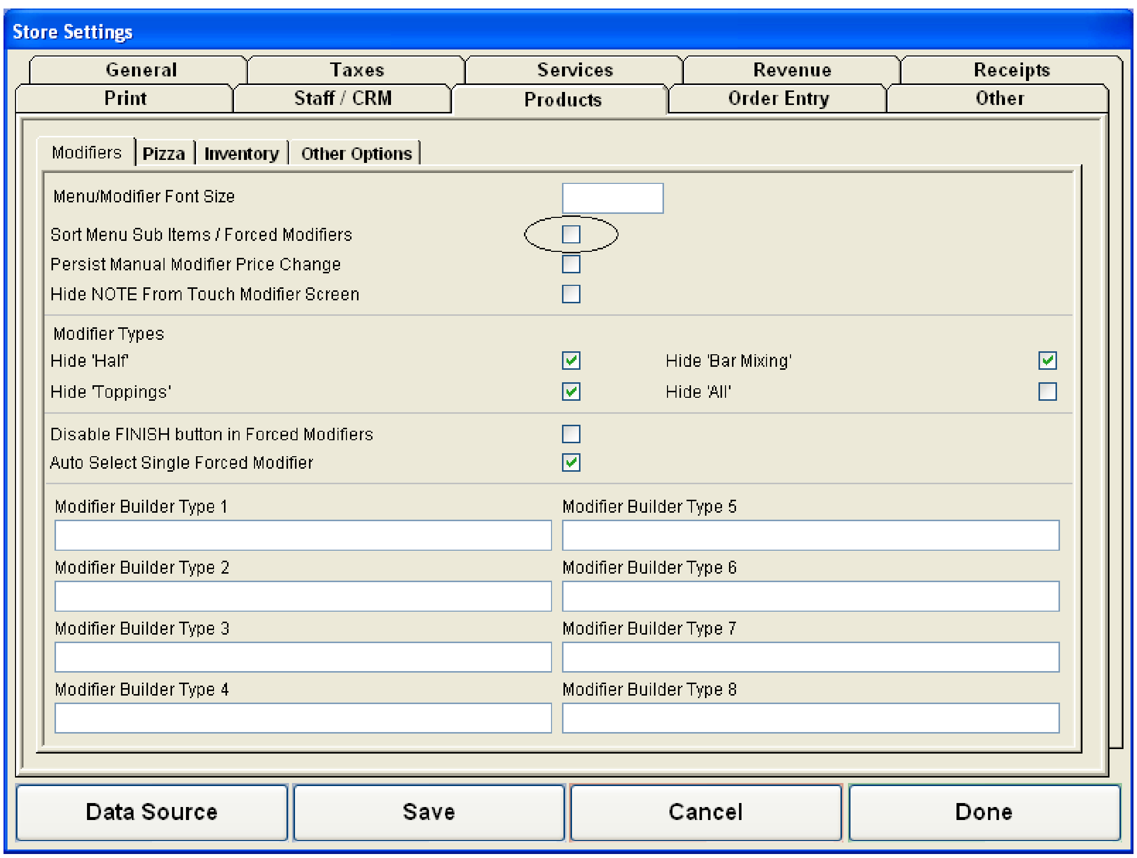


Figure 7-38

Now we will setup two levels of forced modifiers for the Chef Salad. Follow the procedure above, entering the information from the table below.

1st Level	2nd Level
Ranch	Plain Croutons
1000 Island	Garlic Croutons
Italian	Cheese Croutons
Oil/Vinegar	-

Inventory Setup

INVENTORY GROUPS

In Aldelo® For Restaurants, navigate to **Back Office** > **Setup** > **Inventory Setup** > **Inventory Groups.** Here we maintain a list of inventory groups for grouping our inventory items into a logical order. When we assign inventory items to these groups, we can review our inventory in a way that is more understandable than if we list the inventory items randomly.

Click the "New" button. The cursor displays in the Inventory Group Name field. Enter each of the Inventory Group Names as seen in Figure 7-39. After each entry, click the "Save" button and the "New" button. After entering the last group name, click "Save" and "Done."

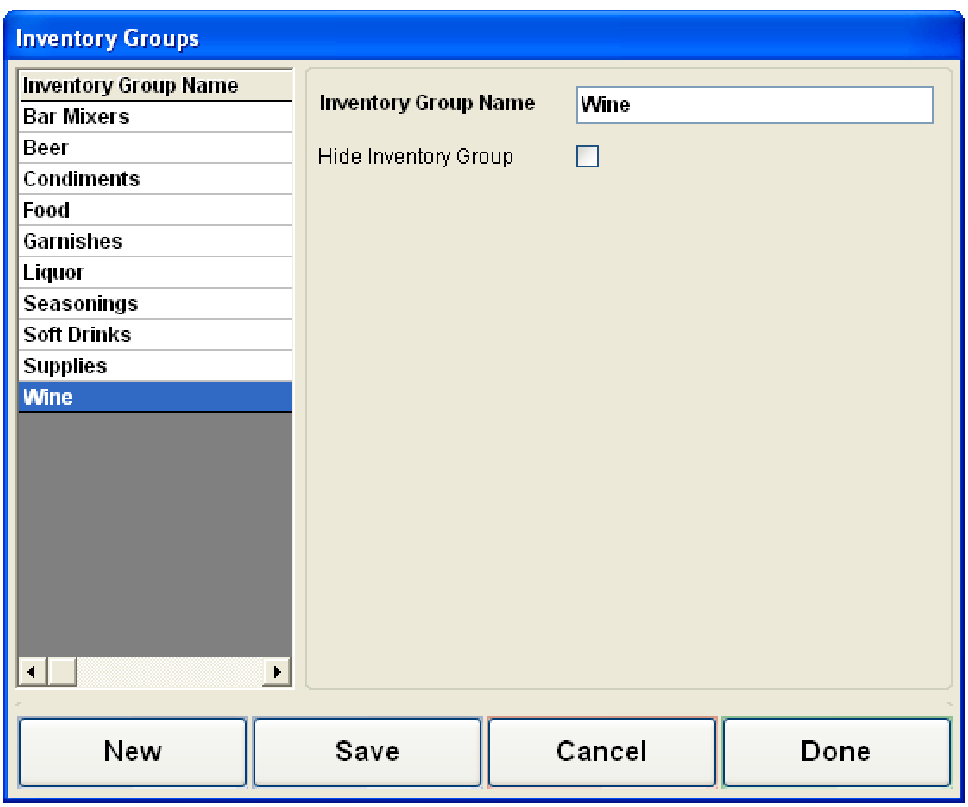


Figure 7-39

INVENTORY LOCATIONS

Navigate to **Back Office** > **Setup** > **Inventory Setup** > **Inventory Locations.** Here we maintain a list of locations in which our inventory items are stored, allowing them to be further grouped into logical order. The Sort Order field allows us to number the inventory locations in the order in which we want them displayed.

Numbering the Sort Order field in multiples of ten, rather than one, allows you to enter any new location names that may be added in the future between existing locations.

Click the “New” button and enter the information, as seen in Figure 7-40, into the Inventory Location Name and Sort Order fields, clicking the “Save” and “New” buttons after each entry. Upon entering the final entry, click the “Save” and “Done” buttons.

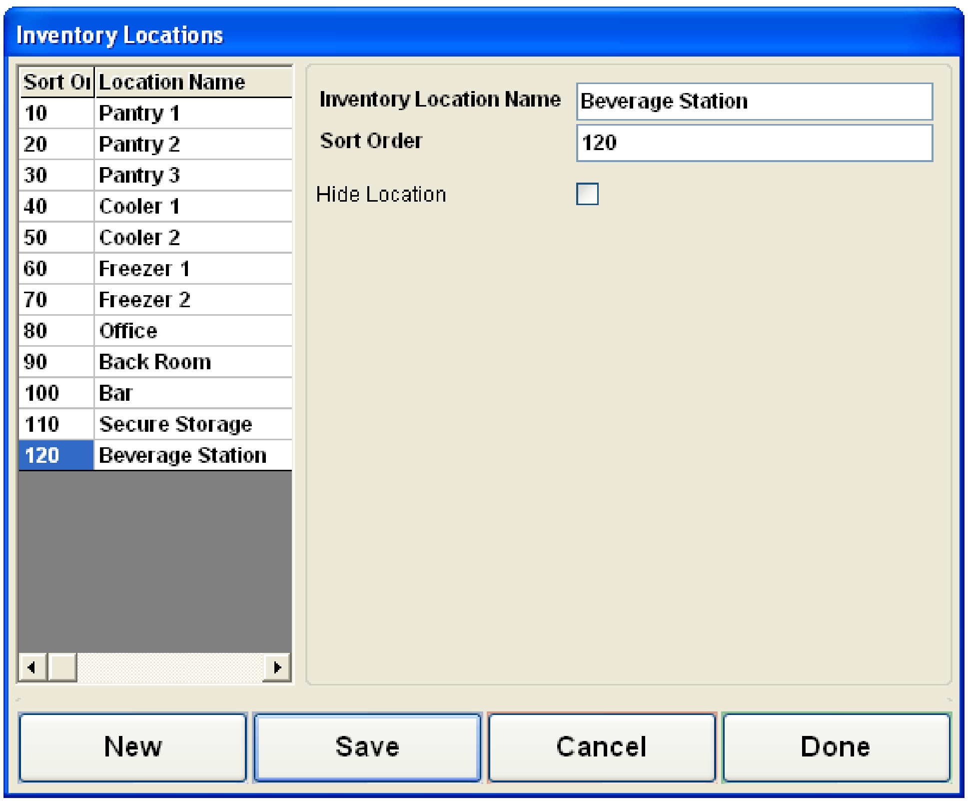


Figure 7-40

INVENTORY VENDORS

Navigate to **Back Office** > **Setup** > **Inventory Setup** > **Inventory Vendors.** Here we setup and maintain a list of our inventory vendors. These vendors are linked to specific inventory items. If an item is available from multiple vendors, a preferred vendor can be setup for the item (for example, if the cost is less from this vendor), making the other vendors secondary sources of supply.

Click the "New" button. The cursor displays in the Inventory Vendor Name field. Enter each of the Inventory Vendor Names as seen in Figure 7-41. After each entry, click the "Save" button and the "New" button. After entering the final vendor name, click "Save" and "Done."

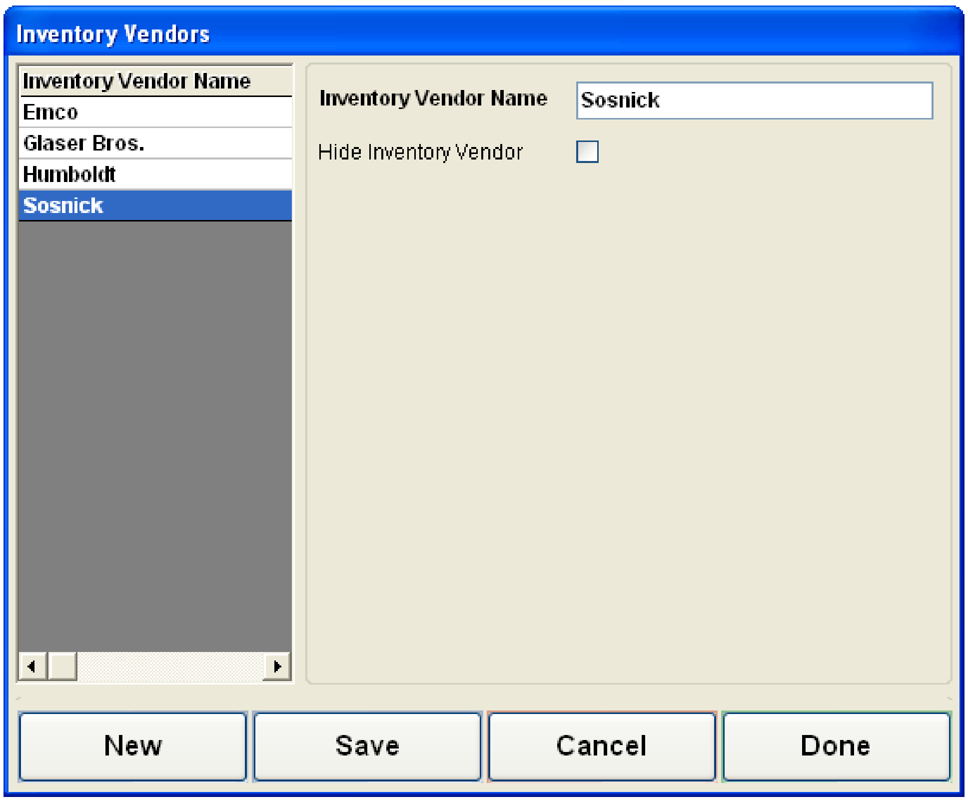


Figure 7-41

INVENTORY ITEMS

Navigate to **Back Office** > **Setup** > **Inventory Setup** > **Inventory Items.** On this screen, we enter and maintain the list of inventory items used by our Checkers restaurant. For detailed descriptions of the field entries on this screen, please see Inventory Setup – Inventory Items in Chapter 5 of the User Manual.

Click the "New" button. The cursor displays in the Inventory Item Name field. Enter the information as seen in the tables below. Enter only information on the Inventory Items screen for the fields whose descriptions appear in **bold** type (see Figure 7-42).

Inventory Item Name	Pack Size Description	Recipe Units / Pack Size	Inventory Group	Inventory Location	Inventory Vendor	Sort Order	Pack Size Re-Order Point	Pack Size Replenish-ment Level
New York Steak	80-12 oz. steaks	80	Food	Cooler 1	Emco	1000	0.5	2
Budweiser Beer	24-12 oz. bottles	24	Beer	Cooler 2	Humboldt	2000	5	20
Apple Pie	6-40 oz. pies	36	Food	Freezer 2	Sosnick	5000	1	3
Cheese Cake	4-24 oz. cakes	48	Food	Freezer 2	Sosnick	5050	1	3
Stuffed Jalapenos	10 lb. box frozen	40	Food	Freezer 1	Sosnick	1100	1	4
Onion Rings	10 lb. box frozen	40	Food	Freezer 1	Sosnick	1500	1	4
Tuna Salad	12-32 oz. cans	96	Food	Cooler 1	Emco	1200	0.5	2
French Fries	6-5 lb. bags frozen	120	Food	Freezer 1	Sosnick	1300	1	4
Coca-Cola	24-12 oz. cans	24	Soft Drinks	Cooler 2	Humboldt	2500	5	20
Diet Coke	24-12 oz. cans	24	Soft Drinks	Cooler 2	Humboldt	2510	5	20
Milk (Whole)	6-1 gallon	96	Food	Cooler 1	Emco	1800	1	3
Vodka	12-1 liter bottles	202.8	Liquor	Pantry 3	Glaser	3000	1	10
Scotch	12-1 liter bottles	202.8	Liquor	Pantry 3	Glaser	3100	1	10
Mixed Vegetables	6-5 lb. bags frozen	120	Food	Freezer 1	Sosnick	1350	1	4
Bloody Mary Mix	12-1 quart bottles	48	Bar Mixers	Pantry 2	Glaser	3800	2	8
Orange Juice	16-1 quart bottles	64	Bar Mixers	Cooler 2	Humboldt	3900	1	3
Orange_Juice	12-1 quart bottles	48	Bar Mixers	Cooler 2	Humboldt	3901	1.34	4
Potatoes	3-20 lb. bags fresh	80	Food	Pantry 1	Emco	1600	0.67	2
Butter	30-1 lb. boxes	960	Food	Cooler 2	Emco	1700	0.5	2
Sour Cream	12-1 quart tubs	192	Food	Cooler 2	Emco	1750	0.5	2
Chives	5 lb. box fresh	320	Condiments	Cooler 1	Emco	1650	0.25	1
Ketchup	12-32 oz. bottles	384	Condiments	Cooler 1	Emco	1675	0.75	3

(Continued)

Inventory Item Name	Pack Size Description	Recipe Units / Pack Size	Inventory Group	Inventory Location	Inventory Vendor	Sort Order	Pack Size Re-Order Point	Pack Size Replenish-ment Level
Vanilla Ice Cream	1-3 gallon tub	48	Food	Freezer 2	Sosnick	5100	1	3
Chocolate Cake	4-21 oz. cakes	14	Food	Freezer 2	Sosnick	5150	1	3
Bacon Bits	6-4 oz. jars	192	Garnishes	Pantry 2	Emco	5500	1	2
Slivered Almonds	12-6 oz. jars	144	Garnishes	Pantry 2	Emco	5550	1	3
Croutons (Plain)	12-8 oz. boxes	96	Garnishes	Pantry 2	Emco	5600	2	4
Croutons (Garlic)	12-8 oz. boxes	96	Garnishes	Pantry 2	Emco	5610	2	4
Croutons (Cheese)	12-8 oz. boxes	96	Garnishes	Pantry 2	Emco	5620	2	4
Olive Oil	12-1 quart bottles	128	Food	Pantry 2	Emco	6000	2	5
Ranch Dressing	6-1 gallon jars	256	Food	Pantry 2	Emco	6100	2	4
1000 Island Dressing	6-1 gallon jars	256	Food	Pantry 2	Emco	6110	2	4
Italian Dressing	6-1 gallon jars	256	Food	Pantry 2	Emco	6120	2	4
Red Wine Vinegar	12-1 quart bottles	128	Food	Pantry 2	Emco	6050	2	5
Chicken Wings	40 lb. bulk frozen	64	Food	Freezer 1	Emco	1055	1	2
Buffalo Sauce	6-1 gallon jars	192	Food	Pantry 2	Emco	6080	1	3
Cheddar Cheese (Shredded)	12-2 lb. bags	384	Food	Cooler 2	Emco	1775	1	2
Green Onions	5 lb. box fresh	320	Condiments	Cooler 1	Emco	1650	0.25	1
Maine Lobster	24-1 lb. frozen	24	Food	Freezer 1	Emco	1025	2	3
Chicken Halves	40 lb. bulk frozen	40	Food	Freezer 1	Emco	1050	1	2
Pork Chops	40 lb. bulk frozen	80	Food	Freezer 1	Emco	1065	1	2
Anchovies	24-8 oz. cans	96	Food	Pantry 2	Emco	6500	1	2
Pepperoni	12-2 lb. bags sliced	36	Food	Cooler 1	Emco	6550	3	6
Sausage	12-2 lb. bags bulk	36	Food	Cooler 1	Emco	6600	3	6
Mozarella Cheese (Shredded)	12-2 lb. bags	36	Food	Cooler 1	Emco	6650	3	6
Pizza Sauce	6-1 gallon cans	192	Food	Pantry 2	Emco	6525	3	6
Bell Peppers	10 lb. box fresh	80	Food	Cooler 1	Emco	6700	2	4
Black Olives (Sliced)	6-1 gallon cans	384	Food	Pantry 2	Emco	6535	1	2
Mushrooms	5 lb. box fresh	40	Food	Cooler 1	Emco	6750	2	5
Pizza Dough	24-12 oz. frozen	24	Food	Freezer 1	Emco	6800	3	6

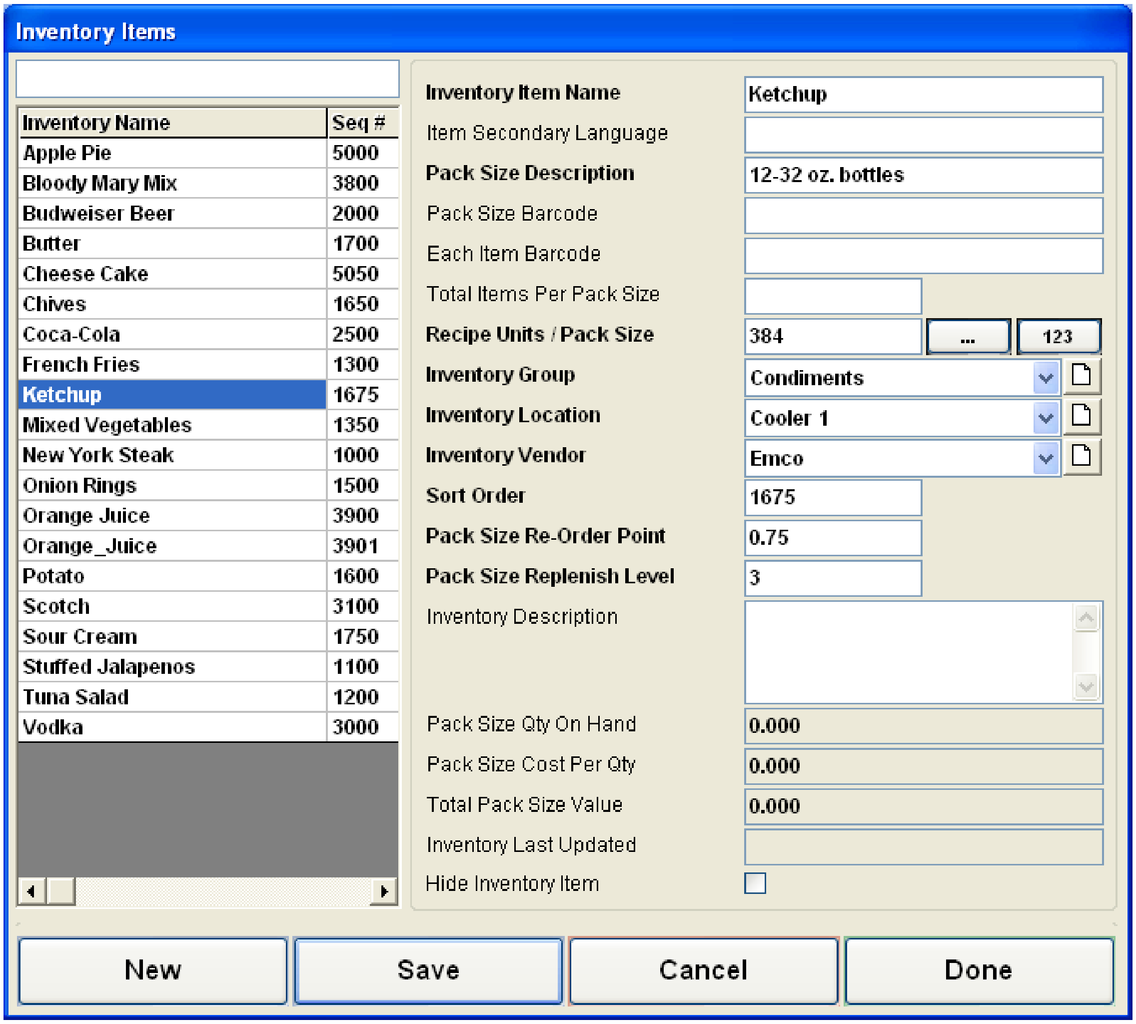


Figure 7-42

Menu Recipe Editor

In this screen, we setup menu item recipes. This allows the ingredient inventory to deplete as the menu items are sold.

Navigate to **Back Office** > **Setup** > **Inventory Setup** > **Menu Recipe Editor.** In the Menu Item Name list, click on Bloody Mary. Double-click the Inventory Item Name field and select Vodka from the list by clicking on it. Enter "1" in the units used field. When we entered Vodka into the Inventory Items list, we selected a serving size of two ounces (12-33.8 oz. bottles equals 405.6 oz., divided by a 2 oz. serving equals 202.8 recipe units per pack size). By entering "1" into this field, we deplete two ounces from our inventory. Click the "Add" button. Vodka is now added to the ingredient list for this recipe item. Now add Bloody Mary Mix to the recipe in the same manner, again entering "1" in the units used field. When finished, click the "Save" button (see Figure 7-43).

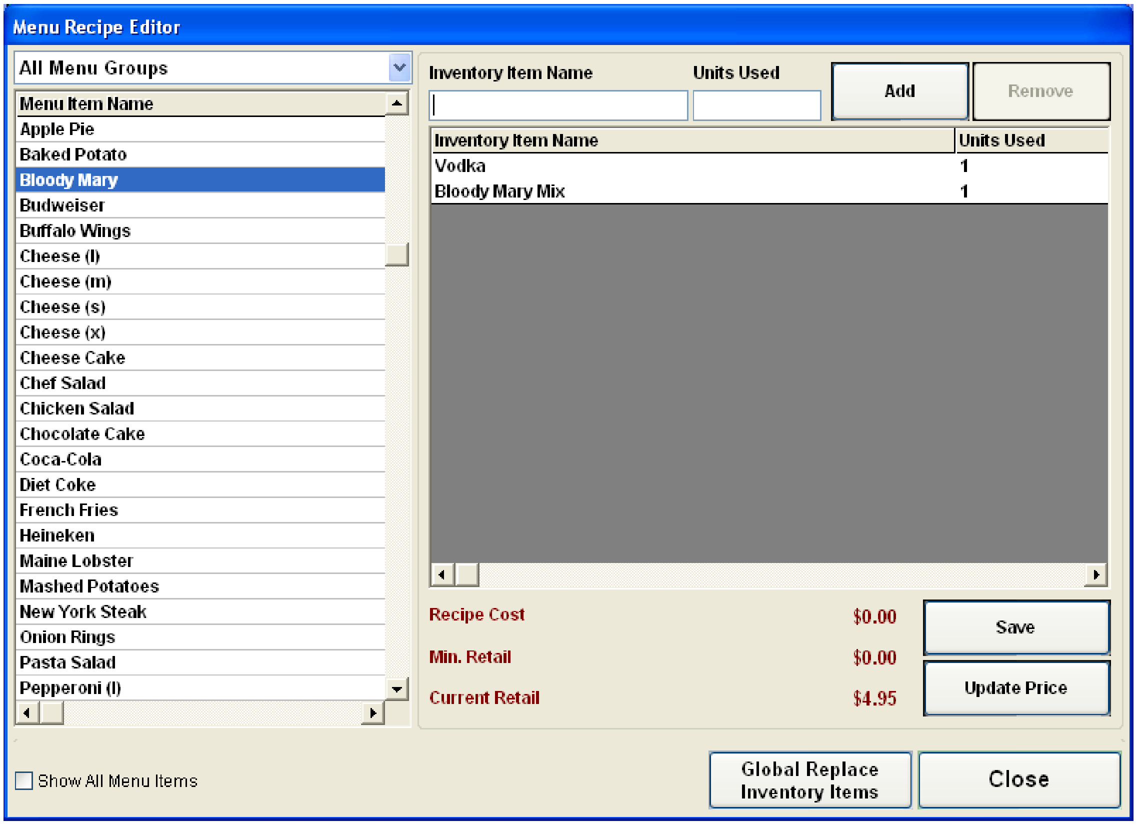


Figure 7-43

Repeat the process above to create the recipes for the menu items listed in the chart below. The Recipe Cost and Min. Retail are not updated because we have not yet received inventory of any of the items used in these recipes. This is covered later in this manual.

Menu Item Name	Inventory Item Name	Units Used
Screwdriver	Vodka	1
	Orange Juice	1
Buffalo Wings	Chicken Wings	1
	Buffalo Sauce	1
Mashed Potatoes	Potatoes	1
	Milk (Whole)	1
	Butter	2
Potato Skins	Potatoes	1
	Cheddar Cheese (Shredded)	1
	Green Onions	1

Now click the "Global Replace Inventory Items" button. This screen allows the user to replace an obsolete inventory item with a new item. For example, if the Orange Juice you use is no longer available in a case of 16-32 oz. bottles but is replaced by a case of 12-32 oz. bottles, you enter the new item into the Inventory Items screen. Note that although the new item may be identical to the old one except for the pack size, the system requires us to give it a unique name; that is why we called it "Orange_Juice" (with an underscore between the words).

Next, navigate to the Global Replace Inventory Items screen. Here you select the old item in the Original Inventory Item list and the new item from the New Inventory Item list. Click the "OK" button when finished (see Figure 7-44). A window displays the message "Inventory item global replacement complete." Click the "OK" button. The old item has now been replaced with the new item.

The system now depletes the recipe units from the case of 12 bottles rather than the case of 16 bottles. If you look at the Menu Recipe Editor again and select Screwdriver from the Menu Item Name list, you see that "Orange Juice" has been replaced with "Orange_Juice" in the ingredients list.

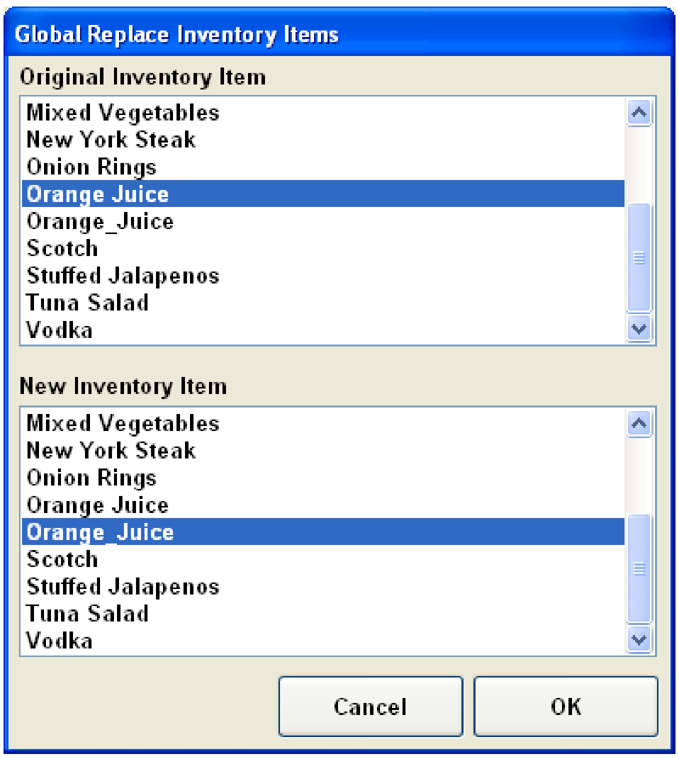


Figure 7-44

In the Menu Recipe Editor screen, select "Modifier Recipes" from the dropdown list in the upper left corner. Here we enter the recipes for our modifiers, thus enabling the software to deplete the inventory of the modifier ingredients as they are used.

Now click the "New Modifier Recipe" button. A virtual keyboard pops up. Enter "Mod: Ketchup" via the keyboard and click the "Finish" button. Next, double-click in the Inventory Item Name field. This displays the list of inventory items entered previously in the Inventory Items screen. Select "Ketchup" from the list and enter "1" in the Units Used field. Click the "Add" button to commit this ingredient to the Inventory Item Name list.

Click the "Save" button to complete the entry. If a mistake is made, we can remove an ingredient from the list by selecting it and clicking the "Remove" button. If a mistake is made in the Modifier Recipe Name, it can be corrected by clicking the "Edit Modifier Recipe Name" button. Enter the rest of the Modifier Recipes for the modifiers listed in the table below. Be sure to click the "Save" button after each entry (see Figure 7-45). When finished, click the "Close" button.

Modifier Recipe Name	Inventory Item Name	Units Used
Mod: Butter	Butter	2
Mod: Sour Cream	Sour Cream	1
Mod: Chives	Chives	1
Mod: Oil / Vinegar	Olive Oil	1
	Red Wine Vinegar	1
Mod: 1000 Island	1000 Island Dressing	1
Mod: Italian	Italian Dressing	1
Mod: Ranch	Ranch Dressing	1
Mod: Bacon Bits	Bacon Bits	1
Mod: Plain Croutons	Croutons (Plain)	1
Mod: Cheese Croutons	Croutons (Cheese)	1
Mod: Garlic Croutons	Croutons (Garlic)	1
Mod: Slivered Almonds	Slivered Almonds	1

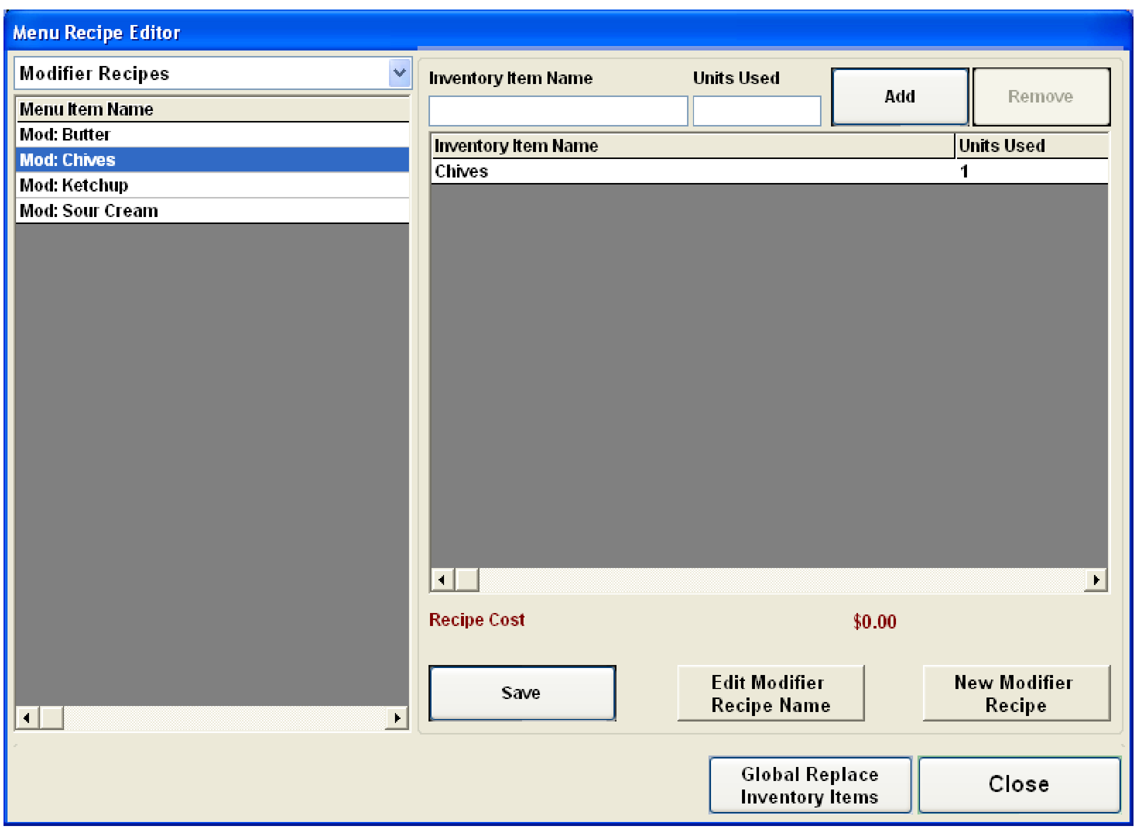


Figure7-45

MODIFIER RECIPE SELECTOR

On this screen, we assign recipes that we created in the Menu Recipe Editor to our modifiers. Navigate to **Back Office > Setup > Inventory Setup > Modifier Recipe Selector.** Click on "Butter" in the left column. Select "Mod: Butter" from the list on the right. Now whenever we select butter as a modifier when entering an order, the proper amount is depleted from our inventory.

Repeat the procedure above to assign recipes to the modifiers as listed in the table below. When finished, click the "Save" button and the "Done" button (see Figure 7-46).

Menu Modifier	Modifier Recipe
Butter	Mod: Butter
Sour_Cream	Mod: Sour Cream
Chives	Mod: Chives
_Butter	Mod: Butter
_Sour_Cream	Mod: Sour Cream
_Chives	Mod: Chives
1000 Island	Mod: 1000 Island
Italian	Mod: Italian
Ranch	Mod: Ranch
Oil / Vinegar	Mod: Oil / Vinegar
Bacon Bits	Mod: Bacon Bits
Plain Croutons	Mod: Plain Croutons
Cheese Croutons	Mod: Cheese Croutons
Garlic Croutons	Mod: Garlic Croutons
Slivered Almonds	Mod: Slivered Almonds
Ketchup	Mod: Ketchup

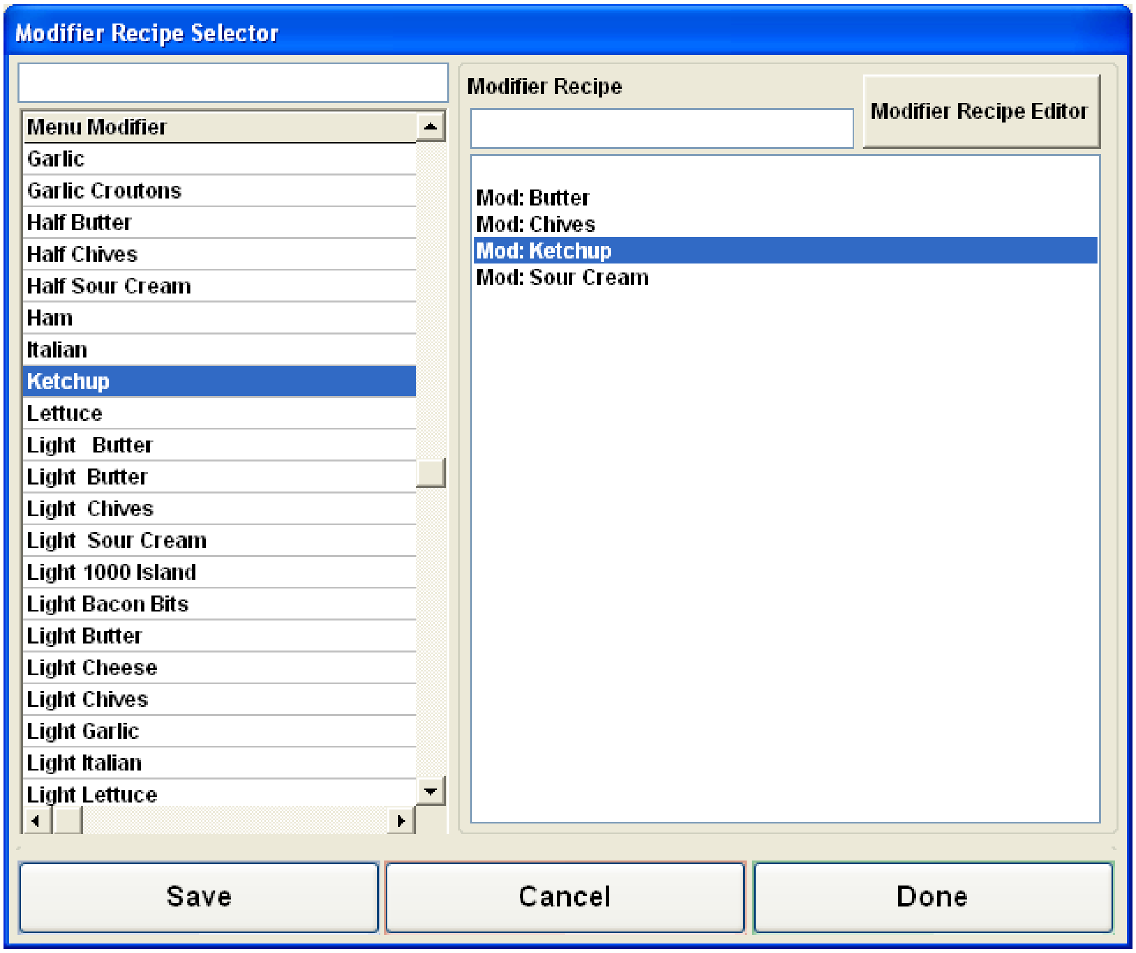


Figure 7-46

INVENTORY UOM

The Inventory Units of Measure screen allows us to define units of measure for our various menu items. Navigate to **Back Office** > **Setup** > **Inventory Setup** > **Inventory UOM.** Enter the information from the table below into the fields on this screen (see Figure 7-47). Click the “Save”button after each entry.

UOM Name	Recipe Units
Apple Pie 6-40 oz.	36
Bldy Mry Mx 12-32 oz	48
Budweiser 24-12 oz.	24
Butter 30-1 lb.	960
Cheese Cake 4-24 oz.	48
Chives 5 lb. fresh	320
Coca-Cola 24-12 oz.	24
French Fries 6-5 lb.	120
Ketchup 12-32 oz.	384
Mxd Vegetable 6-5 lb	120
New York Stk 60 lbs.	80
Onion Rings 10 lbs.	40
Orange Jce 12-32 oz.	48
Orange_Jce 16-32 oz.	64
Potatoes 3-20 lb.	80
Scotch 12-1 liter	203
Sour Cream 12-1 qt.	192
St Jalapenos 10 lbs.	40
Tuna Salad 12-32 oz.	96
Vodka 12-1 liter	203

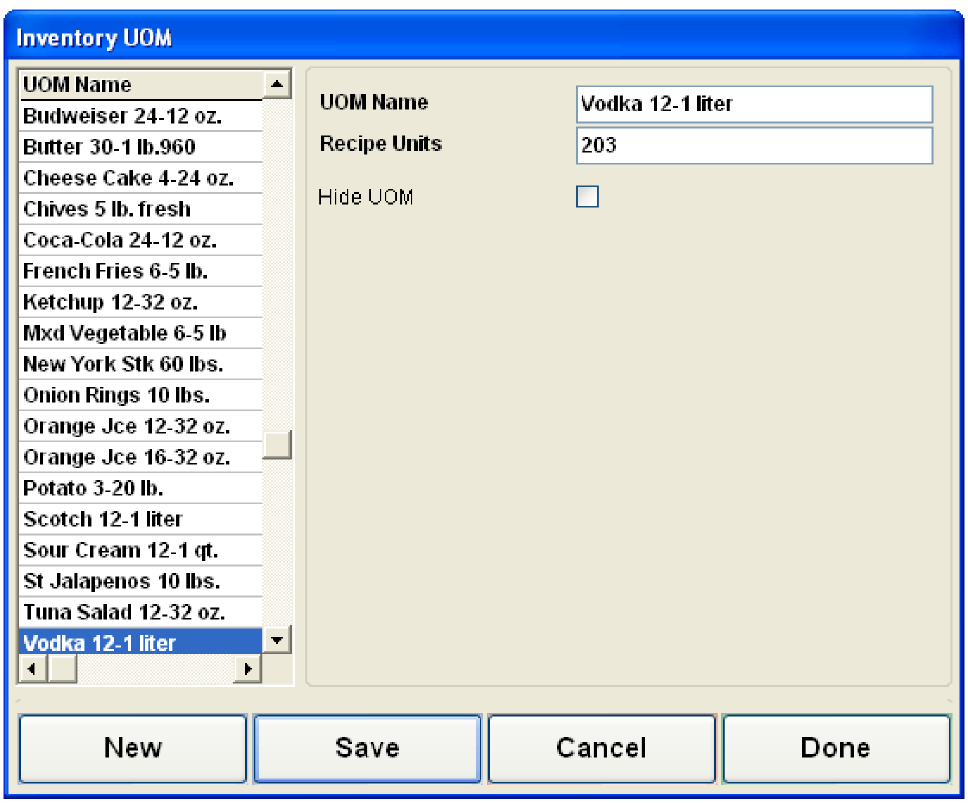


Figure 7-47

Chapter 8 — Opening Procedures

Time Cards

Aldelo® For Restaurants has a time card feature built in, eliminating the need for a mechanical time clock to track your employees' hours. Before an employee begins work, he or she must clock in and may want to review the schedule, have a pager assigned, or see how much has been earned so far during this pay period.

CLOCKING IN

Before doing anything else, an employee must clock in. From the main POS screen, select the "Time Card" button. When prompted, select "12" and press the "Enter" button to clock in our owner, George Murphy. Since all access codes must be unique, the software recognizes the individual employee. Click on the "Clock In" button. The clock-in time displays, letting the employee know the time recorded as the clock in time. To remain in the Employee Time card screen to view schedules or earnings reports, click the "Stay" button **before** clicking the "Clock In" button. For detailed information on clocking in, see Time Cards – Clocking In in Chapter 6 of the User Manual.

When finished clocking in the manager, clock in the cashier, Joan Brodel (access code "3").

SCHEDULE

While in the Time Card screen, the employee may view the schedule by clicking the "View Schedule" button and selecting any date within the week desired by using the date picker tool. After choosing the date, click the "Select" button to view the schedule (see Figure 8-1). Click the "Print" button to print a copy of the schedule or the "OK" button to exit.

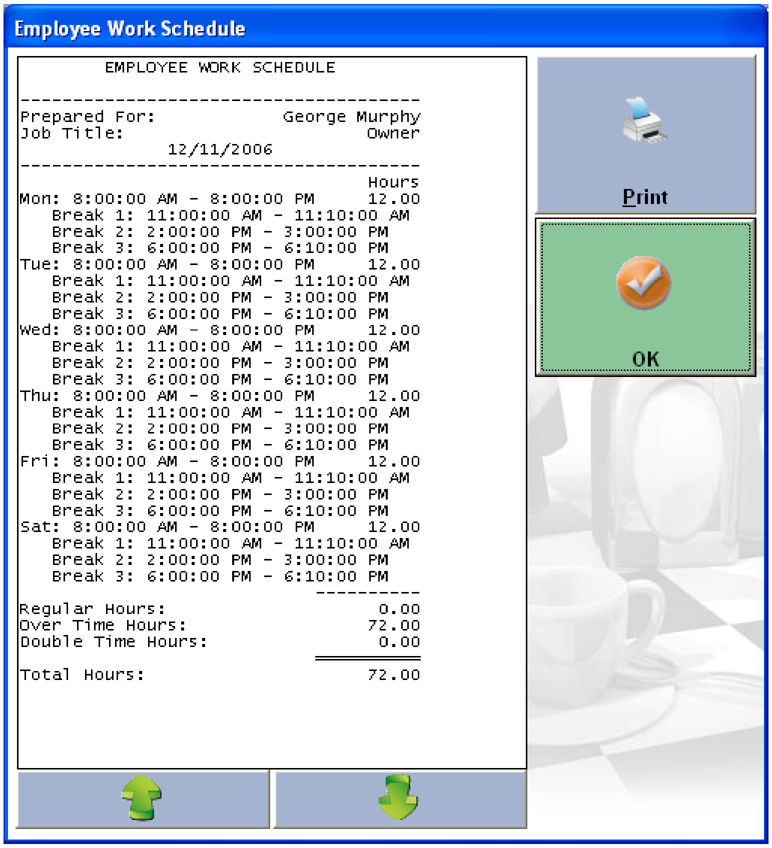


Figure 8-1

Earnings Report

Employees may view their earnings up to this point in the current pay period by clicking the “Earnings Report” button in the Employee Time card screen (see Figure 8-2). Click “Print” or “OK” to exit the screen.

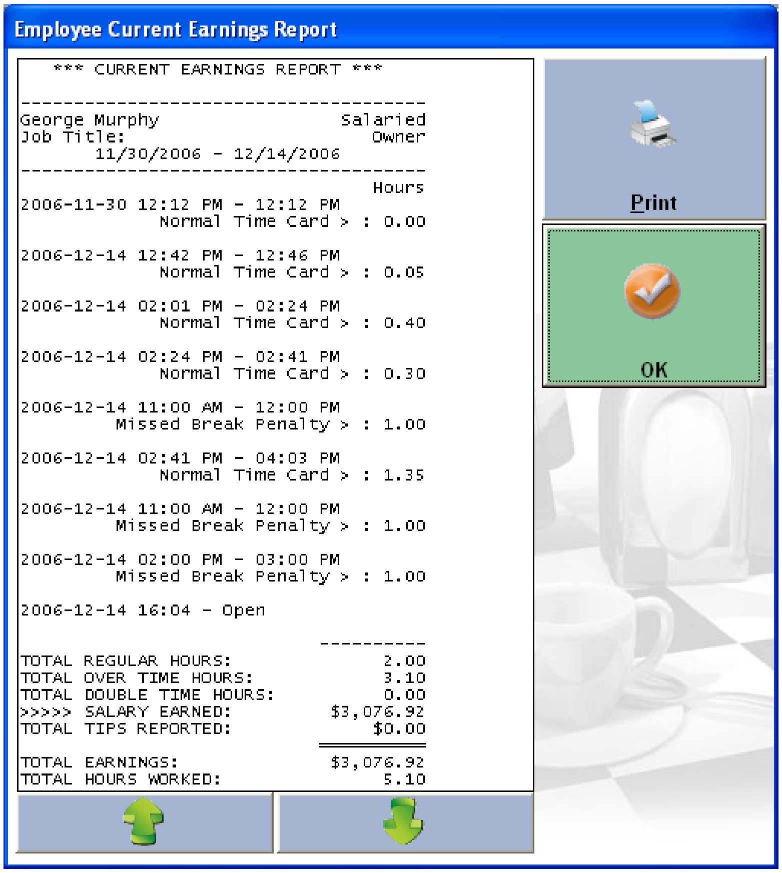


Figure 8-2

Staff Paging

For detailed information on assigning pagers to employees, please see Time Cards – Register a Pager in Chapter 6 of the User Manual.

Starting the Bank

Aldelo® For Restaurants gives the user two options for managing settlement transactions: Cash Drawer or Staff Bank. The Cash Drawer is a traditional cash register drawer connected to the system that opens after entering the transaction. Staff Bank is used when the employee does not have a cash drawer assigned and is taking care of settling his or her own transactions.

Cashier In

In Aldelo® For Restaurants, click the "Cashier In" button in the main POS screen (the employee must already be clocked in for the shift). Enter "3" for the access code (the access code for Joan Brodel, our cashier) and click the "Enter" button. Select Cash Tray 1. The Money Count For Cashier In screen displays. Here you enter the count of each denomination of coin and currency that is in the drawer to start the shift. Enter the starting information from the table below into the Qty column on the left side of the screen. The total should be $200.00 (see Figure 8-3).

Denomination	Quantity
$100.00	-
$50.00	-
$20.00	3
$10.00	4
$5.00	9
$2.00	1
$1.00	25
$0.50	20
$0.25	42
$0.10	50
$0.05	40
$0.01	50

Click the "Finish" button. The next screen asks if the money count is finished. Click the "Yes" button. When prompted to print the money count receipt, select "No." Joan may now enter settlement transactions.

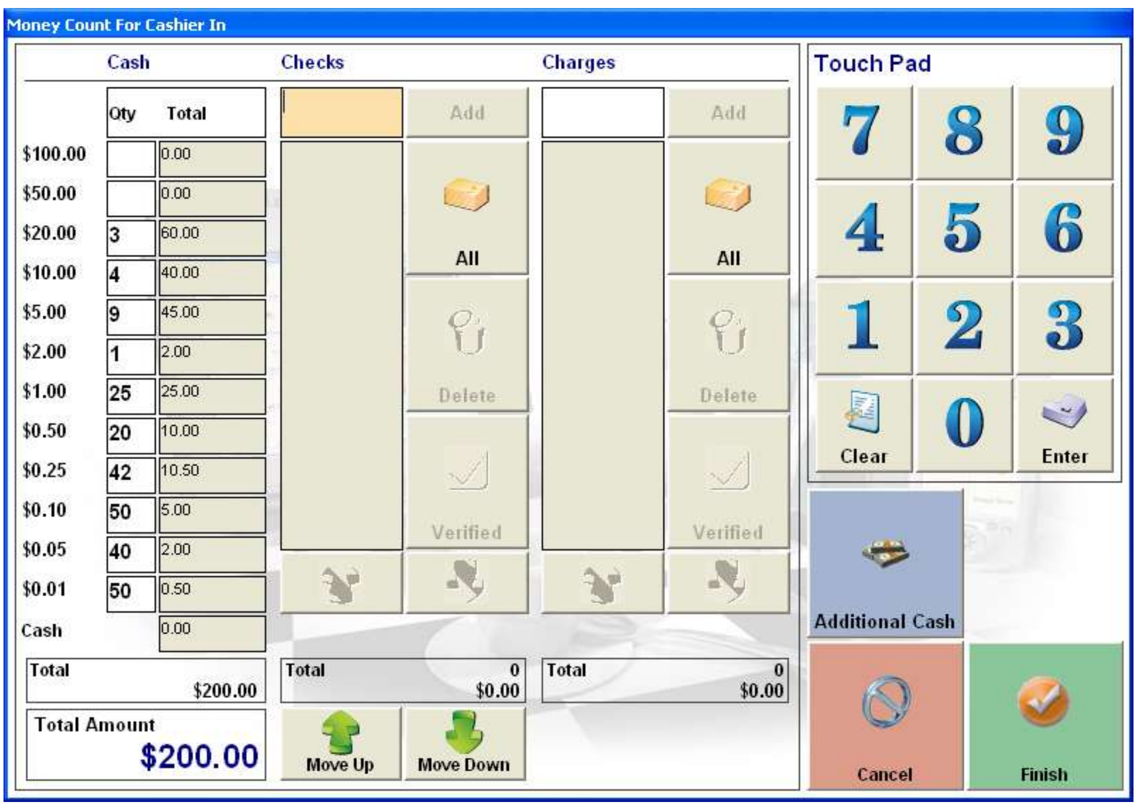


Figure 8-3

STARTING STAFF BANK

In Aldelo® For Restaurants, navigate to **Back Office > Setup > General Settings > Store Settings.** Click on the Revenue tab, and then click on the Cashier tab. Make sure the "Enable Staff Banking" checkbox is checked. If it is not, the Staff Banking button does not display, preventing the use of Staff Banking. Furthermore, any employee that will use Staff Banking must have the "Use Staff Bank" checkbox checked on the Payroll tab of his or her Employee File.

Navigate to **Back Office > Setup > Employee Setup > Employee Files** and select Eleanor Powell fro m the list of employees. Click on the Payroll tab and make sure the "Use Staff Bank" checkbox is checked. Exit back to the main POS screen.

From the main POS screen, click the "Time Card" button. Enter "14" to clock in Eleanor Powell, click the "Stay" button to remain in the Time Card screen after clocking in, and click the "Start Staff Bank" button. The Enter Staff Bank Start Amount window displays (see Figure 8-4). Enter $200.00 for the Staff Bank Start Amount. When asked if the restaurant provided the start amount, click the "Yes" button (employees may also provide the start amount from their own money). Eleanor is now ready to begin work.

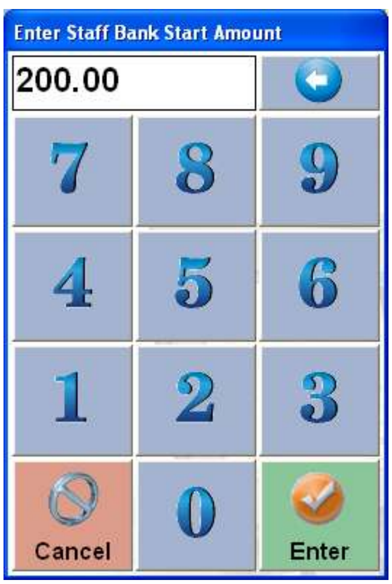


Figure 8-4

Finally, navigate to **Back Office > Setup > Employee Setup > Employee Files** and select Eleanor Powell from the list of employees. Click on the Payroll tab and **uncheck** the "Use Staff Bank" checkbox. Exit back to the main POS screen.

Chapter 9 — Hostess Procedures

Reservations

Any employee who has the Hostess features enabled in his or her employee file may use the Reservations feature. In Aldelo® For Restaurants, navigate to **Back Office > Setup > Employee Setup > Employee Files.** Select Joan Brodel from the Employees list and click on the Payroll tab. Make sure the "Use Hostess Features" checkbox is checked. Click the "Save" and "Done" buttons.

In the main POS screen, click on the "Dine In" button. When prompted for the access code, enter "3" (for Joan Brodel). When the Select Table Number screen displays, click on the "Hostess" button. The Hostess screen displays with the Reservations tab open.

CREATING A RESERVATION

We will create a reservation for a customer who is already entered in the restaurant's database. In order to do this we must first enter our customers into the database. Please see Customer Activities – Maintain Customer Records in Chapter 24 of this manual and enter the customer records from the table below. Please note that when entering customer records manually in this manner, the Delivery Charge and the Delivery Compensation must be entered into the record. These values are **not** pulled automatically from the Postal Code information.

Customer Name	Phone Number	Address	Postal Code	Delivery Charge	Delivery Comp.
Raymond Bulcao	2097777777	1524 Kiernan Ave.	95307	$4.00	$2.50
Donald O'Connor	2097776543	1950 Kansas Ave.	95351	$3.00	$2.00
Charles Bancroft	2098887654	584 Kansas Ave.	95351	$3.00	$2.00
Ethel Keeler	2098248230	1300 K St.	95354	$3.00	$2.00
Daniel Dailey	2094878230	3300 Bonnevier St.	95355	$3.00	$2.00
John Smith	2095551234	3359 Bonnevier St.	95355	$3.00	$2.00
Ted Shively	2099998765	2666 Fiedler Way	95355	$3.00	$2.00
James Newman	2095558230	750 Golden State Bl.	95382	$5.00	$3.00
Paul Gentry	2095554321	1247 Bangs Rd.	95353	$3.00	$2.00
Dave Beck	2095551212	111 Spyres Way	95356	$3.00	$2.00

To create the reservation, click the "New" button. On the Hostess screen, click the "Customer" button. In the Phone Number field, enter 2095558230. This brings up the customer James Newman. If not already displayed, enter the phone number again in the Telephone field. This assures that it will be displayed in the future whenever a reservation is made (this also applies to the rest of the fields in the "Reserved For" section of the screen).

Next, enter two for the number of adult diners and one for the number of child diners. Select "Near Windows" and "Booth Seating" from the next row of buttons (these are optional).

Click the "Enter Reservation Time and Table…" button. To select a date for this reservation, click the date button at the top of the window. We will use the default value for the date. Next, select 08:00 PM from the list of reservation times. Our reservation is for a quarter past eight so click the "08:15 PM" button at the lower left of the screen.

Finally, we select one of the tables from the diagram on the right. The ones that are flashing colors meet the preferences entered on the previous screen; in this case, booth seating near a window (see Figure 9-1). Select table 12 in the upper right corner and the system returns to the Hostess screen, where you can review the information for accuracy. Click the "Done" button to confirm the reservation and return to the Reservations tab of the Hostess screen.

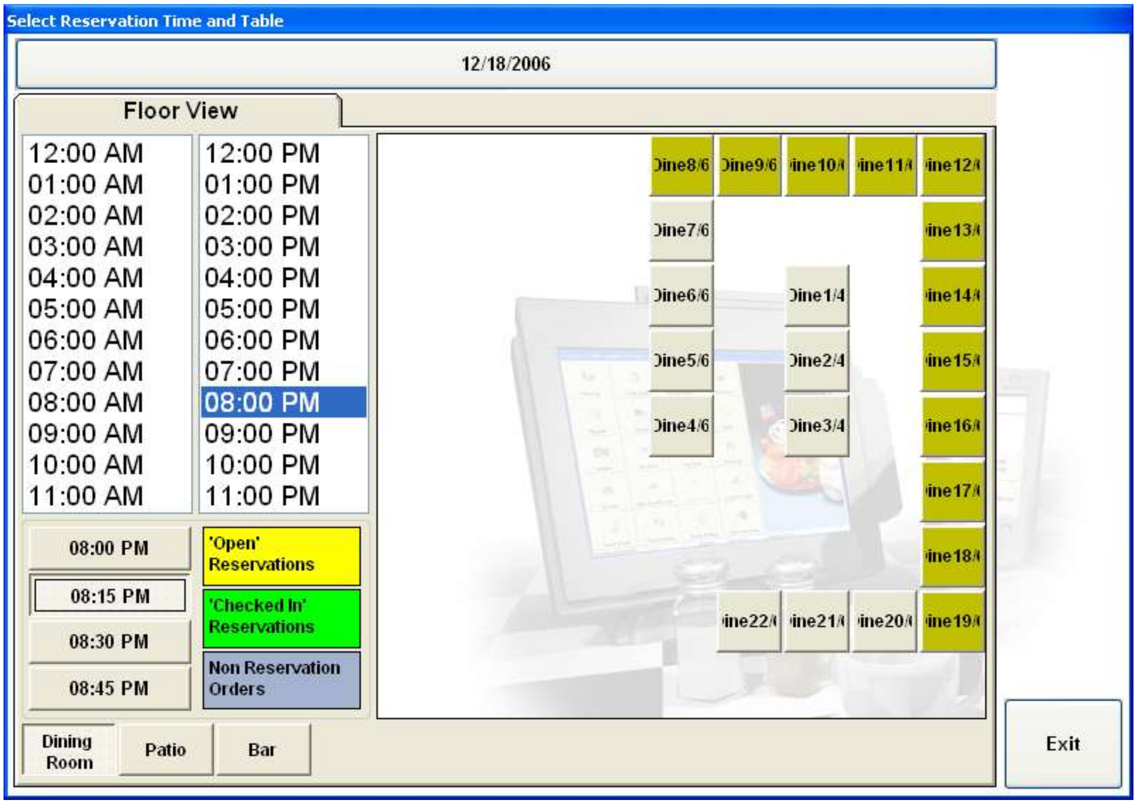


Figure 9-1

Note: A reservation cannot be made for the current date unless the Reservations Minimum Advance Days is set to zero. To change this setting, navigate to Back Office > Setup > General Settings > Store Settings > Services > Dine In and click the "Hostess / Paging Setup" button. Select the Reservations tab and enter "0" in the Minimum Advance Days field.

Changing a Reservation

Should you find a mistake at this point, you may select the reservation from the list and click the "Edit" button. This allows you to make changes as necessary. To finalize the changes, click on the table button again. When finished, click the "Done" button. If the reservation has been marked as Checked In, Walk Out, No Show, or Cancelled, you must make the reservation active again. To do this, select the reservation from the list and click the "Edit" button. Check the "Make Active" checkbox in the lower right of the screen and click the "Done" button (see Figure 9-2). Filter the list by selecting the buttons at the bottom of the screen to show only one category or multiple categories of reservations.

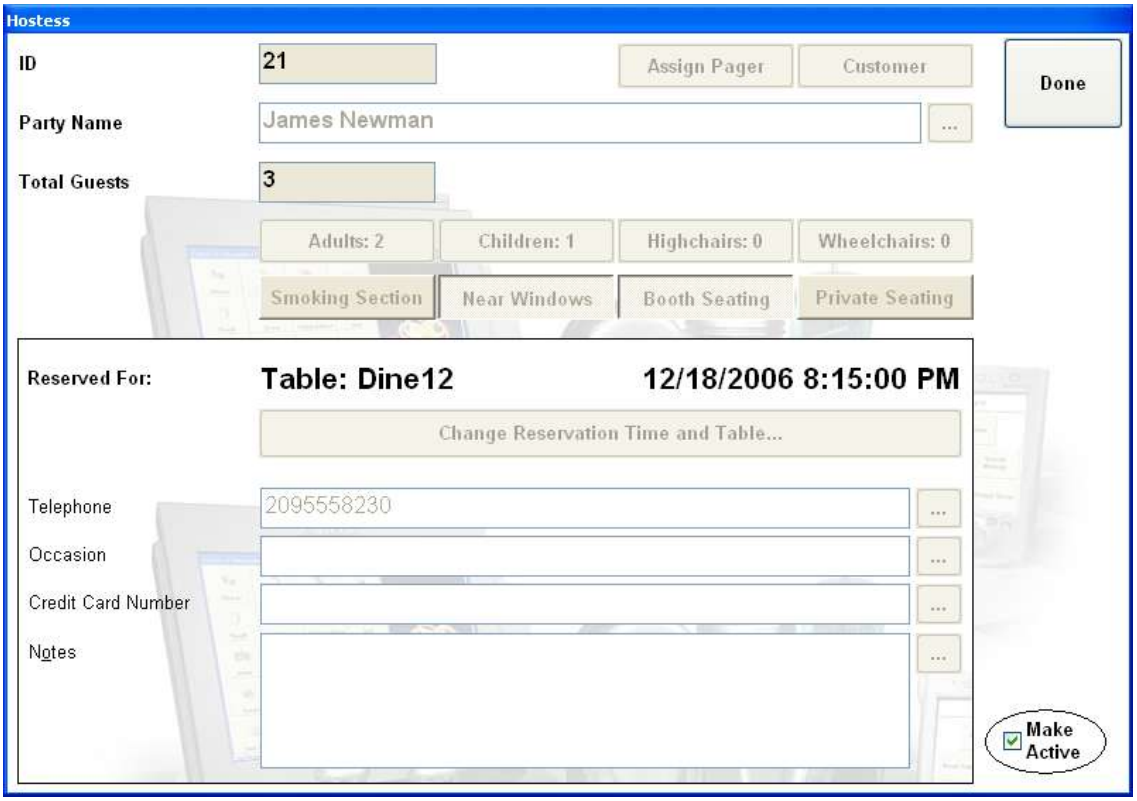


Figure 9-2

CHECKING IN A RESERVATION

When customers arrive, you must check them in. This lets the user know that the customer is here but has not yet been seated because the table is not ready. The check in process is very easy; simply highlight the reservation in the list of open reservations and click the "Check In" button (see Figure 9-3). This moves the reservation from the Open reservation list to the Checked In reservation list.

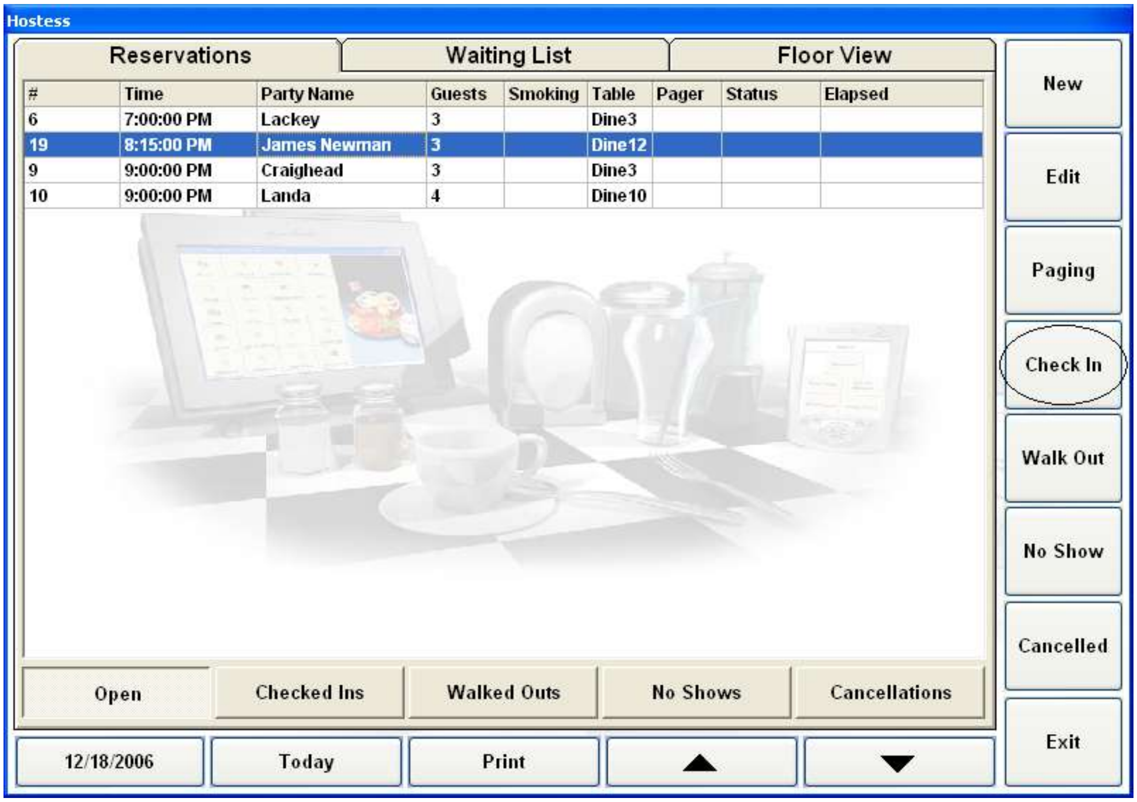


Figure 9-3

Waiting List

To keep track of customers waiting to be seated, the Waiting List feature of Aldelo® For Restaurants may be used. To use this feature, you must navigate to the **Store Settings** > **Services** > **Dine In** > **Hostess / Paging Setup** > **Waiting List** tab and make sure the "Disable Waiting List Feature" checkbox is **not** checked.

ADD A CUSTOMER TO THE WAITING LIST

This procedure is very similar to creating a reservation except that we do not have to select a reservation time or a table, since we are creating a first come / first served list. On the Hostess screen, select the Waiting List tab. Click the "New" button and enter the Party Name (either by clicking on the "Customer" button or entering the name manually). Enter "Gentry" for the Party Name, four adults, one child, and one highchair. The party prefers booth seating. If you are using the Paging system, click the "Assign Pager" button and enter the pager number you are assigning to this customer. (This assumes that the pagers have been setup properly. For detailed information on setting up your pagers, please see Field Name Descriptions – Hostess / Paging Setup in Chapter 26 of the User Manual.) When finished, click the "Done" button (see Figure 9-4). The system returns to the Waiting List window. The rest of the buttons on this screen work identically to those on the Reservations screen.

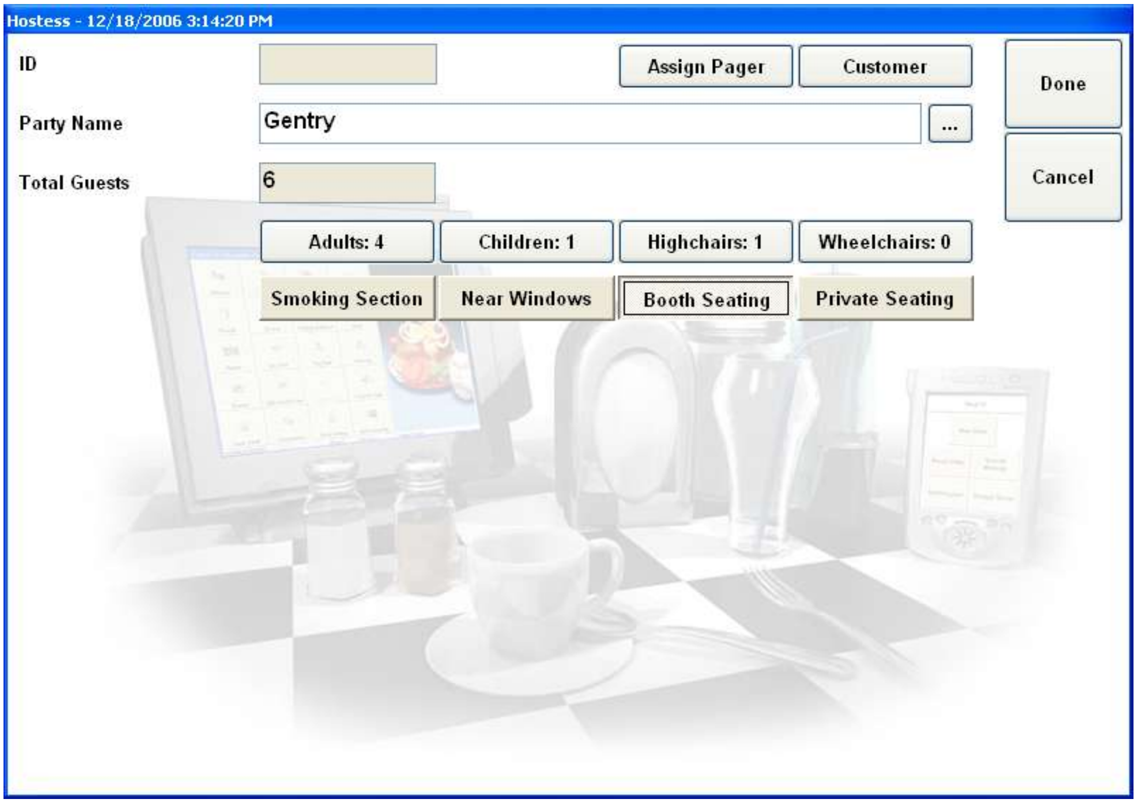


Figure 9-4

CHECK IN THE CUSTOMER

When a table becomes available that meets the customer's needs, the system will recommend that table. The recommendation shows in the "Elapsed" field of the Waiting List screen (next to the elapsed time – see Figure 9-5). If using the Paging system, click the "Paging" button to alert the customer that the table is ready. If not using the Paging system, simply click the "Check In" button to move the customer from the Open to the Checked In list.

Figure 9-5

Assigning a Table

The Hostess may manually assign a table to an employee. To do so, the employee to whom the table is being assigned must be classified as a server in his or her employee file.

From the main POS screen, navigate to **Dine In** > **Assign Table.** The Select Server screen displays (see Figure 9-6). Choose Eleanor Powell and click the “Select” button. When the Select Table Number screen displays, click on table number 22 to assign this table to Eleanor. When prompted for the number of guests at this table, select the default value of six and click the “Enter” button. The table is now assigned to Eleanor Powell.

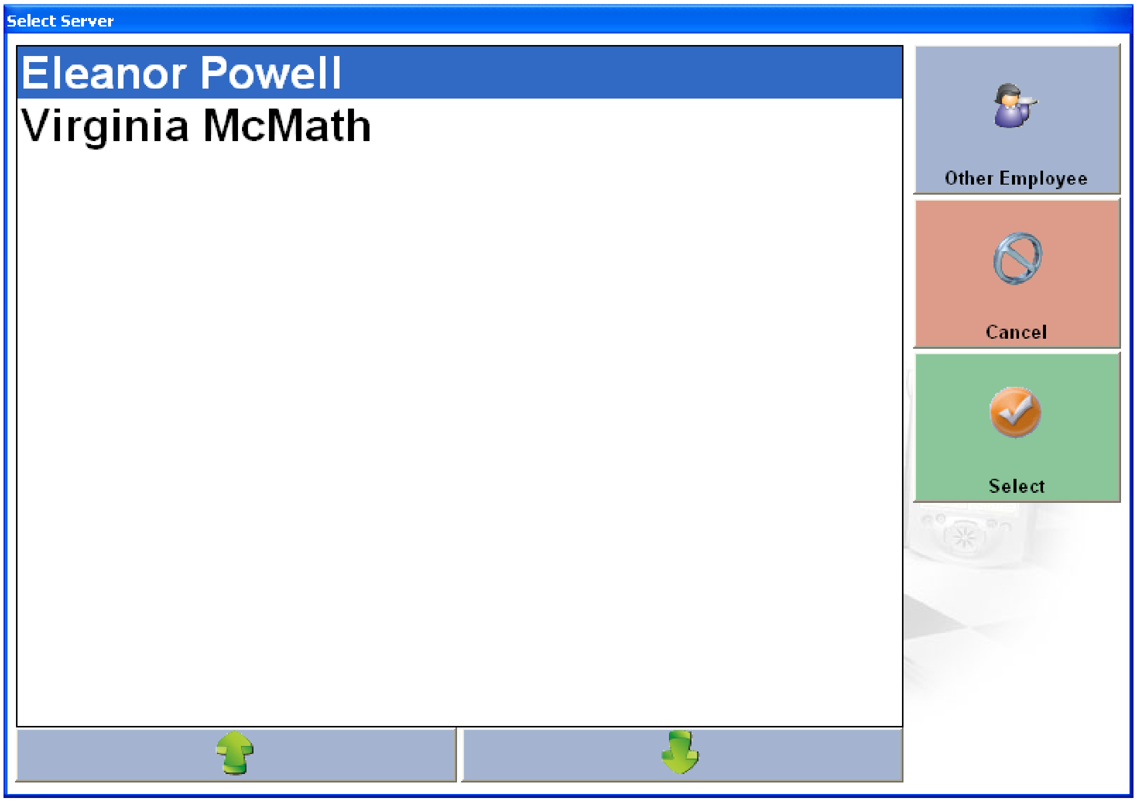

Select Server
Eleanor Powell
Virginia McMath
Other Employee
Cancel
Select

Figure 9-6

Chapter 10 — Dine In Orders

Order Entry

Dine-in orders are always associated with a table. If the term “Dine In” does not fit your restaurant, it may be changed by navigating to **Store Settings > Services > Dine In** and entering your preferred term in the “Alias Name” field. The terms “Take Out,” “Drive Thru,” and “Delivery” may be changed in a similar manner.

CREATING A NEW ORDER

From the main POS screen, click the “Dine In” button and enter 14 when prompted for the access code to assign this order to our server, Eleanor Powell (this assumes she is clocked in). Select the Dining Room table group in the upper right of the window. Click on table number four. When prompted for the number of guests, enter two. The Order Entry screen displays. As you can see, the Menu Groups are located on the left side of the screen. As each menu group is selected, its menu items are displayed in the center area of the screen. Clicking a different menu group displays different menu items.

Take a minute or two to familiarize yourself with this screen (see Figure 10-1). The gray buttons at the top allow the user to make changes to the current order, the blue buttons at the bottom allow the user to take various actions with the order, and the green buttons are used to send the order to the kitchen or settle the order.

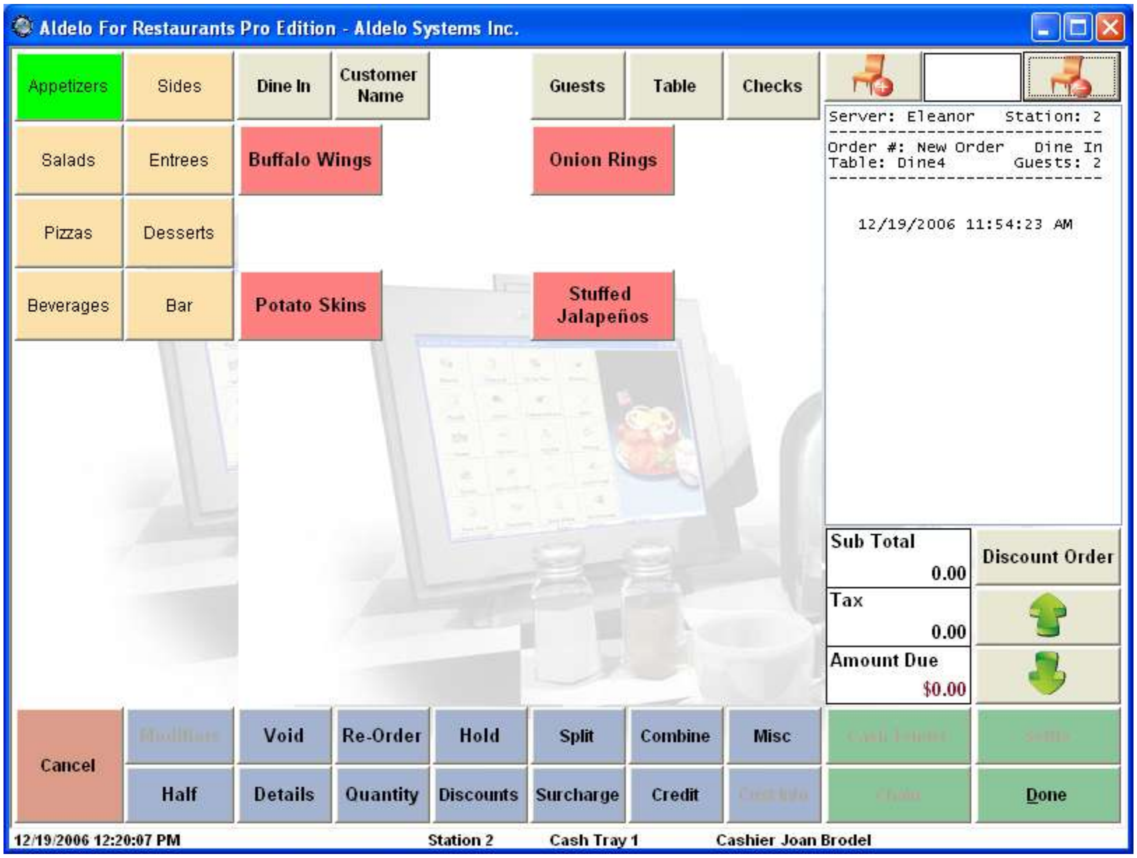


Figure 10-1

ADDING ITEMS TO AN ORDER

To add items to an order, we must first select a Menu Group. From the left side of the screen, select the Appetizers group. The members of the group display in the center of the screen. Click on "Potato Skins." The dish is added to the virtual check at the right of the screen.

Now click on the Entrees group. Select "New York Steak." You are prompted to choose how the customer would like it cooked. Click the "Medium rare" button. On the next screen, you choose the Forced Modifiers that come with the steak dinner. Click on "Baked Pot." Then for the toppings, click the "`Sour Cream" and "`Chives" buttons. At this point, since there is another topping still available, to move to the next screen you must click the "Side 2" button. Choose "Stmd Vegs" for the second side dish and click the "Finish" button.

To prevent the system from sending the items to the kitchen immediately, click the "Misc" button on the order screen and select "No Kitchen / Bar." On the confirm action screen that displays, click "No." The order is held; the next time the order is recalled it will be sent to the printer after the "Done" button is clicked. The action may be repeated as many times as necessary, as long as the above procedure is completed **before** clicking the "Done" button.

If the server believes that he or she may not remember which guest ordered what, seats may be assigned to each dish. Since both guests share the appetizer, no seat assignment is necessary. To assign the New York Steak to Seat 1, click on the "Misc" button at the bottom of the screen. Click the "Assign Seats" button. Select the "New York Steak" button and click on the "Seat 1" button of the table diagram. When finished, click the "Done" button on both screens. On the check, "Seat #: 1" is now listed under New York Steak, signifying that this menu item belongs to the guest sitting in Seat #1.

Now, add the menu items listed in the table below to the guest check.

Menu Group	Menu Item	Force Modifier 1	Forced Modifier 2	Seat Number
Entrees	Maine Lobster	F Fries	Stmd Veg	2
Bar	Bloody Mary	-	-	2
Bar	Screwdriver	-	-	1
Desserts	Vanilla Ice Cream	-	-	1
Desserts	Cheese Cake	-	-	2

Note: If two of the same items are ordered, they may be displayed on a single line of the guest check, making it impossible to assign seats to them unless you order one, assign its seat, order the second, and assign its seat. To display two of the same items on separate lines, navigate to Store Settings > Receipts > Guest Check and select the "Show Ordered Items Individually" checkbox.

VOIDING ITEMS

As items are added to the check, mistakes are occasionally made. These items may be cleared by using the "Void" button. The button is located at the bottom of the Order Entry screen (one of the blue buttons).

Let's change the dessert for guest #1 from ice cream to pie. Click the "Void" button. Select Vanilla Ice Cream from the list on the left side of the screen and click the "Void Line" button. The item is removed from both the list on the left and the check on the right (see Figure 10-2). When finished click the "Done" button. Now, add Apple Pie to the check for guest #1.

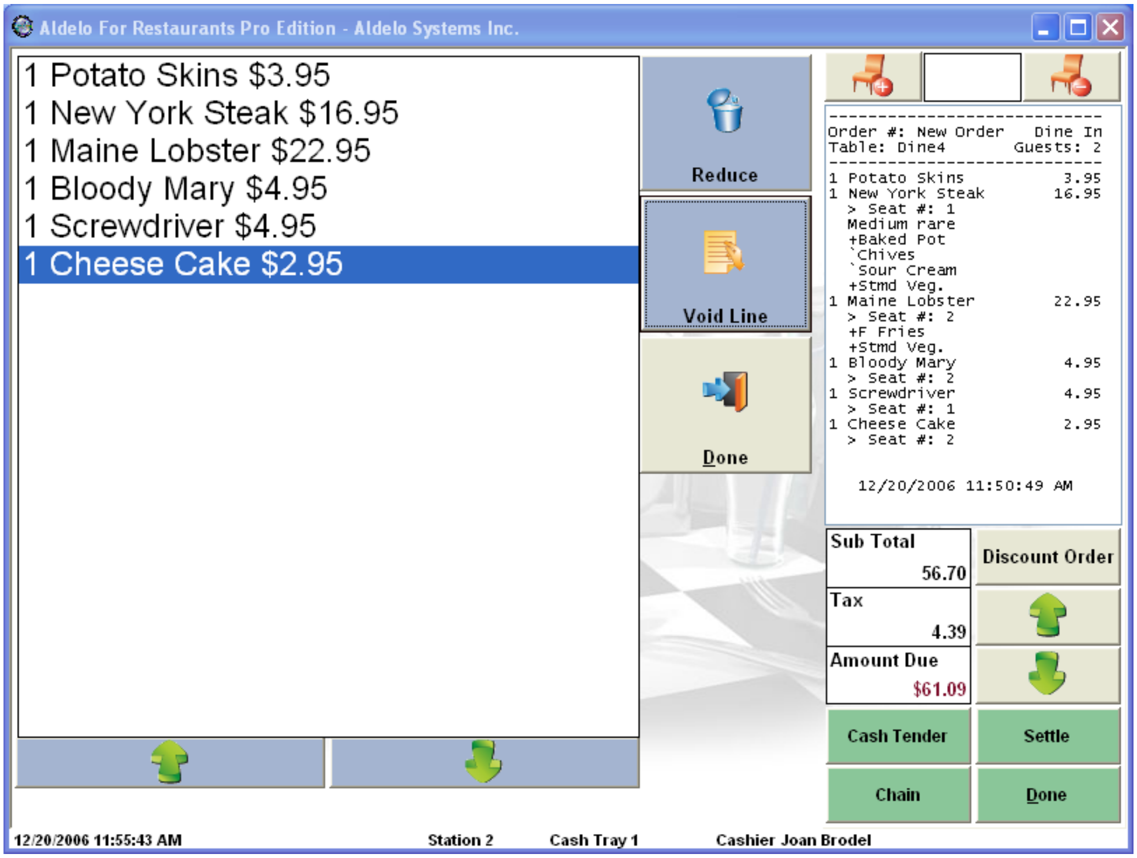


Figure 10-2

An item on a guest check may be voided in this manner **only** if it has not yet been sent to the kitchen. If it has, a certain level of security is required to authorize the void. This may be changed in **Security Settings > Security: Void Order or Items.**

Note: An asterisk (*) preceding the item name on the guest check displayed on the screen does <u>not</u> indicate that the item has been sent to the kitchen; it indicates that the item has been saved to the database.

If more than one of an item has been ordered on the same line, they may be deleted by clicking the "Reduce" button of the Void screen.

Add five orders of Coca-Cola to our check (by clicking the "Coca-Cola" button five times). Now, click on the "Void" button, and select the five Coca-Colas from the item list. Click the "Reduce" button. The quantity reduces to four on both the list and the check. The price also updates to reflect the reduced quantity.

Click the "Reduce" button three more times to reduce the quantity to one. If an item has a quantity of one, the "Reduce" button works identically to the "Void Line" button. The "Void" button removes the entire line from the order, no matter what the quantity. The "Reduce" button diminishes the quantity of an item by one each time it is clicked. Click the "Done" button to return to the Order screen. On the Order screen, click the "Done" button to send the order to the kitchen.

REORDERING ITEMS

If a customer wants to order another of a previously ordered item, using the "Re-Order" button saves the user from having to ask the customer to repeat his or her preferences for that item.

Click the "Dine In" button and enter the access code (14) for Eleanor Powell. Select table one, two for the number of guests, and order the items from the table below.

Menu Group	Menu Item	Force Modifier 1	Forced Modifier 2	Seat Number
Entrees	Pork Chops	F Fries	Stmd Veg	1
Entrees	Roasted Chicken	Mashed Potatoes	French Fries	2

Click the "Re-Order" button. A screen displays that is similar to the seat assignment screen (see Figure 10-3). To order another item with the same modifiers, select it from this screen. Click the "Done" button when finished.

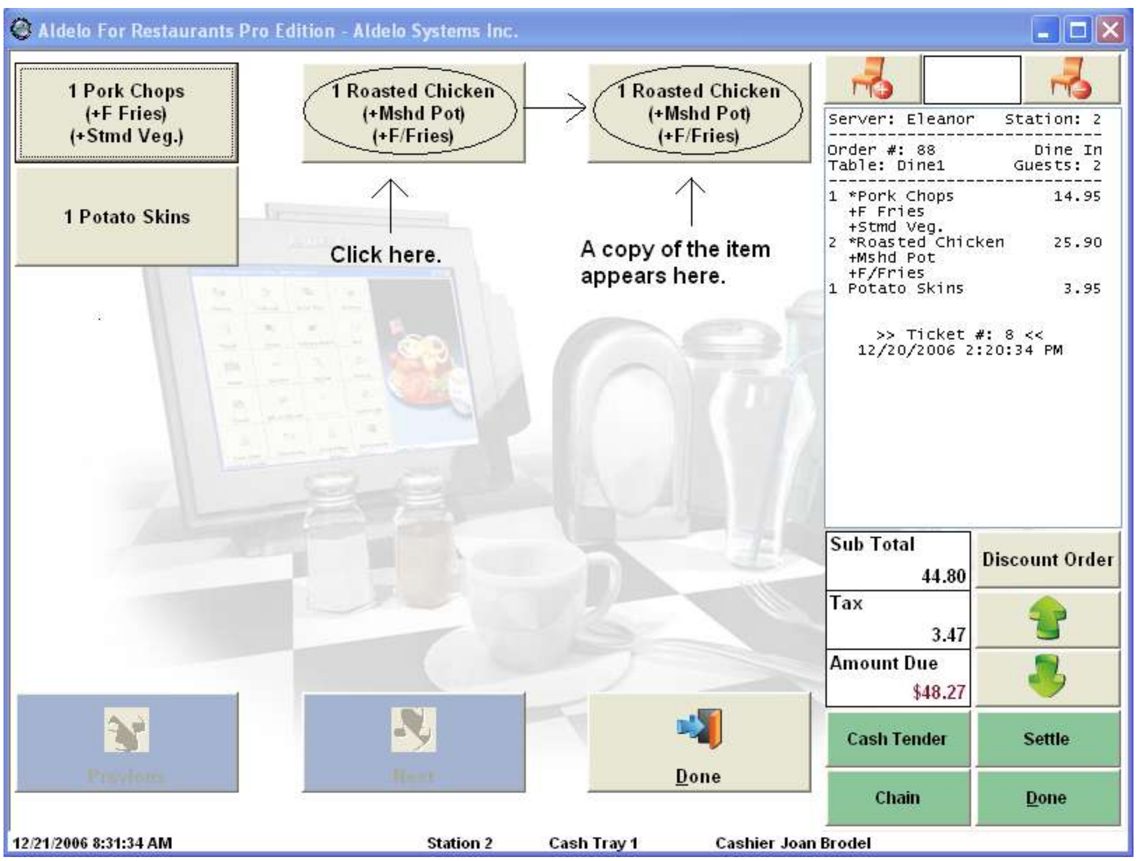


Figure 10-3

HOLDING ITEMS

You may delay sending items to the kitchen by using the Hold feature of Aldelo® For Restaurants. Place an order in the system consisting of the items in the table below.

Menu Group	Menu Item	Guest Number
Appetizers	Onion Rings	-
Salads	Tuna Salad	1
	Pasta Salad	2
Beverages	Diet Coke	1
	Budweiser	2
Bar	Bloody Mary	1
	Scotch	2
Desserts	Vanilla Ice Cream	1 & 2

Now, from the Order Entry screen, click the “Hold” button. A screen displays showing the ordered items on the left and the guest check on the right. Each item on the left has a checkbox next to the description. Place a check mark next to the Vanilla Ice Cream (see Figure 10-4). Click the “Hold Time” button and select the “35 Minutes” button. The Hold Until Time field is populated with the time 35 minutes from the order time. However, we only want to hold the order for 33 minutes. Click the “Down Minute” button twice. The Hold Until Time changes to 33 minutes from the order time. Click the “Accept” button.

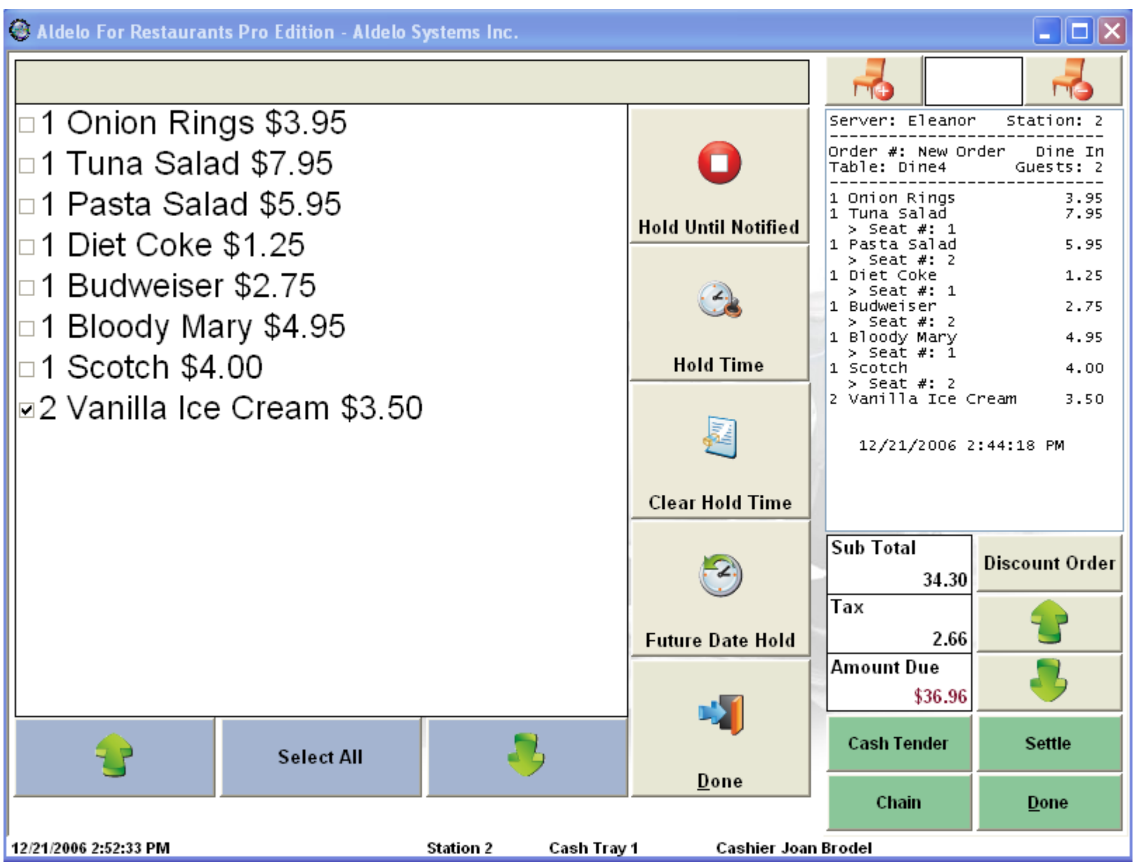


Figure 10-4

There are two other ways to place a hold on an order. The “Hold Until Notified” button allows you to hold the item indefinitely, until you go back into the screen and release the hold. The “Future Date Hold” button adds a button to the screen that, when clicked, displays a Date Picker window. After selecting the date for the item, the rest of the screen is identical to that of the Hold Time screen.

Clicking the “Done” button on the next screen takes you back to the Order Entry screen. Click the “Done” button on the Order Entry screen to send the order to the kitchen. The items placed on hold print a kitchen chit that says, “Hold.” To delay printing the kitchen chit until the hold time has elapsed, navigate to **Store Settings > Print > Kitchen / Bar** and select the “Enable Delayed Send Order Feature” checkbox (recommended).

RELEASING A HOLD

The main way to release a hold on an item is by allowing the hold time to expire. No user action is required. Once released (if the Delayed Send Order Feature is in use), a kitchen chit prints, directing the staff to prepare the item.

An item hold may also be released manually. It is very easy to do. Simply recall the order and navigate to the hold screen. Select the checkbox next to the held item description on the left side of the screen and click the “Clear Hold Time” button. The word “Hold” is removed from both the item list on the left and the guest check on the right. The kitchen chit prints as soon as you click the “Done” button on the Order Entry screen.

SPLITTING AN ORDER

Sometimes customers ask to split the check into separate portions so that each one may pay only for what he or she ordered. If the server is told before placing the order, the “Chain” button may be used. However, if the order is already placed, use the “Split” button.

Re-enter the order we used previously (as seen in the table below).

Menu Group	Menu Item	Guest Number
Appetizers	Onion Rings	-
Salads	Tuna Salad	1
	Pasta Salad	2
Beverages	Diet Coke	1
	Budweiser	2
Bar	Bloody Mary	1
	Scotch	2
Desserts	Vanilla Ice Cream	1 & 2

Click the “Split” button. The Split Order screen displays. Click the “Add” button for each **additional** check you wish to create. Since we have two diners, click the button once. A blank guest check, check two, appears on the screen. Now, on guest check one, click each item to be removed and added to the second check. As each item is clicked, it changes color. After all the items to be removed from check one have been selected, click on guest check two. The selected items move from check one to check two (see Figure 10-5).

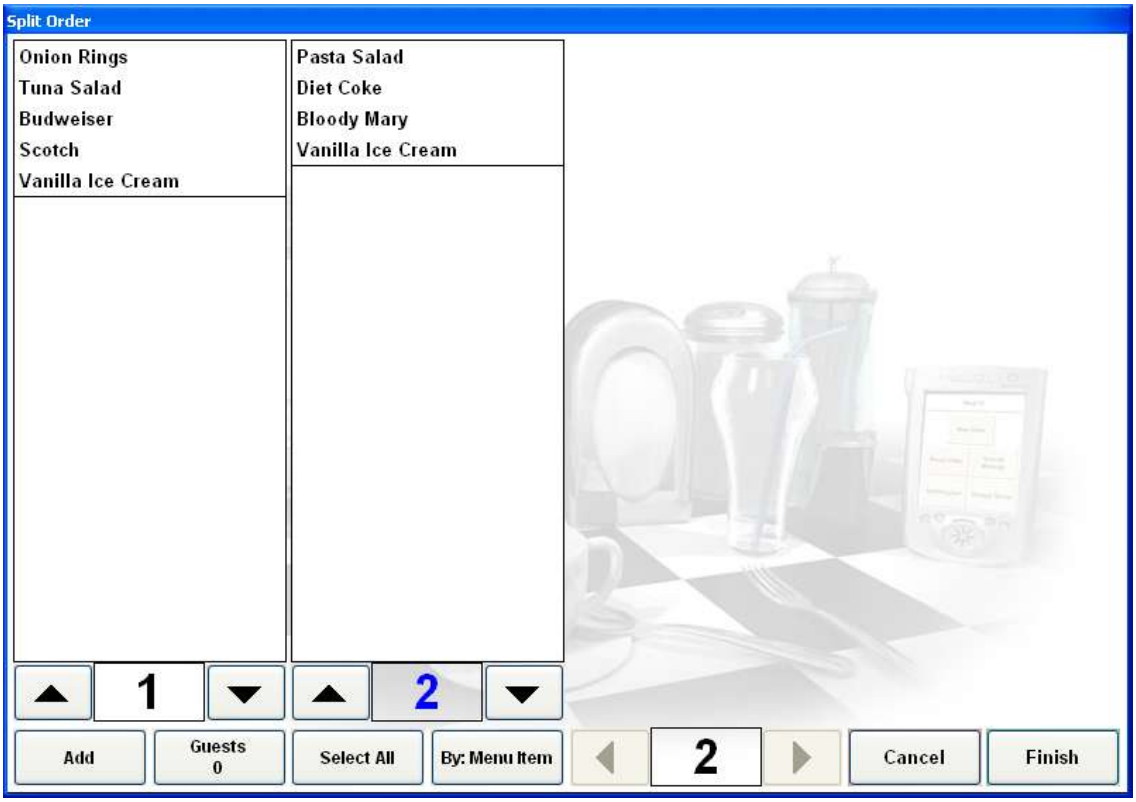


Figure 10-5

If the items in the order are assigned to individual seats, the order may be split another way. Re-enter the order from the table on the previous page. Assign the items to their respective seats. Click on the "Split" button at the bottom of the Order Entry screen. On the Split Order screen, click the "Add" button to display a blank second check. Click the "By: Menu Item" button. If the button does not appear at the bottom of the screen, click the "By: Seat #" button. The caption changes to "By: Menu Item." Click the button again. Now, click any item assigned to seat two. All of the items assigned to seat two are highlighted. Click anywhere on the blank check and those items move from check one to check two.

COMBINING ORDERS

Orders may be combined as well as split. One member of a party may decide to buy for the other, or a couple that had previously asked for separate checks may change their minds. The Combine feature of Aldelo® For Restaurants makes this easy to handle.

Create the three separate orders as listed in the table below, clicking the "Done" button after entering each order.

Order #1	Order #2	Order #3
Potato Skins	Onion Rings	Buffalo Wings
Chicken Salad	Tuna Salad	Pasta Salad
Coca-Cola	Diet Coke	Budweiser

Now, recall the first order. In the Order Entry screen, click the "Combine" button. The other two orders appear as buttons on the screen. Click one of the order buttons, and then click the "Accept" button. When you return to the previous screen, repeat the process, clicking the other order button. Click the "Done" button when finished.

HALF ORDERS

Customers sometimes ask to place a half order of a menu item. Aldelo® For Restaurants makes this easy. Simply click the "Half" button before clicking the button for the menu item (see Figure 10-6). To change a previously ordered item to a half order, void the item, and then follow the procedure above. On a new guest check, enter a half order of Stuffed Jalapenos.

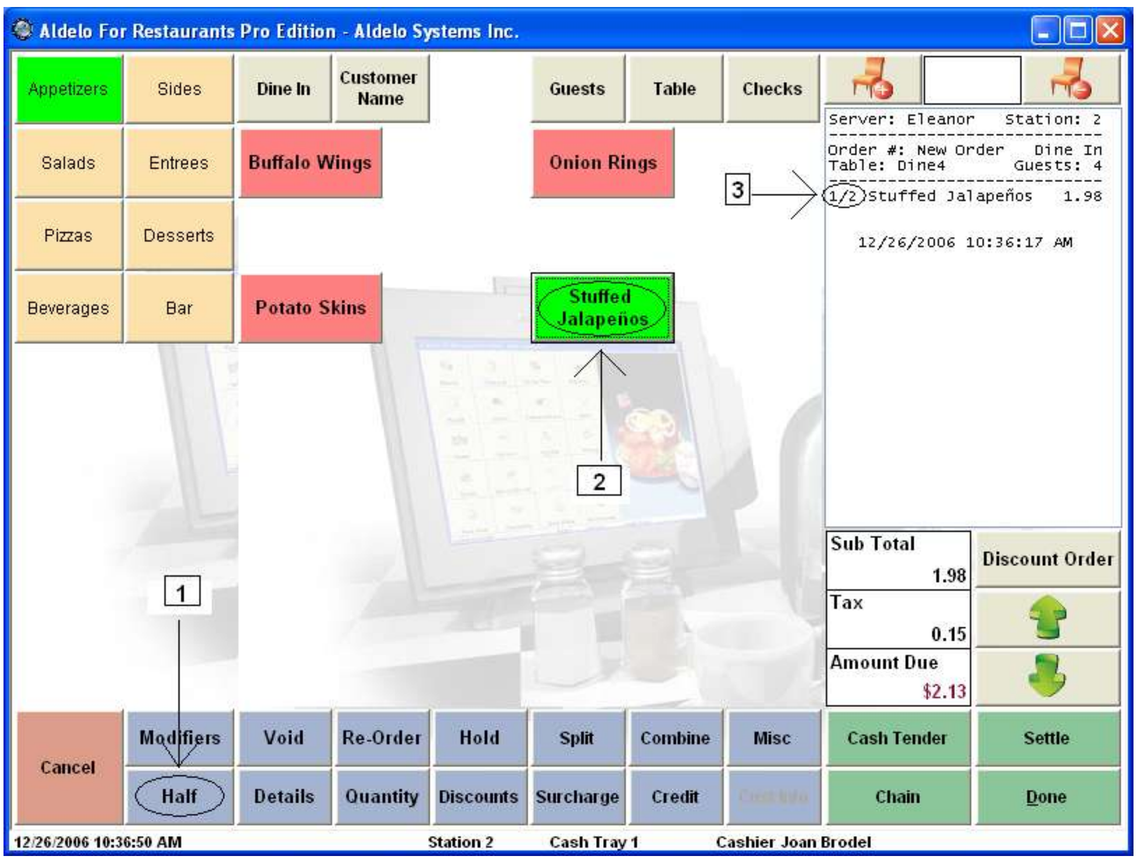


Figure 10-6

ORDERING MULTIPLE QUANTITIES

To place an order for multiple quantities of a single menu item, click the "Quantity" button and enter the number of items desired. Then, select the item from the Order Entry screen.

On the same guest check where we ordered the half order of Stuffed Jalapenos, add eight orders of Chicken Salad. Notice that they all appear on one line of the guest check, even if the setting to show the items individually on the guest check has been selected.

ITEM DETAILS

Select this button before selecting an item from the Order Entry screen to see a description and picture of the item.

Note: This assumes that a description and picture have been setup for the item in the Menu Item Editor. To reach the Menu Item Editor, navigate to Back Office > Setup > Menu Setup > Menu Items. Select a Menu Group, and then select the Menu Item. On the "Page 1" tab, under "Large Picture Name," navigate to the location of the picture file you wish to use for the item (the file must be placed in the Pictures folder of the local machine). On the "Page 2" tab, add your description to the "Menu Item Description" textbox.

DISCOUNTS

Aldelo® For Restaurants allows you to discount individual items or entire orders. Working with the same order (a half order of Stuffed Jalapenos and eight orders of Chicken Salad), in the Order Entry screen, click the "Discounts" button, and then click the "Discount Item" button. Select the button for the eight Chicken Salads. Now click on the "Student Discount -10%" button. The guest check on the right immediately reflects the 10% discount on the Chicken Salads. Click the "Done" button.

Now, click the "Discounts" button again. This time, click the "Discount Order" button and select the "Employee Discount -35%" button. The remainder of the order is discounted 35%. Notice that an individual item that has already been discounted is not eligible for the discount on the entire order. The discount is applied only to the items that have not been discounted individually. Had we not discounted the Chicken Salads, then the entire order would have been discounted by 35%.

Finally, you may discount an order by a certain dollar amount. Click the "Discounts" button again and select the "Cash Discount" button. In the window that appears, enter the discount amount, $5.00, in dollars and cents. Again, the discount is immediately reflected on the guest check on the right side of the screen.

Other than the Cash Discount, all of these discounts must be programmed into the system prior to use. To enter discounts, navigate to **Back Office > Setup > General Settings > Discounts.** For more information, see General Settings – Discounts in Chapter 7 of this training manual.

SURCHARGES

Surcharges may be required for various reasons. Just like Discounts, these must be programmed into the system prior to use.

Recall the order that we discounted in the previous section. From the Order Entry screen, click the "Surcharge" button. Select the "Party of 8 or More" button. The surcharge is immediately reflected on the guest check (see Figure 10-7) and the system reverts to the Order Entry screen. Only one surcharge may be added to an order.

To remove a surcharge, follow the same procedure, but select the "Yes" button when prompted to remove surcharge.

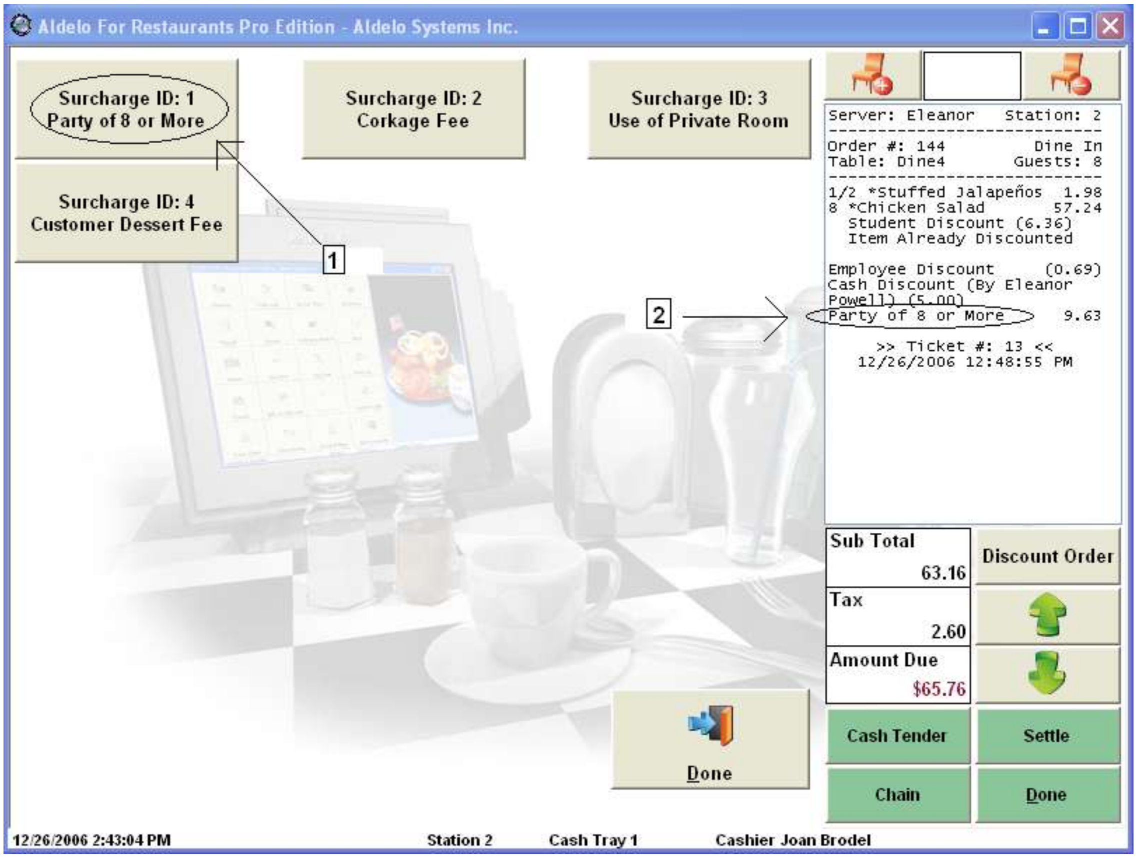

Aldelo For Restaurants Pro Edition - Aldelo Systems Inc.
Surcharge ID: 1 Party of 8 or More
Surcharge ID: 2 Corkage Fee
Surcharge ID: 3 Use of Private Room
Surcharge ID: 4 Customer Dessert Fee
1
2
Server: Eleanor Station: 2
Order #: 144 Dine In
Table: Dine4 Guests: 8
1/2 *Stuffed Jalapeños 1.98
8 *Chicken Salad 57.24
Student Discount (6.36)
Item Already Discounted
Employee Discount (0.69)
Cash Discount (By Eleanor Powell) (5.00)
Party of 8 or More 9.63
>> Ticket #: 13 <<
12/26/2006 12:48:55 PM
Sub Total 63.16
Tax 2.60
Amount Due $65.76
Discount Order
Done
Cash Tender
Settle
Chain
Done
12/26/2006 2:43:04 PM
Station 2
Cash Tray 1
Cashier Joan Brodel

Figure 10-7

APPLYING CREDITS

In Aldelo® For Restaurants, a credit can be generated in one of two ways; it can be issued manually from the main POS screen, or it can be earned by participating in the Frequent Diner Program.

A credit must be created for a customer before it can be applied to the customer's check. In the main POS screen, click on the "Credit" button. Enter the phone number for the customer, 2095558230. If it is not found in the database, you are prompted to create a new customer. Select "Yes" and enter the requested information on the Customer Credit screen (see Figure 10-8; the Limitations field and the Expire Date field are optional). When finished, click the "Done" button.

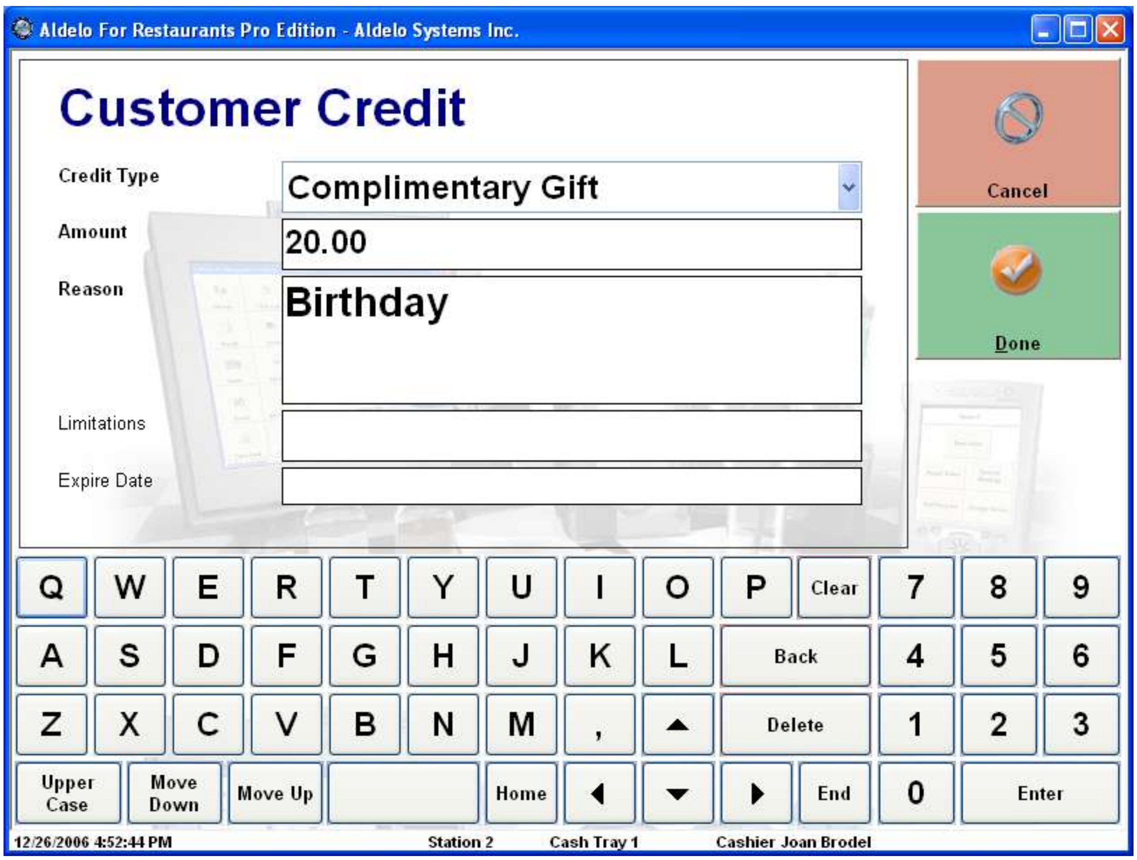


Figure 10-8

Recall the order we created previously and navigate to the Order Entry screen. Click on the "Credit" button. We are using the phone number for our search method, so click on the "Phone" button (you may also search by Account Code, Customer Name, or MSR Card). In the Enter Customer Phone Number window, enter the customer's phone number, 2095558230, and click the "Enter" button. Select the button for the $20.00 credit we created previously. The credit is reflected immediately on the guest check and the system returns to the Order Entry screen. Clicking the "Done" button on the Order Entry screen saves the changes to the database.

CHANGING THE ORDER TYPE

From the Order Entry screen, click the "Dine In" button (located along the top of the screen). A screen displays that allows you to choose another type of order (see Figure 10-9). Click the "Take Out" button to change this order to a Take Out order and return to the Order Entry screen. If no changes are made, click the "Done" button to return to the Order Entry screen.

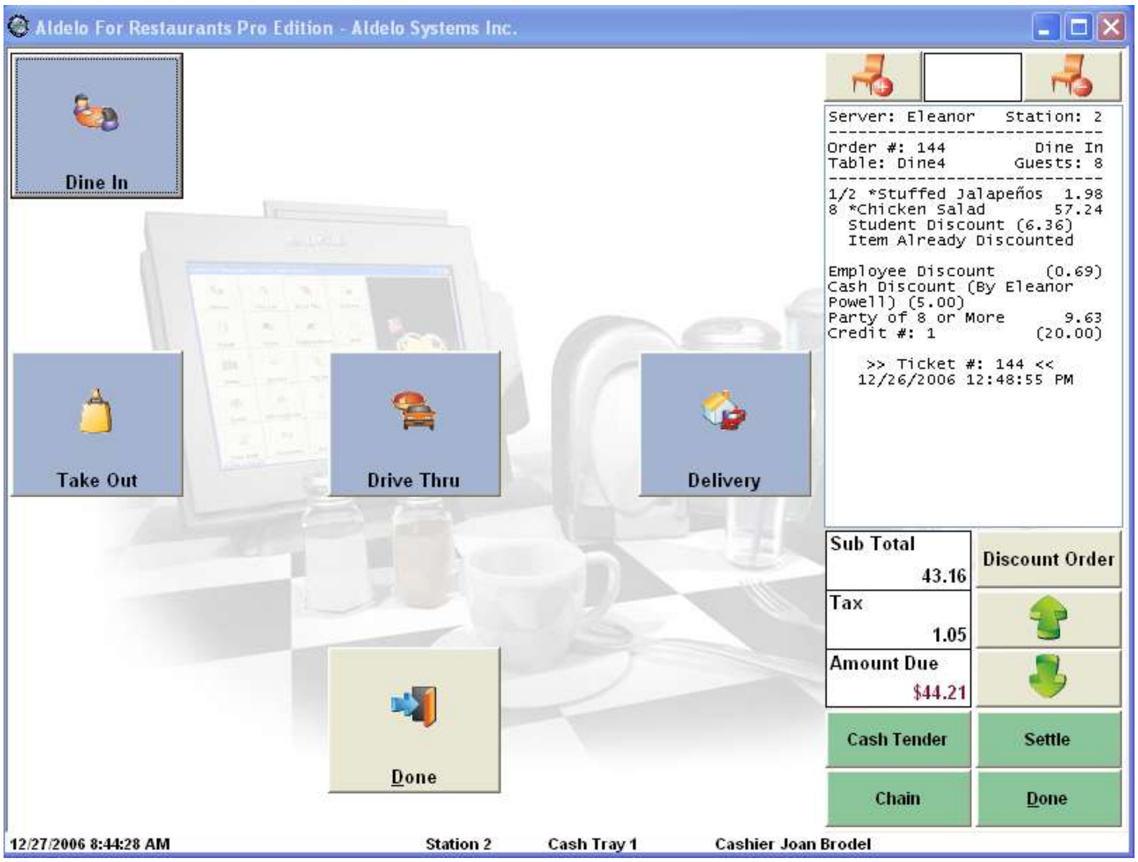


Figure 10-9

ADDING A CUSTOMER NAME TO AN ORDER

Adding a customer name to an order is very simple. From the Order Entry screen, click the "Customer Name" button. Enter the customer's name, either by using your keyboard or by using the virtual keyboard that appears on the screen. Enter the name "James Newman" and click the "Finish" button. The name is added to the customer name field of the guest check on the right side of the screen. Click the "Done" button to save the information to the database.

CHANGING THE NUMBER OF GUESTS ON THE CHECK

From the Order Entry screen, click on the "Guests" button. Select "6" and click the "Enter" button. The number of guests is updated on the guest check. Click the "Done" button to save the change to the database.

CHANGING THE TABLE NUMBER OF THE CHECK

Occasionally, customers may ask to move to another table. To change the table number+ on the check, click the "Table" button at the top of the Order Entry screen. From the Select Table Number screen, choose table 18, a vacant table. Click the "Done" button to save the change to the database.

RECALLING ANOTHER CHECK ON THE SAME TABLE

The "Checks" button allows you to toggle between multiple checks on the same table. Create two new guest checks with the information from the following table, clicking the "Done" button after entering each order.

Check #	Table #	# of Guests	Menu Item	Beverage
Check #1	4	1	Small Chicago Style Cheese Pizza	Coca-Cola
Check #2	4	1	Small Pepperoni Stuffed Crust Pizza	Diet Coke

Recall the first order. Now, click the "Checks" button on the Order Entry screen. Both checks display, allowing you to select the check to work with (see Figure 10-10).

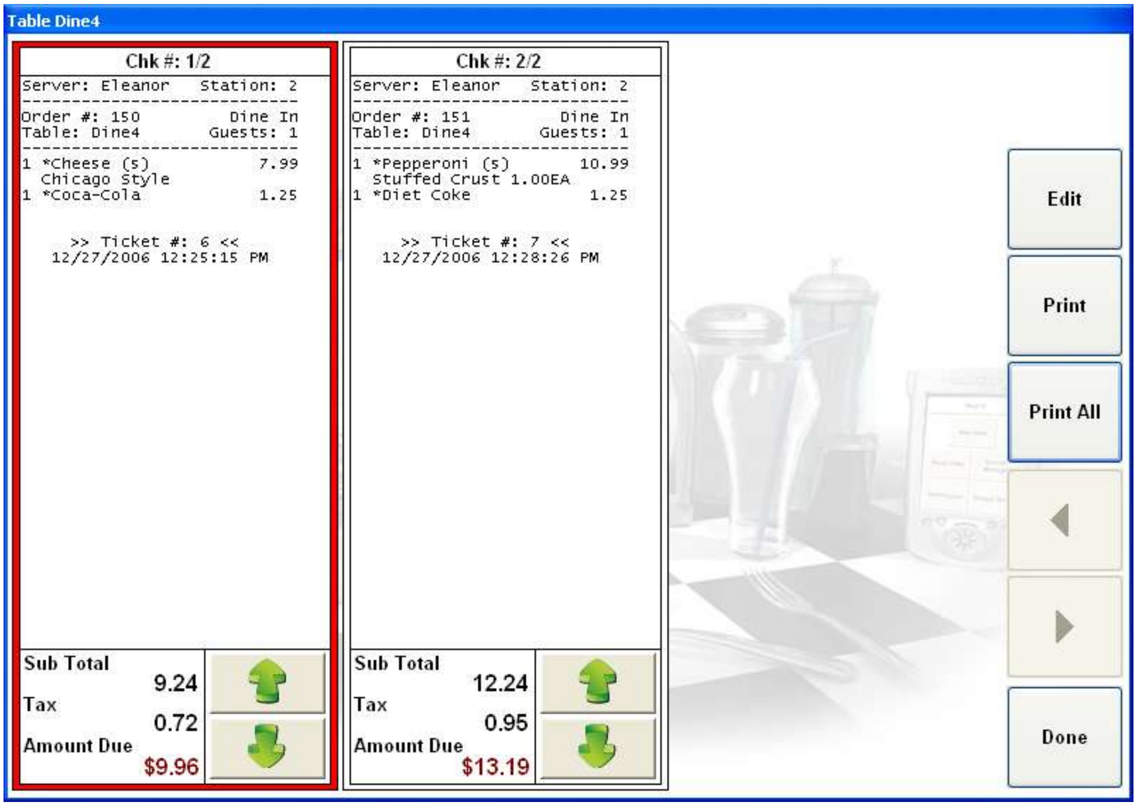


Figure 10-10

MISC Button

On the Order Entry screen of Aldelo® For Restaurants, the “Misc” button is used to navigate to the options that are used less frequently.

Create a new order with the information from the table below.

Server Access Code	Table #	# of Guests	Guest #	Seat #	Menu Items
14	5	2	1	1	Chicken Salad
			1	1	Heineken
			2	2	Pasta Salad
			2	2	Budweiser

CHANGE PRICE

Click the “Misc” button, and then click the “Change Price” button. Select the “Chicken Salad” button. If the user’s Security Level is insufficient to allow access to the Price Change feature, a Manager Login window appears, requiring someone with high enough Security to approve the transaction. A window then appears, prompting you to enter a new price for the menu item.

Enter $6.95 for the new price and click the "Enter" button. The system returns to the menu item selection screen, allowing you to select another item for a price change. Click the "Done" button to return to the Order Entry screen.

ASSIGN SEATS

This button is used to assign ordered menu items to the various seats at the table. The feature is only available for Dine In type orders.

Click on the "Misc" button, and then the "Assign Seats" button. We will reverse the seats previously selected for the ordered menu items. Select the "Chicken Salad" button. Click on the "Seat 2" button. Notice that the seat number changes on the guest check. Continue on this screen, reversing the seat assignments for the rest of the items. When finished the guest check should look like the one shown in Figure 10-11.

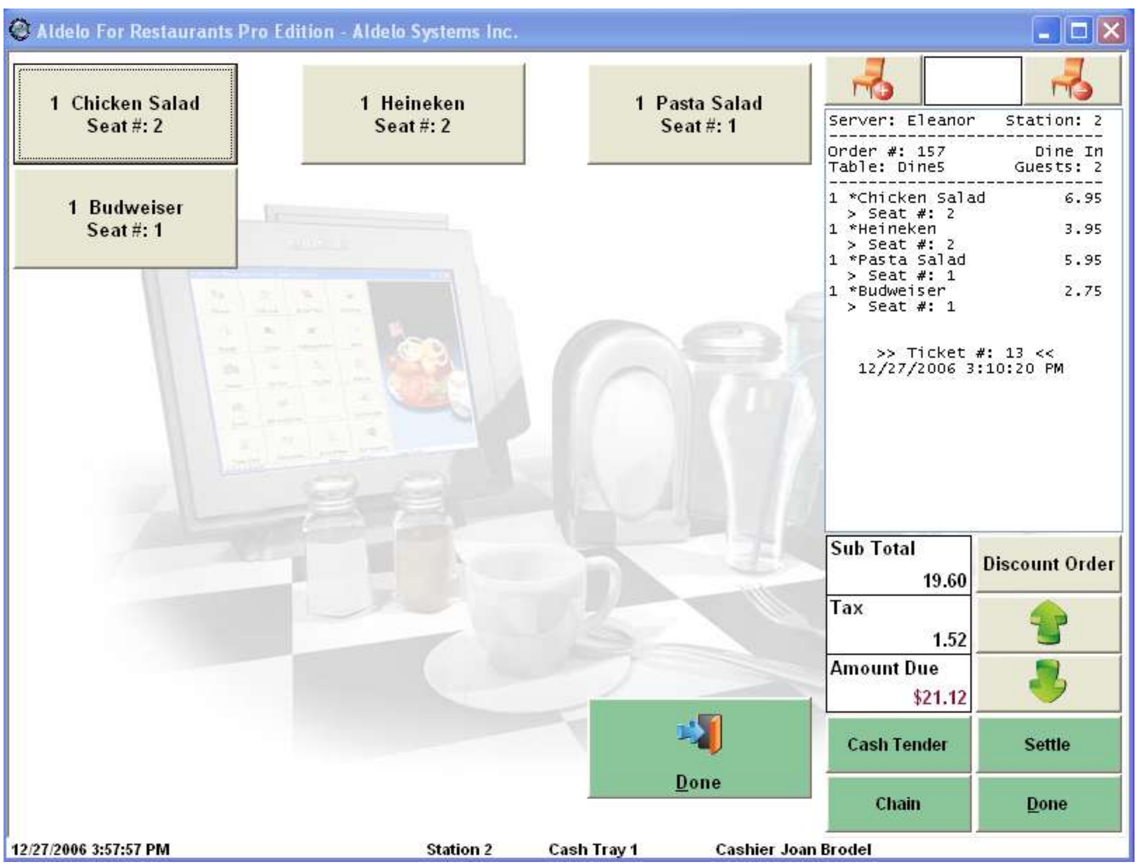


Figure 10-11

CLEAR ORDER

The Clear Order feature of Aldelo® For Restaurants allows you to remove all of the unsent menu items from the guest check.

From the Order Entry screen, click the "Misc" button, and then the "Clear Order" button (if all of the items on the check have been sent to the kitchen, the button does not appear on the screen). A window pops up, asking if you want to clear the unsent items. Select "Yes" and any unsent items are removed from the guest check. Select "No" to return to the previous screen.

NO SALE

Sometimes the cash drawer must be opened when a sale has not been made. You may have given the customer the wrong change, a customer may request change for a dollar, you may perform a payout, etc. In these cases, a No Sale is performed.

From the Order Entry screen, click on the "Misc" button, then the "No Sale" button. Depending on how your security is setup, you may be prompted for the reason for the No Sale. Type the explanation into the field, using either the hardware keyboard or the onscreen keyboard. If your security level is insufficient to perform a No Sale, a manager's approval is necessary. When all requirements are met, the cash drawer opens and the screen displays "No Sale," along with the name of the employee whose security code was entered (see Figure 10-12). Complete the transaction and close the cash drawer.

This feature works identically to the "No Sale" button on the main POS screen.

Figure 10-12

CHANGE SERVER

Enter a new order into the system with Eleanor Powell as the server (access code 14). To change the server assigned to an order, select the "Misc" button and click on the "Change

Server" button. The Enter New Server Access Code window displays. Using the onscreen keypad, enter access code "10" and click the "Enter" button. The server name changes to Virginia immediately on the guest check.

GRATUITY

The Gratuity feature of Aldelo® For Restaurants allows the server to add the customer's tip to the guest check.

Enter the order from the table below into the system.

Server Access Code	Table #	# of Guests	Guest #	Seat #	Menu Items
14	7	2	(Both)	-	Onion Rings
			1	1	New York Steak
			1	1	Bloody Mary
			1	1	Apple Pie
			2	2	Chees Pizza - New York Style
			2	2	Screwdriver
			2	2	Cheese Cake

From the Order Entry screen, select the "Misc" button, and then the "Gratuity" button. Click the "Percent" button. In the Enter Gratuity Percent window that appears, enter "15." Fifteen percent, calculated on the prior Sub Total, is added to the guest check, identified as 15% Gratuity.

Click the "Gratuity" button again and select the "Amount" button. Enter five dollars. Five dollars is added to the guest check, identified as Cash Gratuity. As you can see, multiple gratuities may be added to a guest check.

Finally, click the "Gratuity" button again and select the "Difference" button. In the Total Tendered window, enter $65.00. The difference between the $65.00 entered and the previous Amount Due ($59.85), is added to the guest check. Since we already had a cash gratuity on the guest check of $5.00, $5.15 is added to it, for a total of $10.15. Now click the "Clear" button. All of the gratuities added to the guest check are removed.

CUST. LOOKUP

The Cust. Lookup feature of Aldelo® For Restaurants allows the user to search the database for a customer record by any of several methods.

From the Order Entry screen, click on the "Misc" button and select "Cust. Lookup." Click the "Phone" button. Enter 2095558230 in the Enter Customer Phone Number window. The customer James Newman appears in the window on the left of the screen. Click the "Done" button and the customer's information is displayed on the guest check.

The search may also be performed in a similar manner by Customer Name, Delivery Address, or Account Code (see Figure 10-13). To perform the search by MSR Card, click the "MSR Card" button and swipe the card through the reader.

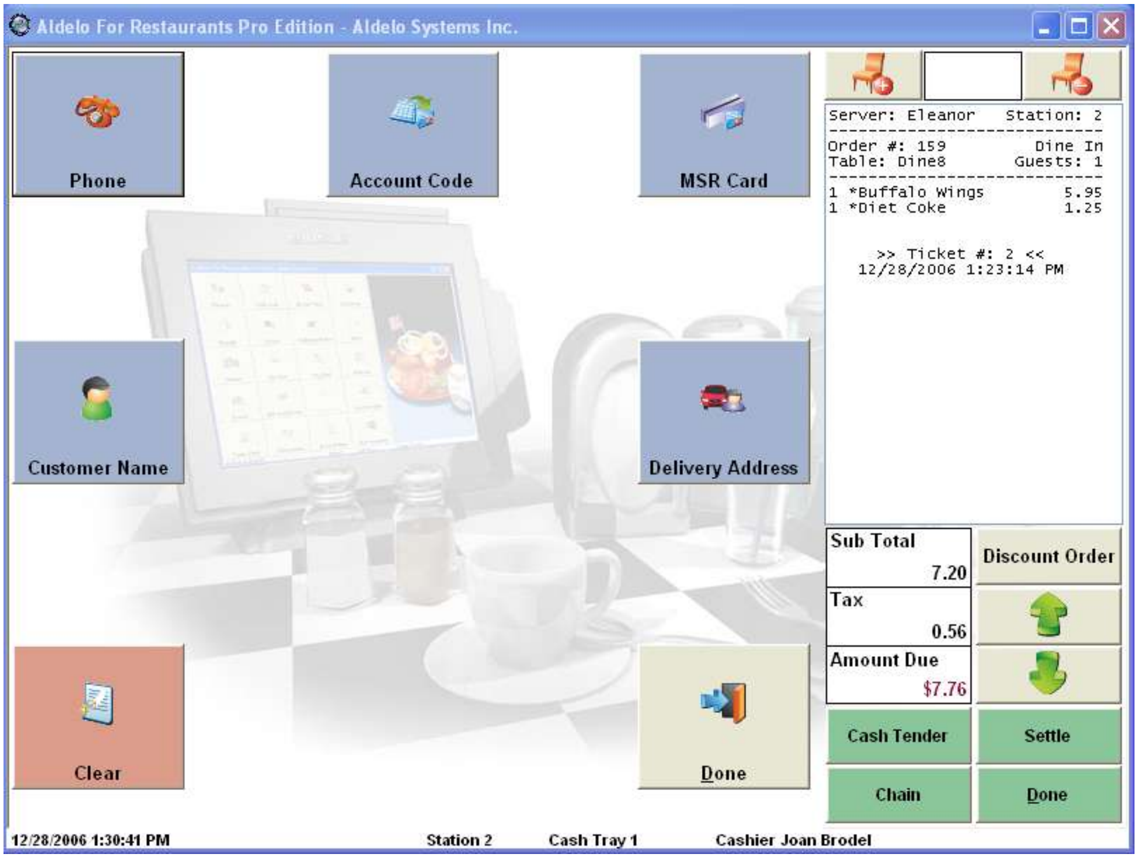


Figure 10-13

RECALL ORDER

The "Recall Order" button under the "Misc" button of the Order Entry screen works identically to the "Recall" button on the main POS screen.

Click the "Recall Order" button. A list of open orders displays on the left side of the screen, allowing the user to choose one to work with.

CREATE LABELS

If your system has a dedicated label printer that can print adhesive labels, you can use the Weighted Menu Item Label Generator feature of Aldelo® For Restaurants.

From the main POS screen, navigate to **Back Office** > **Setup** > **Menu Setup** > **Menu Items.** From Menu Groups, select "Appetizers" and click the "Buffalo Wings" button. On the "Page 1" tab, select the "Order Item By Weight" checkbox. Click the "Save" and "Done" buttons. Exit back to the main POS screen.

Enter the following order into the system.

Server Access Code	Table #	# of Guests	Menu Items
14	9	1	Buffalo Wings

Since we are now ordering this item by weight, after clicking the "Buffalo Wings" button you are prompted to enter the weight quantity of the item. Enter "50." The decimal point is placed automatically, so 50 translates into 0.50 units. Buffalo wings are $5.95 per unit, so 0.50 unit sells for $2.98.

Now, from the Order Entry screen, navigate to **Misc > Create Labels.** Using the onscreen keypad, enter the weight ("50") again. The virtual label in the upper left side of the screen displays the description, unit price, weight, and total price. If desired, the unit of measure and the product expiration date may be entered by clicking on the two buttons displaying the keyboard icons (see Figure 10-14). Clicking the "Print" button sends the information to the label printer. Click "Done" when finished.

Return to Buffalo Wings in the Menu Item Editor and remove the checkmark from the "Order Item By Weight" field.

Figure 10-14

Retail Screen

Use the Retail screen to scan items that have a barcode. From the Order Entry screen, click the “Misc” button, and then the “Retail Screen” button. Barcodes may be entered manually by clicking the “Manual Entry” button. Use the onscreen keypad to enter multiple quantities of an item. Prices may be entered manually, changed, or looked up by clicking the respective buttons. Orders may be split, discounted, surcharged, or settled from this screen. To return to the Order Entry screen, click the “Touch Screen” button.

Tax Exempt

Recall the order we created under Create Labels on the previous page. To exempt an order from tax, click the “Tax Exempt” button on the Misc screen. Select “Yes” when asked, “Make current order tax exempt?” The tax is removed from the guest check and “Tax Exempt Sale” displays below the last item. To remove the tax exemption, repeat the procedure, clicking “Yes” when asked, “Remove tax exempt status for this order?”

No Kitchen / Bar

The No Kitchen / Bar feature allows the user to place a hold on sending the ordered items to the kitchen and bar. Recall the order from the previous section. Add an order of Potato Skins to the guest check. From the Order Entry screen, navigate to **Misc > No Kitchen / Bar.** When asked, “Send items to kitchen/bar?” select “No.” The system returns to the Order Entry screen. Now, clicking the “Done” button does **not** send the order to the kitchen printer. When the order is recalled again, clicking the “Done” button sends the order to the kitchen immediately. To hold the order again, the procedure must be repeated. Only items that have not yet been sent to the kitchen are affected. If all items on the guest check have been sent to the kitchen, this button has no affect.

To Secondary Language

Clicking this button changes the display of the menu item text to the secondary language. A secondary language name must have been setup previously in the Menu Item Editor.

From the main POS screen, navigate to **Back Office > Setup > Menu Setup > Menu Items.** Select Appetizers from the Menu Groups list and click on the “Stuffed Jalapeños” button. In the Secondary Language Name field, enter “Jalapeños Rellenos.” Click the “Save” and “Done” buttons. Return to the main POS screen. Enter the following order into the system to display the Order Entry screen.

Server Access Code	Table #	# of Guests
14	10	1

Click the “Misc” button, and then the “To Secondary Language” button. The system returns to the Order Entry screen. Notice that the “Stuffed Jalapeños” button text has been replaced with

"Jalapeños Rellenos." Click the "Jalapeños Rellenos" button. The guest check still shows the ordered item in English (see Figure 10-15). It is unaffected by the use of this feature. Only the button text changes.

Repeat the procedure to change the button text back to English.

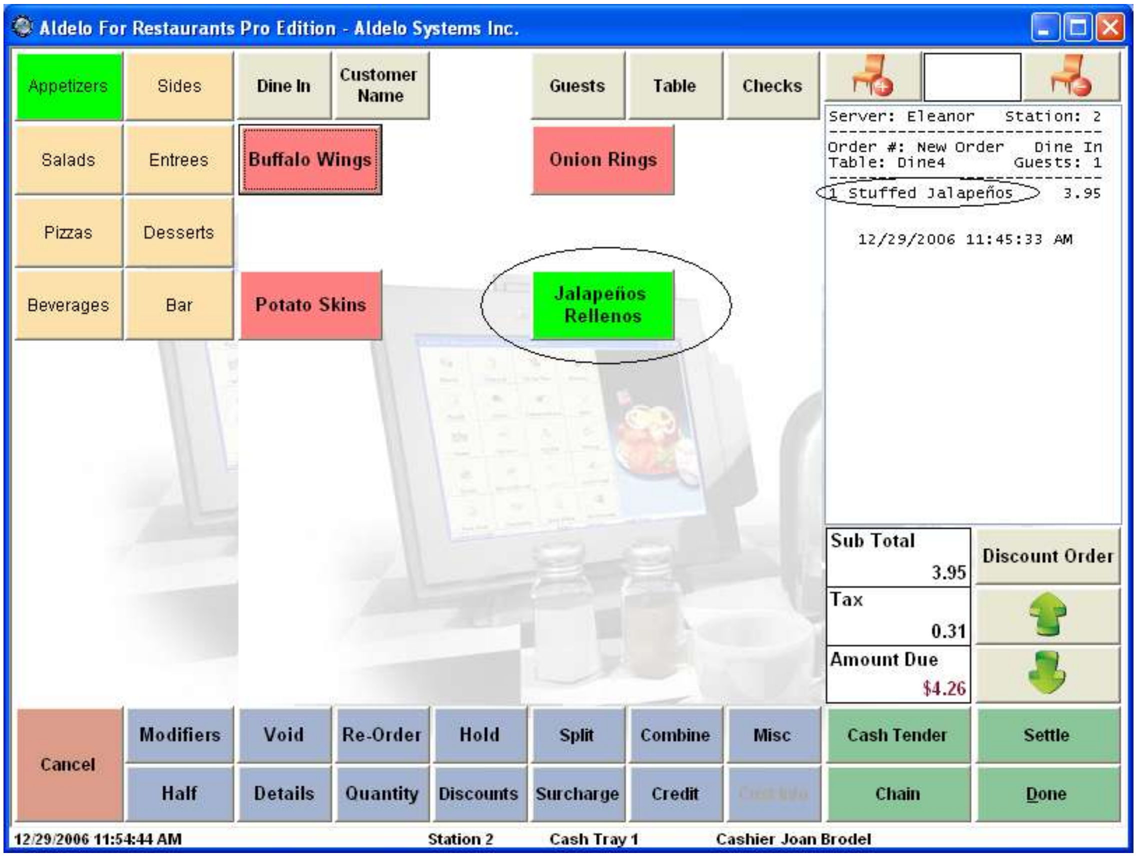


Figure 10-15

LOCK SCREENS

The "Lock Screens" feature disables all the buttons on the screen, preventing unauthorized people from using the terminal.

From the Order Entry screen, click the "Misc" and "Lock Screens" buttons. Enter the access code for the server assigned to the terminal (Eleanor Powell, access code 14). Most of the buttons disappear from the screen. The remaining buttons are disabled.

To unlock the screen, click the "Un-Lock Screens" button. The screens can only be unlocked by the employee who locked them or by an employee with a higher security access level than the employee who locked them.

Unlock the screens and return to the main POS screen.

Modifier System

Menu item modifiers include such things as included side dishes, preparation instructions, and recipe modifications. Aldelo® For Restaurants offers several ways to handle these modifiers.

MANUAL MODIFIERS

Forced modifiers may be changed and additional modifiers may be added to a menu item by selecting the "Modifiers" button on the Order Entry screen.

Enter the following order into Aldelo® For Restaurants.

Server Access Code	Table #	# of Guests	Guest #	Menu Items	Modifiers
14	11	2	-	-	-
			1	New York Steak	Medium Rare
					French Fr
					Stmd Vegs
				Heineken	-
			2	Chef Salad	1000 Island
					Garlic Croutons
					Bacon Bits
				Diet Coke	-

From the Order Entry screen, click the "Modifiers" button. In the upper right of the window, select "New York Steak." On both the center right and top left sides of the screen, select the "All" buttons. Scroll up and down the list of modifiers using the arrow keys at the bottom of the screen. The highlighted buttons indicate the modifiers chosen for the New York Steak (they are also listed in the extreme upper right corner of the screen). To remove a modifier, click the highlighted button to deselect it. To choose an additional modifier, select it from the array of buttons (see Figure 10-16).

Filter these modifiers by selecting the first letter of the description of the modifier from the buttons on the left side of the screen. Further filtering by type is possible by selecting a specific modifier type on the right side of the screen.

Change the side dish for the steak from French Fries to Mashed Potatoes. Change the salad dressing for the Chef Salad from Thousand Island to Ranch.

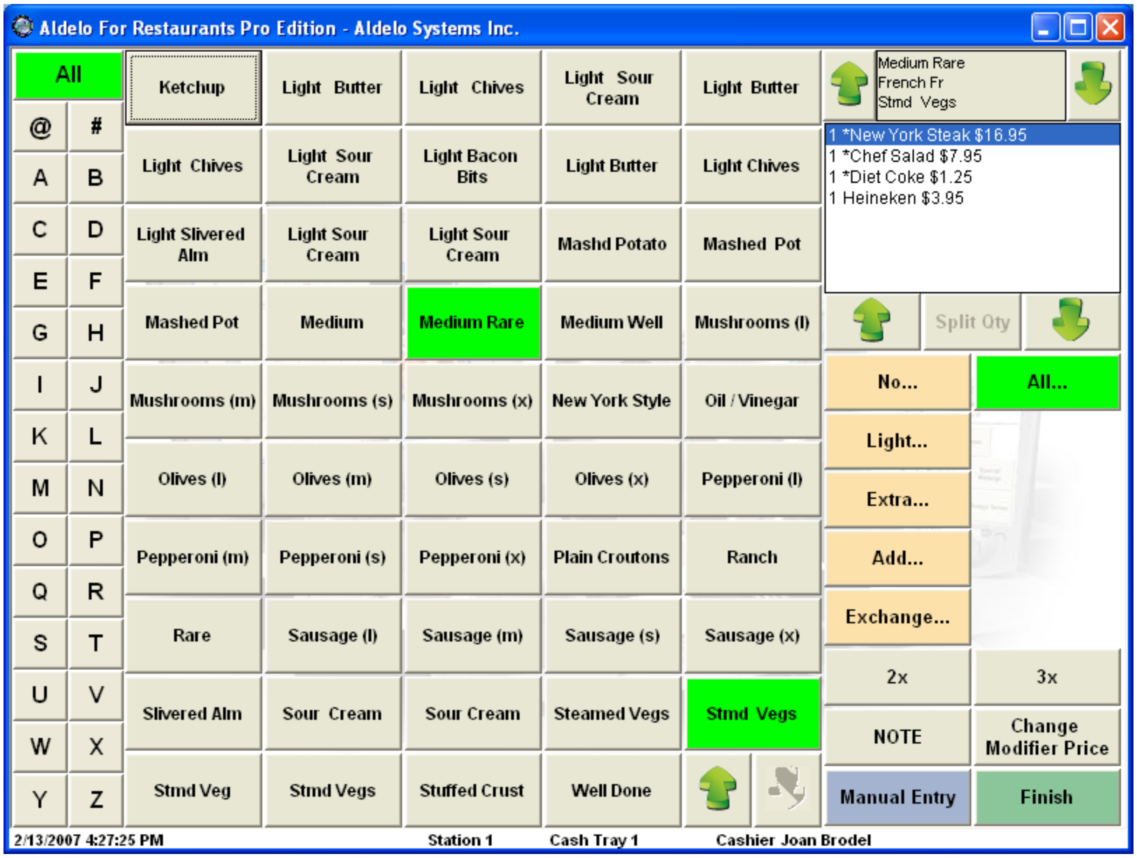


Figure 10-16

Menu modifiers can also be created "on the fly." From the Order Entry screen, click the "Modifiers" button (this assumes that the order has not been sent to the kitchen). Now, click the "Manual Entry" button. On the list of ordered items, click the Diet Coke. In the Modifier Name field, enter "No Ice." For the Sec. Language field, enter "Sin Hielo" (Spanish for "Without Ice"). There is no additional cost for this modifier (see Figure 10-17). At this point, a note may be added to the new modifier by clicking the "Note" button and entering the note, either with your hardware keyboard or by using the onscreen keyboard. Click the "Add" button, and then the "Finish" button. The modifier now appears under the item on the guest check.

Although a new modifier is created, it does not automatically show up in the list of modifiers on the Modifiers screen. A new modifier is always created as a hidden modifier. To add the modifier we just created to the list, navigate to **Back Office** > **Setup** > **Menu Setup** > **Menu Modifiers**, select the new modifier from the list on the left, and deselect the "Hide Modifier" checkbox. Clicking the "Save" and "Done" buttons completes the change.

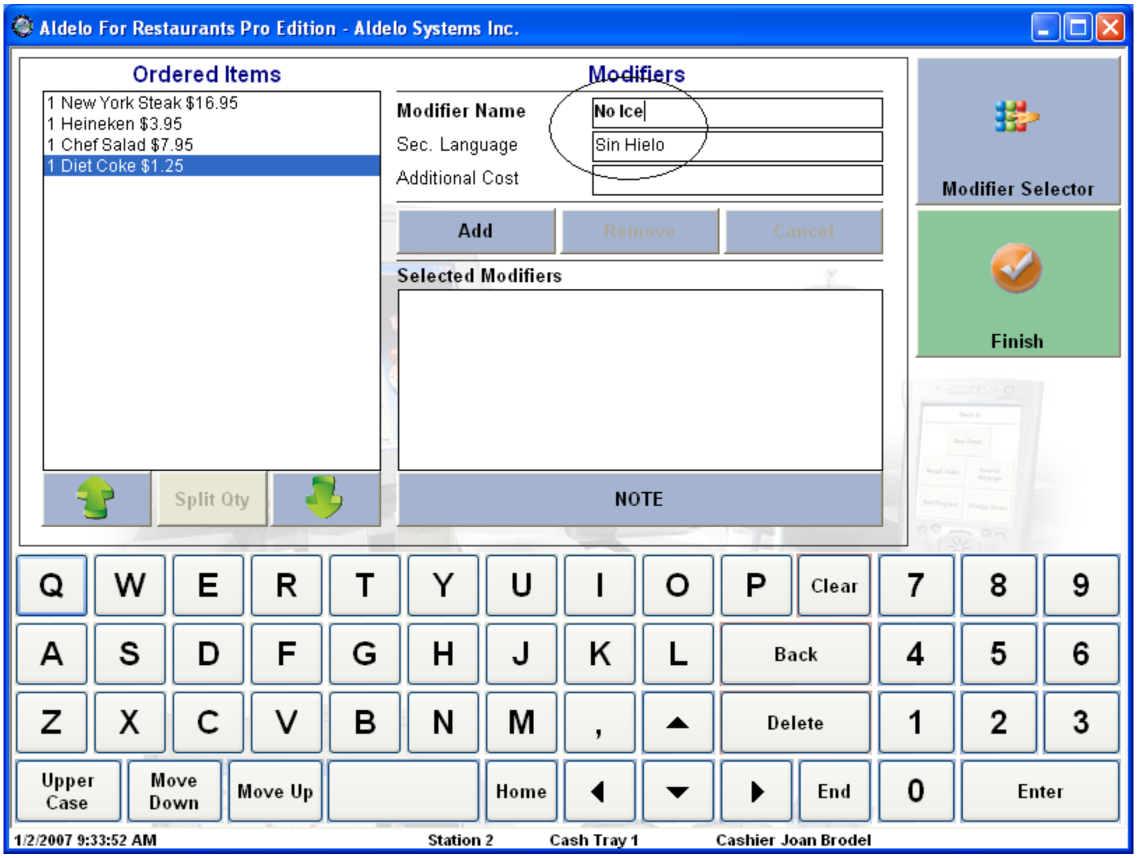


Figure 10-17

FORCED MODIFIERS

Before Forced Modifiers can be used, they must be setup by navigating to **Back Office** > **Setup** > **Menu Setup** > **Forced Modifiers.**

In the Order Entry screen, Forced Modifiers popup immediately after selection of a menu item that has Forced Modifiers created for it. Select one of the modifiers and the next modifier will popup. This continues until all levels of modifiers have been selected. The maximum number of levels is seven.

At any time, the “Finish” button may be clicked to exit the Forced Modifiers screen. The remaining modifiers for the menu item are skipped. The “Finish” button may be disabled, thereby requiring a selection for all levels of modifiers attached to the menu item. To do this, navigate to **Back Office** > **Store Settings** > **Products** > **Modifiers** and select the “Disable FINISH button in Forced Modifiers” checkbox.

MODIFIER BUILDER TEMPLATE

Before Modifier Builder Templates can be used, they must be setup by navigating to **Back Office** > **Setup** > **Menu Setup** > **Modifier Builder Setup.**

Continuing with the order we entered previously, add a baked potato to the order for guest two. The Modifier Builder Template screen displays. The three buttons at the top of the screen are the Modifier Type buttons. The default action for this modifier is “Add.” That is why the button is highlighted (default actions are setup in the Modifier Builder Template Setup screen). A selected Modifier Type button may be deselected by clicking it again or by clicking another Modifier Type button.

Add Sour Cream, Light Butter, and Extra Chives to the baked potato (see Figure 10-18). If there is an extra charge for the modifier, the price may be changed by clicking the “Change Modifier Price” button. To remove a selected modifier, highlight it on the list and click the “Trash Can” button. To remove all selected modifiers, click the “Clear All” button.

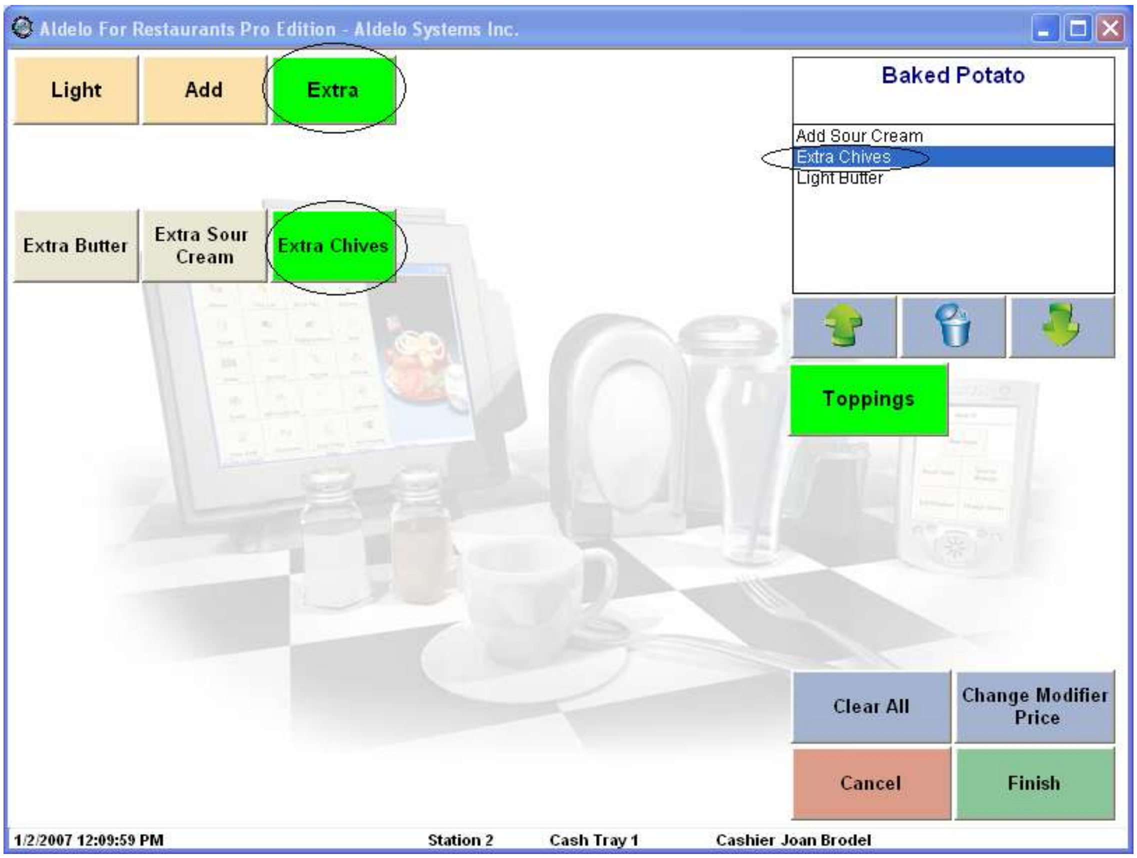


Figure 10-18

Pizza Builder System

Before the Pizza Builder screen can be used, the Pizza Builder setup must be completed by navigating to **Back Office > Setup > Menu Setup > Pizza Builder Setup.** For detailed information, please see Menu Setup – Pizza Builder Setup in Chapter 5 of the User Manual.

Create a new order in Aldelo® For Restaurants. Enter the menu item in the following table.

Server Access Code	Table #	# of Guests	Menu Items
14	12	1	Cheese Pizza (s)

The Pizza Builder screen displays. Select the Chicago Style crust from the buttons at the top of the screen. Then select Sausage, Olives, and Bell Peppers from the toppings buttons. The buttons change color, indicating that they are selected (see Figure 10-19). Notice that the toppings are listed in the Entire Pizza field on the upper right of the screen.

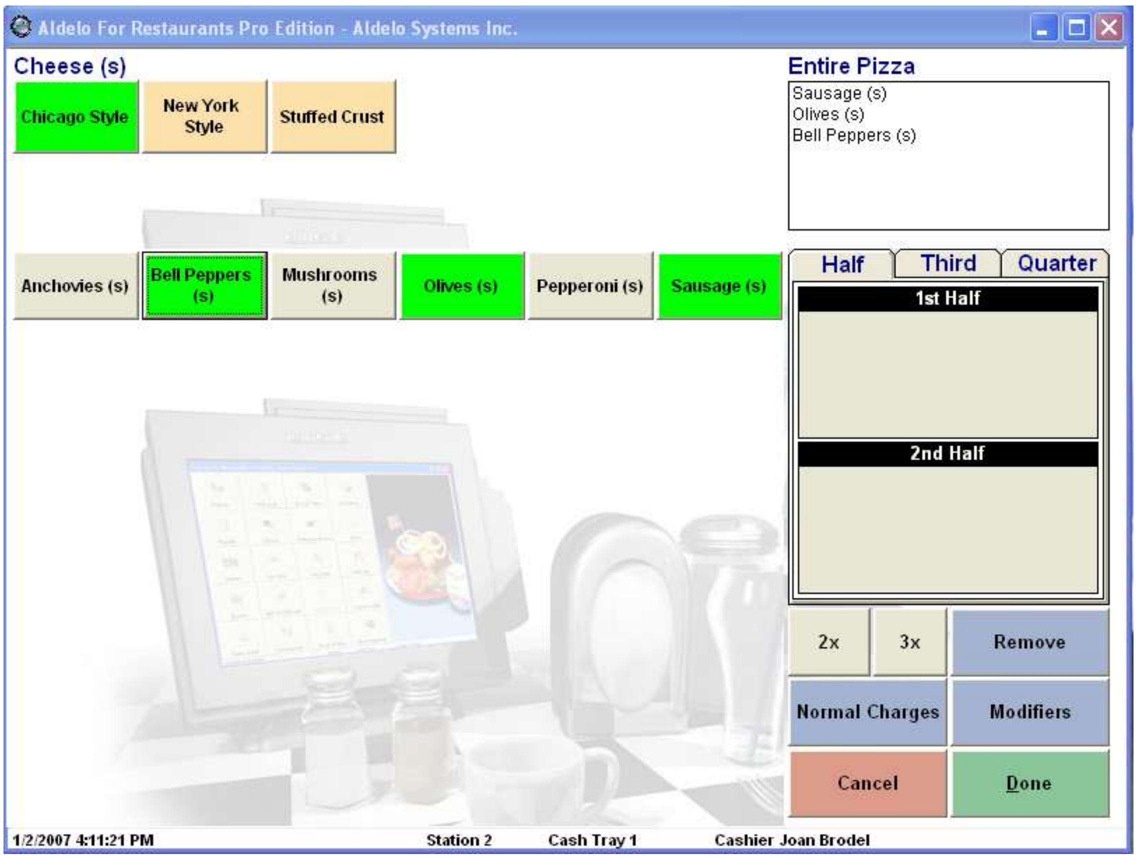


Figure 10-19

If the customer wants different toppings on different portions of the pizza, click the appropriate tab (Half, Third, or Quarter) and click in one of the fields below the tab to enter the toppings. For example, to create a pizza with pepperoni on one half and sausage on the other, click the Half tab, and then click inside the "1st Half" field. The field turns white, indicating that it is selected. Click the Pepperoni button. "Pepperoni" displays in the "1st Half" field. Repeat the procedure, entering sausage in the "2nd Half" field.

To change the way the toppings are priced on pizzas with multiple portions, click the "Normal Charges" button. When the button text says "Most Expensive Half," the price for the higher-priced topping is charged for the entire pizza. When the button text says "Least Expensive Half," the price for the lower-priced topping is charged for the entire pizza. When the button text says “Normal Charges,” the price for the toppings is charged proportionally to each portion of the pizza.

Click the “Done” button when finished.

Chapter 11 — Bar Tab Orders

Bar Tab Order Entry

To use a terminal to create bar tabs, some settings must be changed in Aldelo® For Restaurants.

Navigate to **Back Office > Station Settings > Other Options.** Click the checkboxes next to “Enable bar tab services for this station” and “Skip Table/Bar Tab Type Selection for Dine In.” The former allows the user to create orders based on a customer’s name or description rather than a table number. The latter eliminates the screen requiring the user to choose the type of order (table or bar tab type) before the Order Entry screen appears.

Finally, in the Bar Tab Caption field, enter “Checkers Bar.” Click the “Save” and “Done” buttons.

CREATING A BAR TAB

Click the “Dine In” button on the main POS screen. Enter “10” for the Employee Access Code (Virginia McMath). The New Bar Tab screen displays.

Click the button to the right of the “New Bar Tab” field. The Select Customer Attributes screen appears. Use this screen when the customer’s name is not known. Enter the following description of the customer by using the buttons in the height, gender, hat, and clothing color categories (see Figure 11-1).

Height	Gender	Hat	Clothing Color
Tall	Man	With Hat	Blue

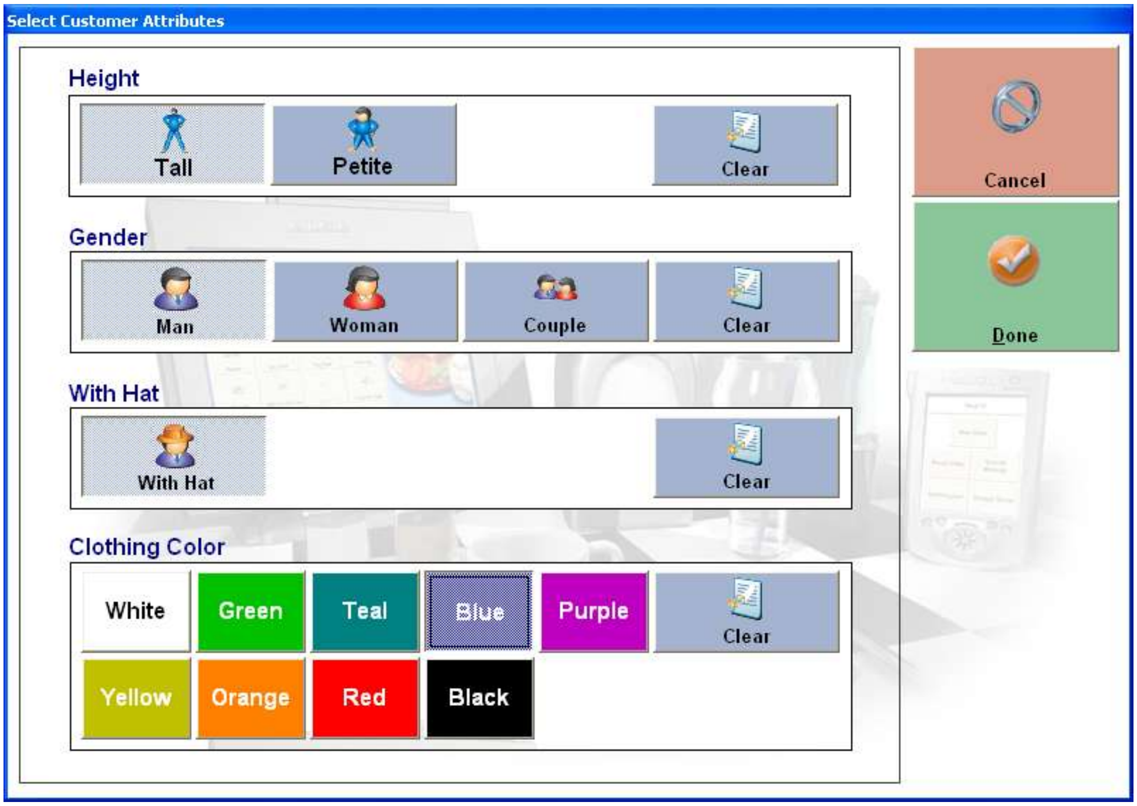


Figure 11-1

Click the “Done” button. The system reverts to the previous screen. The description of the guest now appears, as entered, in the New Bar Tab field. The bar tab may also be identified by the customer’s name, if known. Erase the description and enter the customer’s name, Chris Ebsen (see Figure 11-2). When done, click the “Finish” button. The system continues to the Order Entry screen where menu items may be ordered as usual.

Finally, navigate to **Back Office** > **Station Settings** > **Other Options** and remove the checkboxes next to “Enable bar tab services for this station” and “Skip Table/Bar Tab Type Selection for Dine In.”

Figure 11-2

Note: Although this order is identified by the customer's name, a table number may still be used by clicking the "Table" button at the top of the screen. Select the appropriate table group from the buttons on the right, then the table number from the diagram that appears. In this case, click the "Finish" button on the New Bar Tab screen without entering a customer name.

BAR TAB EFFICIENCY

Several settings are available in Aldelo® For Restaurants to help increase the speed at which bar tab orders are processed. For a detailed explanation, please see Order Entry for Bar Tab – Setting Up Bar Tab Efficiency in Chapter 9 of the User Manual.

Chapter 12 — Take Out Orders

Take Out Order Entry

In Aldelo® For Restaurants, several settings apply to Take Out Orders.

Navigate to **Back Office > Store Settings > Staff / CRM.** Make sure the "Take Out / Delivery Show Search Type" checkbox is **deselected**. This setting, when selected, displays a screen that forces the user to choose the type of search (by Customer Name, Phone, Delivery Address, Account Code, or MSR Card). For training purposes, we will search using the default method exclusively, by Phone. Also, make sure the "Enforce Exact Telephone Number Digits" checkbox is selected. This setting checks the phone number entered to ensure that it matches the proper format, reducing the chance of incorrect entry.

Next, click on the Services tab, and then the Take Out tab. Select "Require Phone# For Take Out." Deselect "New Customer Take Out On Hold." With this setting selected, any order from a new customer is held until the hold is removed manually.

Finally, navigate to **Back Office > Station Settings > Other Options.** Make sure the "Do not prompt user to enter customer phone number for take out on this station" checkbox is **deselected.** When selected, this setting overrides the "Require Phone# For Take Out" setting on the **Store Settings > Services > Take Out** tab.

CREATING A TAKE OUT ORDER

From the main POS screen, click the "Take Out" button. Enter "10" for the Employee Access Code. When prompted to enter the Customer Phone Number, enter "2092223456." Since this phone number is not in our system, we must enter the information for this new customer. Enter the customer's name, Joe Yule, and then click the "Edit" button next to the Delivery Address field. Enter the information from the following table.

Street No.	Street Name	Suffix	Postal Code
584	Creekside Drive	Apt. 1029	95356

Since the Postal Code is already in our system, the city field populates automatically (see Figure 12-1). Click the "Finish" button on this screen and the following screen. We are now in the Order Entry screen and may place orders as usual.

Had the customer already been in the system, these fields would have been populated automatically. If the customer has previous orders, the information on them can be seen in the fields in the center of the screen (see Figure 12-2).

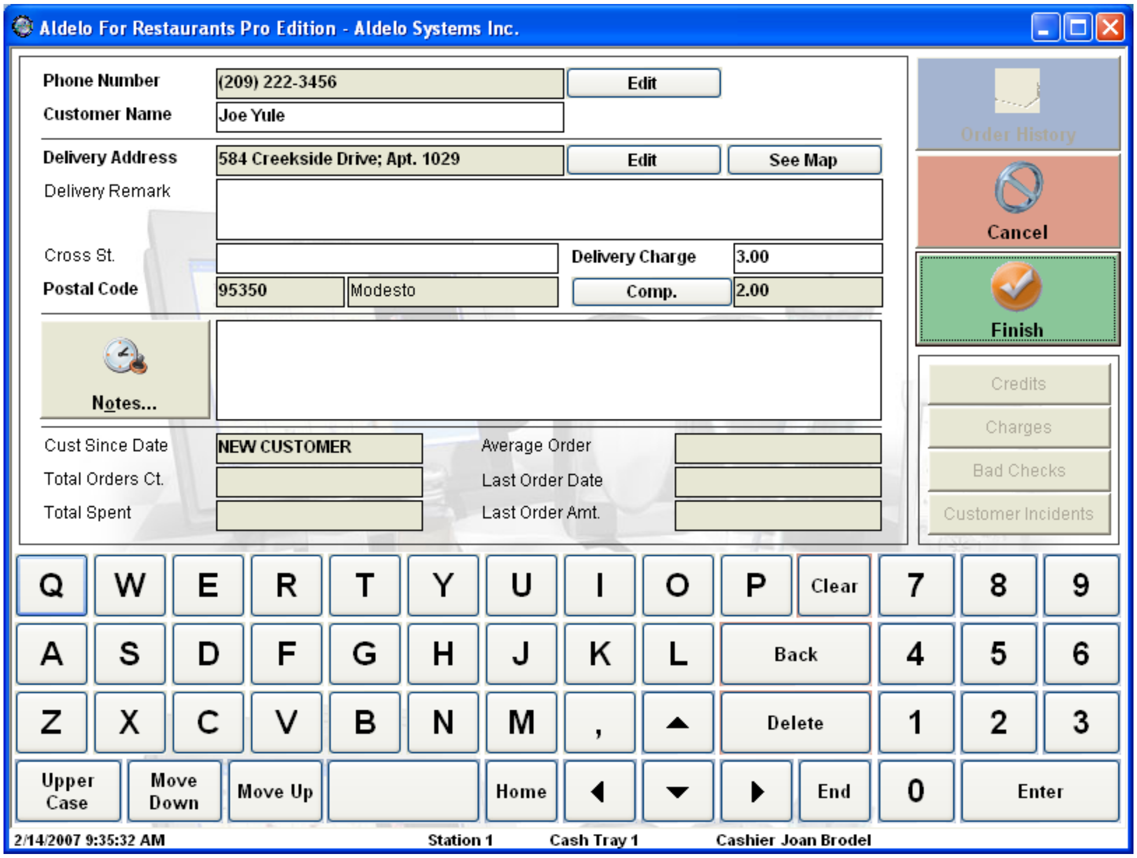

Aldelo For Restaurants Pro Edition - Aldelo Systems Inc.
Phone Number
(209) 222-3456
Edit
Customer Name
Joe Yule
Delivery Address
584 Creekside Drive; Apt. 1029
Edit
See Map
Delivery Remark
Cross St.
Delivery Charge
3.00
Postal Code
95350
Modesto
Comp.
2.00
Notes...
Cust Since Date
NEW CUSTOMER
Average Order
Total Orders Ct.
Last Order Date
Total Spent
Last Order Amt.
Order History
Cancel
Finish
Credits
Charges
Bad Checks
Customer Incidents
Q W E R T Y U I O P Clear 7 8 9
A S D F G H J K L Back 4 5 6
Z X C V B N M , Delete 1 2 3
Upper Case
Move Down
Move Up
Home
End
0
Enter
2/14/2007 9:35:32 AM
Station 1
Cash Tray 1
Cashier Joan Brodel

Figure 12-1

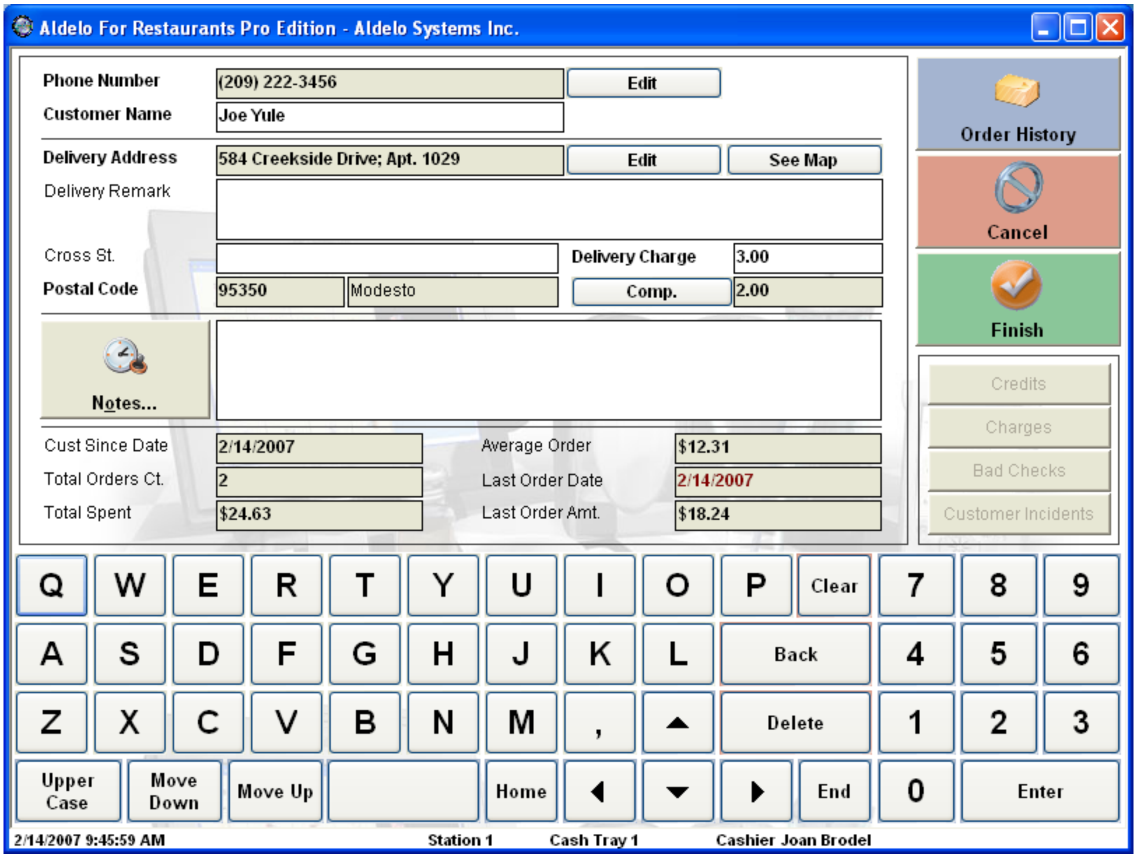

Aldelo For Restaurants Pro Edition - Aldelo Systems Inc.
Phone Number
(209) 222-3456
Edit
Customer Name
Joe Yule
Delivery Address
584 Creekside Drive; Apt. 1029
Edit
See Map
Delivery Remark
Cross St.
Delivery Charge
3.00
Postal Code
95350
Modesto
Comp.
2.00
Notes...
Cust Since Date
2/14/2007
Average Order
$12.31
Total Orders Ct.
2
Last Order Date
2/14/2007
Total Spent
$24.63
Last Order Amt.
$18.24
Order History
Cancel
Finish
Credits
Charges
Bad Checks
Customer Incidents
Q W E R T Y U I O P
Clear
7 8 9
A S D F G H J K L
Back
4 5 6
Z X C V B N M ,
Delete
1 2 3
Upper Case
Move Down
Move Up
Home
End
0
Enter
2/14/2007 9:45:59 AM
Station 1
Cash Tray 1
Cashier Joan Brodel

Figure 12-2

Chapter 13 — Drive Thru Orders

Drive Thru Order Entry

Aldelo® For Restaurants' Drive Thru Order Entry incorporates a timing feature that records the time the order began and presents a list of incomplete orders to the user. These orders are marked as complete upon being given to the customer.

To use the Drive Thru Order feature, there are a few applicable settings to check. Navigate to **Back Office > Store Settings > Services > Drive Thru.** Select "Drive Thru Orders Use Drive Thru Stations" and deselect "Disable Drive Thru Timing Feature." Now navigate to **Back Office** > **Station Settings** > **Other Options** and make sure the "Mark this station as a drive thru station" checkbox is selected.

CREATING A DRIVE THRU ORDER

On the main POS screen, click the "Drive Thru" button. Enter "10" for the Employee Access Code. The Order Entry screen appears. Enter an order for Stuffed Jalapeños and click the "Settle" button. On the Cash Tendered screen, click the "Visa" button. Then click the bright green button that corresponds to the total amount of the order. When the Change screen appears (indicating that the change amount is $0.00), click the "Done" button. The main POS screen displays again.

MARKING A DRIVE THRU ORDER AS COMPLETE

Now, click the "Drive Thru" button again. The Drive Thru screen appears, displaying a list of all orders that are settled but not yet marked as complete (see Figure 13-1). Marking an order as complete indicates that the order has been given to the customer. Select the checkbox next to the order and click the "Mark Complete" button. On the Confirm Action screen that follows, click the "Yes" button.

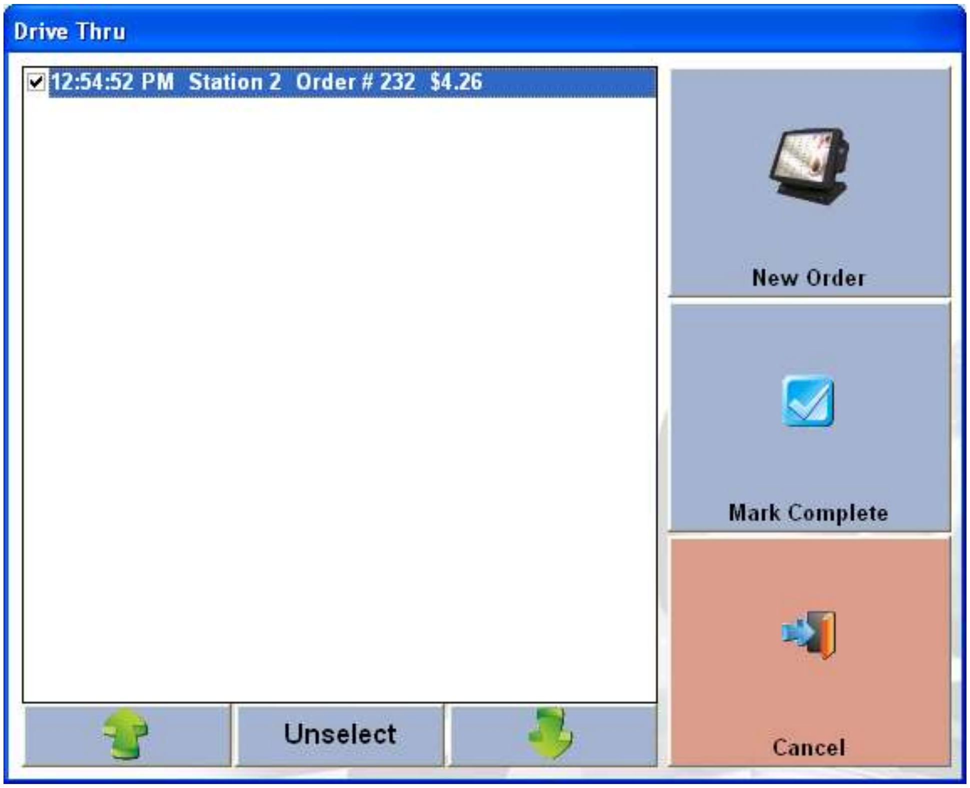

Drive Thru
12:54:52 PM Station 2 Order # 232 $4.26
New Order
Mark Complete
Cancel
Unselect

Figure 13-1

Chapter 14 — Delivery Orders

Delivery Order Entry

Aldelo® For Restaurants contains many features designed to help handle delivery orders efficiently. These features require the user to adjust several settings in order to tailor the system to his or her own restaurant.

Navigate to **Back Office** > **Store Settings** > **Services** > **Delivery.** Make sure the "Delivery" checkbox is selected near the upper left corner of the screen. For training purposes, select the checkboxes for "Enable Driver Money Drop" and "Round Delivery Total to Next Quarter." All other checkboxes on this screen should be **deselected.** In the "Delivery Charge" field, enter "4.00," and in the "Delivery Comp" field, enter "3.00." The other two fields on the screen should remain blank (see Figure 14-1). Click the "Save" and "Done" buttons.

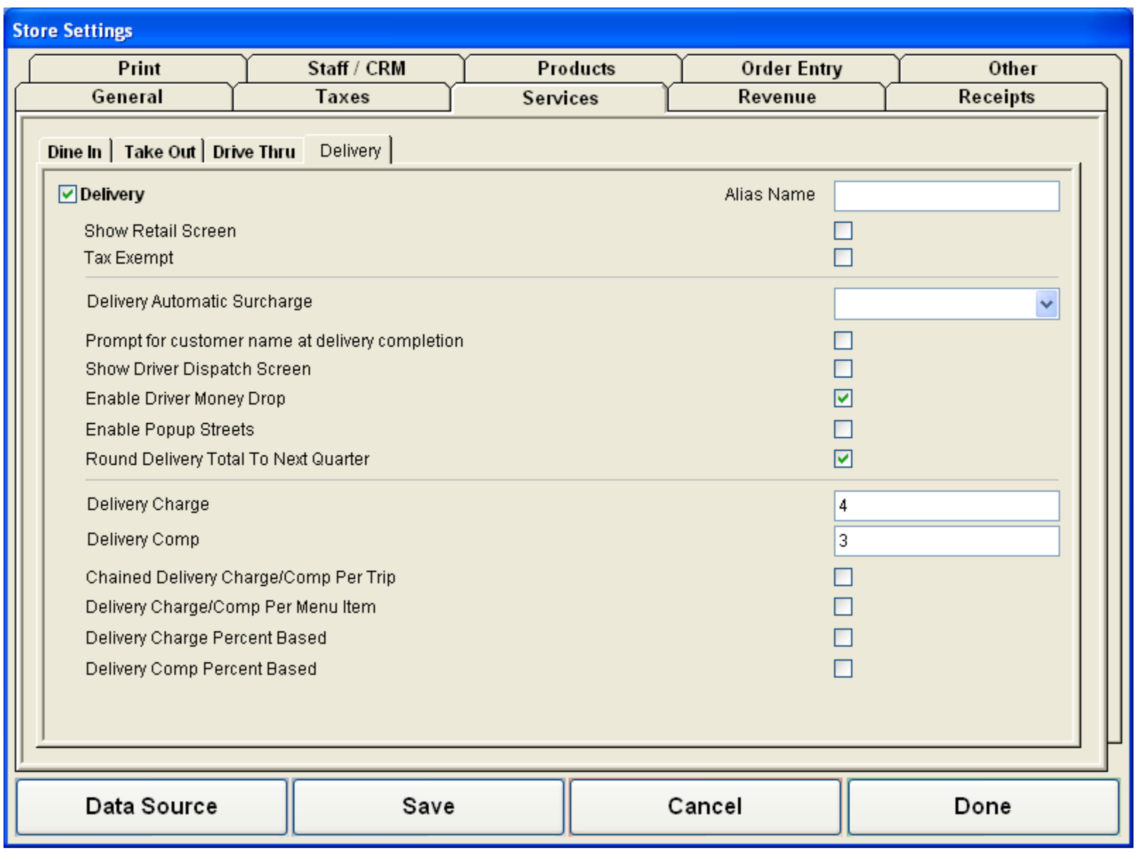


Figure 14-1

Next, click on the "Taxes" tab and open the "Tax 1" tab. Make sure the "Apply Tax On Delivery Charge" checkbox is **not checked.**

Finally, navigate to **Back Office > Station Settings > Other Options > Extra Settings.** On the Registry Settings screen, scroll down to "MapPoint Enabled" Click the "Edit" button and change the Registry Key Value to "NO." Click the "OK" and "Done" buttons when finished.

For a detailed description of how each of these settings work, please see Order Entry for Delivery in Chapter 12 of the User Manual.

CREATING A DELIVERY ORDER

Creating a Delivery Order is a little different than creating other types of orders. Click the "Delivery" button on the main POS screen. When prompted for the Employee Access Code, enter "10." The next screen prompts the user to enter the customer's phone number. Enter "2094878230." If the customer's phone number is in the system, his information displays on the customer form (see Figure 14-2). If not, enter the information manually to create a new customer.

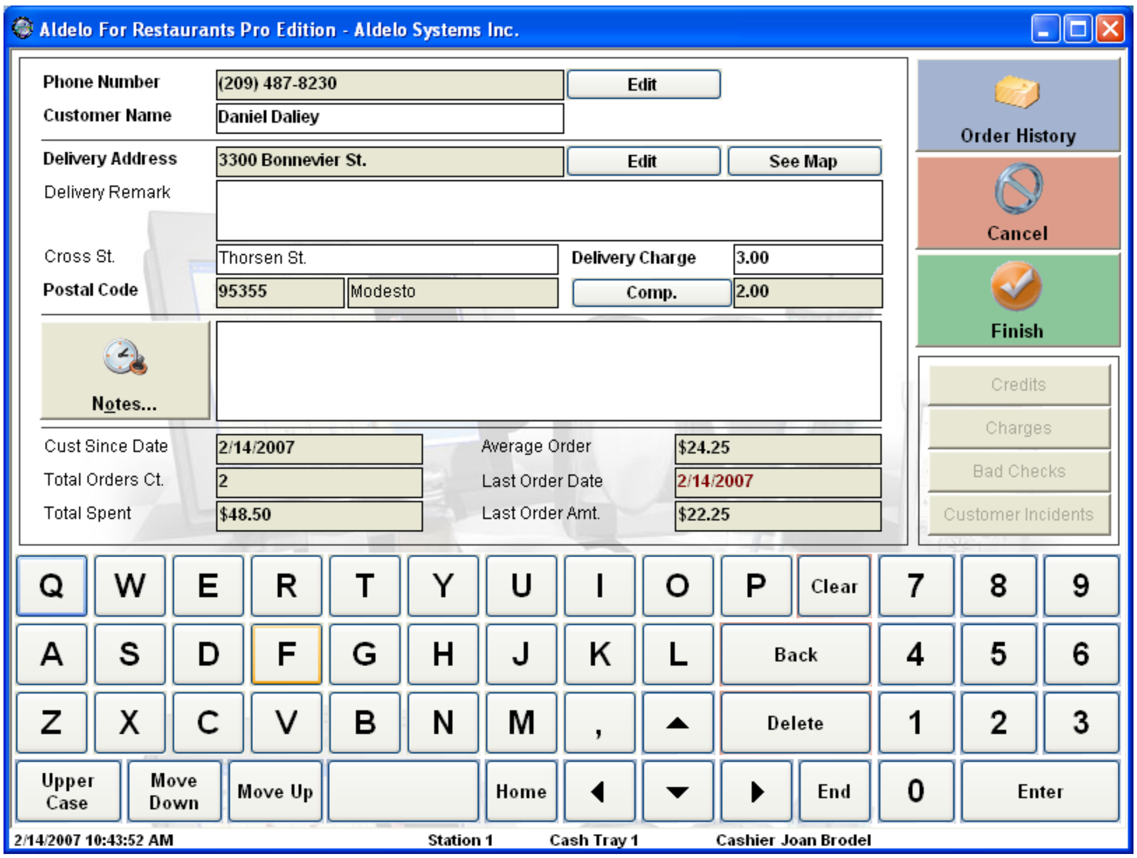


Figure 14-2

Since this is a repeat customer (as indicated by the fields above the on-screen keyboard), click the "Order History" button to display the Order History window. Here, each previous order may be displayed and duplicated. Click one of the orders and simply by click the "Duplicate This" button. The Order Entry screen displays, allowing the user to continue just as though it was a new order.

Chapter 15 — Delivery Procedures

Assigning a Delivery Order

Aldelo® For Restaurants allows two methods of assigning deliveries to drivers: Default Delivery Assignment and Driver Dispatch Screen Assignment.

To use these features, our delivery drivers must be clocked in. Click the “Time Card” button. For the Employee Access Code, enter “7” to clock in Robert Johnson. Repeat the procedure, entering “16” to clock in William Yarborough.

DEFAULT DELIVERY ASSIGNMENT

Enter the Delivery Orders from the following table into the system. Be sure to select the “Delivery” button on the main POS screen as the order type. Click the “Done” button on the Order Entry screen upon completion of each order.

Access Code	Customer Phone Number	Menu Items
10	2097777777	Buffalo Wings
		Potato Skins
14	2098248230	Pepperoni Pizza (l)
		Tuna Salad

Next, click the “Driver” button. For the Employee Access Code, enter “7” (for Robert Johnson). On the following screen, click the “Departure” button. Now, select the orders that the driver will take on this delivery run by selecting the checkboxes to the left of the Ticket number. The driver may take one, several, or all of the orders waiting for delivery. For our purposes, select only the first order. When finished, click the “Departure” button.

DRIVER DISPATCH SCREEN ASSIGNMENT

Navigate to **Back Office > Store Settings > Services > Delivery.** Select the Checkbox for “Show Driver Dispatch Screen.” Return to the main POS screen and click the “Driver” button.

The Driver screen displays. The second order we entered appears in the bottom portion of the screen. Click on William Yarborough in the upper section of the screen and click the checkbox next to the order in the lower portion of the screen to select it (guest checks with barcodes may be scanned). The “Departure” button is now enabled (see Figure 15-1). Click it to assign the order to the driver. Click the “Done” button to return to the main POS screen.

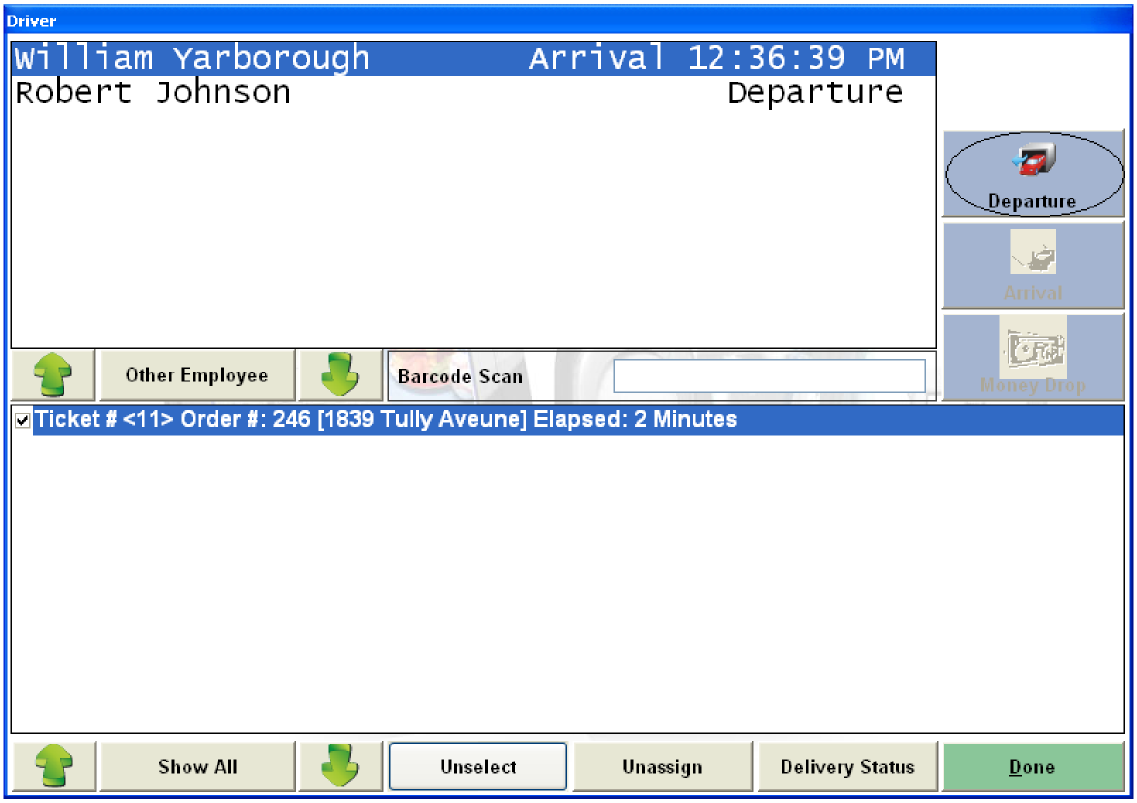


Figure 15-1

Driver Arrival

From the main POS screen, click the "Driver" button. Select Robert Johnson and click the "Arrival" button. When prompted to "Mark your assigned delivery orders as arrived?" click the "Yes" button. Click the "OK" button on the Driver screen.

Next, click the "Money Drop" button. When prompted for the Employee Access Code, enter "7" for Robert Johnson. The Driver Money Drop Report screen displays, allowing the driver to review the amounts due from his completed deliveries. After reviewing the screen, click the "OK" button.

At this point, the driver turns over the money he has collected from the customers to the cashier. The cashier login screen appears. Enter "3" (for Joan Brodel) and click the "Enter" button. The Money Count screen displays, allowing the cashier to enter the money received in one of two ways; by entering the count of each denomination on the left of the screen or by clicking the "Additional Cash" button, and then entering the total in the "Additional Cash" window. Notice that the amount expected from the driver displays in the title bar of the Money Count screen. Click the "Finish" when done.

In Store Settings, if the "Show Driver Dispatch Screen" checkbox is **not** selected, the driver must enter his Employee Access Code after clicking the "Driver" button. The rest of the procedure remains the same.

Repeat the procedure above to mark the second order as arrived and to settle the order with the cashier.

Delivery Directions and Route Planning

Microsoft MapPoint 2004 integrates seamlessly with Aldelo® For Restaurants, giving the restaurant a convenient source for driving directions. MapPoint must be installed on the terminal that is used to view the driving directions (**not** on the server). If more than one terminal is used to view driving directions, a copy of MapPoint must be installed on each terminal.

MAPPOINT SETUP

Install MapPoint on the terminal that will be used for route planning and driving directions.

Navigate to **Back Office > Help > Technical Support** and press the "F10" button on your keyboard. The Registry Settings window displays. In the Key Name column, scroll down to "MapPoint Enabled." If the Key Value field says "YES," click the "Done" button. However, if the Key Value field says "NO," click the "Edit" button, type "YES" in the window that displays, and click the "OK" button.

Now, open "MapPoint Fuel Cost" and click the "Edit" button. Enter "3.00" for the fuel cost per unit and click the OK" button. MapPoint uses this figure to estimate the cost of fuel used to make the delivery.

Next, open "MapPoint Home Address" and click the "Edit" button. Here we enter the restaurant address as the starting point for deliveries. Enter the address using the format [Street Address], [City], [State] [Zip Code]. Notice that there is no comma between the state and the zip code. Click the "OK" button when finished.

Note: The address must follow this format exactly or MapPoint will not work.

Now, open "MapPoint Optimize Way Points" and set the Key Value to "YES." This feature enables MapPoint to determine the driver's most efficient route when delivering orders to multiple locations.

Finally, open "MapPoint Route Start Minutes After" and set the value to "18." This represents the average order preparation time. MapPoint uses this figure, along with the calculated delivery time, to estimate the total time from order to delivery. Click the "Done" button when finished.

USING MAPPOINT

Create the order in the following table as a Delivery order.

Access Code	Customer Phone Number	Menu Items
10	2095551234	Chicken Salad
		Tuna Salad
		Coca-Cola
		Diet Coke

From the main POS screen, click the “Driver” button. Select the checkbox next to the order on the lower half of the screen. Click the “See Map” button. MapPoint displays a map and written directions to the customer’s address (see Figure 15-2). Two printing options are available. “Print Map” prints the map and written instructions as seen on the screen. “Print Detail” prints a separate map that corresponds to each line in the printed instructions.

Click the “Print Map” button and the “Done” button. Select the order again by clicking the checkbox next to it, and then select driver Robert Johnson. Click the “Departure” button.

Note: The maps print to the desktop printer. They cannot be printed to a receipt printer. If the maps do not print, navigate to Back Office > Station Settings > Printer > Report Printer and select your desktop printer as your report printer.

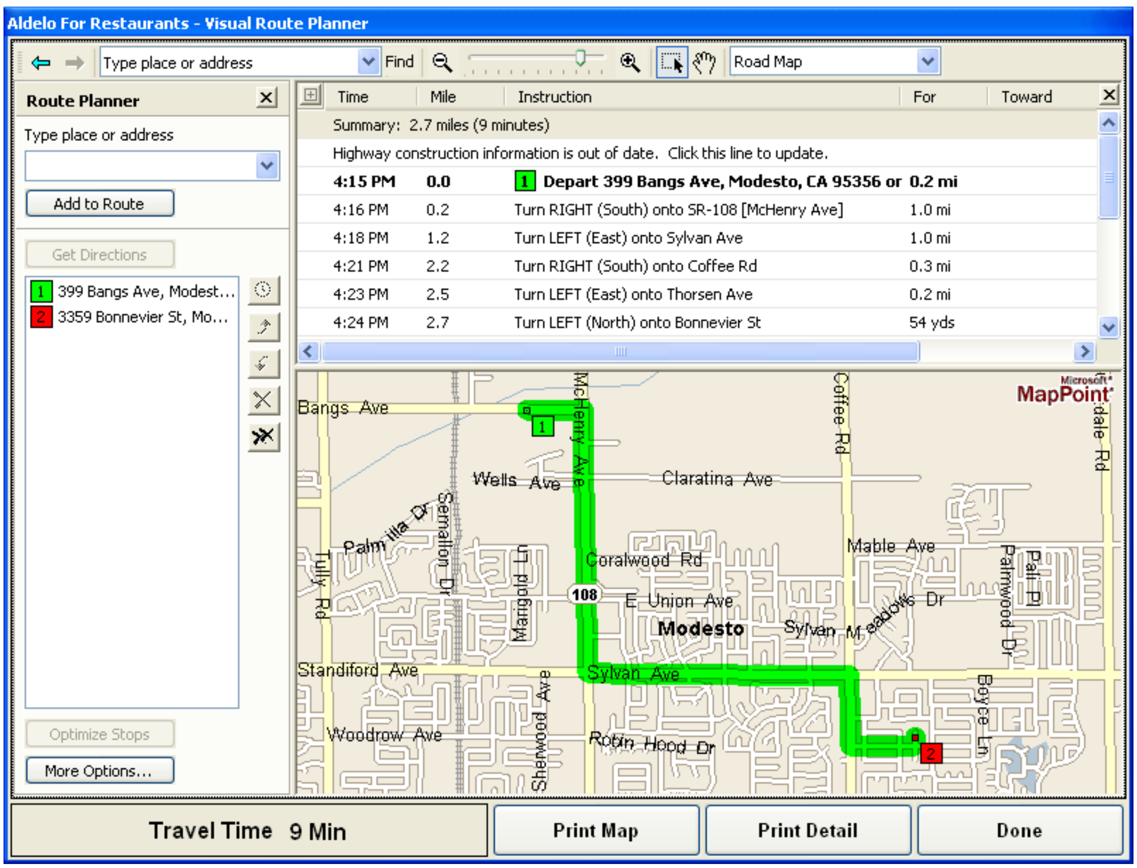


Figure 15-2

Viewing Delivery Order Status

Managers may view the status of deliveries by clicking the “Delivery Status” button on the main POS screen.

USING THE DELIVERY STATUS SCREEN

Click the “Delivery Status” button on the main POS screen. A manager must enter his or her Employee Access Code. The Delivery Route Status window appears (see Figure 15-3). The order number and dollar amount, order time, address, driver, departure time, time since order placement, and time since departure display in this window. If MapPoint is in use, the driving directions may also be displayed by clicking the “See Map” button.

When the driver returns and marks the order as delivered, it disappears from the list. Only orders that are not yet complete appear on this screen.

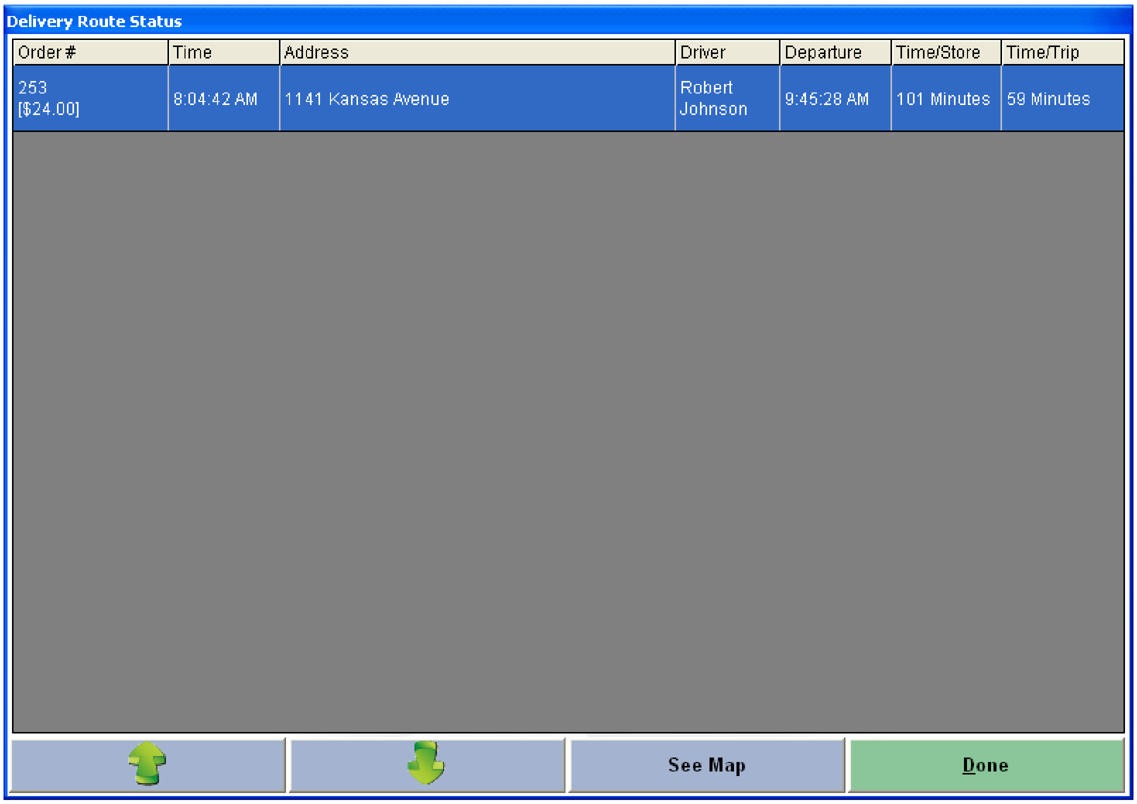


Figure 15-3

Chapter 16 — Quick Service

The Quick Service screen includes many differences from the normal Order Entry screen, designed to make the ordering process faster. Cash transactions in particular are quicker in the Quick Service Screen. This feature is ideal for fast food restaurant applications.

Using the Quick Service Screen

Navigate to **Back Office** > **Station Settings** > **Quick Service** and select the “Dine In Use Quick Service Order Screen” checkbox. Click the “Save” and “Done” buttons.

The Quick Service screen incorporates many of the operational buttons, eliminating the extra button clicks required to reach the separate screens containing these buttons when using the normal Order Entry screen (see Figure 16-1).

The Quick Service screen’s auto-logout feature automatically logs the user out upon the completion of the order. This may also be handled manually by using the “Change Server” button.

Now, navigate to **Back Office** > **Station Settings** > **Quick Service** and **deselect** the “Dine In Use Quick Service Order Screen” checkbox. Click the “Save” and “Done” buttons.

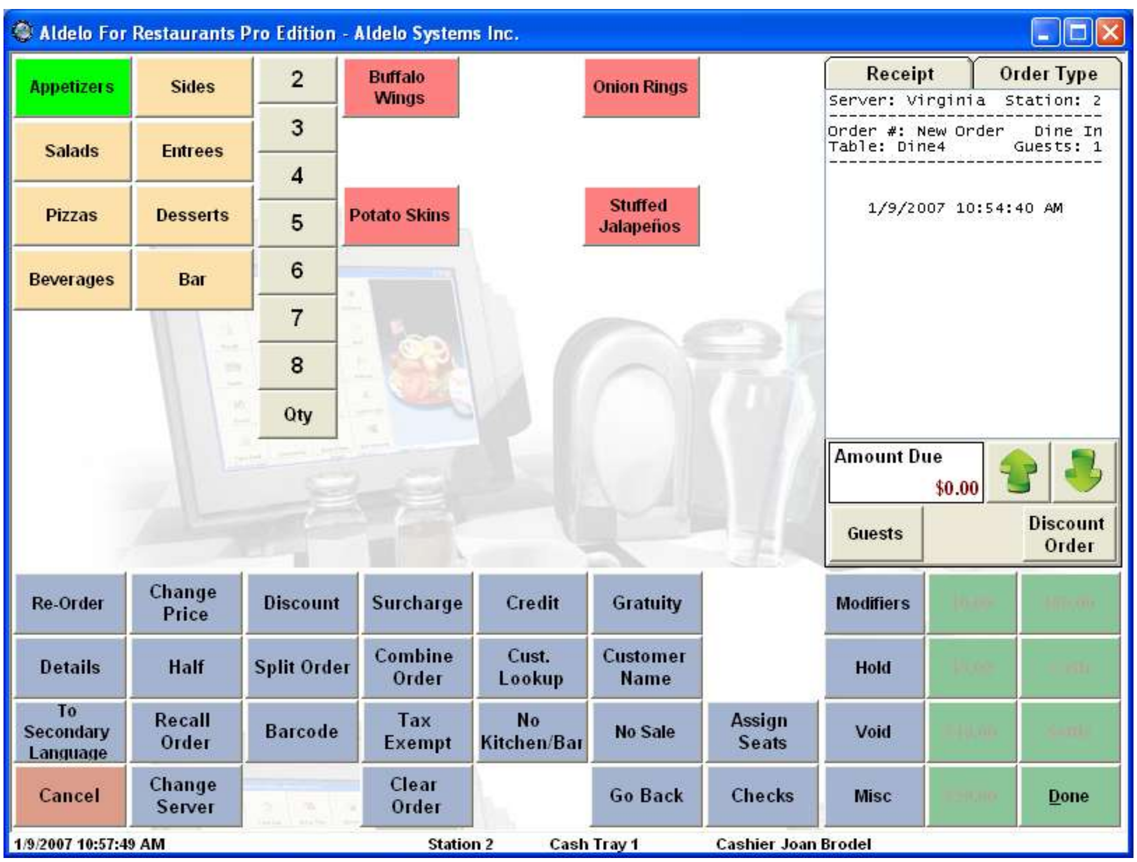


Figure 16-1

Chapter 17 — Recall Procedures

Whenever an order must be changed, use the Recall feature of Aldelo® For Restaurants.

Recall Operations

Recall an order when you must edit it to change the table number, add menu items, change the number of guests, etc. There are several ways to recall an order in Aldelo® For Restaurants.

Create three Dine In orders, clicking the “Done” button of the Order Entry screen after each one.

RECALL BUTTON

From the main POS screen, click the “Recall” button. When prompted for the Employee Access Code, enter the same one used to create the orders. The Recall Order window displays (see Figure 17-1).

Figure 17-1

The Order Type may be filtered at the bottom of the screen. Click the “Dine In” button to see only Dine In orders.

The “My Orders” button displays either the current server’s orders or all server’s orders. When the button is depressed (the default state), only the current server’s orders may be viewed.

The “Open Orders” button toggles between “Open Orders” and “All Orders.” Click the button until “Open Orders” displays in the upper left of the screen.

The “Show List” button displays the orders in a list format, streamlining the screen by eliminating the rest of the buttons from the display. This is a matter of personal preference.

In the Open Orders window, select the first order created (the oldest one based upon the time field). Click the “Edit Order” button to return this order to the Order Entry screen.

SELECT TABLE NUMBER SCREEN

From the main POS screen, click the “Dine In” button. Select one of the occupied table buttons to edit the order.

SELECT ORDER TO SETTLE

From the main POS screen, click the “Settle” button. On the Select Order To Settle screen, click the “Recall” button next to one of the orders. The check appears in the Recalled Order screen (see Figure 17-2). Note that with this method of order recall, the order may only be printed. The “Edit Order” button does not display on the Recalled Order screen.

Figure 17-2

ORDER ENTRY "CHECKS" BUTTON

Whenever there are multiple checks at one table, the "Checks" button on the Order Entry screen may be used to recall the orders.

Create two Dine In orders at the same table, clicking the "Done" button after each order. From the main POS screen, click the "Dine In" button and select the table with multiple orders. Click on one of the checks and click the "Edit" button to go to the Order Entry screen. From this screen, click the "Checks" button. All of the checks associated with this table display, allowing the user to select one by clicking it (see Figure 17-3). Click the "Edit" button to continue to the Order Entry screen.

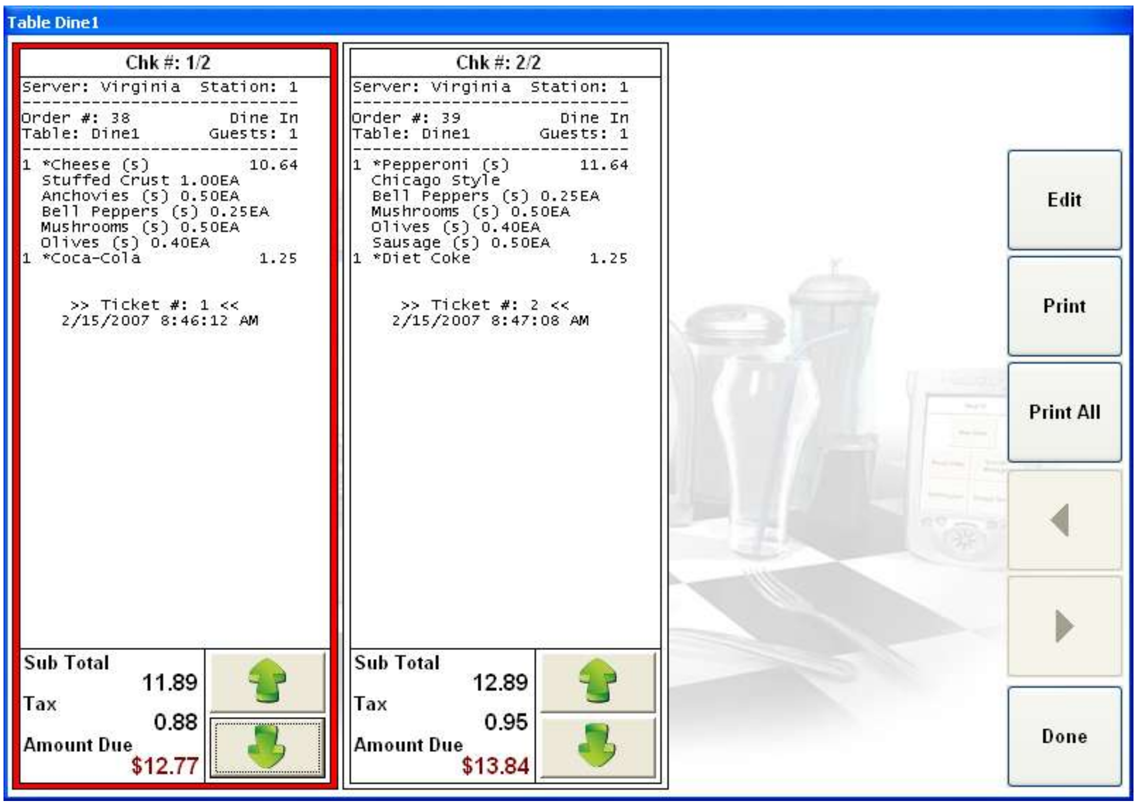


Figure 17-3

MISC > RECALL ORDER BUTTON

From the Order Entry screen, click the "Misc" button, and then the "Recall Order" button. The Recall Order screen opens, allowing the user to select the order to edit.

BATCH TRANSFER

When a server's shift ends and he or she still has open orders, they may be assigned to another server by using the "Batch Transfer" button on the Recall Order screen.

From the main POS screen, click the “Recall” button. The Recall Order screen appears. Click the “Batch Transfer” button. The Employee Access Code window displays. Here, the new server must enter his or her access code. Enter “14” for Eleanor Powell. Click the “Enter” button to transfer the orders to Eleanor.

Chapter 18 — Void Procedures

Occasions may arise when an order must be voided. Careful thought should be given to the security level required to perform a void. Servers or cashiers, if able to void orders, can give away free meals to family and friends. The security level of a manager or above should be required to void an order.

Void Operations

Enter an order into the system. From the main POS screen, click the "Void" button. Enter an access code with a high enough security level to perform a void operation. The Open Orders screen appears. If the order to be voided does not appear on the screen, disable the "My Orders" button to see all employees' orders.

Select the order from the list. Enter the reason for the void on the following screen. If a hardware keyboard is attached to this terminal, it may be used to type the reason, otherwise use the on-screen keyboard. When done, click the "Finish" button (see Figure 18-1).

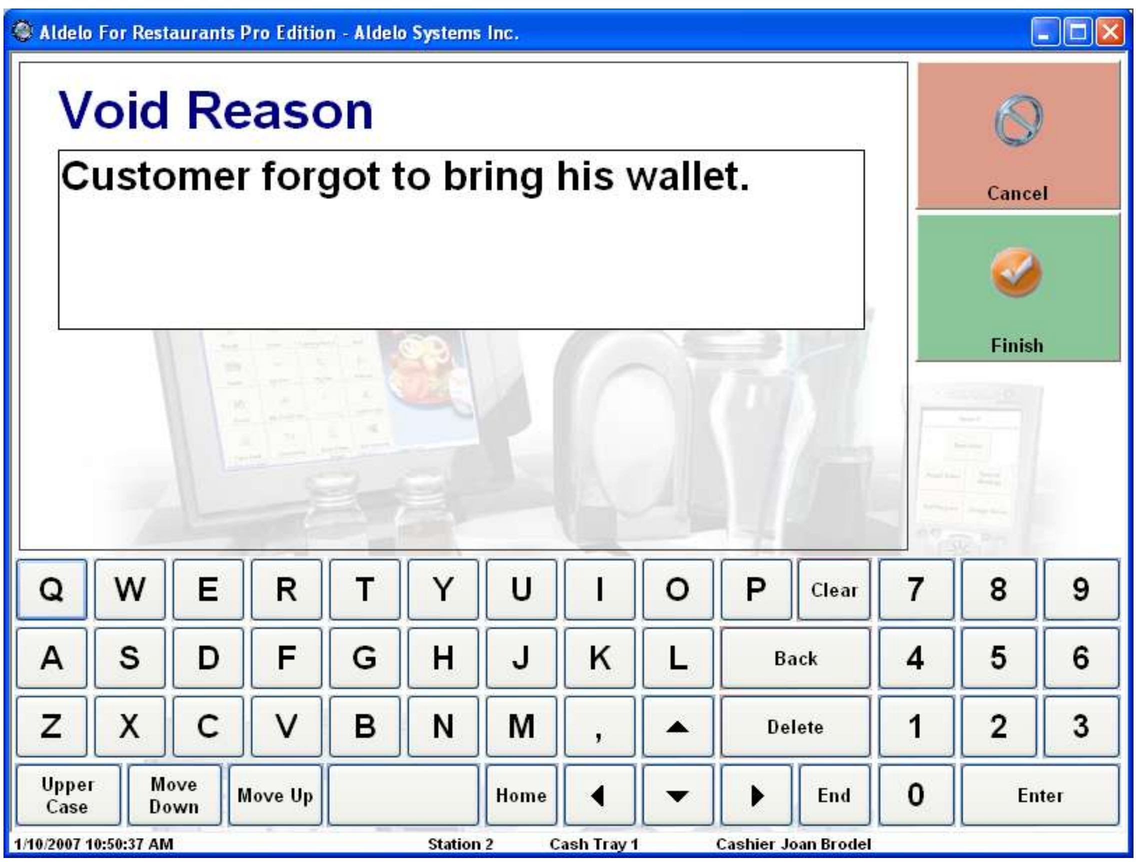


Figure 18-1

The following message box asks if you want to notify the kitchen or bar of the void (see Figure 18-2). Select "Yes" or "No."

Figure 18-2

If Inventory Depletion is enabled on the system, the final screen displays “Waste” or “No Waste” (see Figure 18-3). If the order has already been prepared and is thrown out, click “Waste.” If the order was voided before it was prepared, click “No Waste.”

Figure 18-3

Chapter 19 — Cashier Operations

No Sale

A No Sale operation is the opening of the cash drawer outside of a sale transaction. The most common reason for a No Sale is when a customer asks for change.

From the main POS screen, click the “No Sale” button. An employee with a sufficient security level must enter his or her Employee Access Code to approve the No Sale.

Next, the No Sale Reason screen displays. Enter the reason for the No Sale and click the “Finish” button (see Figure 19-1). The No Sale Alert screen appears. It displays the words “No Sale” and the employee’s name in very large letters so that it is easily visible from a distance.

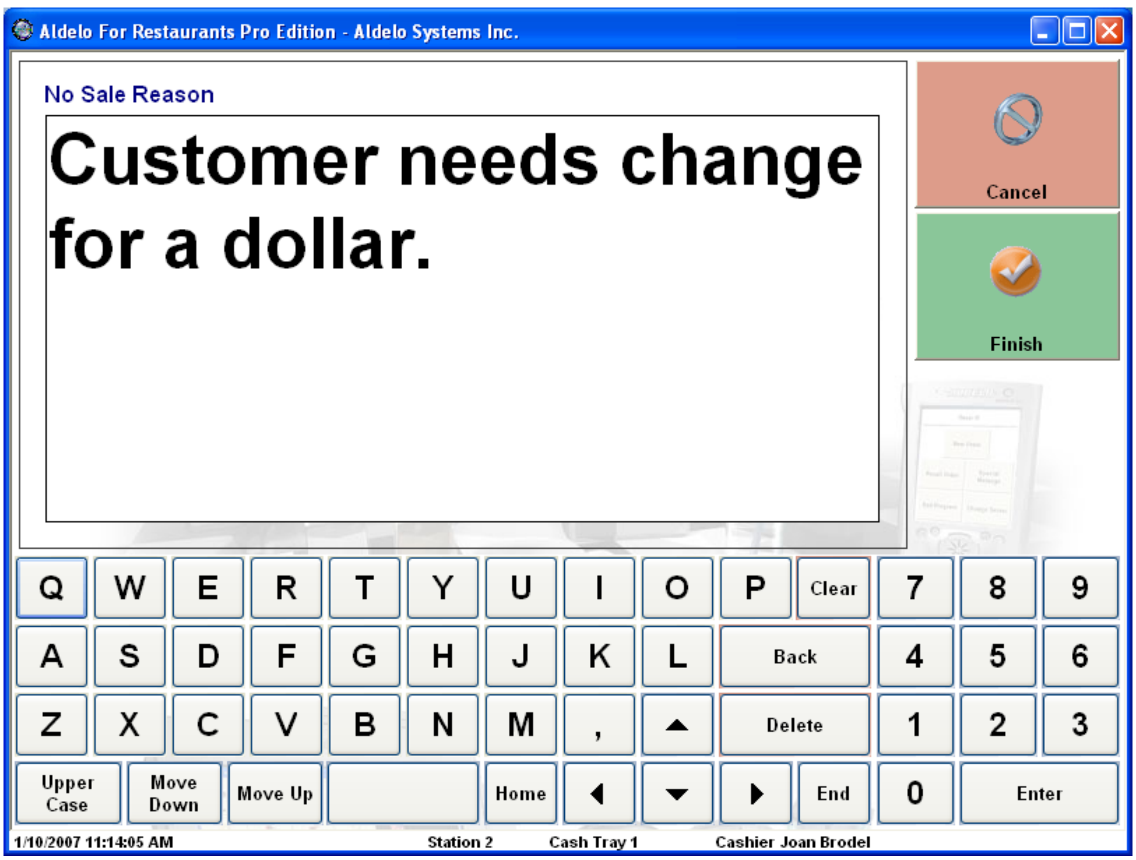


Figure 19-1

Pay Out

A pay out is performed anytime money is removed from the cash drawer (other than a refund). Use the “Pay Out” button to make general payouts, wage advances, and cash drops from the till.

GENERAL PAY OUT

A General Pay Out is performed to pay petty amounts out of the cash till. The vendor does not want to wait until a check can be issued. Examples include paying for newspapers, minor repairs, and the purchase of inventory items that have run out.

From the main POS screen, click the "Pay Out" button. An employee with a sufficient security level must enter his or her access code. Click the "General" button on the Pay Out Type screen.

Next, enter the information as seen in Figure 19-2. The description should include invoice number and date, if applicable. Upon completion, click the "Finish" button. A receipt for the pay out prints to the receipt printer.

Note: Most businesses require that the receipt and invoice be turned in with the employee's paperwork. This provides proof that the pay out was made legitimately.

Figure 19-2

WAGE ADVANCE

Employees sometimes ask for advances of their wages due to unforeseen circumstances. The Wage Advance feature of Aldelo® For Restaurants accounts for the wage advance and automatically deducts it from their normal payroll.

From the main POS screen, click the "Pay Out" button. Upon entering the Employee Access Code, the Pay Out Type screen displays. Click the "Wage Advance" button. On the following screen, select the button containing the employee's name.

The Employee Wage Advance screen appears with the "Pay Out To" field pre-populated. Enter $100.00 and the description of the pay out, then click the "Finish" button (see Figure 19-3).

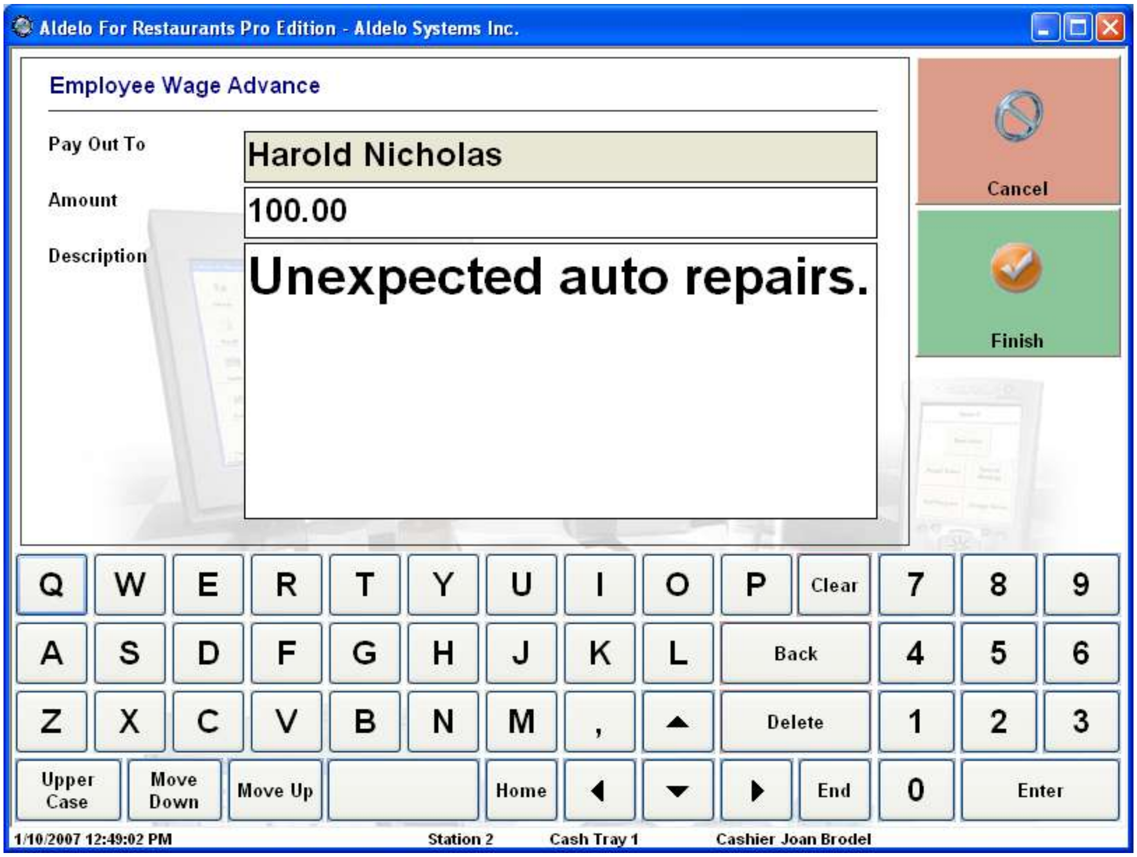


Figure 19-3

MANAGER CASH OUT

Whenever too much cash accumulates in a cash drawer, the manager may perform a Manager Cash Out to reduce the cash to a reasonable amount. The excess cash is usually placed in a safe. The system prints two copies of the receipt: one for the manager and one for the cashier. The cashier treats the receipt the same as cash when signing out.

Click the "Pay Out" button on the main POS screen. The manager must enter his or her Employee Access Code. The Pay Out Type screen appears. Click the "Manager Cash Out" button. Enter $500.00 in the Enter Manager Cash Out Amount window and click the "Enter" button. Give a copy of the receipt to the cashier for use when balancing the cash drawer.

Issuing Refunds

The Refund feature of Aldelo® For Restaurants should be used anytime a refund is issued to a customer.

Click the "Refund" button on the main POS screen. Enter the access code. The Refund screen appears. Enter the Order # (optional), the Refund Amount, and the Reason for the refund (see

Figure 19-4). Select the Refund Method by clicking the arrow next to the field to display the drop-down list. Select the appropriate refund method from the list by clicking it. When done, click the “Finish” button.

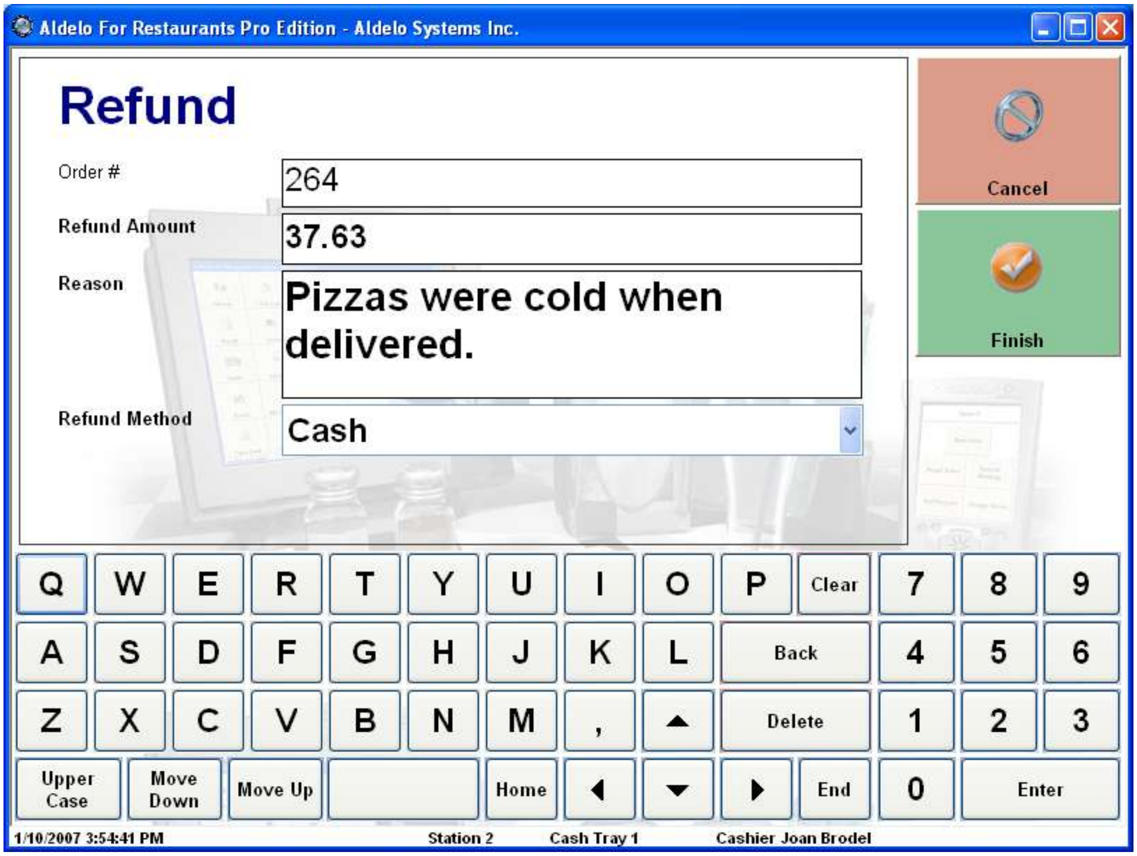


Figure 19-4

Chapter 20 — Gift Card Procedures

Gift cards provide the restaurant owner a way to help stimulate customer loyalty. A customer who buys a gift card for someone else is obviously pleased with the restaurant and wants to introduce others to it.

Issuing Gift Cards

From the main POS screen, click the "Gift Certificate" button. Enter the Employee Access Code to display the Gift Certificate screen (see Figure 20-1).

In the Account Number field, enter "101." These numbers are usually found preprinted consecutively on the gift certificates.

If the restaurant uses MSR Cards, place the cursor in the MSR Card field and swipe the card through the reader.

Note: The MSR Card data is required if the Account Number field is not used. Correspondingly, the Account Number is required if the MSR Card field is not used. However, both may be used together.

Enter the expiration date, "12/31/2009." The "/" button to the right of the field may be used to type the slashes between the numbers. This field is optional.

In the Issued To field, enter "Paul Gentry," and in the Presented By field, enter "Jim Newman." Both of these fields are optional.

Next, enter the dollar value of the gift card, "$100.00." we are discounting this card by 20%, so enter "$20.00" in the Discount field. Discounting the purchase price of the gift card gives the customer a reason to buy it because he or she will save money by doing so. To issue a free card to a customer, discount the entire amount.

If the customer wishes to purchase additional gift cards, click the "Add" button and fill in the required data again for the new card. You can create as many gift cards as necessary in this manner.

Finally, click the arrow next to the Payment Type field to display the drop-down list of payment methods. Select "Cash" by clicking on it. Enter the amount tendered from the customer and click the "Finish" button. The amount tendered must be sufficient to cover the balance due or the Finish button does not become active.

If any change is due, the amount displays on the screen. A receipt for the transaction prints unless the "Do Not Print Receipt" button is clicked **before** clicking the "Finish" button.

Figure 20-1

Recharging Gift Cards

When a customer's gift card balance gets low, it can be recharged to add more value to it.

Click on the "Gift Certificate" button on the main POS screen. Enter the Employee Access Code to display the Gift Certificate screen. Click the "Recharge" button. Select "Search by gift card account number" as the desired search method (the search may also be performed by swiping the MSR Card through the reader).

Continue the transaction as though it was a new gift card purchase. Enter "$50.00" in the Total Amount field and "$10.00" in the Discount field. Select "Cash" as the Payment Type and enter "$40.00" in the Amount Received field. Click the "Finish" button.

Checking Balances

From the main POS screen, type "101," the account number of the gift card we just created (there is no field displayed; just type the number on the keyboard when in the main POS screen). Press the Enter button on your keyboard. The Gift Certificate Balance screen appears, displaying the gift card balance, $150.00. If an MSR card was used to create the gift card, swiping it through the reader while on the main POS screen yields the same information.

Chapter 21 — Order Settlement Procedures

Cashier Settle Operations

An employee signed in as a cashier may settle orders. The cashier must have a cash drawer open on a terminal before settling orders.

SETTLING IN THE MAIN POS SCREEN

The cashier may settle any order in the system, no matter who created it.

Enter an order for Eleanor Powell into the system (Employee Access Code “14”). When finished, click the “Done” button. To settle an order in the main POS screen, click the “Settle” button. The cashier, Joan Brodel, must enter her Employee Access Code (“3”).

The Select Order To Settle screen appears, displaying a list of all open orders (if the screen displays “No Orders Found,” **deselect** the “My Orders” button). Click on the order that was just created. The Settle Order screen appears (see Figure 21-1). Select a payment method.

Figure 21-1

Payment by Cash

Click on the “Cash” button. The Cash Tendered screen displays (see Figure 21-2). Enter the amount tendered in the field on the upper left corner of the screen and click the “Enter” button. Alternatively, you may select one of the preset amount buttons (the bright green button indicates the exact balance due). The change due amount appears on the screen and the receipt prints. The system returns to the main POS screen.

Figure 21-2

Payment by Check

Create another order in Aldelo® For Restaurants. Settle the order by clicking the “Check” button. The Check Scan screen appears (see Figure 21-3). Enter the bank routing number in the appropriate field. This is a nine-digit number encoded on the lower portion of the check. As soon as the ninth digit is entered, the Checking Account field becomes enabled. Enter the checking account number and the driver license number in their respective fields.

Click the “Keyboard” button to the right of the field if you wish to enter the number by using the onscreen keypad; otherwise, a hardware keyboard may be used. At any time, if a mistake is made in entering the numbers into these fields, click the “Eraser” button to the right of the “Keyboard” button to clear the entry.

Clicking the “Verify” button compares the check to the list of bad checks in the system. If there is a previous bad check from the customer, the screen displays the Alert Code (Approval, Declined, or Manager Attention). If not, the check-tendered screen appears. Select one of the preset amount buttons or enter the check amount in the field and click the “Enter” button.

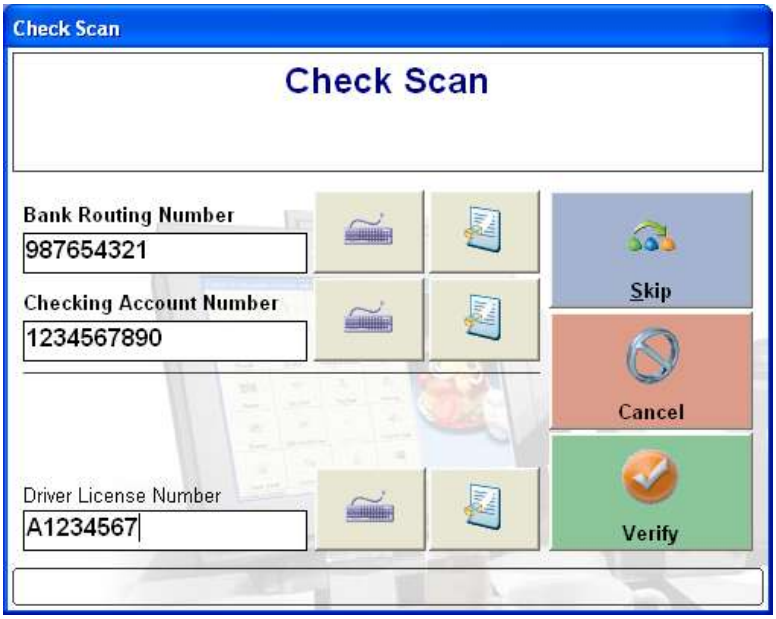


Figure 21-3

Payment by Credit Card

If the restaurant uses a bank terminal to process credit card transactions, the procedure for accepting payment by credit card is identical to that of accepting payment by cash. The user should run the credit card transaction through the bankcard terminal and get approval **before** entering the amount tendered.

If integrated credit card processing is used, the Credit Card Processing screen displays, allowing the user to process the transaction internally through Aldelo® For Restaurants.

Payment by Gift Card

If the customer has a gift card to redeem, settle the order by clicking the “Gift Certificate” button. The Gift Certificate screen displays. Select the search method by clicking the appropriate button. When the gift card is found in the system, the order settles and the receipt prints. A separate receipt also prints, showing the remaining balance left on the card.

If the prior balance on the gift card is insufficient to cover the check, the Settle Order screen displays the balance due (see Figure 21-4). The gift card payment may be withdrawn and another payment method chosen by clicking the “Gift Certificate” button, or the gift card may be used and the balance paid by another method (cash, check, credit card, debit card, or another gift card).

Figure 21-4

In-House Charge Accounts

Customers may be setup with in-house charge accounts, enabling them to patronize the restaurant and pay their accounts later. Navigate to **Back Office** > **Activities** > **Customer Activities** > **Maintain In House Charge Accounts** to create and maintain in-house charge accounts. Click the "New" button. The Maintain In House Charge Accounts window displays.

Create a new charge account by entering the requested information. Click the "Save" and "Done" buttons. Now, create an order in Aldelo® For Restaurants and settle it by choosing the "House Account" button on the Settle Order screen. The Customer Look Up Type screen appears, giving the user several choices of method for finding the customer in the system. Click on the "Phone" button and enter the phone number that was used when the customer account was created. On the Review Customer Information screen, verify that the correct customer is displayed and click the "Done" button.

On the Confirm Action screen, click the "Yes" button. Click the "Enter" button on the Enter Charge Tender window to accept the default amount tendered and complete the transaction (see Figure 21-5).

Note: The default amount in the Enter Charge Tender field equals the Total Due for the guest check. A lesser amount may be entered in the field and the balance paid by another method. However, a greater amount may not be entered into this field, as no change is allowed to be given when settling an order as a House Account.

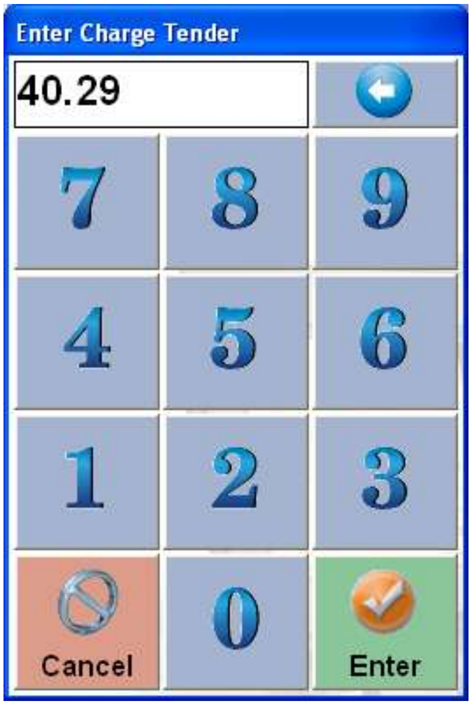


Figure 21-5

Complimentary Meals

The "Complimentary" button of the Settle Order Screen allows the user to discount a guest check by any amount, up to and including the full total due. This button has a security setting attached to it, allowing management to limit its use to managers and above, if desired.

Enter the order in the following table into Aldelo® For Restaurants as a Dine In order. Click the "Done" button when finished.

Access Code	Guests	Menu Items
14	2	Chicken Salad
		Tuna Salad
		Coca-Cola
		Budweiser
		Apple Pie
		Vanilla Ice Cream

Now, recall the order using "3" as the Employee Access Code when prompted (cashier Joan Brodel). Select the order from the list of open orders and settle it by clicking the "Complimentary" button. Enter "$20.00" in field of the Enter Complimentary Amount screen. The new balance due is shown. Settle the new balance due as a cash payment. Orders settled as "Complimentary" are considered cash discounts and are displayed in reports as such.

Note: In Back Office > Store Settings > Other > Taxes > Other Options, there is a setting to determine if the discount is applied after the taxes. Leaving the checkbox blank applies the taxes to the pre-discounted amount. Selecting the checkbox reduces the tax amount on the total order by applying tax to the discounted amount. If the residual balance due is not as expected, check this setting (a similar setting is available for applying credit after taxes).

Charging to a Room

An order may be settled by charging it to the customer's room. This requires that the Aldelo® Hotel Integrator be enabled.

Settling from the Order Entry Screen

Using the "Settle" button in the Order Entry screen simultaneously sends the order to the kitchen and moves to the Settle Order screen, eliminating the steps of clicking the "Done" button and recalling the order.

Settling Using Staff Bank

SETTING UP STAFF BANKING

From the main POS screen, navigate to **Back Office** > **Store Settings** > **Revenue** > **Cashier** tab and select the Enable Staff Banking checkbox. Click the "Save" and "Done" buttons.

Next, click **Setup** > **Employee Setup** > **Employee Files** and select Eleanor Powell. Click the Payroll tab and select the Use Staff Bank checkbox. Click the "Save" and "Done" buttons.

From the main POS screen, click the Time card button and enter Eleanor's Employee Access Code ("14"). Click the "Stay" button, then the "Clock In" button (if the "Clock In" button is missing from the screen, Eleanor must first clock out and then clock in again). After clocking in, select the "Start Staff Bank" button. Enter $100.00 in the Enter Staff Bank Start Amount window. On the Confirm Action screen, click "Yes" to confirm that the start amount was provided by the restaurant. Finally, click the "Close" button. Eleanor Powell is now setup to use Staff Bank.

SETTLING

When an employee uses Staff Bank, the Order Entry screen looks different from normal. The Settle" and "Cash Tender" buttons disappear, replaced by a "Staff Bank" button (see Figure 21-6).

Create an order in Aldelo® For Restaurants, using "14" as the Employee Access Code. Click the "Done" button when finished. Recall the order and click the "Pay To Staff Bank" button on the Recalled Order screen. Select the payment method and settle the order. Click the "Done" button on the Change screen.

A Staff Bank order may also be settled directly from the Order Entry screen by clicking the "Staff Bank" button. Like the Settle button of the Order Entry screen, this moves the order directly to the Settle Order screen and sends the order to the kitchen at the same time.

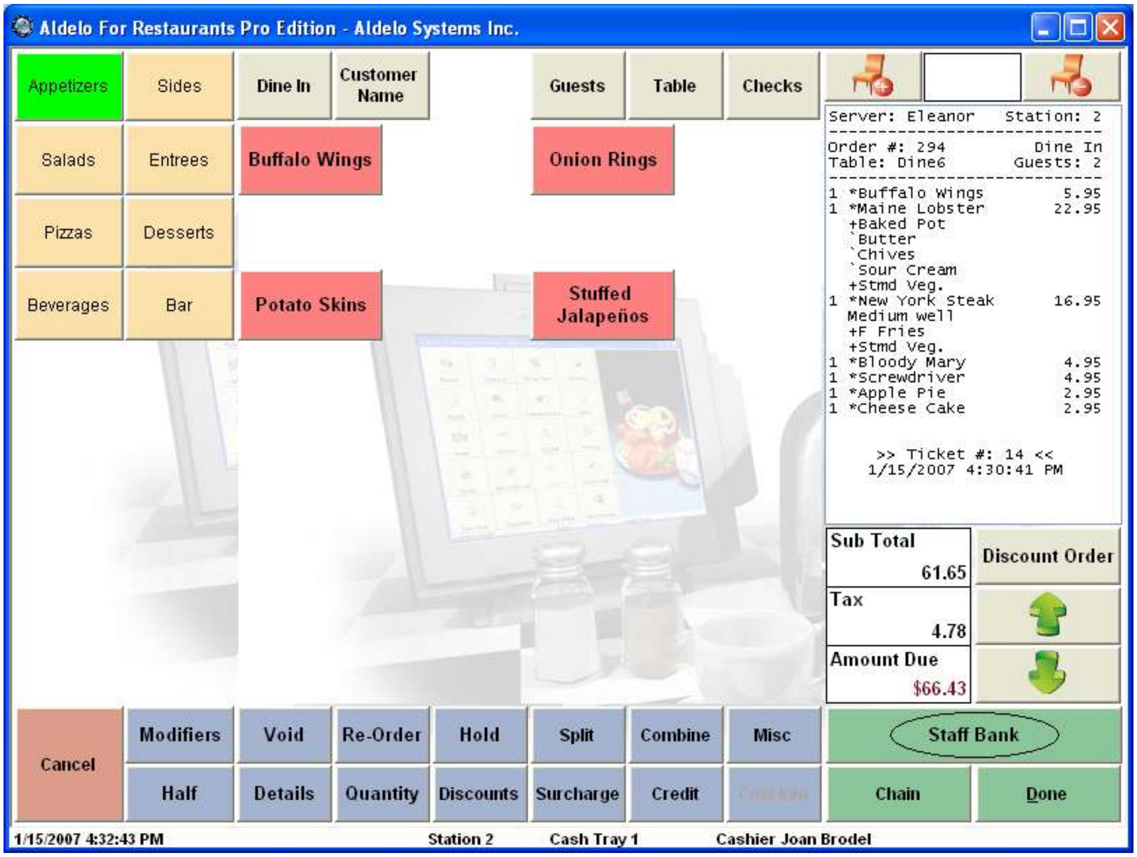


Figure 21-6

Settling Using Driver Money Drop

Create two delivery orders in Aldelo® For Restaurants, clicking the "Done" button after each. Next, from the main POS screen, click the "Driver" button. Select both orders, click on one of the drivers to deliver them, and then click the "Departure" button.

Now, click on the name of the driver assigned to make the delivery to enable the "Arrival" button. Click it, and on the Confirm Action screen, click the "Yes" button to indicate that the delivery orders have arrived. Click the "OK" button on the Driver window, and then the "Money Drop" button on the Driver screen.

Enter the Employee Access Code for the driver. The total money due for both orders displays on the Driver Money Drop Report screen. Click the "OK" button.

The Cashier Login screen displays next. Enter the Employee Access Code for a cashier. On the Money Count screen, enter the cash received from the delivery customers (see Figure 21-7). The total due displays in the title bar. The entries may be made by denomination, or the total may be entered by clicking the "Additional Cash" button. Click the "Finish" button when done. Confirm that the money count is finished and acknowledge that the money drop is complete.

Note: Before using the Money Drop feature of Aldelo® For Restaurants, the user must settle all orders separately that were paid by methods other than cash.

Figure 21-7

Chapter 22 — Closing Procedures

Closing the Cash Drawer

Before a cashier clocks out, his or her cash drawer must be counted and closed. A physical count of the receipts is performed and balanced against the expected amount. Any discrepancy is reported as an amount over or short.

CASHIER SIGN OUT

Click the "Cashier Out" button on the main POS screen and enter the Employee access code for the cashier who is signing out. On the Select Cash Tray For Cashier Sign Out screen, click the button for the cash tray corresponding to this cashier. The Money Count For Cashier Out screen displays (see Figure 22-1).

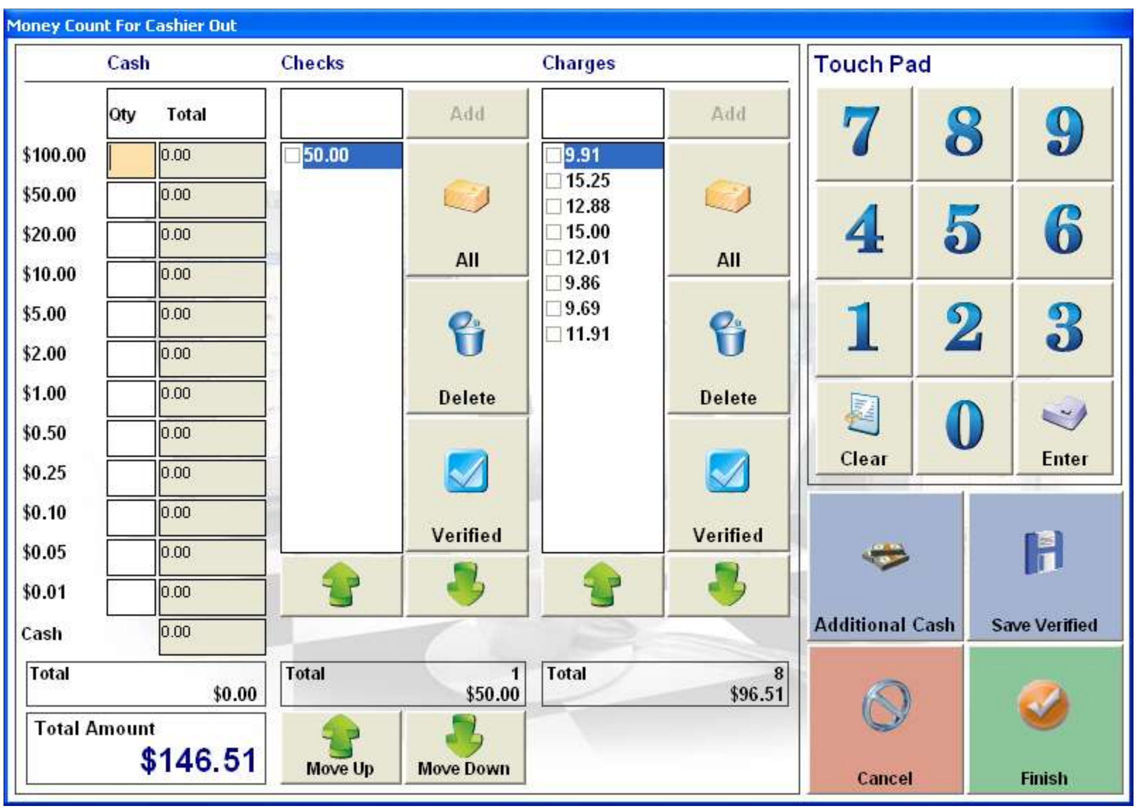


Figure 22-1

Verify the amount of each check and charge slip in the cash drawer, and click the checkbox next to the corresponding amount listed in the Checks and Charges columns on the screen. If there is a check or charge slip that is not listed on the screen, enter the amount in the appropriate field at the top of each column and click the "Add" button.

Next, perform a physical count of each denomination of bill and coin, entering the quantity of each in the appropriate Qty field of the Cash column. Be sure to enter the **quantity** of each coin or bill, not the total dollar amount. The total is calculated automatically, the product of the denomination and the quantity.

Click the “finish” button when done and verify that the money count is finished. The Register Discrepancy window appears, displaying the discrepancy amount (see Figure 22-2). A Discrepancy Note must be entered in order to enable the “Approval” button. Clicking the “Approval” button displays the Manager Login screen. A manager level employee must enter his or her Employee Access Code to approve the reason for the discrepancy.

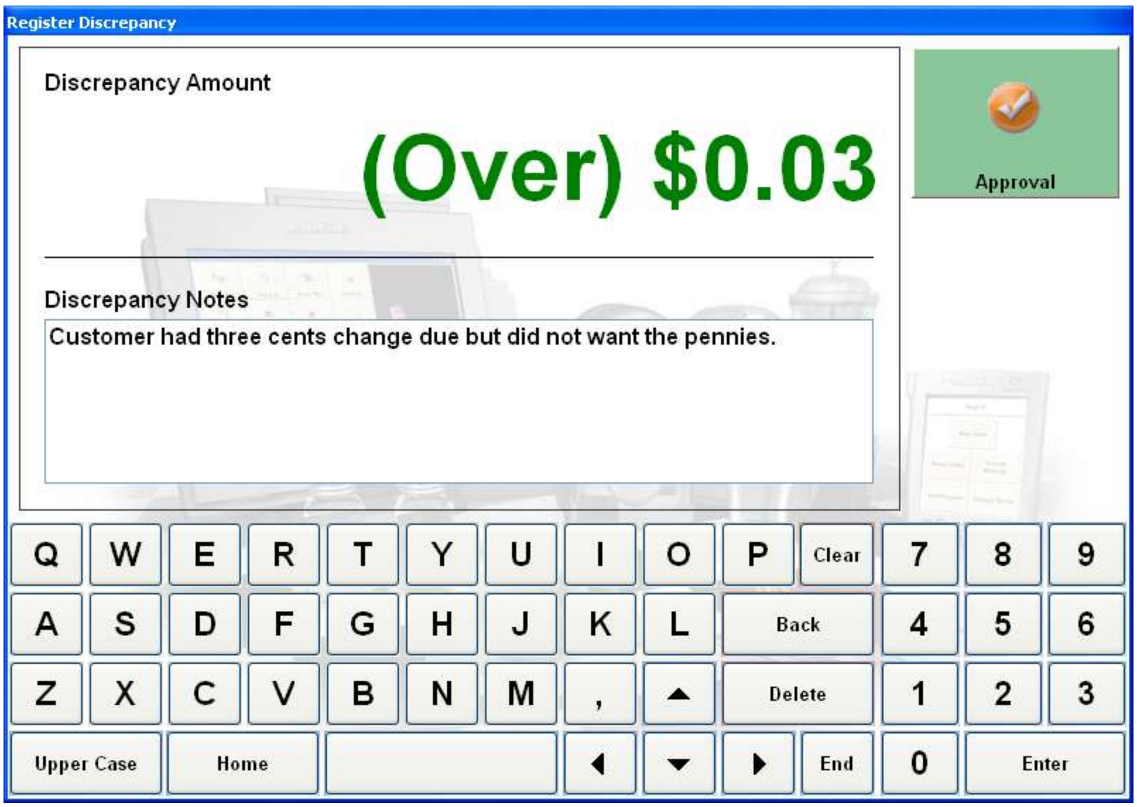


Figure 22-2

Finally, the Withdraw Amount screen appears, displaying the amount of cash to remove from the cash tray to deposit to the bank. Removing this amount from the cash tray leaves the exact starting balance for the next cashier’s use. Click the “Done” button when finished.

Note: The Adjust Gratuity and Gratuity Amount screens may display immediately after the user selects the cash tray to close. Use these screens to adjust gratuities by highlighting an order and clicking the “Adjust Gratuity” button. These screens only appear if credit card integration is used with Aldelo® For Restaurants.

QUICK CASHIER SIGN OUT

The Quick Sign Out feature of Aldelo® For Restaurants allows the user to switch the cash tray out of a busy station and into a station located in a manager's office so that the money count may be completed in a safer environment.

From main POS screen, click the "Cashier Out" button and enter the cashier's Employee Access Code. Select the cash tray to close. On the Money Count screen, click the "Cancel" button. On the Confirm Action screen, select "Yes" to exit without saving. Next, select "Quick Sign Out (No Money Count Performed)." When the cash tray is signed out, it may only be signed in again by the same employee. Click the "Revert Quick Cashier Out" button to assign this cash tray to the new station.

CLOSING STAFF BANK

To close Staff Bank, all orders must first be closed or transferred to another server.

To close Staff Bank, click the "Time Card" button on the main POS screen and enter the Employee Access Code. On the Employee Time Card screen, click "End Staff Bank." The Staff Bank Liability Report window displays. Click either the "Print" or "OK" button to continue to the Money Count screen.

From this point forward, the procedure is identical to that of a cashier sign out, except that the Withdraw Amount screen does not display.

Note: If the starting amount for the employee using Staff Bank is provided by the restaurant, this starting amount is included in the figure of total money expected from the employee. If the employee provided the starting amount, only the net money collected is included in this figure.

Clocking Out

Any orders that an employee is responsible for must be settled or transferred to another server before he or she may clock out. These instructions also assume that the employee is clocked in.

Click the "Time Card" button on the main POS screen and enter the Employee Access Code. Click the "Clock Out" button. The Clock Out Time screen appears (see Figure 22-3). Click "Yes" to acknowledge the clock out time displayed.

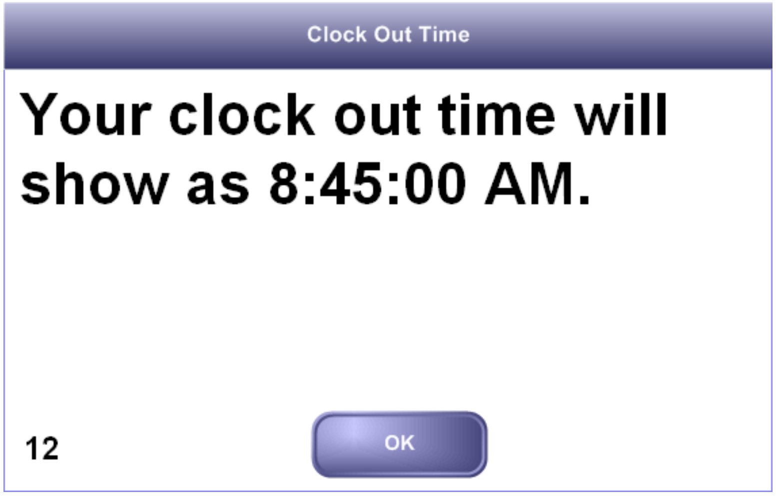


Figure 22-3

Closing Report

A Closing Report may only be run if all employees are clocked out. This report should be run every day.

From the main POS screen, click the “Operations” button. Enter “12” when prompted for the Employee Access Code (George Murphy). Click the “Revenue Center” button, and then the “Closing Report” button. Select the report date and click the “select” button. When asked if you want to review the Access Denied logs, choose “Yes.”

The Daily Closing Report displays on the screen (see Figure 22-4). Scroll through it using the arrow buttons at the bottom of the screen to become familiar with it. The Access Denied logs are near the bottom of the report. If you have a printer attached to your system, click the “Print” button to create a hard copy of the report.

Employee Time Cards, Gratuity Recap, and Tender Details are hidden from this report by default. To display any of these, navigate to **Back Office > Help > Technical Support** and press the F10 button on your keyboard to display the Registry Settings screen. All three of these reports are listed under “Daily Close.” Edit the Key Values as necessary.

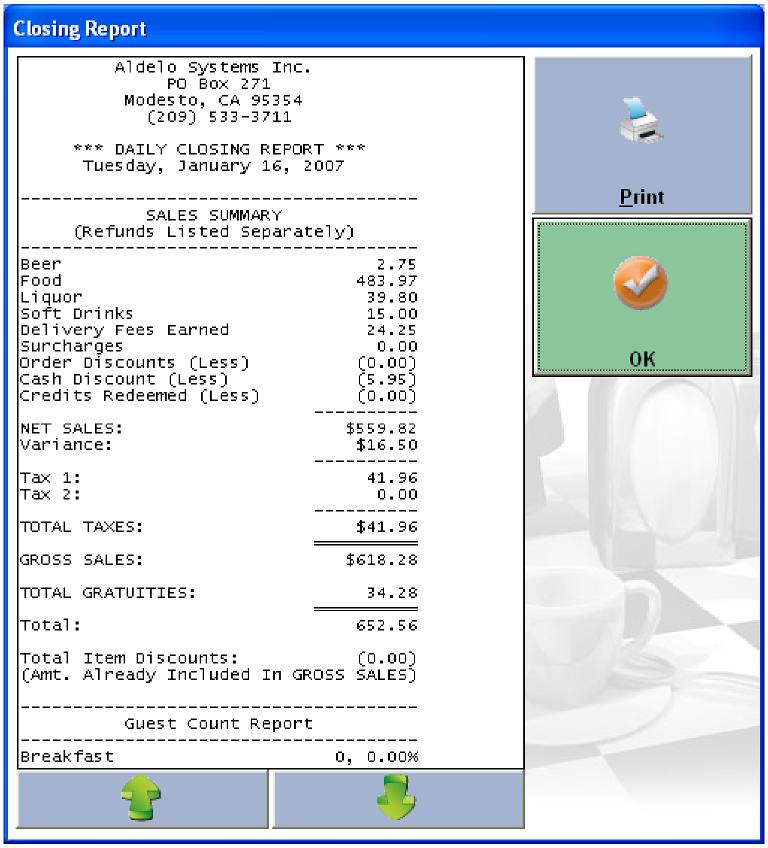

Closing Report
Aldelo Systems Inc.
PO Box 271
Modesto, CA 95354
(209) 533-3711
*** DAILY CLOSING REPORT ***
Tuesday, January 16, 2007
SALES SUMMARY
(Refunds Listed Separately)
Beer 2.75
Food 483.97
Liquor 39.80
Soft Drinks 15.00
Delivery Fees Earned 24.25
Surcharges 0.00
Order Discounts (Less) (0.00)
Cash Discount (Less) (5.95)
Credits Redeemed (Less) (0.00)
NET SALES: $559.82
Variance: $16.50
Tax 1: 41.96
Tax 2: 0.00
TOTAL TAXES: $41.96
GROSS SALES: $618.28
TOTAL GRATUITIES: 34.28
Total: 652.56
Total Item Discounts: (0.00)
(Amt. Already Included In GROSS SALES)
Guest Count Report
Breakfast 0, 0.00%
Print
OK

Figure 22-4

Chapter 23 — Manager Operations

Time Cards

EDITING TIME CARDS

Sometimes, employee time cards must be corrected. To do so, Click the “Time Card” button on the main POS screen, and then the “Edit Time Cards” button. Select William Yarborough from the list at the left side of the Edit Unpaid Time cards screen (see Figure 23-1).

Highlight one of the dates below the list of names. The Clock In and Clock Out times appear. Click the Clock Out time on the upper right and add five minutes to it by using the arrow buttons near the bottom of the screen. When complete, click the “Save” and “Done” buttons.

Note: If the gratuity amount reported is incorrect, it may be changed in this window by clicking the “Tips” button and keying in the new amount.

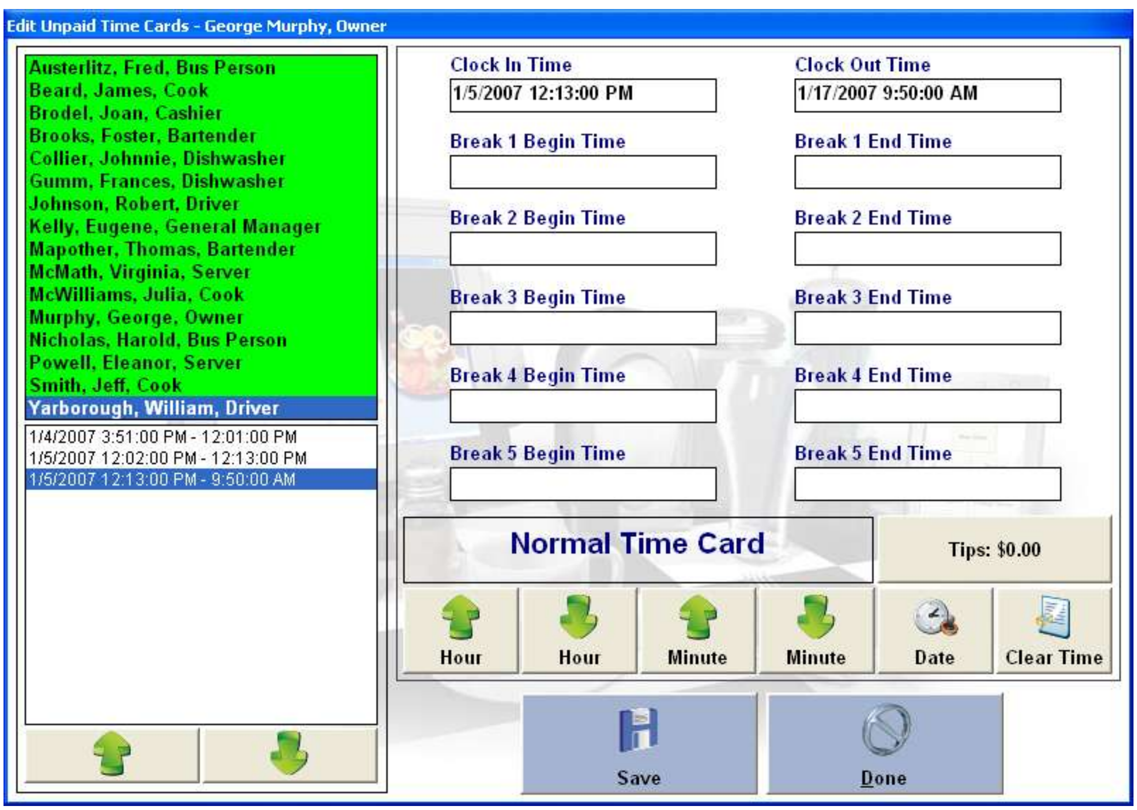


Figure 23-1

Orders

RE-OPENING AN ORDER (REVERTING)

Changes may be made to closed orders by re-opening them. This should require a manager security level.

Perform the necessary steps to create an order and settle it. From the main POS screen, click the "Recall" button. Enter "8" when prompted for the Employee Access Code (Eugene Kelly). Deselect the "My Orders" button and click the "Open Orders" button to display all orders (settled and open) on the screen.

Select the first settled order from the list to re-open it. On the Recalled Order screen, click the "Re-Open Check" button. Confirm on the next two screens. The Recalled Order screen displays the re-opened order (see Figure 23-2). If desired, click the "Edit Order" button to make changes to this order.

Figure 23-2

Cash Drawers

RE-OPENING A CASH DRAWER

A cash drawer less than three days old may be re-opened to make needed adjustments. Under no circumstances may a cash drawer three or more days old be re-opened.

From the main POS screen, click the “Operations” button and enter “12” for the Employee Access Code. Next, click the “Revenue Center” button, and then the “Re-Open Cashier” button. Confirm the re-open operation, and then select the cashier tray to re-open. Click “Yes” to confirm the re-open.

Note: To ensure you re-open the correct cash tray, select the tray by the “Liab. #.”

Operations Center

RECEIVE PAYMENTS

Clicking the “Receive Payments” button on the Operations screen allows the user to accept payment for bad checks or in house charge accounts.

Pay In House Charges

When a customer wishes to make a payment against his In House Charge Account, navigate to **Operations > Receive Payments** and click the “Pay In House Charges” button. Select the customer lookup method and enter the required information. The In House Charge Payment screen appears displaying the customer’s records (see Figure 23-3). Select the appropriate payment method button and enter the amount tendered. If the entered amount is greater than the total amount due, the system shows the change due the customer. Partial payments may also be made.

Pay Bad Checks

When a customer wishes to reimburse the restaurant for a bad check, navigate to **Operations > Receive Payments** and click the “Pay Bad Checks” button. Select the check from the following screen to display the Receive Bad Check Payment screen (see Figure 23-3). Select the Payment Source and the Payment Method from their respective drop-down lists and click the “Finish” button.

Enter the amount received on the next screen and click the “Enter” button. Any change due displays on the following screen.

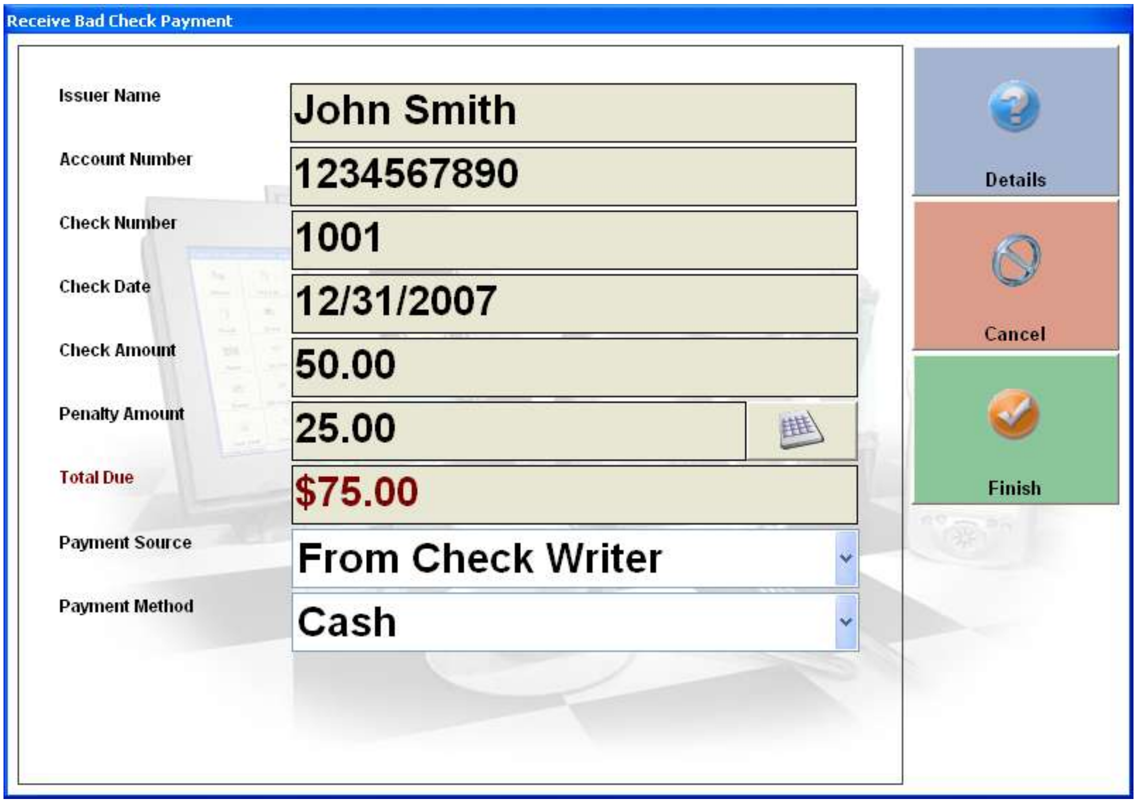


Figure 23-3

Auto Pay All Open Deliveries

To use this feature, the “Blind Cashier Close Out” checkbox must be checked under the **Back Office** > **Store Settings** > **Revenue** > **Cashier** tab.

In Aldelo® For Restaurants, create several delivery orders and mark them as delivery completed but do not settle them. From the main POS screen, navigate to **Operations** > **Receive Payments** and click the “Auto Pay All Open Deliveries” button. The Auto Pay All Open Deliveries screen displays, asking the user to confirm the action. Click the “Yes” button to complete the payment.

Navigate to **Back Office** > **Store Settings** > **Revenue** > **Cashier** and **deselect** the “Blind Cashier Close Out” checkbox.

REVENUE CENTER

This button on the Operations Center screen enables a manager to transfer orders to the next day (when in 24 Hour Operation Mode) and prepare bank deposits, as well as view and print a multitude of reports (see Figure 23-4). Access it by clicking the “Operations” button on the main POS screen.

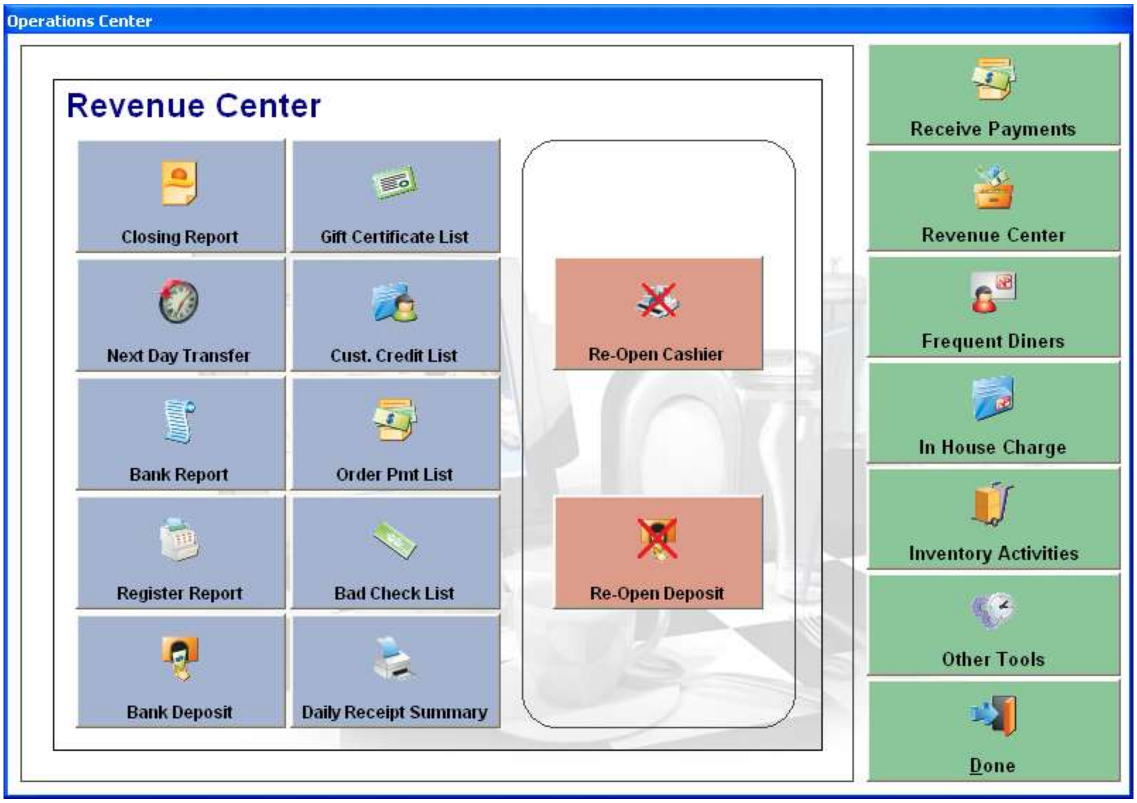


Figure 23-4

Closing Report

The Closing Report lists all sales and other important information necessary for closing the accounting day. Please see "Closing Report" in Chapter 22 of this manual for detailed information.

Next Day Transfer

When a restaurant is open 24 hours per day, an arbitrary time is chosen to close the accounting period for one day and begin the accounting period for the next day. Any orders open at this time must be transferred to the next business day.

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the "Next Day Transfer" button. The Next Day Transfer screen appears, asking you to confirm the transfer of all open orders to the next business day (see Figure 23-5). Click the "Yes" button to complete the transfer.

Figure 23-5

Register Report

The activity of all registers for a specified date is shown on the Register Report.

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the "Register Report" button. Select the desired date from the date picker screen and click the "select" button. The report displays, allowing the user to view it on the screen or print a hard copy.

Bank Report

The Bank Report (also known as the Bank Liability Report) summarizes the activity of a cashier or staff bank employee.

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the "Bank Report" button. The Enter Bank Report # screen displays. Enter the bank report number. The Bank Report number may be found on the register report (see previous section). Click the "Enter" button to display the report (see Figure 23-6). A hard copy of the report may be printed by clicking the "Print" button.

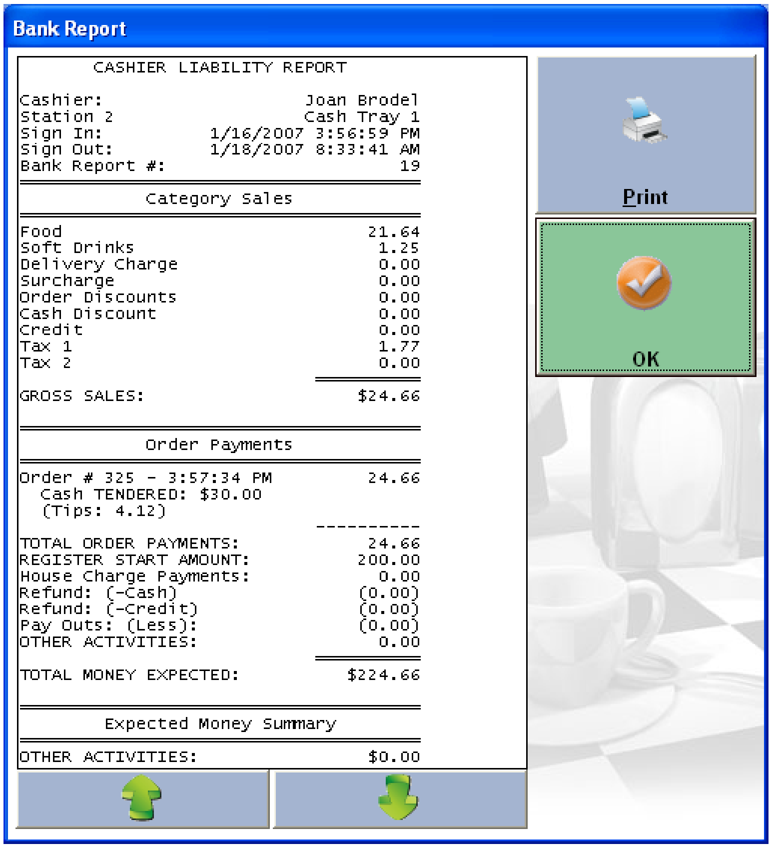


Figure 23-6

Bank Deposit

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the “Bank Deposit” button. The Money Count For Bank Deposit screen displays (see Figure 23-7). On this screen, confirm the checks received from customers by checking them off the list, and then enter the count of each denomination of bill and coin to be deposited to the bank. A Money Count report, Checks List, and Bank Deposit Slip print to the selected printer.

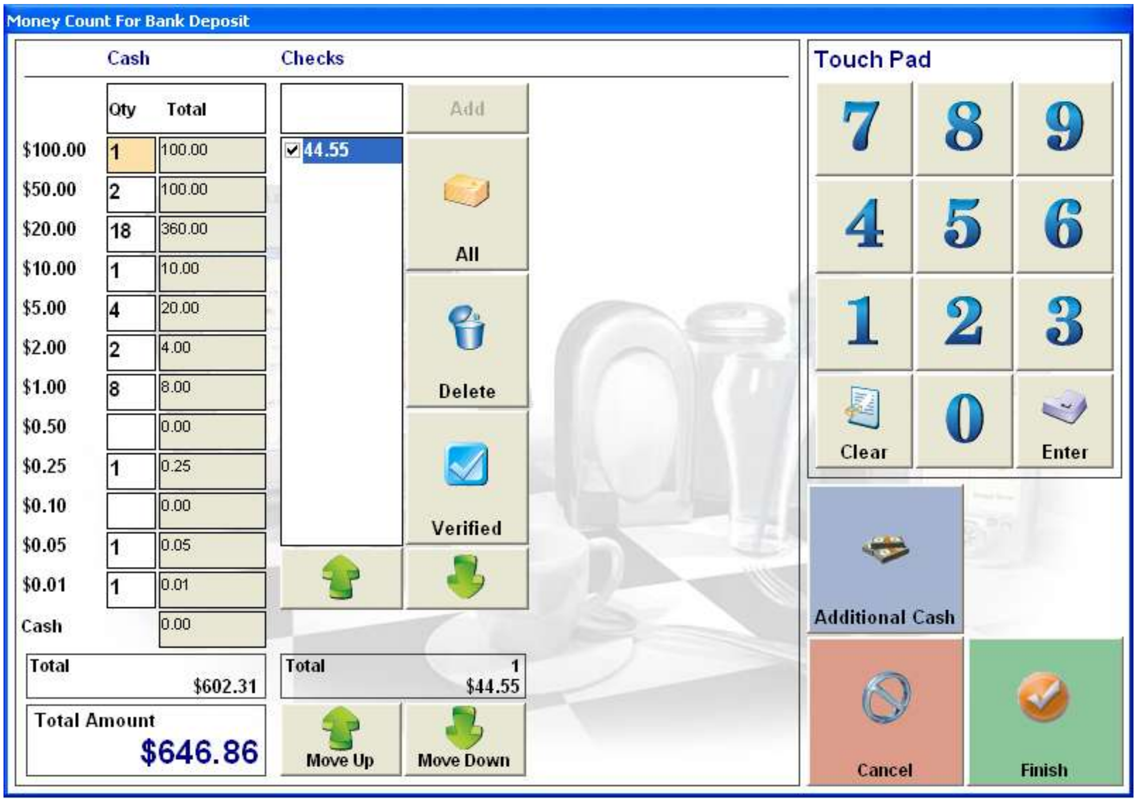


Figure 23-7

Gift Certificate List

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the “Gift Certificate List” button. The Gift Certificate List Report screen appears, displaying all gift certificates that have been issued (see Figure 23-8).

Click the “Export” button. A tab-delimited text file is created and sent to the Reports folder in Aldelo® For Restaurants. It may be viewed and edited in Microsoft Excel.

A copy may also be printed by clicking the “Print” button.

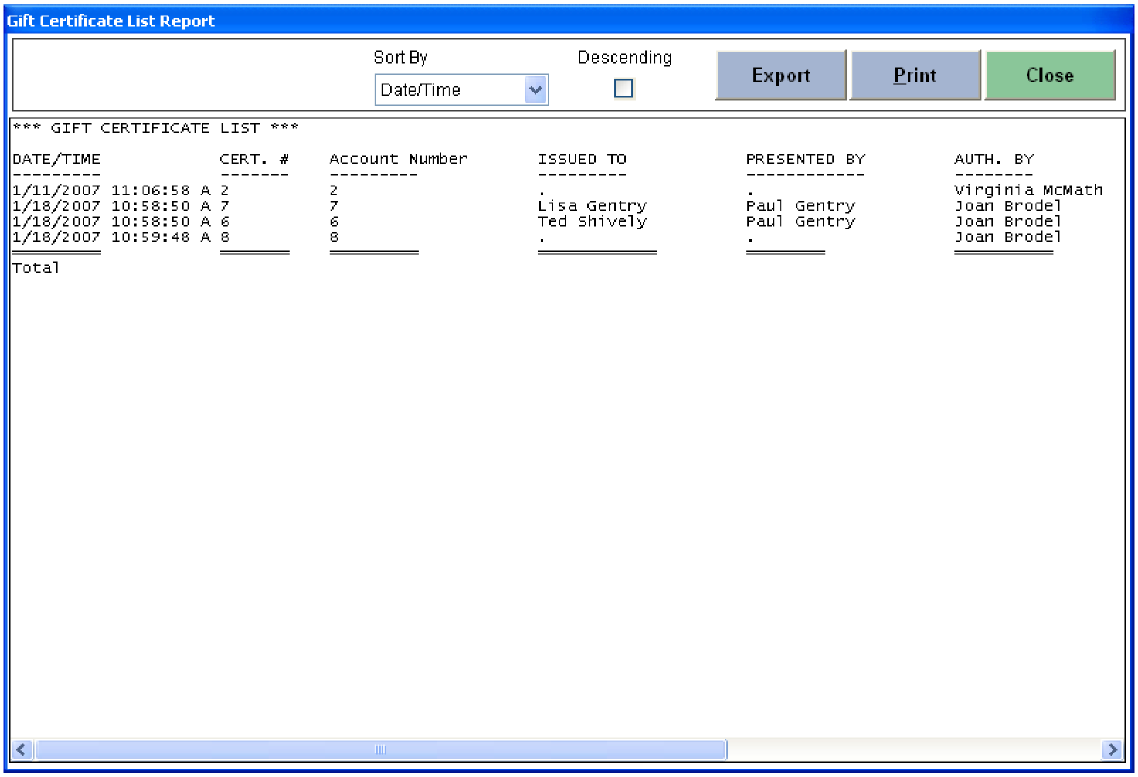


Figure 23-8

Cust. Credit List

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the “Cust. Credit List” button. The Customer Credit List Report appears, displaying a list of all customer credits. The list may be exported or printed.

Order Pmt List

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the “Order Pmt List” button to display a list of orders, payment methods, and tender amounts for the period selected. The list may be exported or printed.

Bad Check List

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the “Bad Check list” button. The Bad Check List window displays (see Figure 23-9). Here the user may view, enter, or edit bad checks. Selecting the “Show All Checks” checkbox displays **all** bad checks, including those that have eventually cleared.

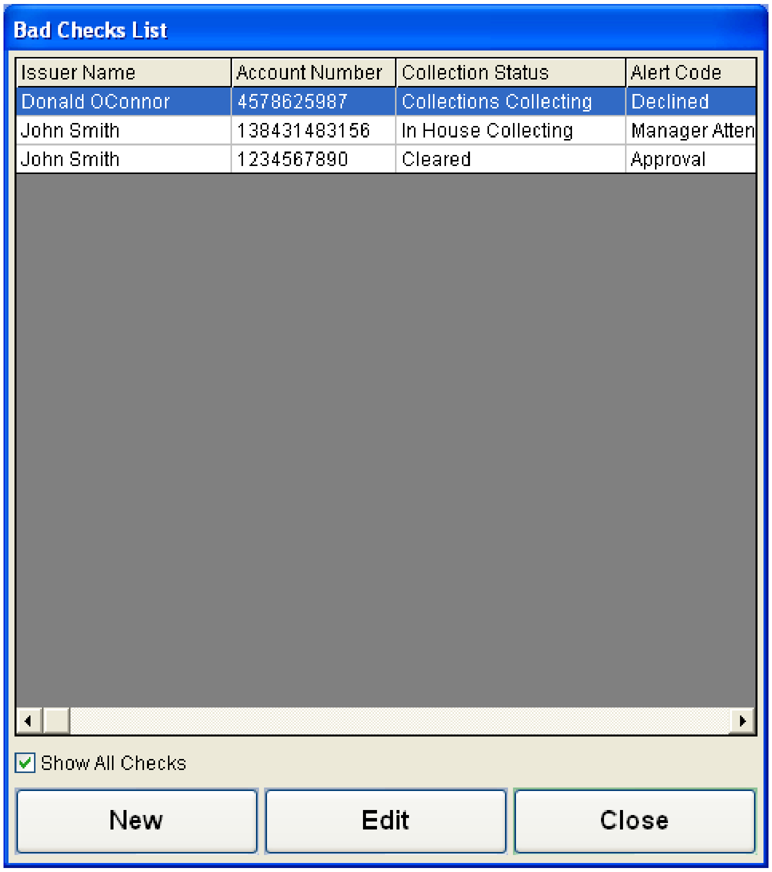


Figure 23-9

Daily Receipt Summary

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the "Daily Receipt Summary" button. Every receipt for the selected date prints in a condensed format to save paper. The report can only be printed; it cannot be displayed. Print this report only if absolutely necessary, as it is very long and uses quite a lot of paper. Before using this feature, be sure that the printer is loaded with sufficient paper to print the entire report.

Z Report

A Z Report's Grand Total shows the cumulative total of all positive transactions that have been entered into the system since it was first installed. This number cannot be changed for any reason. This is a security measure and is required by law in some jurisdictions.

From the main POS screen, navigate to **Back Office** > **Help** > **Technical Support** and click the F10 button on your keyboard to display the Registry Settings screen. In the Key Name column, scroll down to "Special Z Report" and change the Key value to "Yes" by clicking the "Edit" button. Return to the Revenue Center screen and click the "Z Report" button.

Before a Z Report can be run, all orders must be closed and all cashiers, including employees who are using Staff Bank, must be signed out.

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the “Z Report” button. Next, click the “Create ‘Z’” button to display the report (see Figure 23-10). Use the arrow buttons at the bottom of the window to scroll through the report. Click the “Print” button if you want a hard copy of the report.

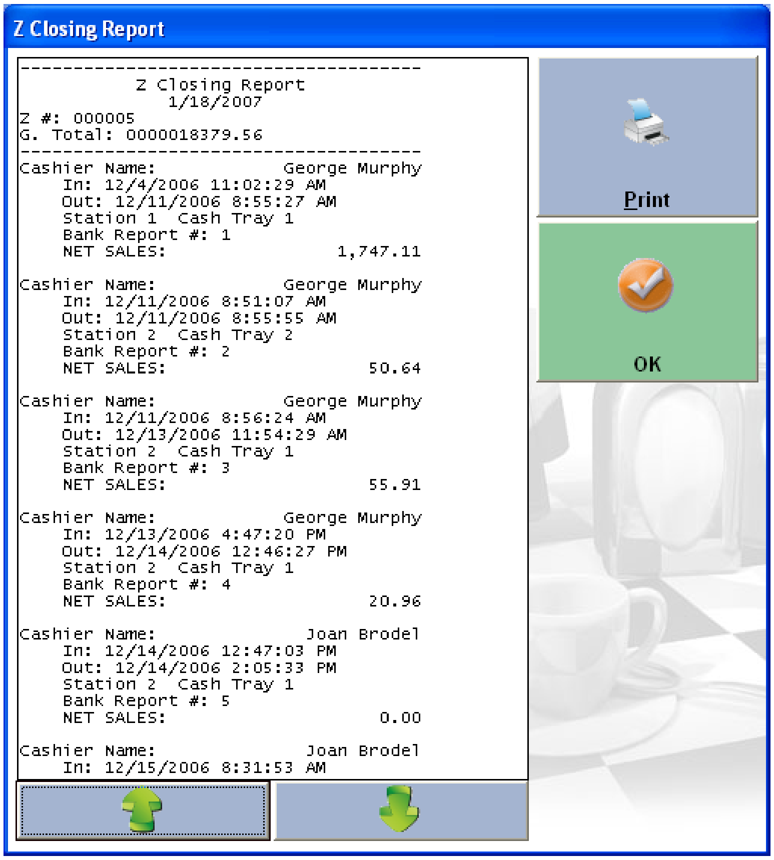


Figure 23-10

Re-Open Cashier

Cash drawers that are closed may be re-opened to make any necessary adjustments Please see Cash Drawers (Re-Opening a Cash Drawer) in Chapter 23 of this manual for details.

Re-Open Deposit

From the main POS screen, navigate to **Operations** > **Revenue Center** and click the “Re-Open Deposit” button. Enter the deposit slip number. If found, the deposit re-opens, allowing adjustments to be made.

FREQUENT DINERS

New Freq. Diner

From the main POS screen, navigate to **Operations > Frequent Diners** and click the “New Freq. Diner” button. Enter the customer’s phone number. If an account already exists under that phone number, an Account Already Established window appears. If an account does not already exist, the New Freq. Diner window displays (see Figure 23-11). Enter the required information and click the “Finish” button to add the new frequent diner.

Note: When a new frequent diner is created, a new customer record is created as well.

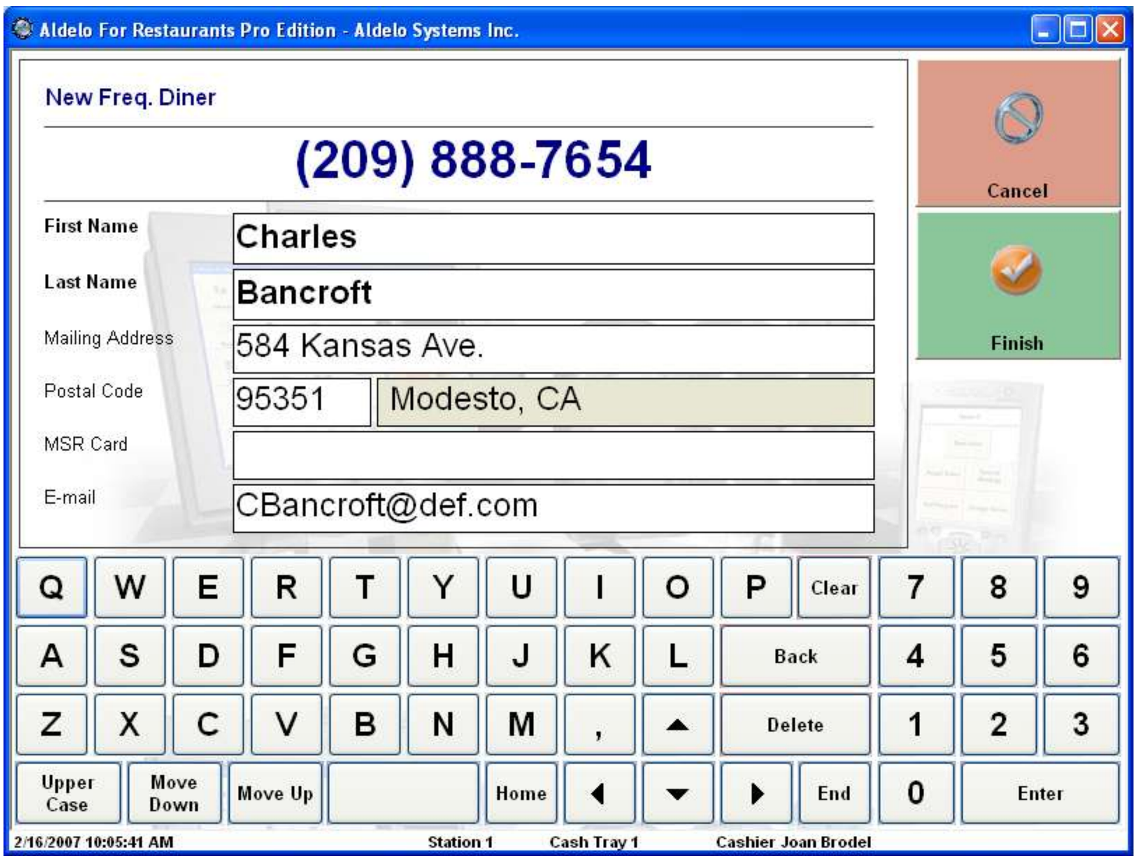


Figure 23-11

Track Order

The Track Order feature of Aldelo® For Restaurants is used to link orders to members of the Frequent Diner program.

From the main POS screen, navigate to **Operations** > **Frequent Diners** and click the “Track Order” button. Enter the customer’s phone number, and then enter the order number. The Order Already Tracked screen displays if the order has already been linked to one of the frequent diners. If not, the order is added to the frequent diner’s account.

Redemption

From the main POS screen, navigate to **Operations > Frequent Diners** and click the "Redemption" button. Enter the customer's phone number and the amount of credit to be given to the customer. A Freq. Diner Credit slip is printed on the receipt printer and the tracked information for the frequent diner is reset to zero (the Tracked Count and the Tracked Amount). The customer may use the face value of this slip to pay for a future order.

Note: If the Enforce Create Freq. Diner Reward checkbox is selected in Back Office > Store Settings > Staff / CRM and the fields below are populated with the appropriate information, redemption of a frequent diner's award will occur automatically.

Freq. Diner Acct. List

From the main POS screen, navigate to **Operations > Frequent Diners** and click the "Freq. Diner Acct. List" button. The Frequent Diner Accounts Report screen appears, displaying the information for all customers with frequent diner accounts. Whenever a redemption is made from a customer's account, the Tracked Count and the Tracked Amount are reset to zero.

IN HOUSE CHARGE

The In House Charge screen allows the user to maintain the restaurant's In House Charge accounts.

Maintain In House Accounts

The Maintain In House Charge Accounts screen allows the user to add new or edit existing in house charge accounts.

From the main POS screen, navigate to **Operations > In House Charge** and click the "Maintain In House Charge Accounts" button.

To add a new in house charge customer account, click the "New" button and enter the requested information. When finished, click the "Save" and "Done" buttons. Please note that the fields in **bold** are required information.

To edit an existing in house charge account, click on the "Maintain In House Charge Accounts" button to display the Maintain In House Charge Accounts screen (see Figure 23-12). Click on an existing name in the list. Edit the information as required and click the "Save" and "Done" buttons when finished.

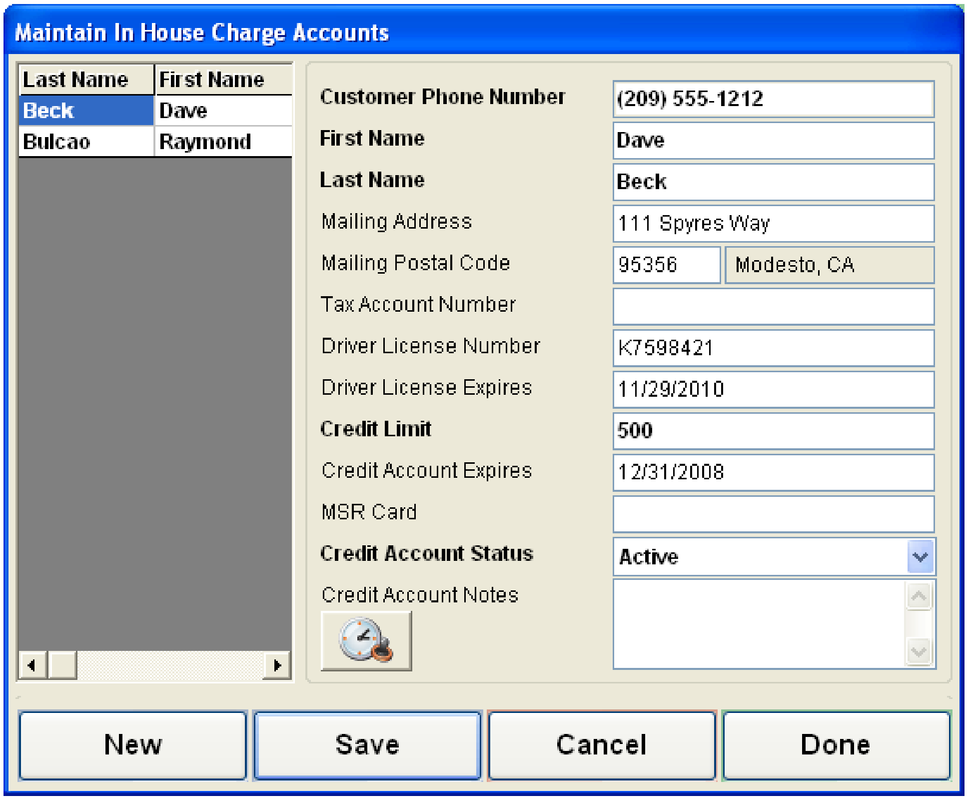


Figure 23-12

Create In House Statements

Use the Create In House Statements feature of Aldelo® For Restaurants to prepare account statements for your in house charge customers. The use of this feature assumes that In House accounts have been created and that the accounts show prior activity.

From the main POS screen, navigate to **Operations > In House Charge** and click the "Create In House Statements" button. Select the checkbox next to one of the accounts listed on the In House Charge Account List screen. Multiple accounts may be selected or they may all be selected simultaneously by clicking the "Select All" button. Click the "Done" button to display the results.

If multiple accounts were selected, use the "<<Previous" and "Next>>" buttons to navigate through the data. The statements may be printed by using the print buttons. Click the "Close" button when finished.

In House Account List

From the main POS screen, navigate to **Operations > In House Charge** and click the "In House Account List" button to display the In House Charge Accounts Report screen. The report lists all in house charge accounts, past and present (see Figure 23-13).

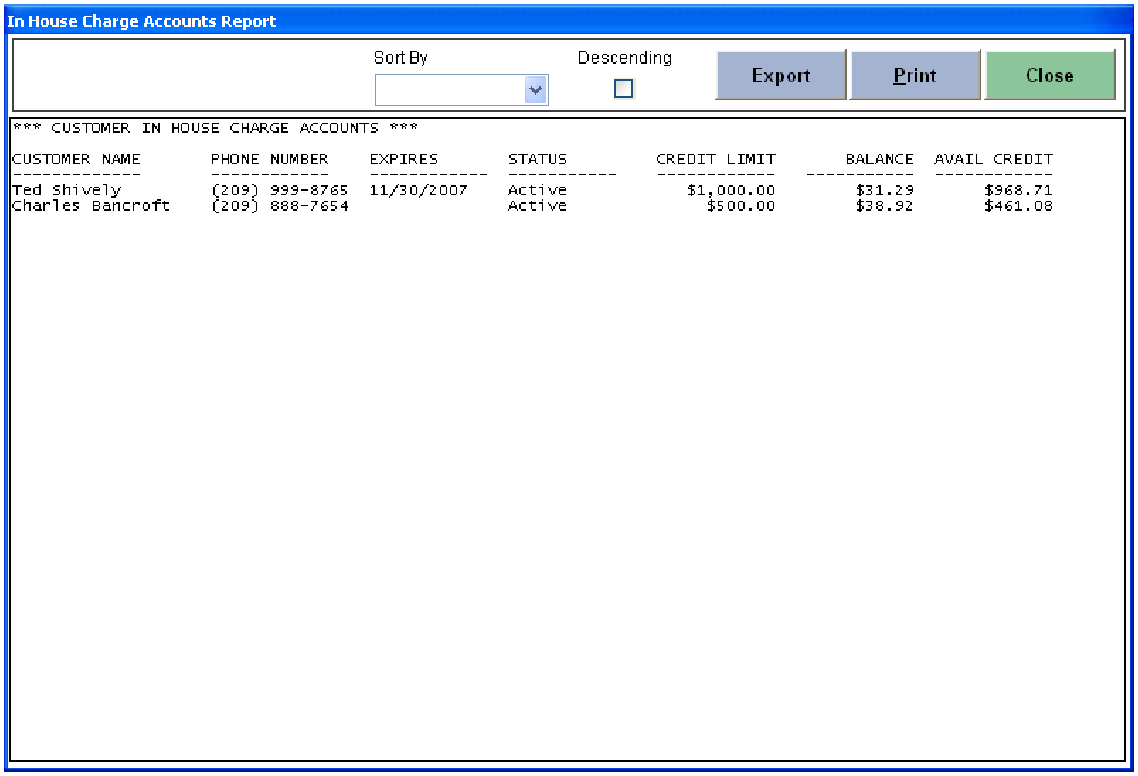


Figure 23-13

Customer Files

From the main POS screen, navigate to **Operations > In House Charge** and click the "Customer Files" button. The Maintain Customer Records screen displays. On this screen, customer records may be reviewed or edited, and new customer records may be created. Whenever changes are made or new records created, click the "Save" and "Done" buttons when finished.

INVENTORY ACTIVITIES

Shopping List

When using the Automatic Inventory Depletion feature of Aldelo® For Restaurants, if the quantity of an inventory item falls below the minimum Pack Size Re-order Point, the item is added to the Shopping List (see Figure 23-14). Management uses this list to create vendor orders to replenish inventory items to acceptable levels.

From the main POS screen, navigate to **Operations > Inventory Activities** and click the "Shopping List" button to display the report.

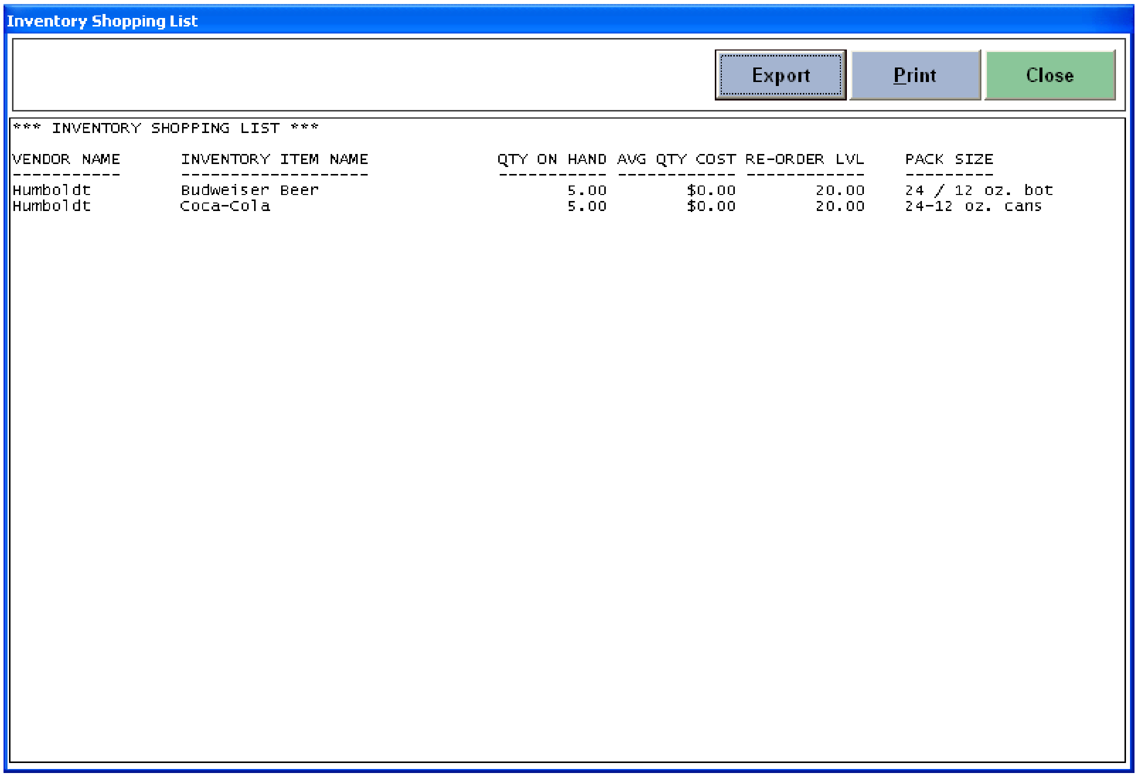


Figure 23-14

New PO

From the main POS screen, navigate to **Operations** > **Inventory Activities** and click the "New PO" button to display the New Purchase Order window. Use this screen to create new purchase orders when ordering inventory from vendors.

Review PO

From the main POS screen, navigate to **Operations** > **Inventory Activities** and click the "Review PO" button. Use this feature to review purchase orders that have already been created.

Select the purchase order to be reviewed from the list of the Purchase order Selection window. Click the "Review" button to display the purchase order on the screen.

Receive Items

When an order arrives from a vendor, it must be received into inventory to allow the system to calculate quantities on hand and the costs per quantity.

From the main POS screen, navigate to **Operations** > **Inventory Activities** and click the "Receive Items" button. Select a date in the Earliest PO Date field and click the arrow next to the Purchase Orders field. Select the purchase order from the drop-down list to display the list of received inventory items (see Figure 23-15). Review the items. If everything is correct, click the "Finish" button.

If changes must be made, select the inventory item from the list and click the "Edit" button. Make the necessary changes on the Receive Inventory Item Editor screen and click the "Done" button.

Items may be added to or removed from the list by clicking the appropriate button at the bottom of the Receive Inventory Items window.

Click the "Finish" button to complete the procedure.

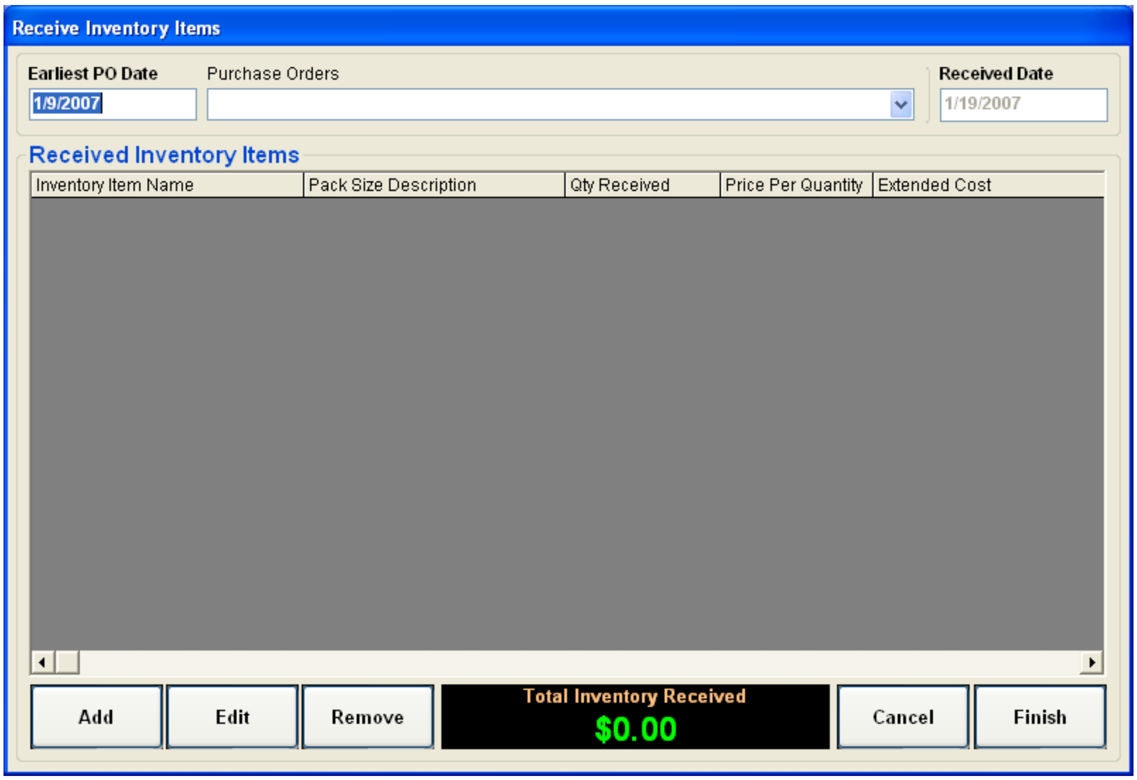
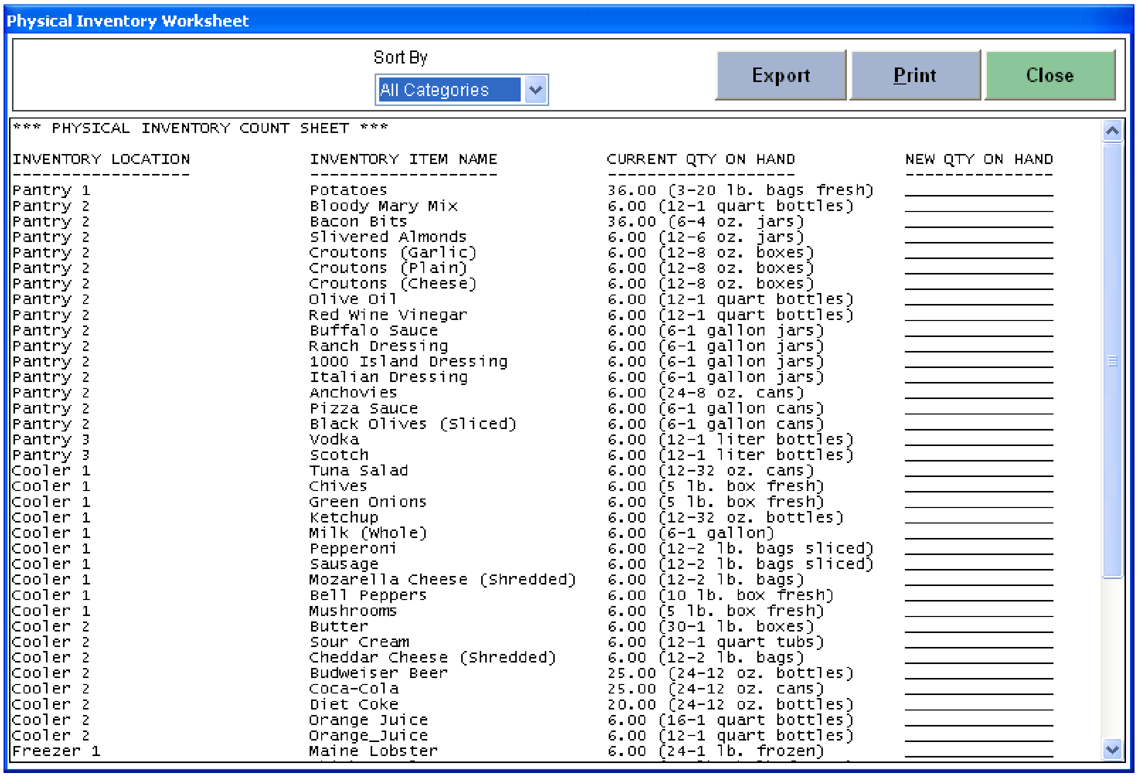


Figure 23-15

Phy. Count Sheet

From the main POS screen, navigate to **Operations** > **Inventory Activities** and click the "Phy. Count Sheet" button. Use this feature to create a list of all inventory items, to use when preparing a physical inventory count (see Figure 23-16). The list may be viewed, printed, or exported.



*** PHYSICAL INVENTORY COUNT SHEET ***

INVENTORY LOCATION	INVENTORY ITEM NAME	CURRENT QTY ON HAND	NEW QTY ON HAND
Pantry 1	Potatoes	36.00 (3-20 lb. bags fresh)	
Pantry 2	Bloody Mary Mix	6.00 (12-1 quart bottles)	
Pantry 2	Bacon Bits	36.00 (6-4 oz. jars)	
Pantry 2	Slivered Almonds	6.00 (12-6 oz. jars)	
Pantry 2	Croutons (Garlic)	6.00 (12-8 oz. boxes)	
Pantry 2	Croutons (Plain)	6.00 (12-8 oz. boxes)	
Pantry 2	Croutons (Cheese)	6.00 (12-8 oz. boxes)	
Pantry 2	Olive Oil	6.00 (12-1 quart bottles)	
Pantry 2	Red Wine Vinegar	6.00 (12-1 quart bottles)	
Pantry 2	Buffalo Sauce	6.00 (6-1 gallon jars)	
Pantry 2	Ranch Dressing	6.00 (6-1 gallon jars)	
Pantry 2	1000 Island Dressing	6.00 (6-1 gallon jars)	
Pantry 2	Italian Dressing	6.00 (6-1 gallon jars)	
Pantry 2	Anchovies	6.00 (24-8 oz. cans)	
Pantry 2	Pizza Sauce	6.00 (6-1 gallon cans)	
Pantry 2	Black Olives (Sliced)	6.00 (6-1 gallon cans)	
Pantry 3	Vodka	6.00 (12-1 liter bottles)	
Pantry 3	Scotch	6.00 (12-1 liter bottles)	
Cooler 1	Tuna Salad	6.00 (12-32 oz. cans)	
Cooler 1	Chives	6.00 (5 lb. box fresh)	
Cooler 1	Green Onions	6.00 (5 lb. box fresh)	
Cooler 1	Ketchup	6.00 (12-32 oz. bottles)	
Cooler 1	Milk (Whole)	6.00 (6-1 gallon)	
Cooler 1	Pepperoni	6.00 (12-2 lb. bags sliced)	
Cooler 1	Sausage	6.00 (12-2 lb. bags sliced)	
Cooler 1	Mozarella Cheese (Shredded)	6.00 (12-2 lb. bags)	
Cooler 1	Bell Peppers	6.00 (10 lb. box fresh)	
Cooler 1	Mushrooms	6.00 (5 lb. box fresh)	
Cooler 2	Butter	6.00 (30-1 lb. boxes)	
Cooler 2	Sour Cream	6.00 (12-1 quart tubs)	
Cooler 2	Cheddar Cheese (Shredded)	6.00 (12-2 lb. bags)	
Cooler 2	Budweiser Beer	25.00 (24-12 oz. bottles)	
Cooler 2	Coca-Cola	25.00 (24-12 oz. cans)	
Cooler 2	Diet Coke	20.00 (24-12 oz. bottles)	
Cooler 2	Orange Juice	6.00 (16-1 quart bottles)	
Cooler 2	Orange_Juice	6.00 (12-1 quart bottles)	
Freezer 1	Maine Lobster	6.00 (24-1 lb. frozen)	

Figure 23-16

Phy. Inv. Count

Use this feature to enter the physical inventory count into the system. This assumes that a physical inventory count has already been performed.

From the main POS screen, navigate to **Operations** > **Inventory Activities** and click the “Phy. Inv. Count” button. On the Physical Inventory Count screen, click on an inventory item and enter the new quantity. When all items have been updated, click the “Record” button.

If a barcode scanning device is used to receive the inventory, export the information from the device to the computer as a text file. Click the “Inv. Download” button and navigate to the file to download. Click the “Download” button to complete the process.

Inv. Prep Forecast

The Inv. Prep Forecast feature of Aldelo® For Restaurants creates a report, based on past inventory usage, which forecasts the quantities of inventory use to prepare for. The use of this feature assumes that menu recipes and inventory depletion figures have already been defined.

From the main POS screen, navigate to **Operations** > **Inventory Activities** and click the “Inv. Prep Forecast” button. Select the appropriate date on the date picker screen and click the “Select” button. The Inventory Preparation Forecast For Kitchen/Bar screen displays the inventory items to prepare, including the pack size quantity and the recipe units quantity. The report may be viewed, printed, or exported to a text file.

Note: These estimates are based upon up to six weeks of historical data. Past experience cannot predict with 100% certainty exact usage quantities.

Inventory Items

From the main POS screen, navigate to **Operations > Inventory Activities** and click the "Inventory Items" button. This is a shortcut to the Inventory Items screen, where inventory items may be viewed, edited, or added. Whenever changes are made, click the "Save" and "Done" buttons to complete the procedure.

Menu Recipe Editor

From the main POS screen, navigate to **Operations > Inventory Activities** and click the "Menu Recipe Editor" button. This is a shortcut to the Menu Recipe Editor screen, where menu recipes may be added, removed, or edited. Click the "Save" button whenever changes are made. Click the "Close" button when finished.

OTHER TOOLS

The Other Tools section groups several more Back Office shortcuts and a few options that do not appear anywhere else in Aldelo® For Restaurants.

Caller ID Log

This feature assumes that Caller ID is configured properly and in use.

From the main POS screen, navigate to **Operations > Other Tools** and click the "Caller ID Log" button. The Caller ID Logs screen displays information about received calls. Select a call from the list and click the "Details" button. Click the "Done" button when finished.

Caller ID Switch

From the main POS screen, navigate to **Operations > Other Tools** and click the "Caller ID Switch" button to activate or deactivate Caller ID in the software.

Customer Incidents

The Customer Incidents feature allows the user to record the phone number of a customer whose order resulted in wasted product. It may have been a crank call, an order that was never picked up, an order that was delivered to an address where nobody was not home, etc.

To record the customer phone number, from the main POS screen, navigate to **Operations > Other Tools** and click the "Customer Incidents" button. Enter the phone number. The New Customer Incident screen appears (see Figure 23-17). Enter the order number, check the "Waste" checkbox (if waste occurred), and enter the details of the incident. It is important to be as precise as possible here, as management must decide whether to allow future sales to this customer based on this information. Click the "Finish" button to record the information.

In the future, if the customer calls again, a “Customer Incidents” button appears on the Customer Information screen while the user enters a Take Out or Delivery order. The button flashes to draw the user’s attention. Clicking the button displays the details of the incident, allowing the user to decide whether or not to accept the order.

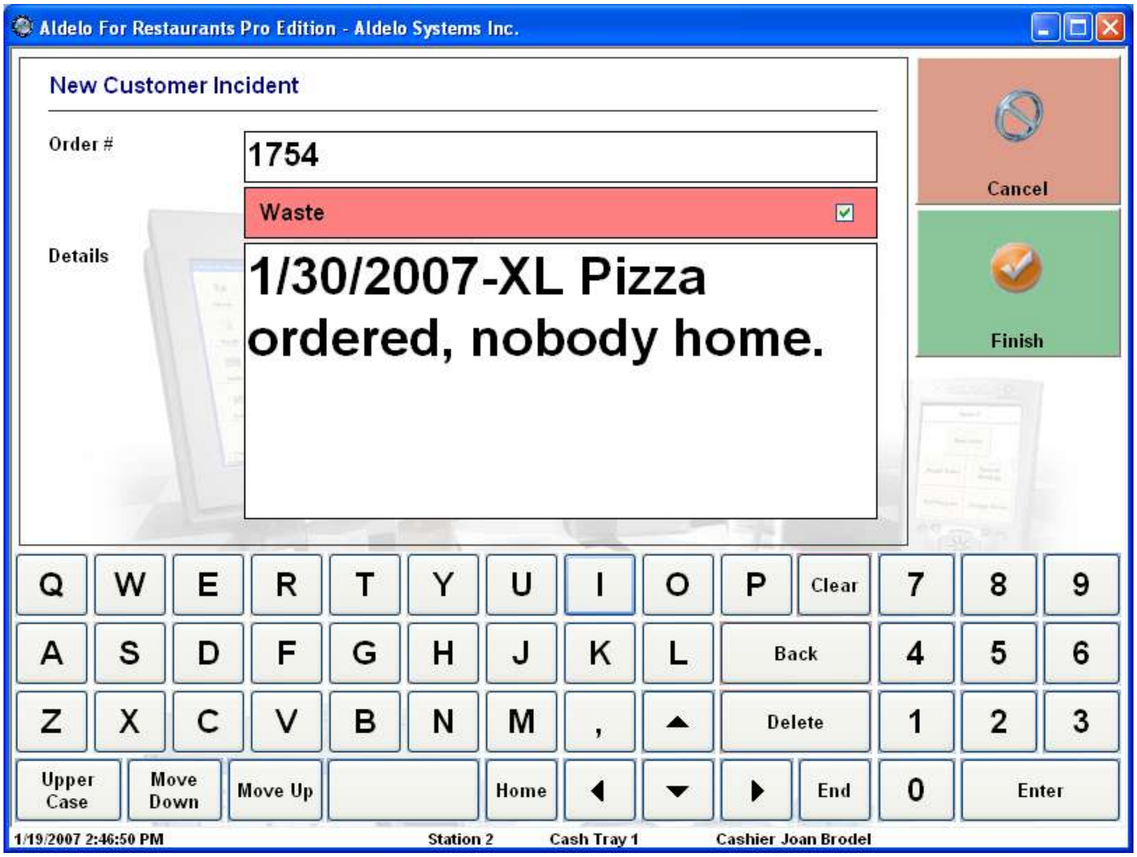


Figure 23-17

Assign Table

The Assign Table feature allows a manager to assign tables to employees. From the main POS screen, navigate to **Operations** > **Other Tools** and click the “Assign Table” button. The Dine In Tables screen appears (see Figure 23-18). Select a server from the drop-down list and click on the tables to assign to the server. Repeat the procedure for the other servers. When finished, click the “Assign Table” button and the “Close” button.

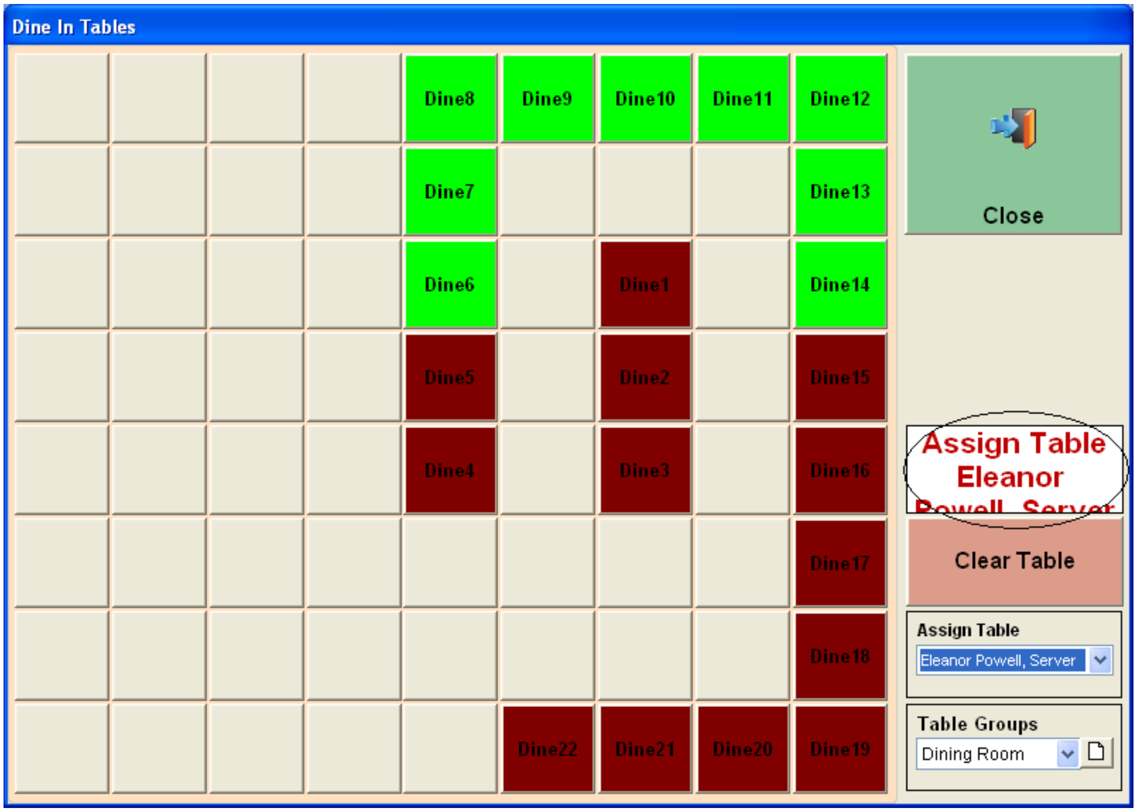


Figure 23-18

To Training Mode

The Training Mode of Aldelo® For Restaurants enables the terminal to be used to train employees on using the system without recording any orders in the live database. A training database is used during training mode and the system switches back to the live database when the training session ends.

From the main POS screen, navigate to **Operations** > **Other Tools** and click the "To Training Mode" button. Click "Yes" on the Training Mode screen to confirm that you wish to start Training Mode. The caption on the button now says "To Live Mode." Clicking the button again reverses the procedure, putting the system back into Live Mode.

Note: If your training database file is outdated, go to your Aldelo For Restaurants Databases folder and delete the file "Training.mdb." A new training database is created based upon the current information in your live database file. <u>Do not</u> delete any other files in this folder.

Edit Work Schedule

From the main POS screen, navigate to **Operations** > **Other Tools** and click the "Edit Work Schedule" button. This is a shortcut to the Employee Schedules window. Here a manager may create or edit employee work schedules.

Add Cash To Bank

This feature allows a manager to add additional cash to the start amount of a Cashier or an employee using Staff Bank.

From the main POS screen, navigate to **Operations** > **Other Tools** and click the "Add Cash To Bank" button. Enter the Bank Liability Number for the cashier account. Enter the amount to add. A message displays if the operation is successful.

Calculator

The Calculator button in the Other Tools window is a shortcut to the Windows Calculator tool.

From the main POS screen, navigate to **Operations** > **Other Tools** and click the "Calculator" button. The Microsoft Calculator displays (see Figure 23-19). Close the calculator by clicking the red "X" button when finished.

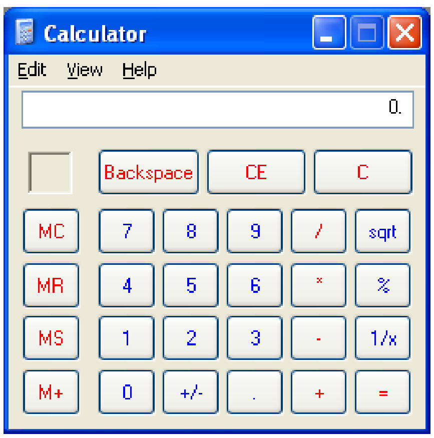


Figure 23-19

Emp. Still Working

The Emp. Still Working feature of Aldelo® For Restaurants gives the user an easy way to check which employees are still on the time clock.

From the main POS screen, navigate to **Operations** > **Other Tools** and click the "Emp. Still Working" button. The Employee Still Working Report displays, showing a list of all employees who are still clocked in (see Figure 23-20).

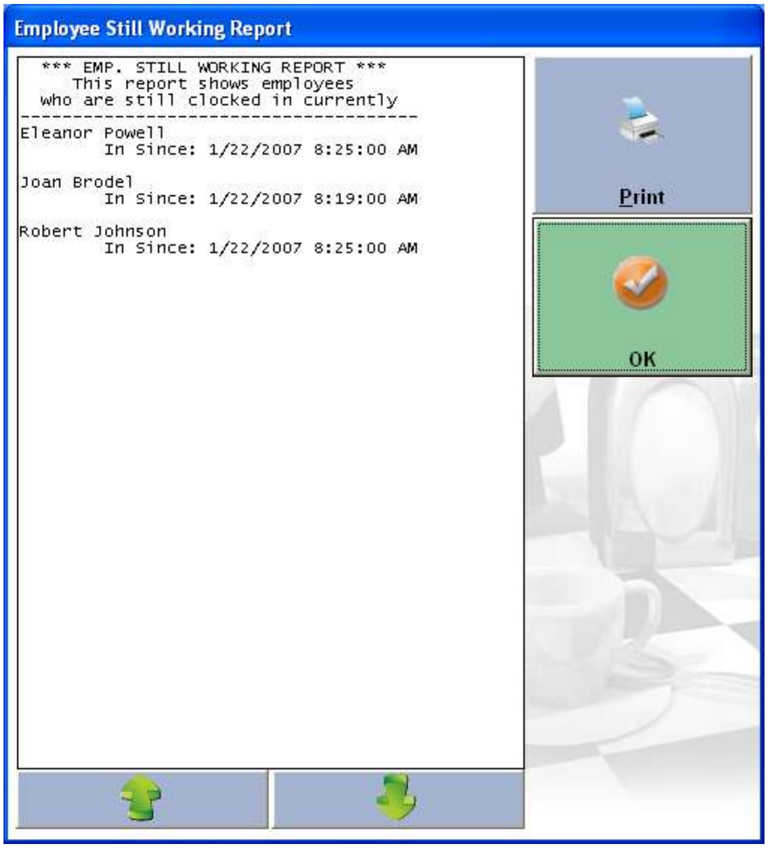


Figure 23-20

Driver Summary

The Driver Summary feature generates a report listing the number of deliveries, the net sales, and the delivery commission for each driver.

From the main POS screen, navigate to **Operations** > **Other Tools** and click the "Driver Summary" button. The Driver Delivery Summary Report displays (see Figure 23-21). The report may be printed or exported to a text file.

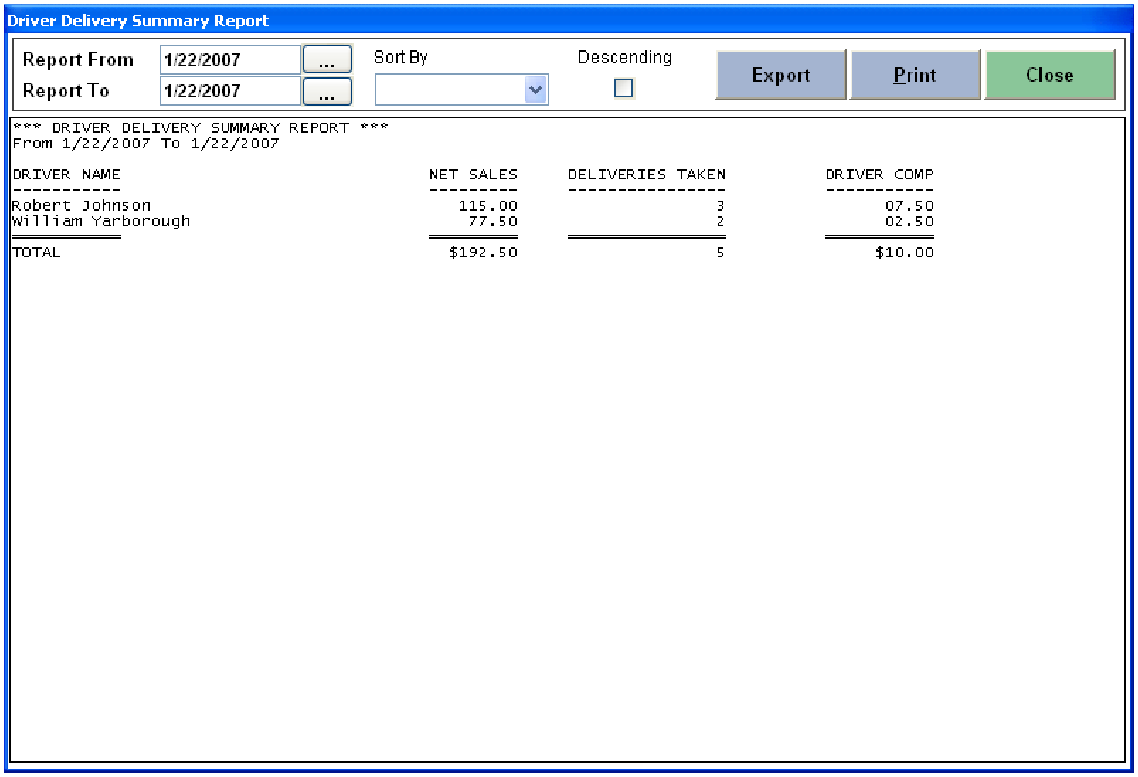


Figure 23-21

Open Order Report

The Open Order Report feature lists all the servers and the open orders for each of them.

From the main POS screen, navigate to **Operations** > **Other Tools** and click the "Open Order Report" button. The Open Order Report displays orders that have not yet been settled (see Figure 23-22).

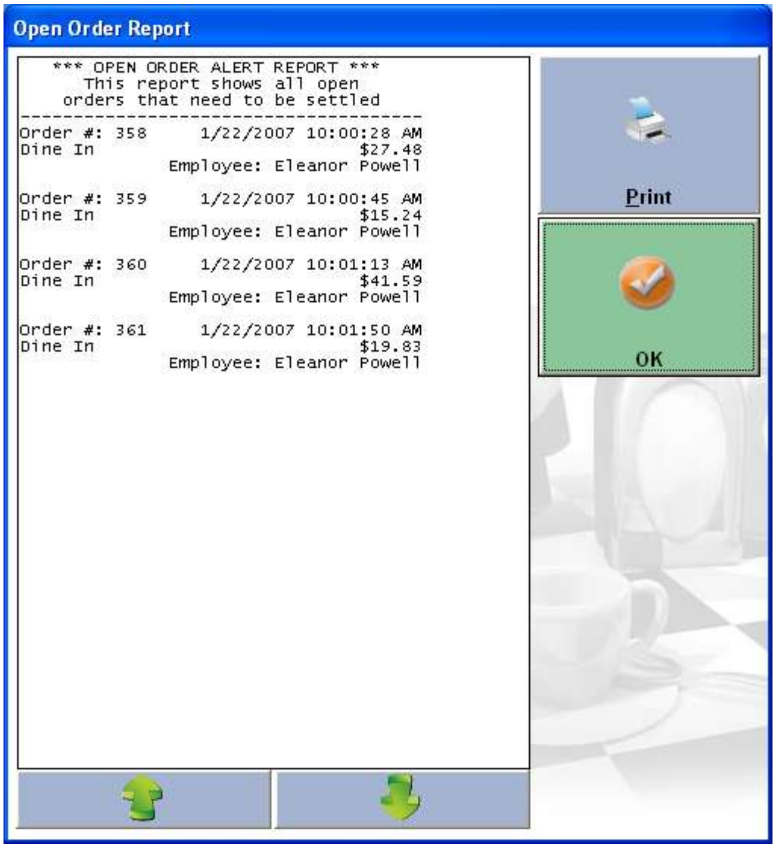
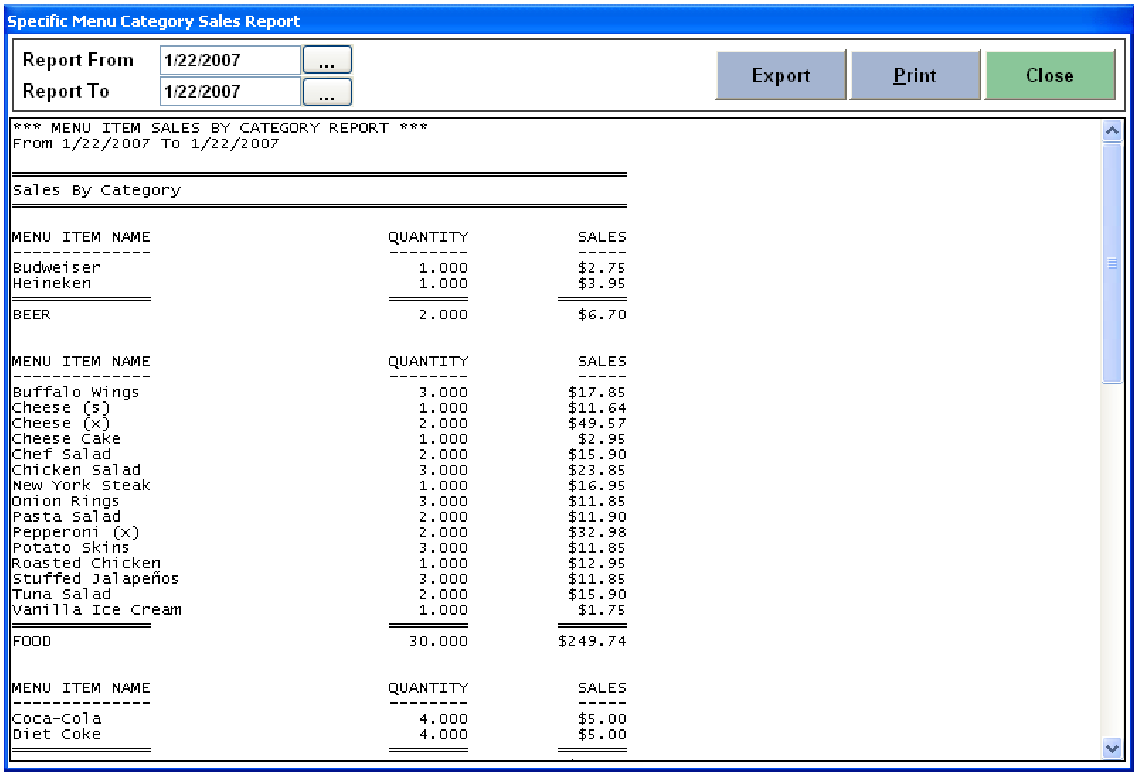


Figure 23-22

Menu Item Sales By Category

This feature of Aldelo® For Restaurants generates a report showing the sales by category, menu item, and quantity of each. A separate section also lists the same information by server. The report may be filtered to show sales for only one category or sales for all categories.

From the main POS screen, navigate to **Operations** > **Other Tools** and click the “Menu Item By Sales Category” button. Select a specific category from the drop-down list of the Specific Menu Category Sales Report window, and then click the “Report” button. The report displays on the screen (see Figure 23-23). It may be printed or exported to a text file.



*** MENU ITEM SALES BY CATEGORY REPORT ***
From 1/22/2007 To 1/22/2007

Sales By Category

MENU ITEM NAME	QUANTITY	SALES
Budweiser	1.000	$2.75
Heineken	1.000	$3.95
BEER	2.000	$6.70

MENU ITEM NAME	QUANTITY	SALES
Buffalo Wings	3.000	$17.85
Cheese (S)	1.000	$11.64
Cheese (X)	2.000	$49.57
Cheese Cake	1.000	$2.95
Chef Salad	2.000	$15.90
Chicken Salad	3.000	$23.85
New York Steak	1.000	$16.95
Onion Rings	3.000	$11.85
Pasta Salad	2.000	$11.90
Pepperoni (X)	2.000	$32.98
Potato Skins	3.000	$11.85
Roasted Chicken	1.000	$12.95
Stuffed Jalapeños	3.000	$11.85
Tuna Salad	2.000	$15.90
Vanilla Ice Cream	1.000	$1.75
FOOD	30.000	$249.74

MENU ITEM NAME	QUANTITY	SALES
Coca-Cola	4.000	$5.00
Diet Coke	4.000	$5.00

Figure 23-23

Sales By Category Report

The Sales By Category Report generates a report that shows the total sales for each category, as well as percentages of the total sales for each category.

From the main POS screen, navigate to **Operations > Other Tools** and click the “Sales Report By Category” button to display the report (see Figure 23-24). The report may be printed or exported to a text file.

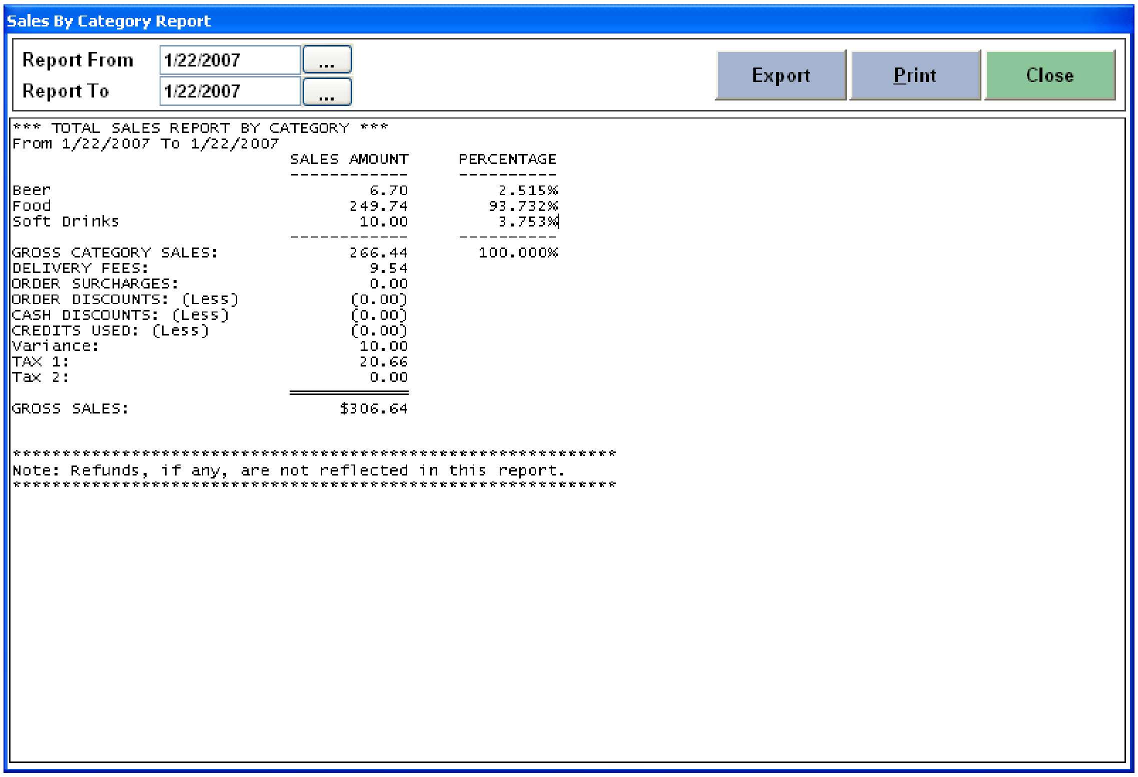
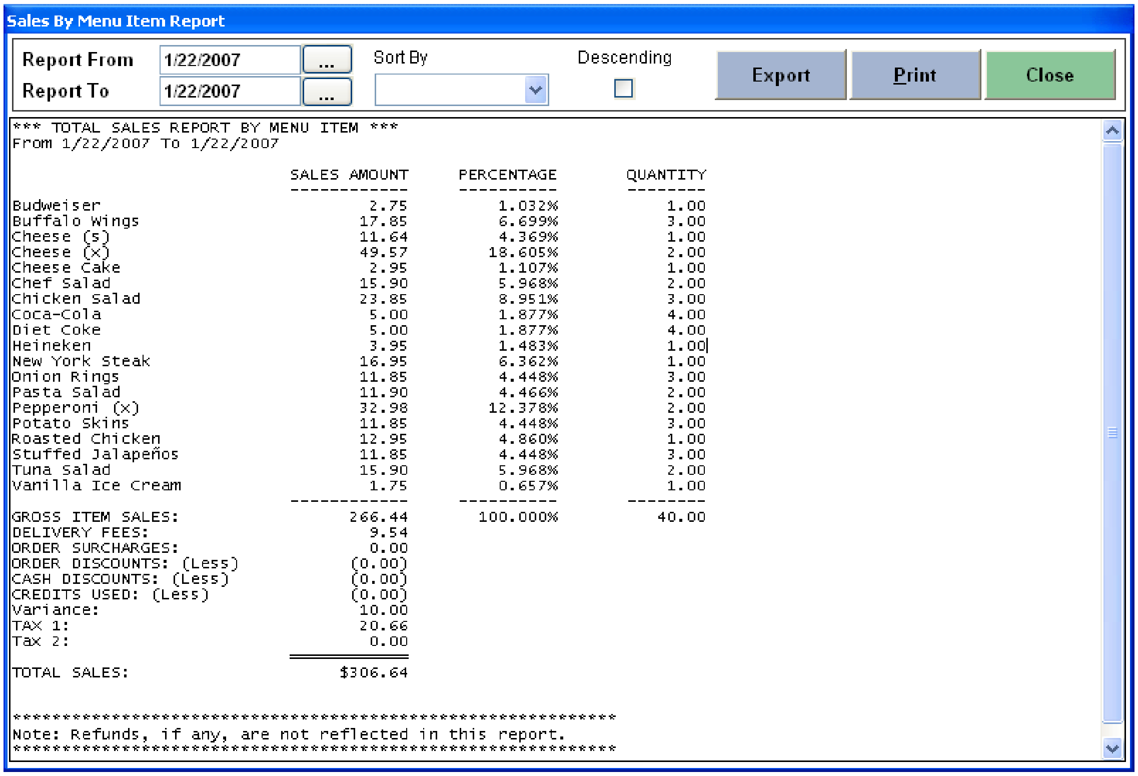


Figure 23-24

Sales By Menu Item Report

The “Sales By Menu Item Report” button provides the user with a shortcut to the same report available from the Back Office. It shows the sales amount, the percentage of the total, and the quantity of each item sold.

From the main POS screen, navigate to **Operations** > **Other Tools** and click the “Sales By Menu Item Report” button to display the report (see Figure 23-25). The report may be printed or exported to a text file.



*** TOTAL SALES REPORT BY MENU ITEM ***
From 1/22/2007 To 1/22/2007

	SALES AMOUNT	PERCENTAGE	QUANTITY
Budweiser	2.75	1.032%	1.00
Buffalo Wings	17.85	6.699%	3.00
Cheese (S)	11.64	4.369%	1.00
Cheese (X)	49.57	18.605%	2.00
Cheese Cake	2.95	1.107%	1.00
Chef Salad	15.90	5.968%	2.00
Chicken Salad	23.85	8.951%	3.00
Coca-Cola	5.00	1.877%	4.00
Diet Coke	5.00	1.877%	4.00
Heineken	3.95	1.483%	1.00
New York Steak	16.95	6.362%	1.00
Onion Rings	11.85	4.448%	3.00
Pasta Salad	11.90	4.466%	2.00
Pepperoni (X)	32.98	12.378%	2.00
Potato Skins	11.85	4.448%	3.00
Roasted Chicken	12.95	4.860%	1.00
Stuffed Jalapeños	11.85	4.448%	3.00
Tuna Salad	15.90	5.968%	2.00
Vanilla Ice Cream	1.75	0.657%	1.00
GROSS ITEM SALES:	266.44	100.000%	40.00
DELIVERY FEES:	9.54		
ORDER SURCHARGES:	0.00		
ORDER DISCOUNTS: (Less)	(0.00)		
CASH DISCOUNTS: (Less)	(0.00)		
CREDITS USED: (Less)	(0.00)		
Variance:	10.00		
TAX 1:	20.66		
Tax 2:	0.00		
TOTAL SALES:	$306.64		

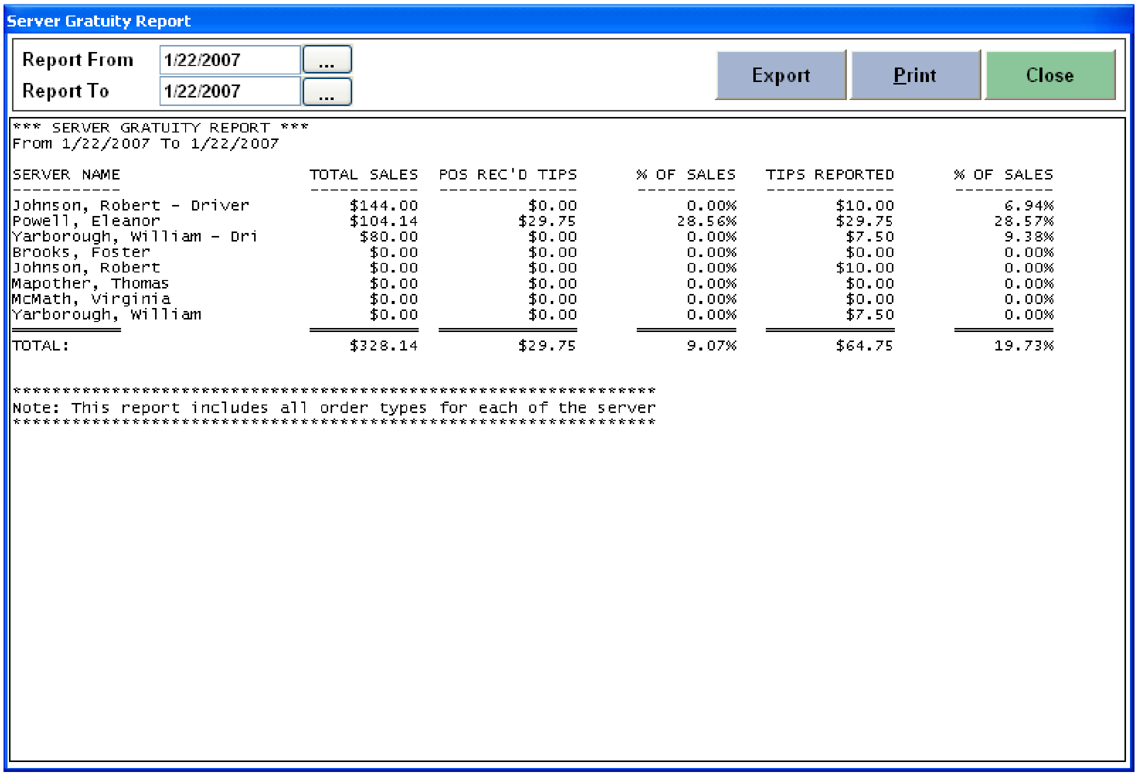
****
Note: Refunds, if any, are not reflected in this report.
****

Figure 23-25

Server Gratuity Report

This feature generates a report that displays the total sales and received tips for each employee, as well as the tip percentage of total sales.

From the main POS screen, navigate to **Operations > Other Tools** and click the “Server Gratuity Report” button. The Server Gratuity Report displays (see Figure 23-26). The report may be printed or exported to a text file.



Server Gratuity Report

Report From 1/22/2007 ...

Report To 1/22/2007 ...

Export Print Close

*** SERVER GRATUITY REPORT ***
From 1/22/2007 To 1/22/2007

SERVER NAME	TOTAL SALES	POS REC'D TIPS	% OF SALES	TIPS REPORTED	% OF SALES
Johnson, Robert - Driver	$144.00	$0.00	0.00%	$10.00	6.94%
Powell, Eleanor	$104.14	$29.75	28.56%	$29.75	28.57%
Yarborough, William - Dri	$80.00	$0.00	0.00%	$7.50	9.38%
Brooks, Foster	$0.00	$0.00	0.00%	$0.00	0.00%
Johnson, Robert	$0.00	$0.00	0.00%	$10.00	0.00%
Mapother, Thomas	$0.00	$0.00	0.00%	$0.00	0.00%
McMath, Virginia	$0.00	$0.00	0.00%	$0.00	0.00%
Yarborough, William	$0.00	$0.00	0.00%	$7.50	0.00%
TOTAL:	$328.14	$29.75	9.07%	$64.75	19.73%

****
Note: This report includes all order types for each of the server
****

Figure 23-26

Chapter 24 — Maintenance Activities

The sections of this chapter may be found under the Activities menu item by navigating to **Back Office** > **Activities** from the main POS screen.

General Activities

PAY EMPLOYEES

Aldelo® For Restaurants generates a report that lists the hours worked and earnings of each employee. This report can be used to prepare your restaurant's payroll.

From the main POS screen, navigate to **Back Office** > **Activities** > **General Activities** and click on "Pay Employees (Payroll)". The Pay Employees (Payroll Preparation Report) screen displays (see Figure 24-1). Select an employee to be paid and click the ">" button to move the name to the selected list. To pay all employees, click the ">>" button to move all the employees to the selected list simultaneously. Enter the Pay Period End Date in the format MM/DD/YYYY.

If any extra pay is due an employee above and beyond his or her normal wages, select the employee from the list on the right of the screen and click the "Additional" button. Key in the extra pay and click the "Enter" button.

Next, click the "Preview" button. Here you may preview the report for accuracy. The report may be printed or exported to a text file. When you are satisfied that everything is correct, click the "Pay" button to generate the payroll.

If mistakes are discovered after a payroll has been generated, click the "Undo Last Payroll" button. This feature will only erase the last payroll from the system. Any payroll prior to the last one may not be removed.

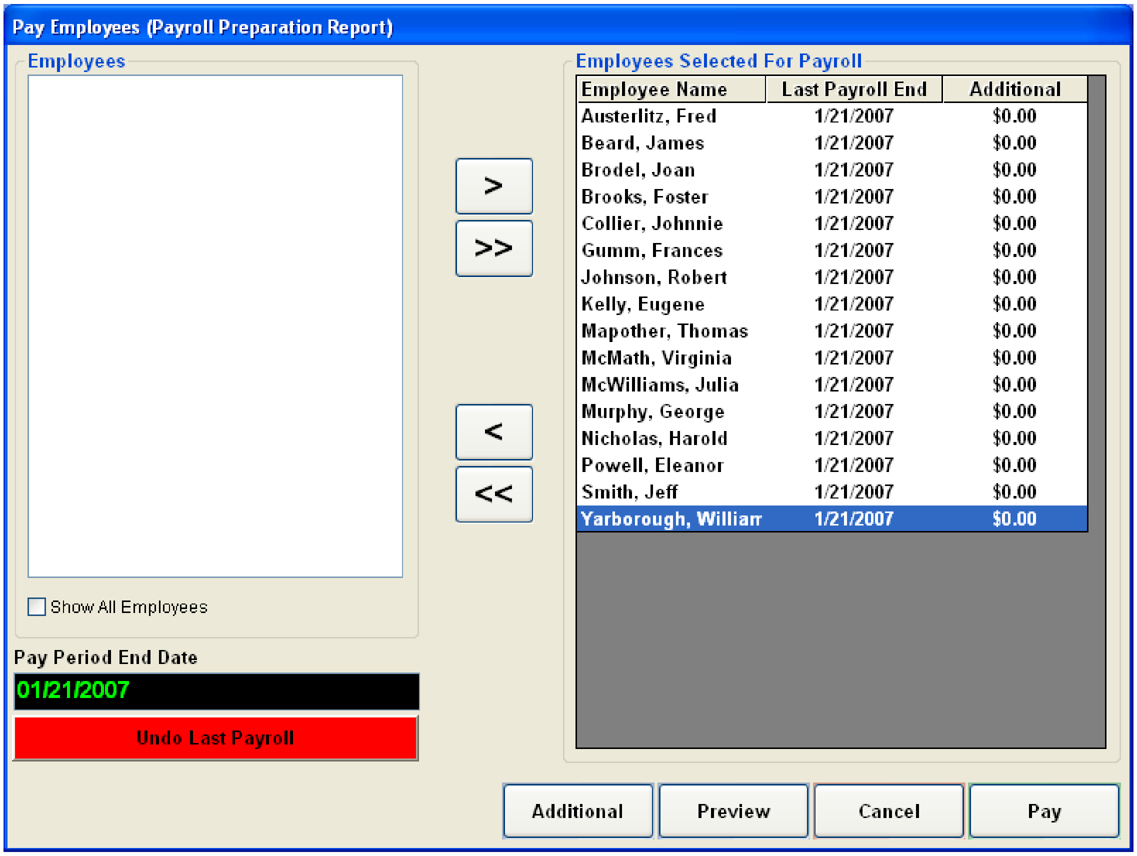


Figure 24-1

NEW LOCAL E-MAIL

Aldelo® For Restaurants includes an internal e-mail system that can be used to communicate with employees. The system stores messages internally, and does not communicate with the internet.

From the main POS screen, navigate to **Back Office** > **Activities** > **General Activities** and click on "New Local E-mail." The New Local E-mail Message screen appears (see Figure 24-2).

Select the employees to receive the e-mail by clicking the checkboxes next to their names. Alternatively, groups of employees may be selected by choosing their job description from the drop-down list.

Next, the employee from whom this message is being sent should select his or her own name from the drop-down list on the top right of the window.

Finally, type the message into the message field either by using the "Keyboard" button or your hardware keyboard. When finished, click the "Send" button.

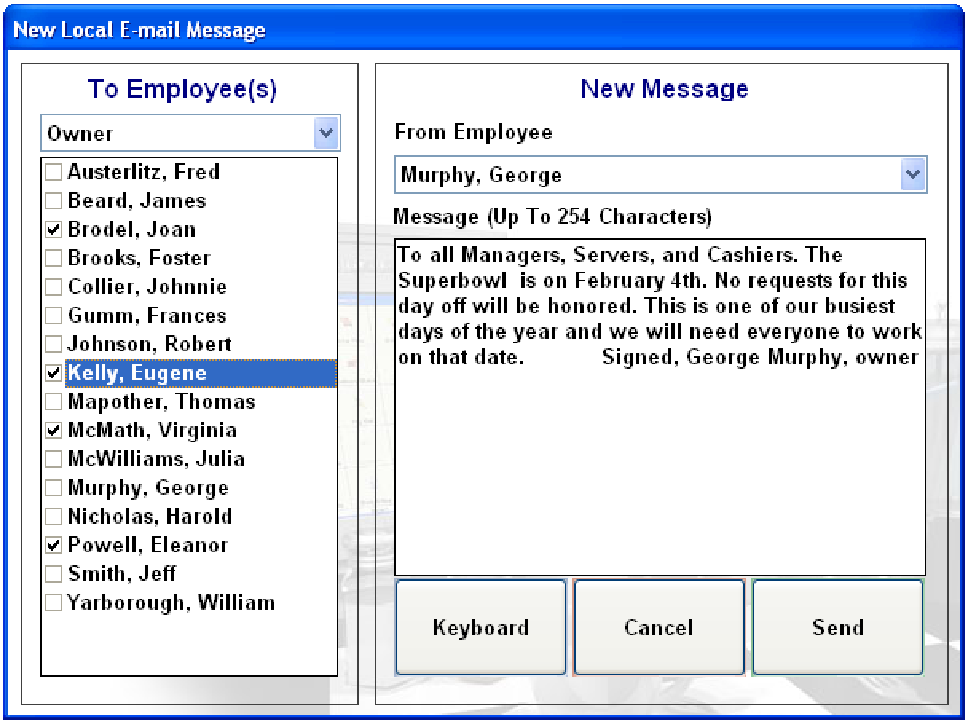


Figure 24-2

REVIEW LOCAL E-MAIL

Managers may review the internal e-mail communications between their employees, if desired, to make sure the system is used for legitimate business purposes. This procedure assumes that e-mails have been created in the system.

From the main POS screen, navigate to **Back Office** > **Activities** > **General Activities** and click on “Review Local E-mail.” Since access to the Back Office screen requires a manager’s security level, only management personnel should be able to reach this screen. The Local E-mail Viewer screen displays (see Figure 24-3).

Click on one of the names on the list of employees who have e-mail, and then click on the “Read E-mail” button. If there is more than one e-mail for this employee, select a name from the list on the left to display the message.

After reading all messages, they may all be deleted by selecting the Delete All Read E-mail Messages checkbox. Click the “Done” button when finished.

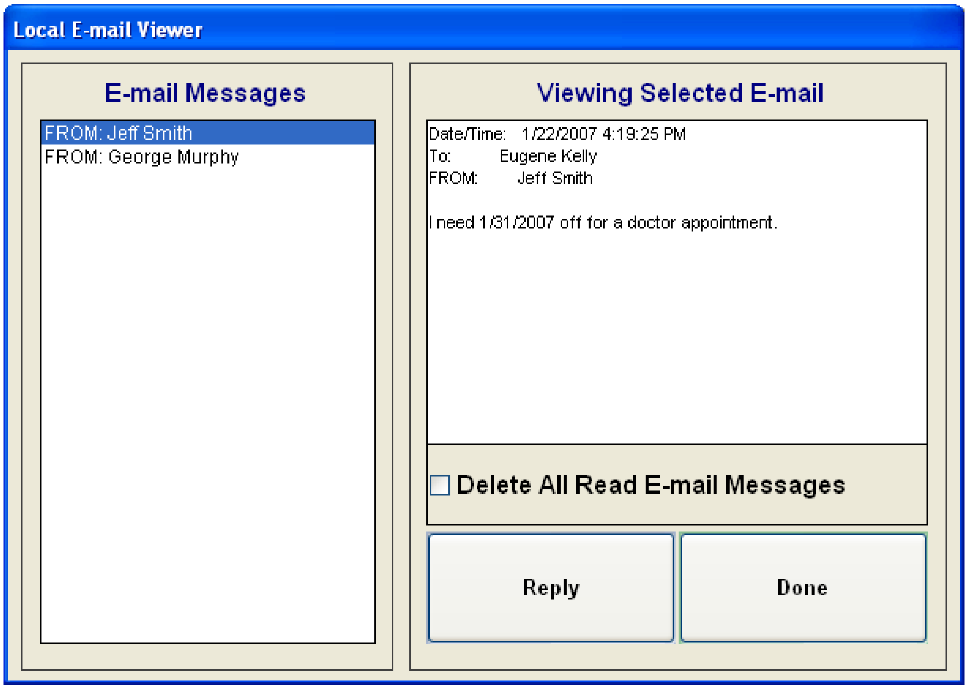


Figure 24-3

VIDEO SURVEILLANCE CONTROL CENTER

To use this feature of Aldelo® For Restaurants, a webcam must be installed and the Enable Video Surveillance Captures checkbox under the General tab in Station Settings must be checked.

From the main POS screen, navigate to **Back Office** > **Activities** > **General Activities** and click on "Video Surveillance Control Center." The Video Surveillance Control Center screen appears (see Figure 24-4). Click the "Snapshot" button to capture a picture of the current view.

Click the "Preferences" button. A series of checkboxes allows the user to disable the picture capture feature when certain events occur. Note that **enabled** is the default state for each of these events. Selecting the checkbox **disables** the picture capture for that event.

Next, there are four Camera Settings buttons, "Compression," "Display,", "Format," and "Source." Use these buttons to adjust the camera settings for the best picture quality.

At the bottom of the window are two options for deleting pictures. Enter "30" in the Delete All Surveillance Pictures When Older Than (Days) field. When pictures reach 31 days old, they are deleted. Clicking the "Delete All Surveillance Pictures Now" button removes all pictures from the system. Use this feature with caution; the process is **irreversible.**

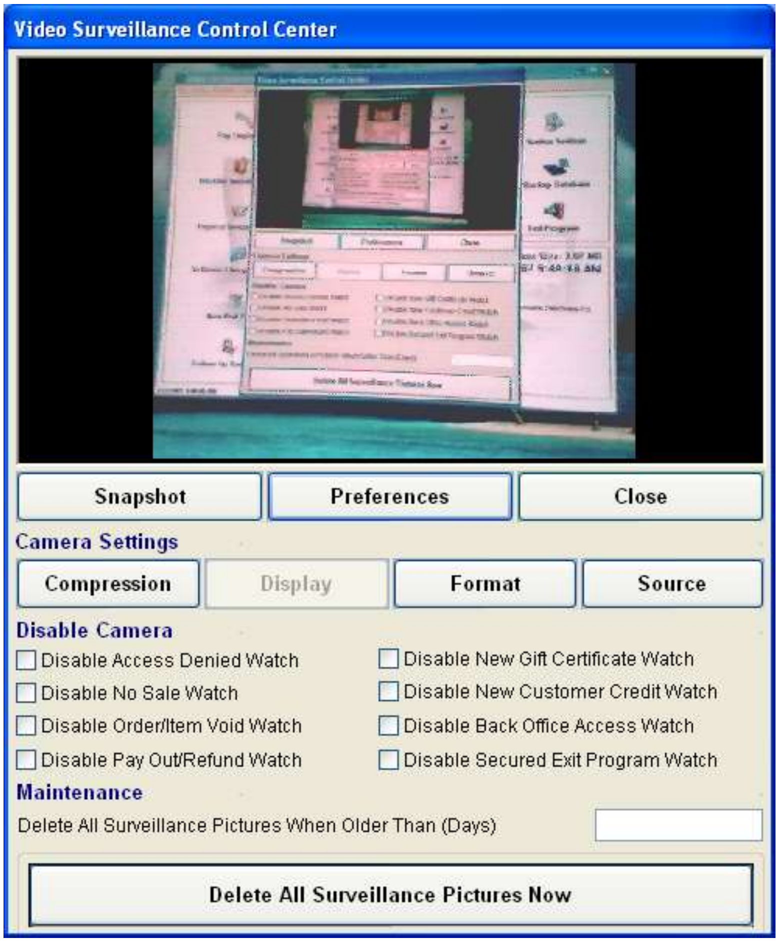


Figure 24-4

VIDEO SURVEILLANCE REVIEW BROWSER

The Video Surveillance Review Browser feature allows the manager to review the pictures captured by the system.

From the main POS screen, navigate to **Back Office** > **Activities** > **General Activities** and click on "Video Surveillance Review Browser." The Video Surveillance Review Browser window opens (see Figure 24-5). Open the Look In drop-down list and select the type of picture to review. Next, select the individual picture to display from the list at the bottom of the screen. The picture displays in the window at the top of the screen. When finished, click the "Done" button.

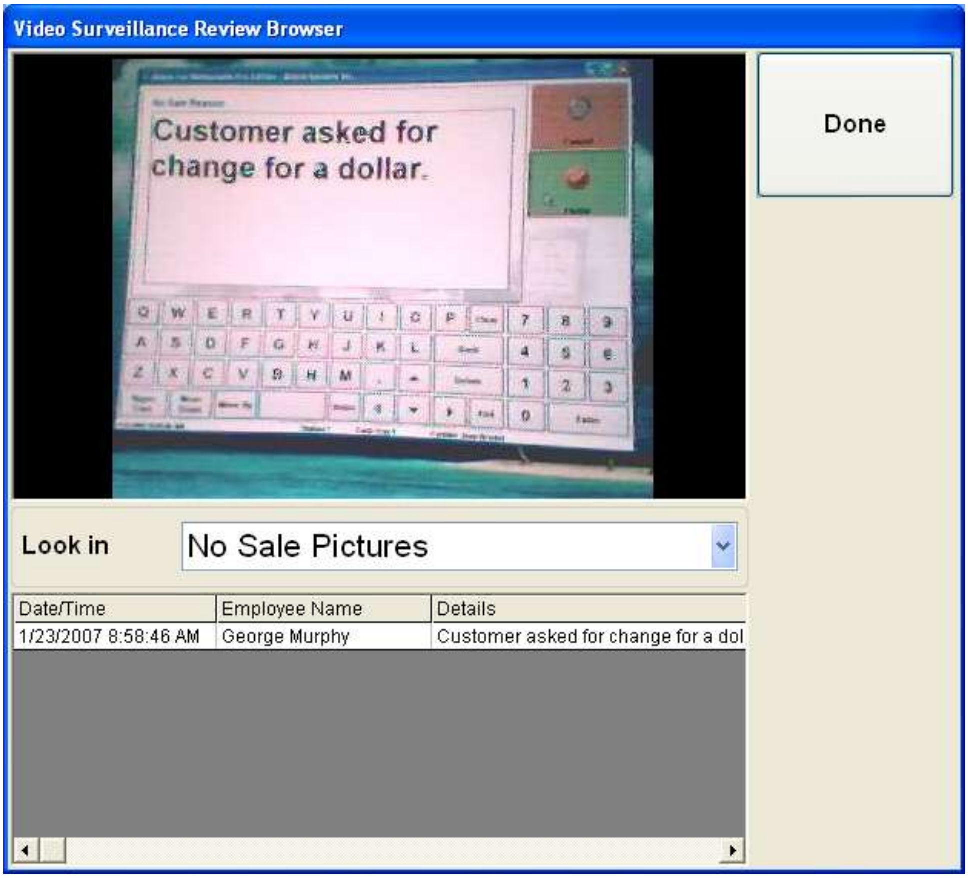


Figure 24-5

CREATE MENU ITEM LABELS

The Menu Item Label Generator feature of Aldelo® For Restaurants allows the user to create barcode stickers to attach to the items. This feature requires the use of an Aldelo Systems Inc. certified label printer using 1” X 3” labels.

From the main POS screen, navigate to **Back Office > Activities > General Activities** and click on “Create Menu Item Labels.” The Menu Item Label Generator screen displays (see Figure 24-6). Select the search method in the upper left of the screen. If the Select Menu Items with Barcode method is chosen, the Filter By Menu Category and Filter By Menu Group drop-down lists become enabled. Select a filter from one of the lists, and then enter the number of copies desired in the Total Copies To Print For Each Label field.

Next, click the “Search” button. The selected items display. If labels are not needed for any of the items in the list, deselect the checkbox next to the item description. Finally, click the “Print” button to send the job to the printer.

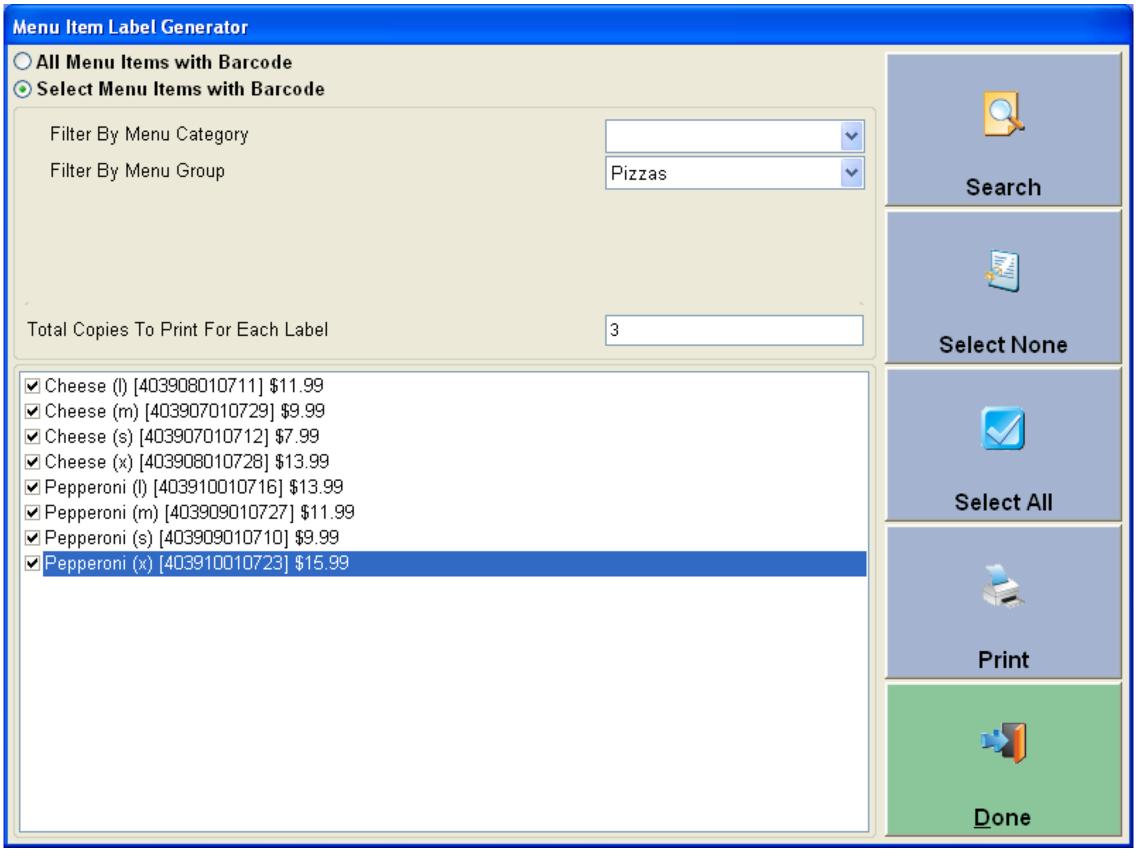


Figure 24-6

MAINTAIN PAYOUTS

The Maintain Payouts feature allows the user to view the information that was entered when a payout was created. The information may only be viewed; it may not be edited.

From the main POS screen, navigate to **Back Office** > **Activities** > **General Activities** and click on "Maintain Payouts." The Maintain Payouts screen displays (see Figure 24-7). Select one of the payouts from the list on the left to view its information.

See General Activities - Maintain Payouts in Chapter 22 of the User Manual for a detailed description of each field on the Maintain Payouts screen. When finished, click the "Done" button.

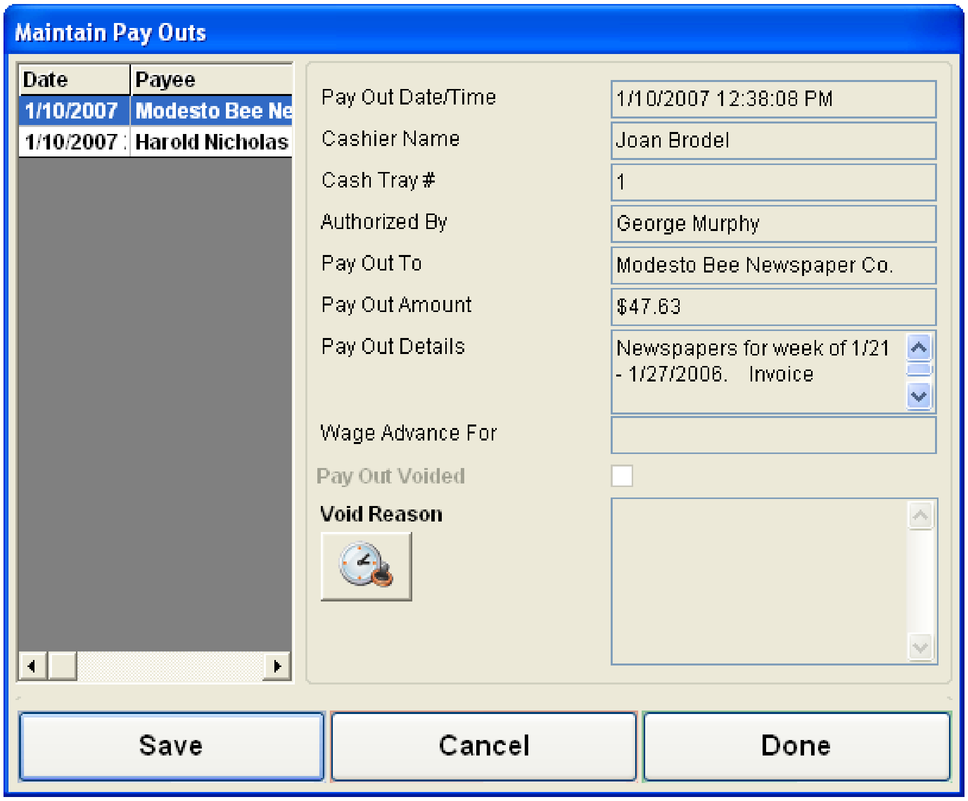


Figure 24-7

Maintain Manager Cash Outs

The Maintain Manager Cash Outs feature allows the user to view information about Manager Cash Outs. The information may only be viewed; it may not be edited.

From the main POS screen, navigate to **Back Office** > **Activities** > **General Activities** and click on “Maintain Manager Cash Outs.” The Maintain Manager Cash Outs screen displays (see Figure 24-8). Select one of the cash outs from the list on the left to view its information.

See General Activities - Maintain Manager Cash Outs in Chapter 22 of the User Manual for a detailed description of each field on the Maintain Manager Cash Outs screen. When finished, click the “Done” button.

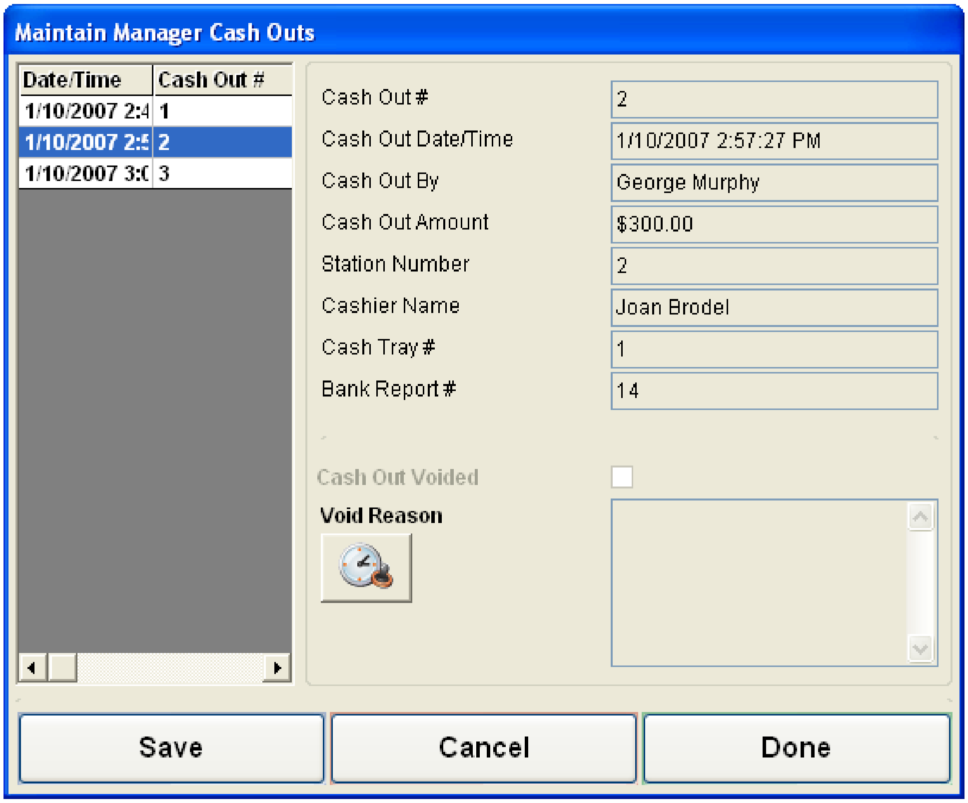


Figure 24-8

GLOBAL MENU ITEM PRICE CHANGE

The Global Menu Item Price Change feature of Aldelo® For Restaurants allows the user to change the prices of entire groups of menu items all at once.

From the main POS screen, navigate to **Back Office** > **Activities** > **General Activities** and click on “Global Menu Item Price Change.” The Global Menu Item Price Change screen displays (see Figure 24-9). On the left side of the screen, select the menu group to change by choosing the group from the Menu Group drop-down list at the top of the screen, and then select the individual items to change by selecting the checkboxes next to each item.

Next, choose the Price Change Option method by clicking one of the radio buttons at the bottom of the screen. Enter a number in the amount field. If the Markup / Markdown method is by Percent, enter a percentage figure in this field. Enter this amount as a whole number. For example to change the price by 10%, enter “10” in this field, not “0.10.”

If the Markup / Markdown method is by Amount, enter the dollar amount expressed in decimal form. For example, to change a price by $1.00, enter “1” or “1.00” in this field. To change a price by 25¢, enter “0.25” in this field.

To change a price to a specific amount, enter that new price in the Amount field and choose the “Amount” radio button.

Clicking the “Update” button completes the menu item price change.

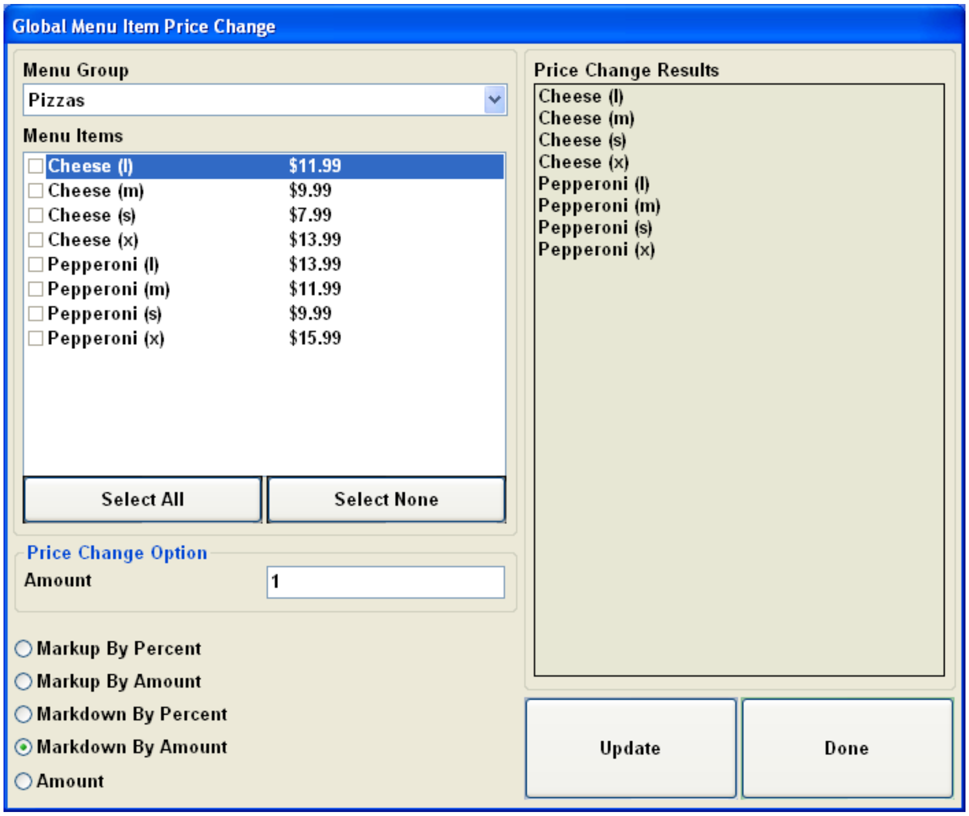


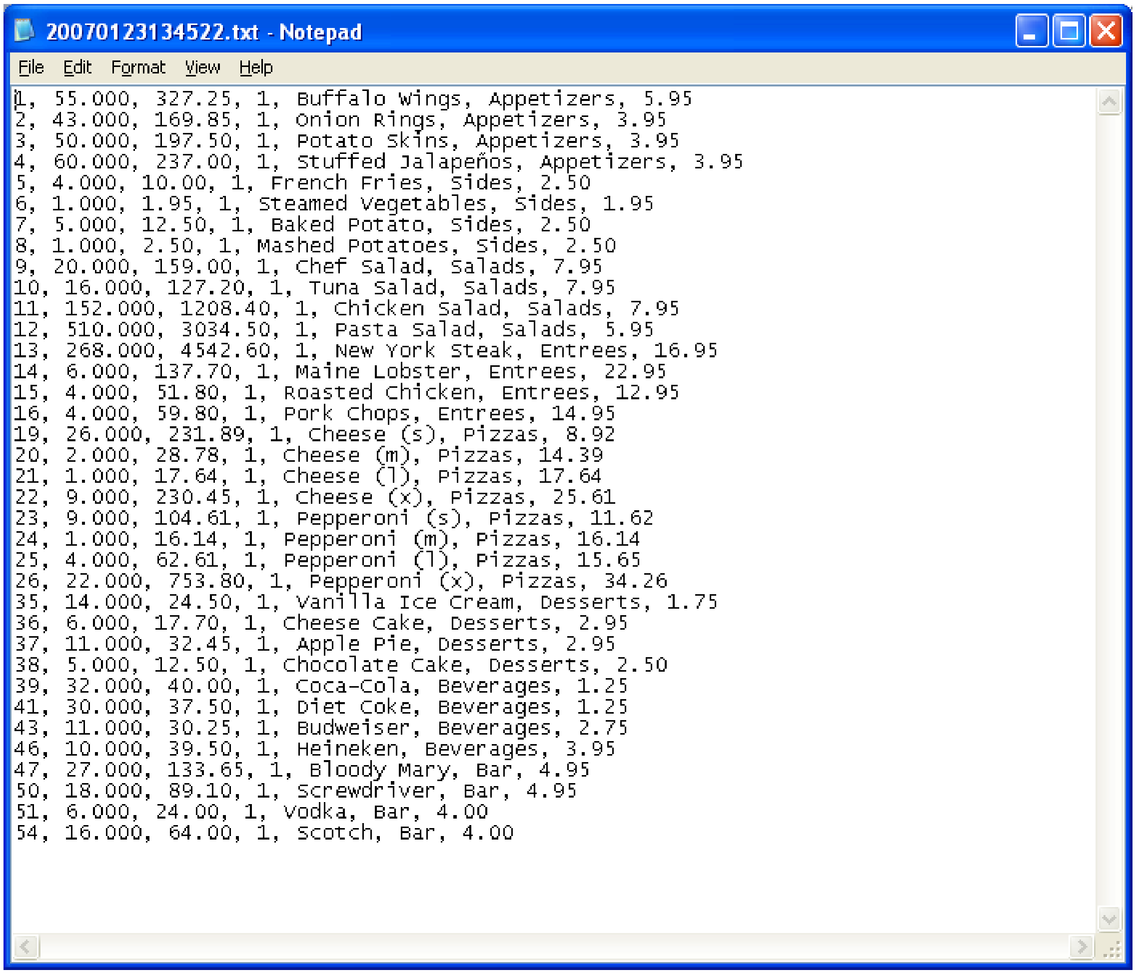
Figure 24-9

EXPORT MENU ITEM SALES

The Export Menu Item Sales feature of Aldelo® For Restaurants enables the user to export menu item sales information to a CSV (Comma Separated Values) text file.

From the main POS screen, navigate to **Back Office** > **Activities** > **General Activities** and click on "Export Menu Item Sales." On the date picker screen, select a start date and click the "Select" button. Next, select an end date and click the "Select" button. A confirmation message displays and the CSV file is generated and written to the Export \ Menu Item Sales Recap folder of the Aldelo® For Restaurants installation (see Figure 24-10). Double-clicking on the name of the file opens it in Microsoft Notepad.

The fields, from left to right are Menu Item ID, Quantity Ordered, Total Sales, 1 (a place holder only), Menu Item Name, Menu Group Name, and Menu Item Price.




```
1, 55.000, 327.25, 1, Buffalo Wings, Appetizers, 5.95
2, 43.000, 169.85, 1, Onion Rings, Appetizers, 3.95
3, 50.000, 197.50, 1, Potato Skins, Appetizers, 3.95
4, 60.000, 237.00, 1, Stuffed Jalapeños, Appetizers, 3.95
5, 4.000, 10.00, 1, French Fries, Sides, 2.50
6, 1.000, 1.95, 1, Steamed Vegetables, Sides, 1.95
7, 5.000, 12.50, 1, Baked Potato, Sides, 2.50
8, 1.000, 2.50, 1, Mashed Potatoes, Sides, 2.50
9, 20.000, 159.00, 1, Chef Salad, Salads, 7.95
10, 16.000, 127.20, 1, Tuna Salad, Salads, 7.95
11, 152.000, 1208.40, 1, Chicken Salad, Salads, 7.95
12, 510.000, 3034.50, 1, Pasta Salad, Salads, 5.95
13, 268.000, 4542.60, 1, New York Steak, Entrees, 16.95
14, 6.000, 137.70, 1, Maine Lobster, Entrees, 22.95
15, 4.000, 51.80, 1, Roasted Chicken, Entrees, 12.95
16, 4.000, 59.80, 1, Pork Chops, Entrees, 14.95
19, 26.000, 231.89, 1, Cheese (s), Pizzas, 8.92
20, 2.000, 28.78, 1, Cheese (m), Pizzas, 14.39
21, 1.000, 17.64, 1, Cheese (l), Pizzas, 17.64
22, 9.000, 230.45, 1, Cheese (x), Pizzas, 25.61
23, 9.000, 104.61, 1, Pepperoni (s), Pizzas, 11.62
24, 1.000, 16.14, 1, Pepperoni (m), Pizzas, 16.14
25, 4.000, 62.61, 1, Pepperoni (l), Pizzas, 15.65
26, 22.000, 753.80, 1, Pepperoni (x), Pizzas, 34.26
35, 14.000, 24.50, 1, Vanilla Ice Cream, Desserts, 1.75
36, 6.000, 17.70, 1, Cheese Cake, Desserts, 2.95
37, 11.000, 32.45, 1, Apple Pie, Desserts, 2.95
38, 5.000, 12.50, 1, Chocolate Cake, Desserts, 2.50
39, 32.000, 40.00, 1, Coca-Cola, Beverages, 1.25
41, 30.000, 37.50, 1, Diet Coke, Beverages, 1.25
43, 11.000, 30.25, 1, Budweiser, Beverages, 2.75
46, 10.000, 39.50, 1, Heineken, Beverages, 3.95
47, 27.000, 133.65, 1, Bloody Mary, Bar, 4.95
50, 18.000, 89.10, 1, Screwdriver, Bar, 4.95
51, 6.000, 24.00, 1, Vodka, Bar, 4.00
54, 16.000, 64.00, 1, Scotch, Bar, 4.00
```

Figure 24-10

Customer Activities

MAINTAIN CUSTOMER RECORDS

The Maintain Customer Records feature enables the user to view and edit customer records.

From the main POS screen, navigate to **Back Office > Activities > Customer Activities** and click on “Maintain Customer Records.” The Maintain Customer Records screen displays (see Figure 24-11). Records may be viewed, edited, or added. Click the “Save” and “Done” buttons to save any changes. For a detailed description of each field, see Customer Activities – Maintain Customer Records in Chapter 22 of the User Manual.

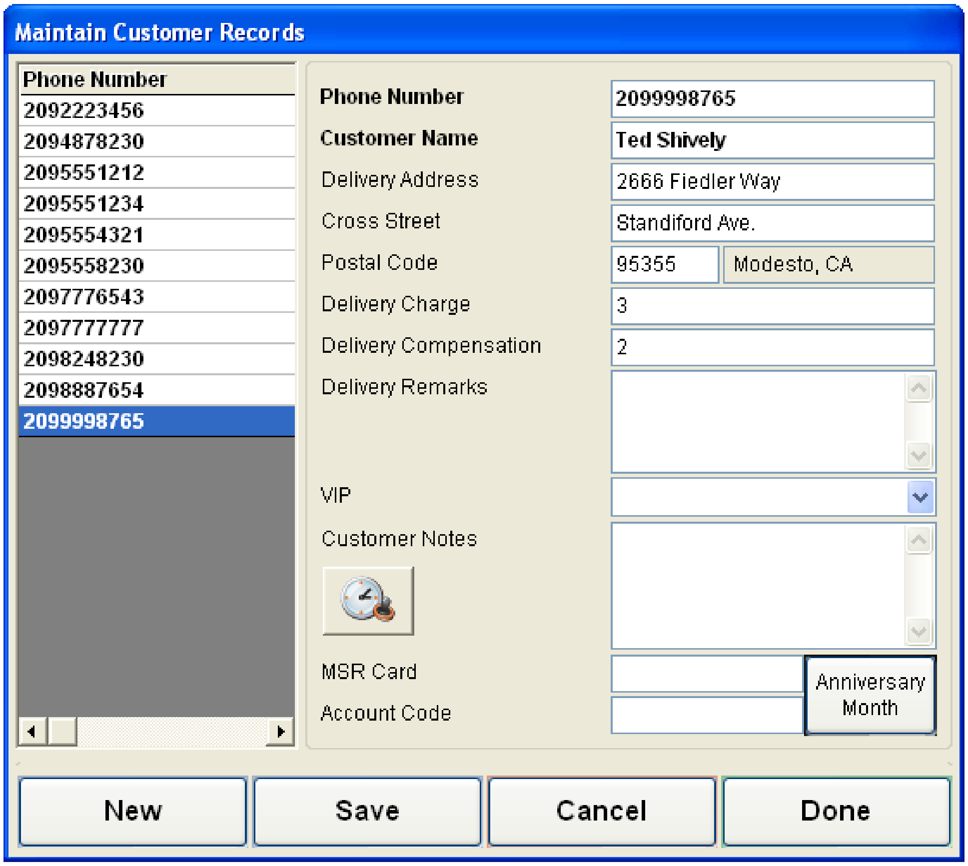


Figure 24-11

CREATE CUSTOMER ADDRESS LABELS

Aldelo® For Restaurants can print customer address labels to use on mailings to your customers. This assumes that you have customer addresses programmed in the system and that you are using an Aldelo Systems Inc. certified label printer with 1" X 3" labels.

From the main POS screen, navigate to **Back Office** > **Activities** > **Customer Activities** and click on "Create Customer Address Labels." The Customer Address Label Generator window appears (see Figure 24-12). Choose the search criteria by selecting one of the radio buttons at the top of the screen and filtering by any appropriate field necessary. Enter the number of copies of each label to print and click the "Search" button. Check the results and edit the names as necessary. Click the "Print" button to send the job to the printer.

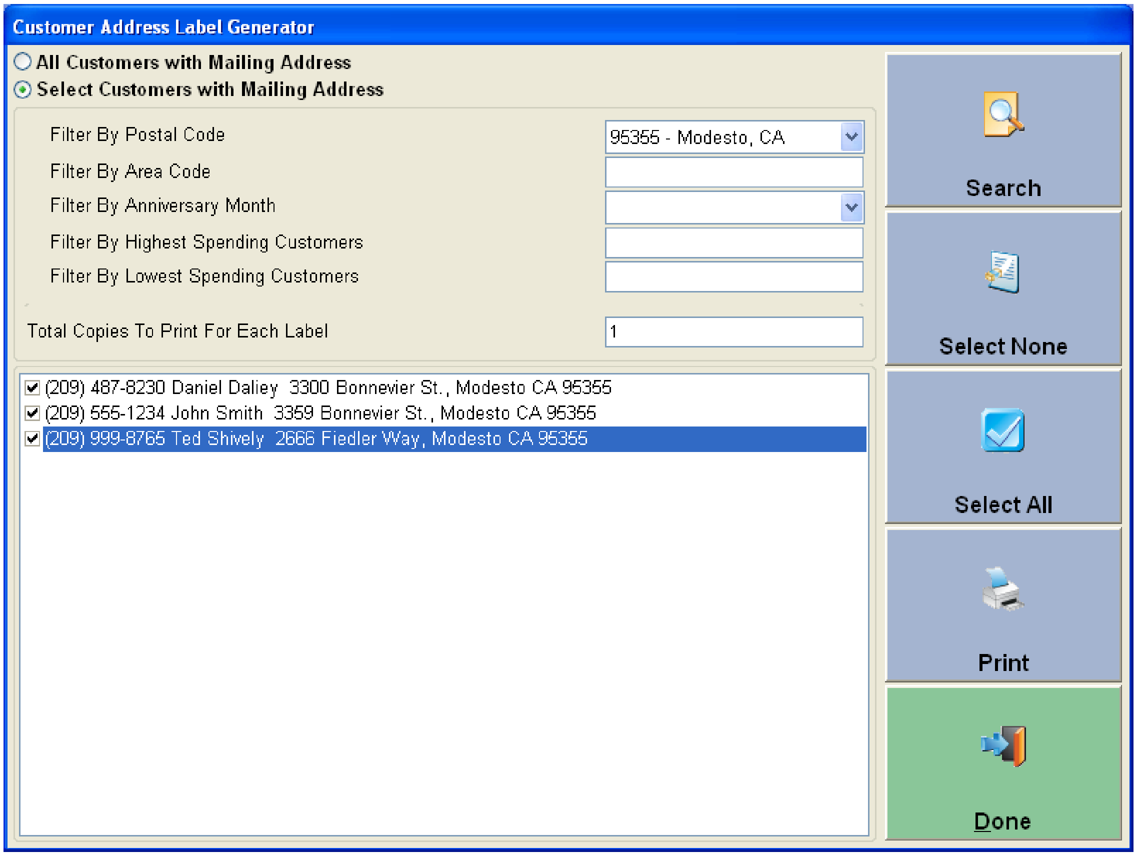


Figure 24-12

Maintain In House Charge Accounts

The Maintain In House Charge Accounts feature enables the user to view, edit, and create in house charge account records.

From the main POS screen, navigate to **Back Office** > **Activities** > **Customer Activities** and click on “Maintain In House Charge Accounts.” The Maintain In House Charge Accounts screen displays (see Figure 24-13). If any records are changed or added, click the “Save” and “Done” buttons when finished. For a detailed description of each field, see Customer Activities – Maintain In House Charge Accounts in Chapter 22 of the User Manual.

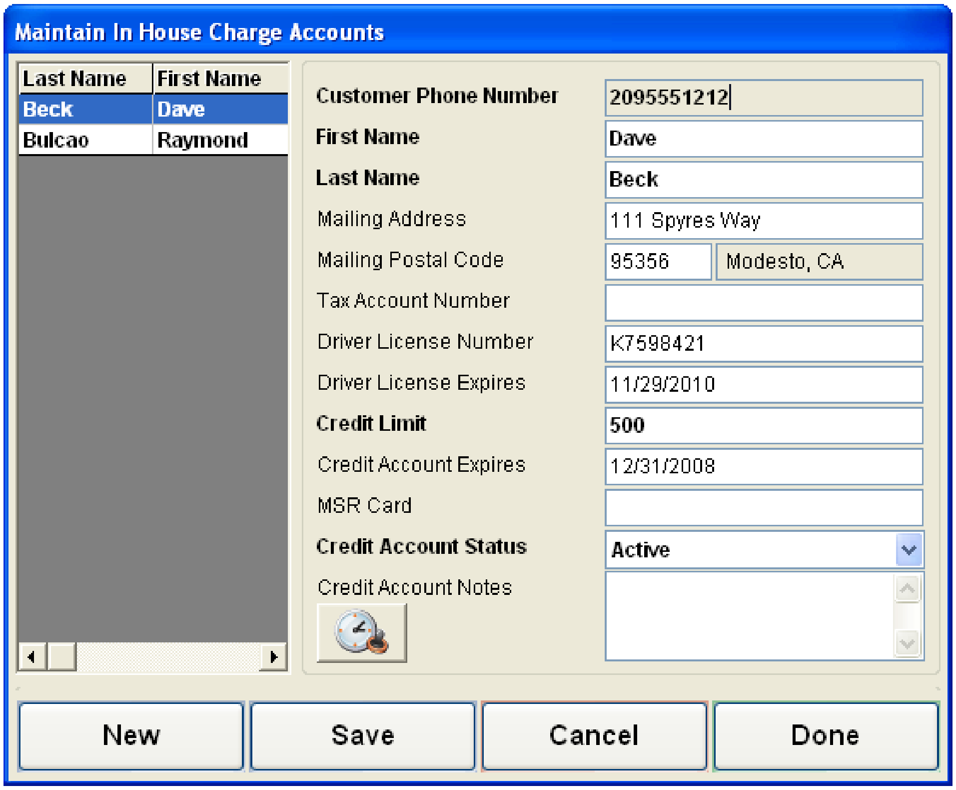


Figure 24-13

CREATE IN HOUSE CHARGE STATEMENTS

Statements may be prepared to print and mail to your in house charge account customers.

From the main POS screen, navigate to **Back Office** > **Activities** > **Customer Activities** and click on “Create In House Charge Statements.” The In House Charge Account List screen displays. Select the customers from the list for whom you wish to prepare statements by clicking the checkboxes next to the names. Click the “Done” button to preview the statements (see Figure 24-14).

Navigate through the statements by clicking the “Next>>” and “<<Previous” buttons. To remove a statement from the list to print, navigate to it and click the “Clear Current” button. To print only one statement, navigate to it and click the “Print Current” button. To print all of the statements, click the “Print All” button. When finished, click the “Close” button.

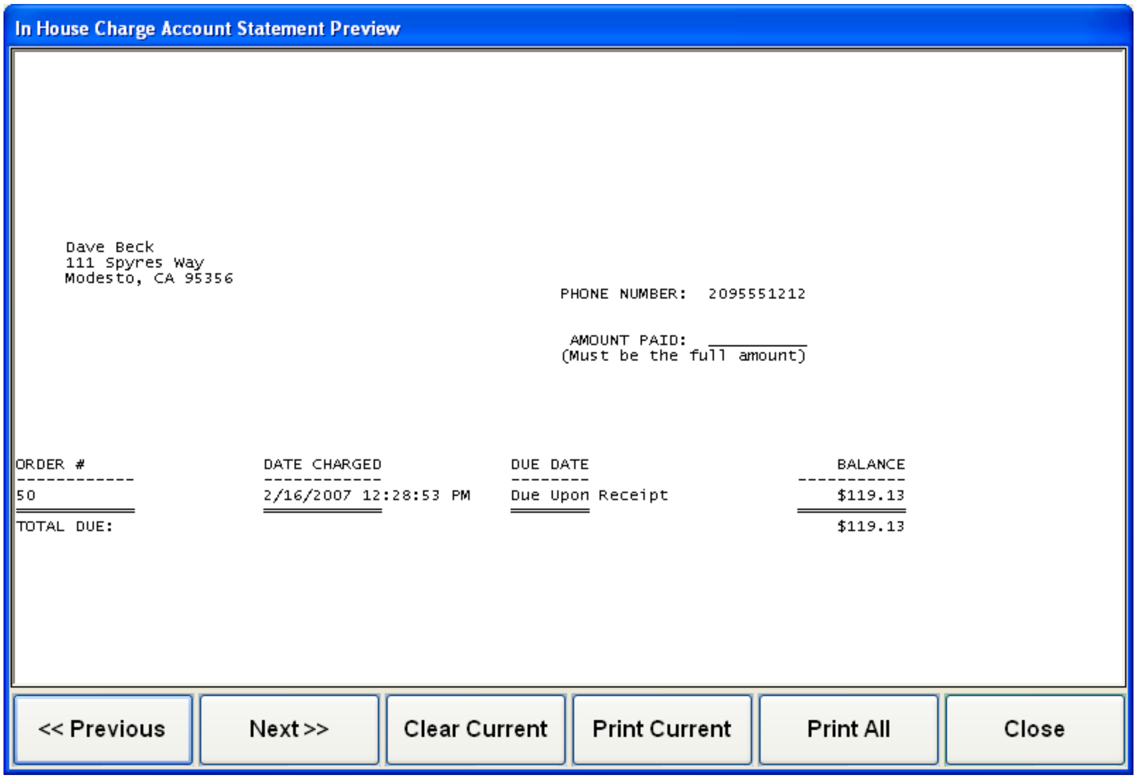


Figure 24-14

MAINTAIN FREQUENT DINER ACCOUNTS

The Maintain Frequent Diner Accounts feature enables the user to view, edit, and create frequent diner account records.

From the main POS screen, navigate to **Back Office** > **Activities** > **Customer Activities** and click on “Maintain Frequent Diner Accounts.” The Maintain Frequent Diner Accounts window appears (see Figure 24-15). Select the customer record you wish to work with, or, to create a new record, click the “New” button and enter the necessary information. For a detailed description of each field, see Customer Activities – Maintain Frequent Diner Accounts in Chapter 22 of the User Manual.

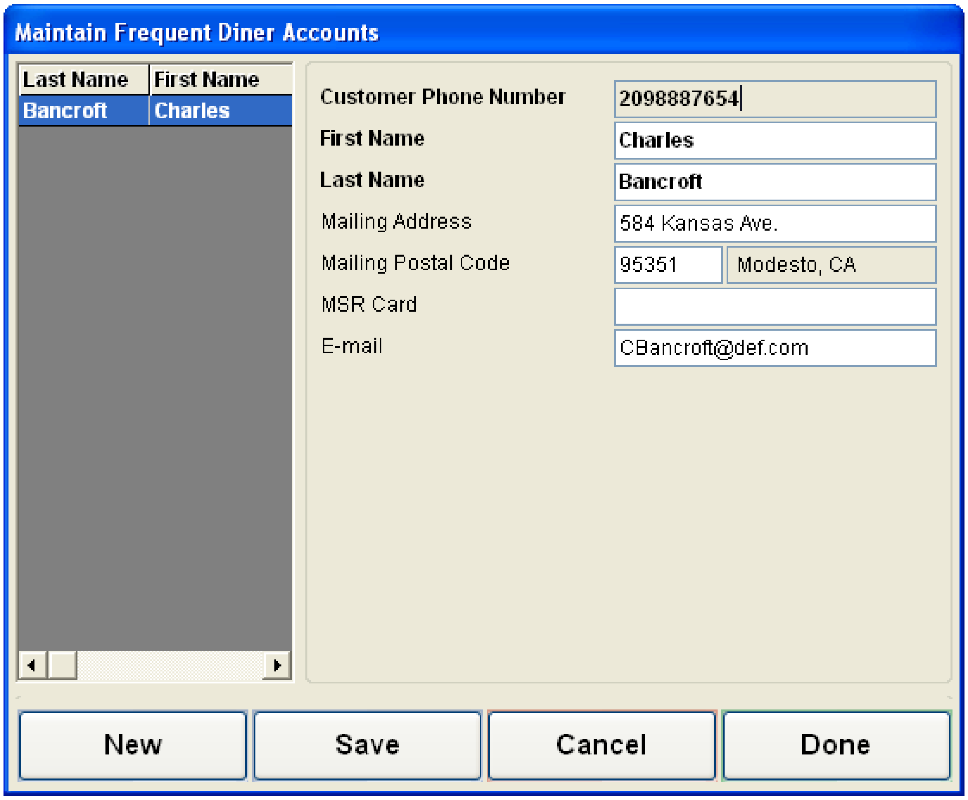


Figure 24-15

MAINTAIN FREQUENT DINER TRACKING

The Maintain Frequent Diner Tracking feature of Aldelo For Restaurants allows the user to view unredeemed frequent diner activity.

From the main POS screen, navigate to **Back Office** > **Activities** > **Customer Activities** and click on “Maintain Frequent Diner Tracking.” Enter the customer’s phone number. The Maintain Unredeemed Frequent Diner Tracking Points screen displays (see Figure 24-16). When finished, click the “Close” button.

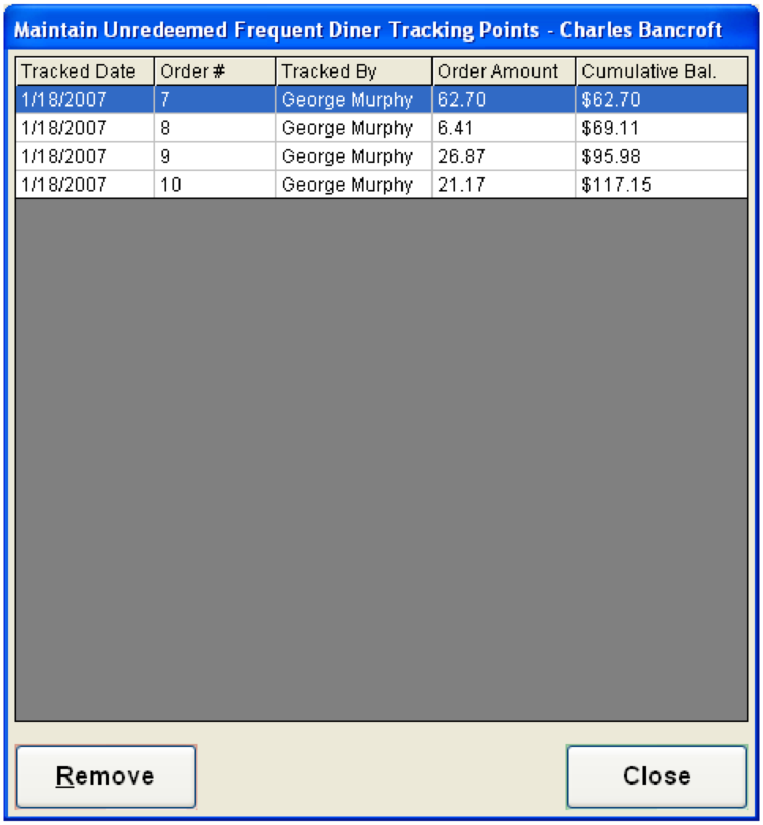


Figure 24-16

Maintain Customer Credits

The Maintain Customer Credits screen allows the user to view credits issued to customers.

From the main POS screen, navigate to **Back Office** > **Activities** > **Customer Activities** and click on “Maintain Customer Credits.” The Maintain Customer Credits screen displays (see Figure 24-17). Select a record to view from the list on the left of the screen.

The only field that is editable is the Credit Status field. If any changes are made, click the “Save” and “Done” buttons to save them. If no changes are made, click the “Cancel” button to exit.

For a detailed description of each field, see Customer Activities – Maintain Customer Credits in Chapter 22 of the User Manual.

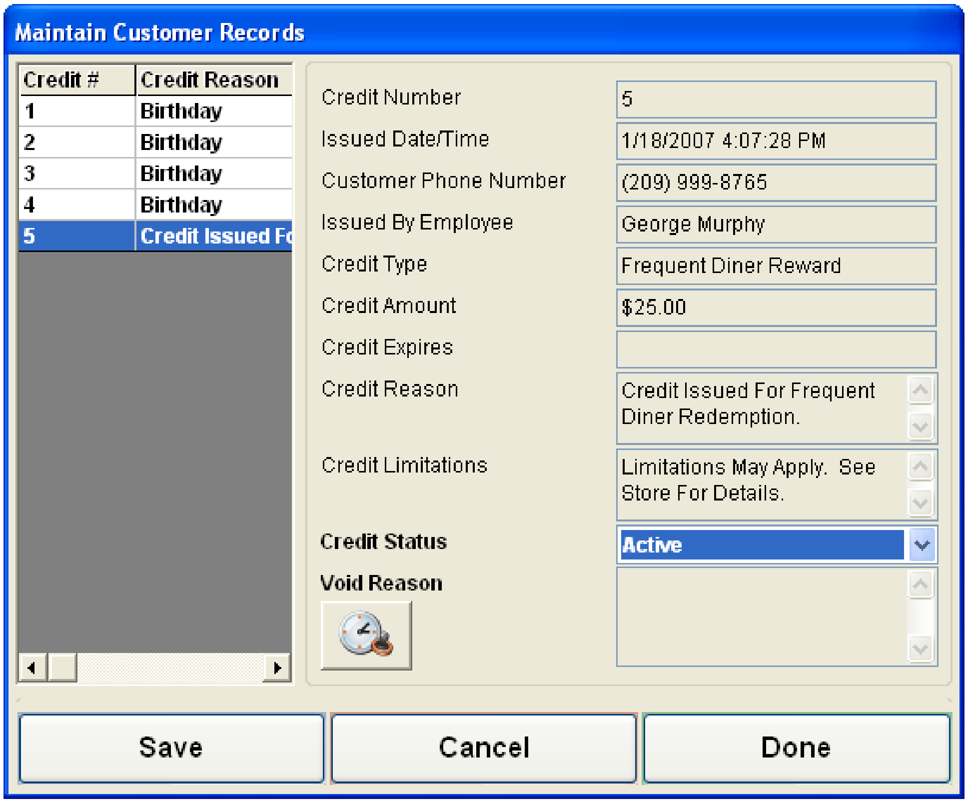


Figure 24-17

MAINTAIN GIFT CERTIFICATES

The Maintain Gift Certificates screen allows the user to view all gift certificates.

From the main POS screen, navigate to **Back Office** > **Activities** > **Customer Activities** and click on “Maintain Gift Certificates.” The Maintain Gift Certificates screen displays (see Figure 24-18). Select an account to view from the list on the left of the screen.

The only field that can be edited is the Status field. If any changes are made, click the “Save” and “Done” buttons to save them. If no changes are made, click the “Cancel” button to exit.

For a detailed description of each field, see Customer Activities – Maintain Gift Certificates in Chapter 22 of the User Manual.

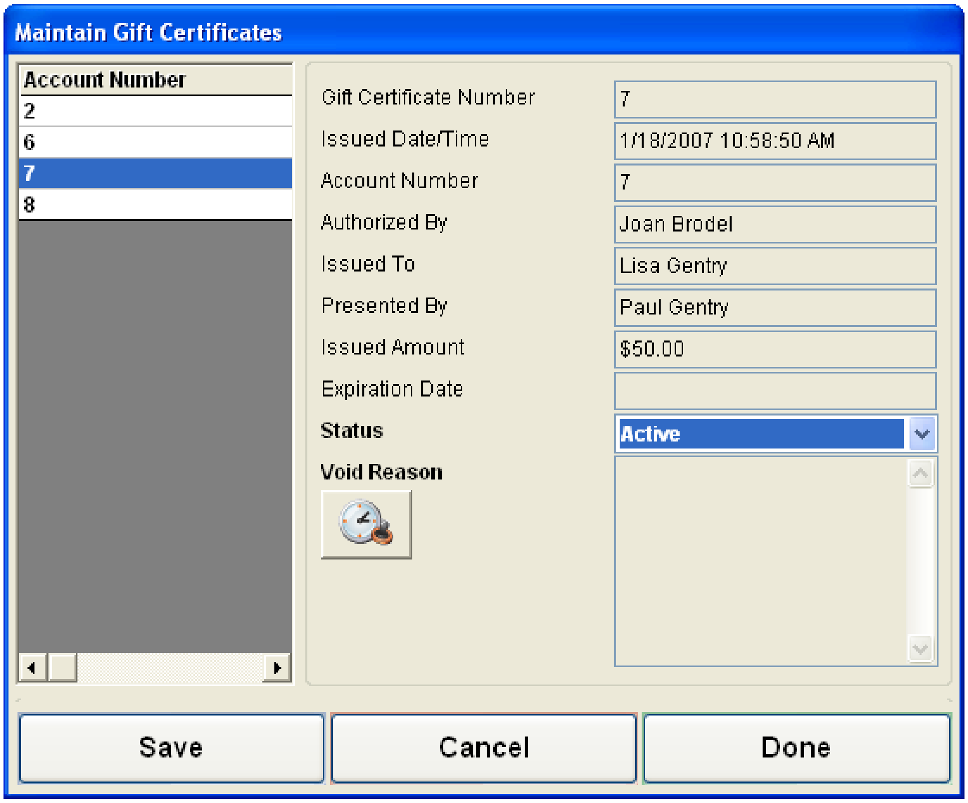


Figure 24-18

New Bad Check

If the restaurant receives a returned check from the bank, enter it into the Bad Check Editor.

From the main POS screen, navigate to **Back Office** > **Activities** > **Customer Activities** and click on "New Bad Check." The Bad Check Editor screen displays (See Figure 24-19). Enter the necessary information from the check into the fields on the form. When finished, click the "Done" button.

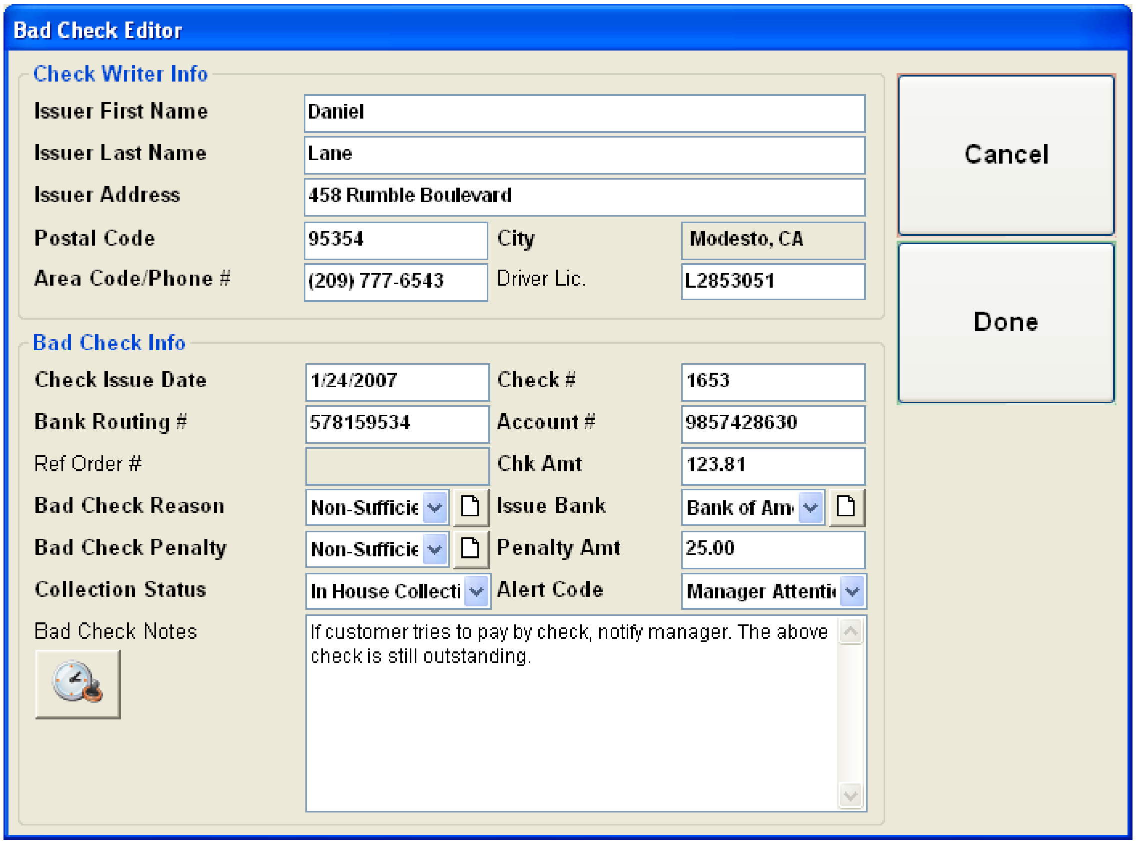


Figure 24-19

Follow Up Bad Check

The Follow Up Bad Check feature of Aldelo® For Restaurants allows the user to edit information entered by way of the Bad Check Editor.

From the main POS screen, navigate to **Back Office** > **Activities** > **Customer Activities** and click on "Follow Up Bad Checks." The Bad Checks List displays. Click the Show All Checks checkbox. Select a customer from the list and click the "edit" button. The Bad Check Editor appears. Here you may edit any field on the form. When finished, click the "Done" button to save the changes.

Inventory Activities

New Purchase Order

Purchase Orders are created when inventory is ordered from vendors.

From the main POS screen, navigate to **Back Office** > **Activities** > **Inventory Activities** and click on "New Purchase Order." The New Purchase Order screen displays (see Figure 24-20). For a detailed description of each field, see Inventory Activities – New Purchase Order in Chapter 22 of the User Manual.

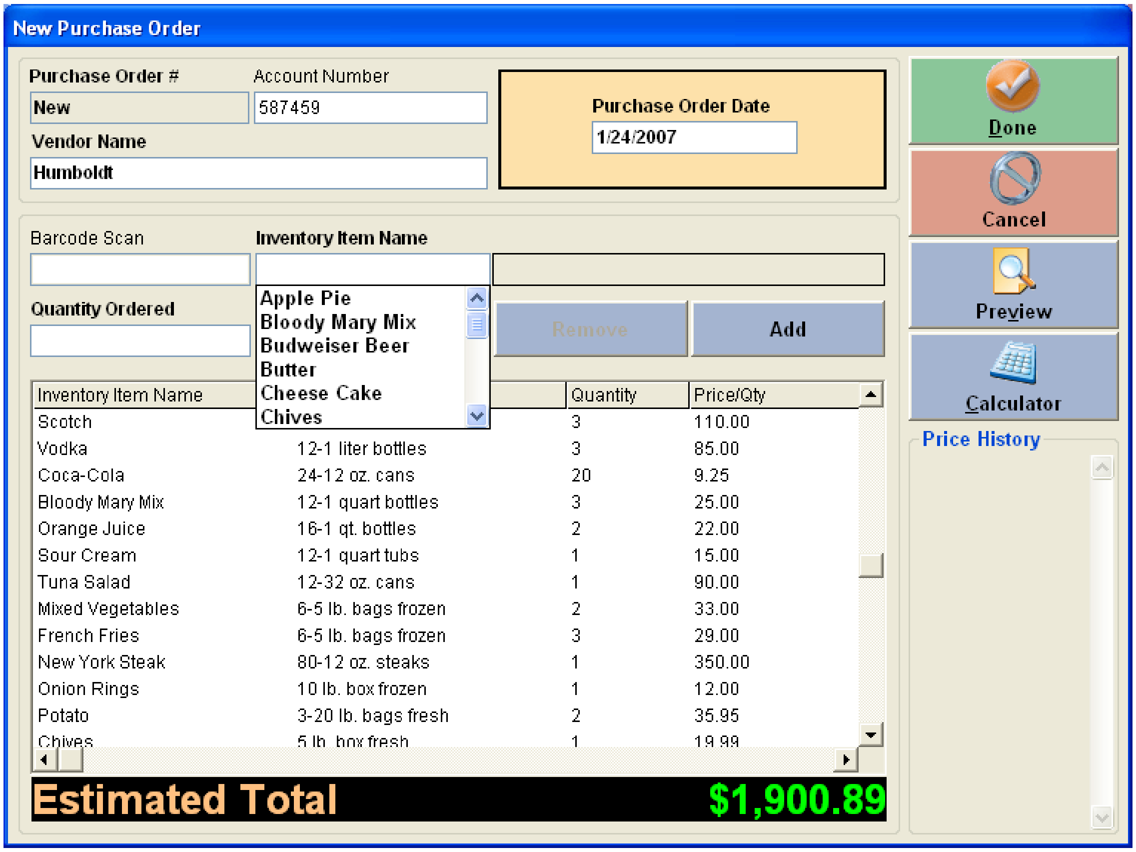


Figure 24-20

Review Purchase Order

Existing purchase orders may be reviewed by using the Review Purchase Order feature of Aldelo® For Restaurants.

From the main POS screen, navigate to **Back Office** > **Activities** > **Inventory Activities** and click on "Review Purchase Order." The Purchase Order Selection screen displays. If desired, enter the "From" and "To" dates at the bottom of the screen and press the "Enter" button to narrow the number of purchase orders displayed.

Next, double-click one of the purchase orders in the list to display the Review Purchase Order screen, which is almost identical to the New Purchase Order screen. The purchase order may also be selected by highlighting it and clicking the "Review" button.

The purchase order may be viewed or edited from the Review Purchase Order screen. Click the "Preview" button to display an image of the purchase order as it will look when printed. Click the "Done" button when finished.

CREATE PO FROM SHOPPING LIST

If the system has generated a large shopping list, use this feature to create purchase orders for your vendors. The purchase orders are created automatically, by vendor, eliminating the need to enter the items manually on each purchase order.

From the main POS screen, navigate to **Back Office > Activities > Inventory Activities** and click on “Create PO From Shopping List.” The current shopping list displays on the Create PO From Shopping List screen. Click the “Create PO” button. A new purchase order is added to the list. It may be reviewed by navigating to the Review Purchase Order screen, as described in the previous section.

For information on creating a shopping list, see Operations Center **-** Inventory Activities \ Shopping List in Chapter 23 of this manual.

CREATE INVENTORY ITEM LABELS

The Inventory Item Label Generator feature of Aldelo® For Restaurants allows the user to create barcode stickers to attach to inventory items. This feature requires the use of an Aldelo Systems Inc. certified label printer using 1” X 3” labels.

From the main POS screen, navigate to **Back Office > Activities > Inventory Activities** and click on “Create Inventory Item Labels.” The Inventory Item Label Generator screen displays (see Figure 24-21). Select the search method in the upper left of the screen. If the Select Inventory Items with Barcode method is chosen, the Filter By Inventory Vendor and Filter By Inventory Group drop-down lists become enabled. Select a filter from one of the lists, and then enter the number of copies desired in the Total Copies To Print For Each Label field.

Next, click the “Search” button. The selected items display. If labels are not needed for any of the items in the list, deselect the checkbox next to the item description. Finally, click the “Print” button to send the job to the printer.

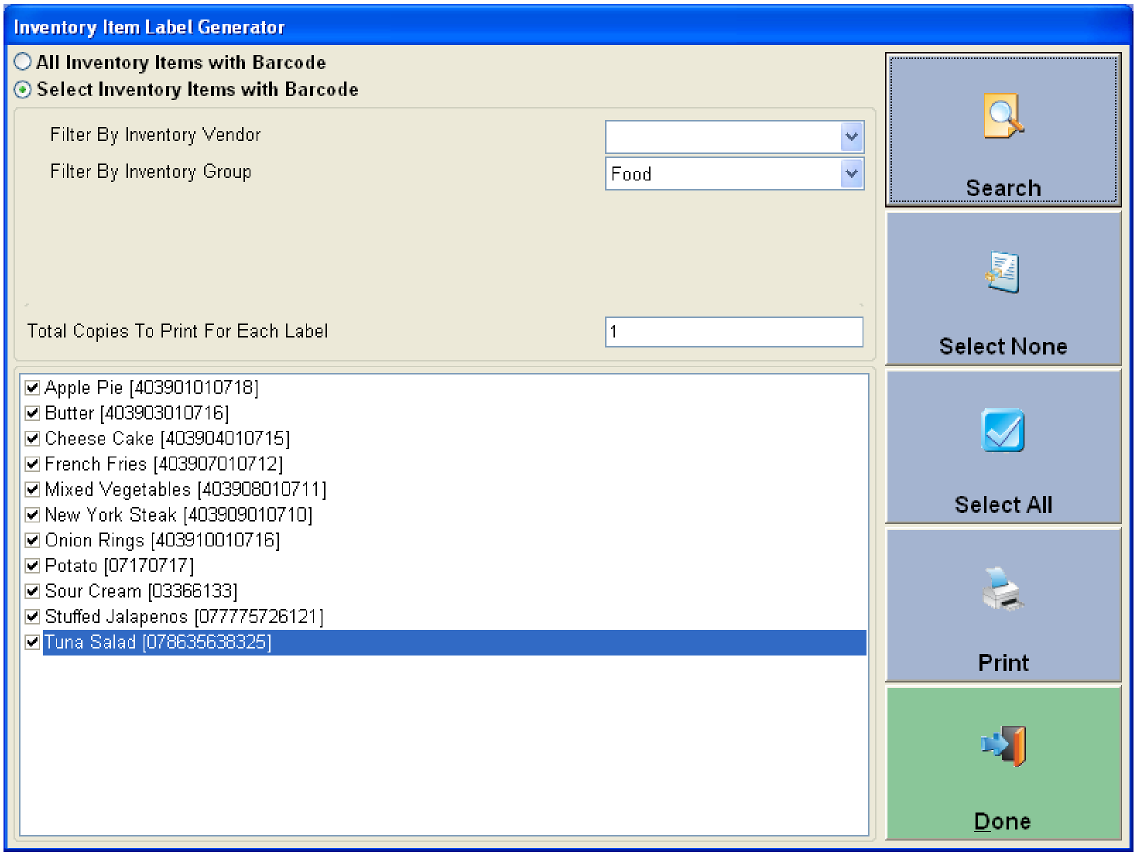


Figure 24-21

RECEIVE INVENTORY ITEMS

Whenever an order arrives from a vendor, it must be received into the system. The Receive Inventory Items feature of Aldelo® For Restaurants records the incoming inventory items and determines the quantity on hand and the unit cost. These instructions assume that a purchase order for the incoming inventory has already been created.

From the main POS screen, navigate to **Back Office** > **Activities** > **Inventory Activities** and click on “Receive Inventory Items.” The Receive Inventory Items screen displays (see Figure 24-22).

Enter a date in the Earliest PO Date field. The entry in this field filters the purchase orders displayed in the drop-down list. Next, select the purchase order from the drop-down list that corresponds to the order that has just arrived.

Compare the purchase order with the supplier’s invoice. Use the “Add,” “Remove,” and “Edit” buttons to make any changes required. The purchase order must be edited so that it exactly matches the actual items that were delivered by the vendor.

When the editing is complete, click the ”Finish” button.

Figure 24-22

PHYSICAL INVENTORY COUNT

The Physical Inventory Count feature of Aldelo® For Restaurants enables the user to update the system with the actual inventory numbers as determined by performing a physical count. These instructions assume that inventory figures have already been entered into the system during the inventory item setup procedure. If desired, a Physical Count Worksheet may be printed to aid in the count. To print this worksheet, see Operations Center – Inventory Activities \ Phy. Count Sheet in Chapter 23 of this manual.

From the main POS screen, navigate to **Back Office** > **Activities** > **Inventory Activities** and click on "Physical Inventory Count." The Physical Inventory Count screen displays (see Figure 24-23).

Highlight an item from the list and type in the new quantity. Repeat this procedure for each item in the list that must be changed. Be sure to enter the total quantity on hand of each item, not the additional quantity added since the last count.

When all changes are finished, click the "Record" button to commit the changes to the system and exit the window. If using a scanning device to count your inventory, import the information from the device into a text file on your computer. Click the "Inv. Download" button and navigate to the location of the file. Click the "Open" button to bring the information into the Physical Inventory Count window.

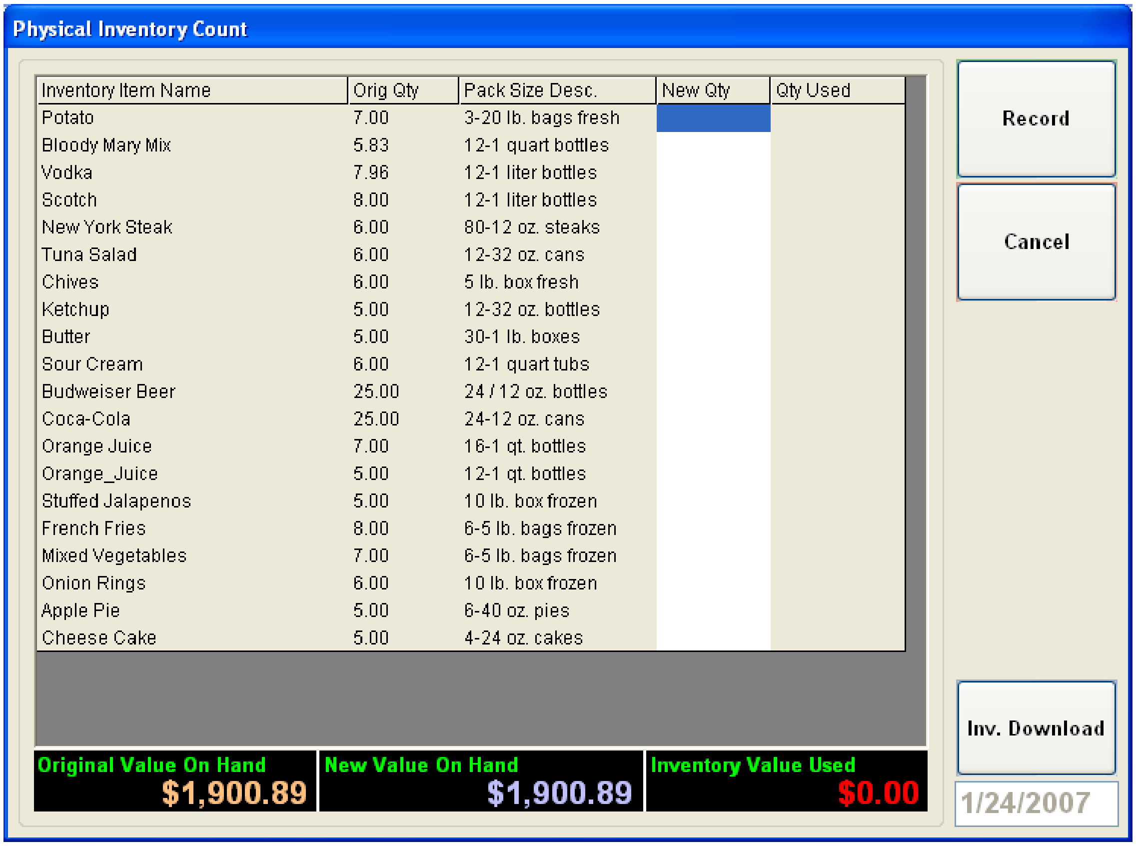


Figure 24-23

Maintenance Activities

MONITOR CLIENT CONNECTIONS

The Monitor Client Connections feature of Aldelo® For Restaurants allows the user to see all of the client connections to the network. Client connections may be shut down if they are no longer necessary. Exceeding the number of client connections allowed prevents the ability to backup or compact the database.

From the main POS screen, navigate to **Back Office** > **Activities** > **Maintenance Activities** and click on “Monitor Client Connections.” The Client Connection Monitor displays (See Figure 24-24).

The maximum number of clients allowed on the system and the number of clients currently logged onto the system are displayed at the bottom of the window. If there are more clients logged on than the maximum number allowed, shut down any client connections that are expendable.

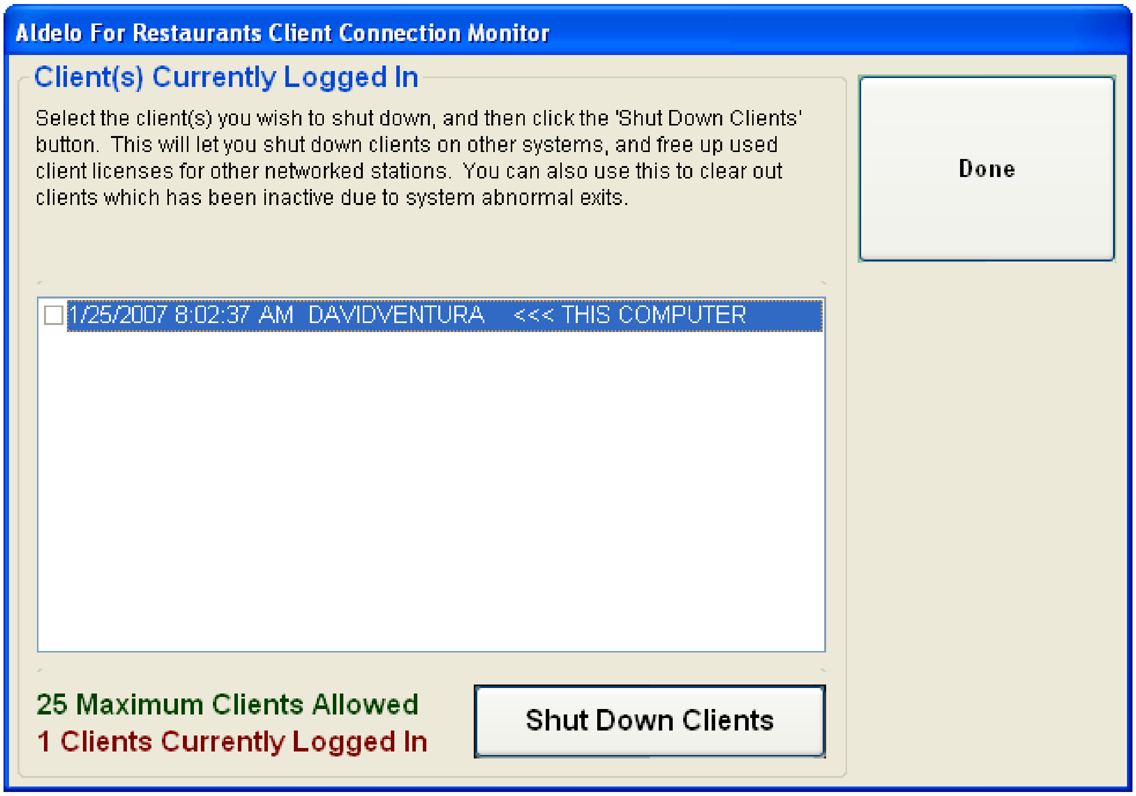


Figure 24-24

Remove All Access Denied Logs

This feature of Aldelo® For Restaurants allows the user to remove all of the recorded access denied logs.

From the main POS screen, navigate to **Back Office** > **Activities** > **Maintenance Activities** and click on “Remove All Access Denied Logs.” When prompted to confirm the deletion, click the “Yes” button. When finished, compact the database. Removing the database’s empty space allows it to run more efficiently.

Remove All Caller ID Logs

This feature of Aldelo® For Restaurants allows the user to remove all of the recorded caller ID logs.

From the main POS screen, navigate to **Back Office** > **Activities** > **Maintenance Activities** and click on “Remove All Caller ID Logs.” When prompted to confirm the deletion, click the “Yes” button. When finished, compact the database. Removing the database’s empty space allows it to run more efficiently.

REMOVE ALL CUSTOMER NAMES FROM ORDERS

The Remove All Customer Names From Orders feature allows the user to delete the names from the specified customer's orders. This may be necessary for database maintenance purposes or due to a request by the customer.

From the main POS screen, navigate to **Back Office** > **Activities** > **Maintenance Activities** and click on "Remove All Customer Names From Orders." Enter the customer's phone number and click the "Enter" button. A confirmation screen displays indicating that the names have been removed successfully.

REMOVE ALL REDEEMED GIFT CERTIFICATE MSR CARD INFORMATION

This feature of Aldelo® For Restaurants allows the user to delete all MSR card information from the system for gift certificates that have already been redeemed. Outstanding gift certificates are not affected.

From the main POS screen, navigate to **Back Office** > **Activities** > **Maintenance Activities** and click on "Remove All Redeemed Gift Certificate MSR Card Information." Click the "Yes" button on the Confirm Action screen. When finished, the Operation Completed Successfully window displays.

REMOVE PRIOR MANAGER CASH OUTS

This feature allows the user to delete all manager cash out information prior to the date selected.

From the main POS screen, navigate to **Back Office** > **Activities** > **Maintenance Activities** and click on "Remove Prior Manager Cash Outs." Select a date from the date picker screen. All information from before this date will be removed from the system. When the procedure is successfully completed, a confirmation screen displays.

REMOVE PRIOR RESERVATIONS

This feature allows the user to delete all table reservation information prior to the date selected.

From the main POS screen, navigate to **Back Office** > **Activities** > **Maintenance Activities** and click on "Remove Prior Reservations." Select a date from the date picker screen. All table reservation information prior to this date will be removed from the system. When the procedure is successfully completed, a confirmation screen displays.

DELETE MASTER DATA

The Delete Master Data feature of Aldelo® For Restaurants allows the user to remove database entries from the system that have either never been used or were created in error. This feature should be used immediately after the database is created to clean up any entries that were created in error.

From the main POS screen, navigate to **Back Office** > **Activities** > **Maintenance Activities** and click on "Delete Master Data." The Delete Master Data screen displays (see Figure 24-25).

Select a category from the list on the left and a data item from the list on the right. If the item can be deleted, a message indicating so appears beneath the list. Select the checkbox next to the item to be removed and click the "Delete" button. Any data item that has sales associated with it or that is attached to another database item may not be deleted, as indicated by the message in red near the bottom of the screen. These items must stay in the database forever.

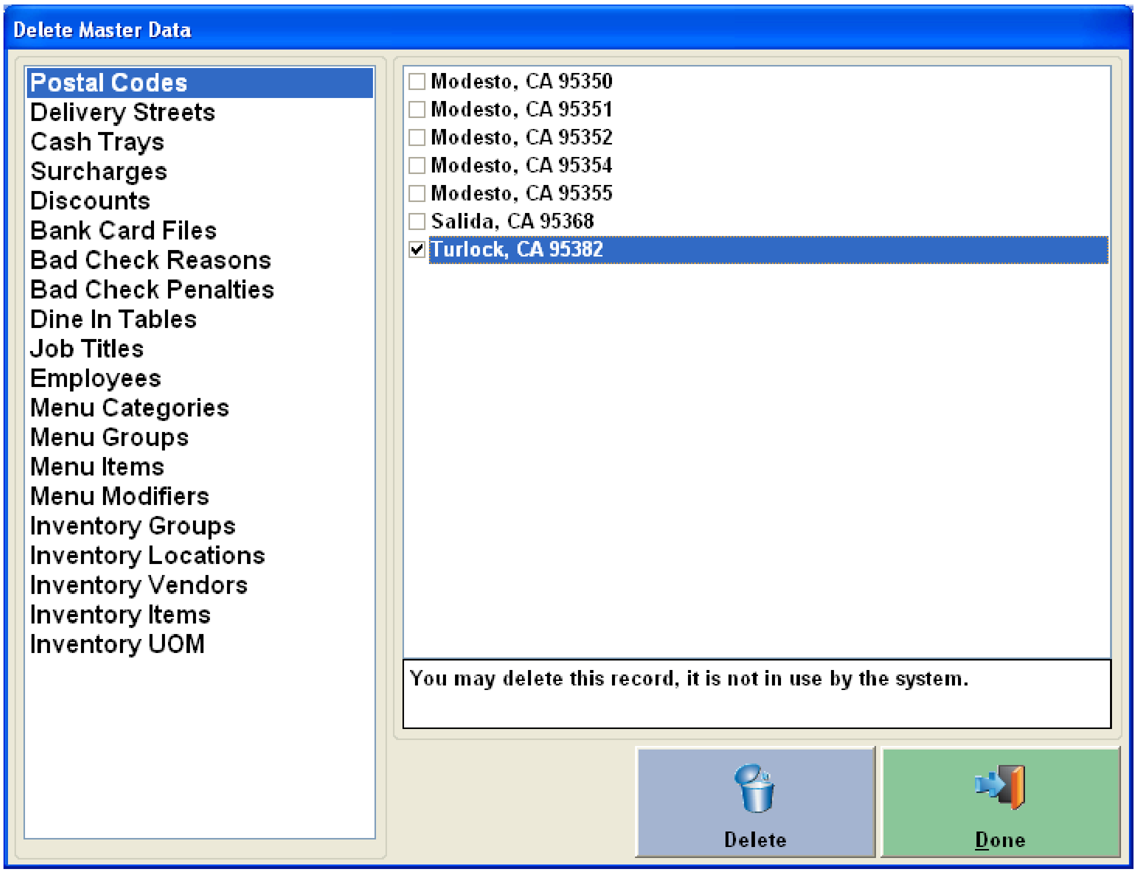


Figure 24-25

Refresh Cumulative Grand Total

This option recalculates the total sales if the Show Non Resettable Grand Total feature is used (this feature is selected under **Store Settings** > **Other**).

From the main POS screen, navigate to **Back Office** > **Activities** > **Maintenance Activities** and click on "Refresh Cumulative Grand Total." This should be performed anytime you suspect the total to be in error. The system checks it for accuracy and updates the database with the correct figure. Upon completion, a message displays indicating that the operation was successful.

Third Party Add Ins

Third party add-ins are shortcuts to programs that are added to the **Back Office > Activities > Third Party Add-Ins** menu. These programs are not integrated into the software; the menu entry merely acts as a way to open the program from within Aldelo® For Restaurants. The Third Party Add-Ins menu comes standard with shortcuts to Microsoft Notepad and the Microsoft Calculator.

NEW

Additional third party add-ins may be added to the menu. Selecting these menu items opens the program from within Aldelo® For Restaurants.

From the main POS screen, navigate to **Back Office > Activities > Third Party Add-Ins** and click on “New.” A text file opens in Notepad. The instructions for adding menu items are listed at the top of the file.

Place your computer’s cursor at the end of the line that reads “Calculator|C:\WINDOWS\System32\calc.exe” and press the “Enter” button on your keyboard to create a blank line between this line and the line below it. Next, add a menu separator to this blank line by typing DASH PIPE DASH (“-|-” the pipe symbol is usually found on the same key as the backslash symbol).

Now move the cursor to the blank line below the last line of the file and type the following: “WordPad|C:\Program Files\Windows NT\Accessories\wordpad.exe” (the path on your computer may be different). The portion before the pipe symbol dictates what displays on the menu. The pipe symbol acts as a separator for the line and serves no other purpose. The portion that follows the pipe symbol is the path to the program’s executable file. The path to the executable file may be found by right clicking the program name in the Windows All Programs menu and selecting “Properties.”

When finished, the file should look like Figure 24-26. Next, on the Notepad screen, click on **File > Save** and then close the file. Close and reopen Aldelo® For Restaurants. Now when you navigate to Third Party Add-Ins, you see that WordPad has been added to the menu. We also placed a menu separator between the Calculator and the Notepad programs and grouped Notepad with WordPad, since these tools are similar. The programs open from within Aldelo® For Restaurants.

This feature is very handy for creating shortcuts to additional programs that are used frequently while in Aldelo® For Restaurants such as accounting programs, Microsoft Excel, Adobe Reader, etc.

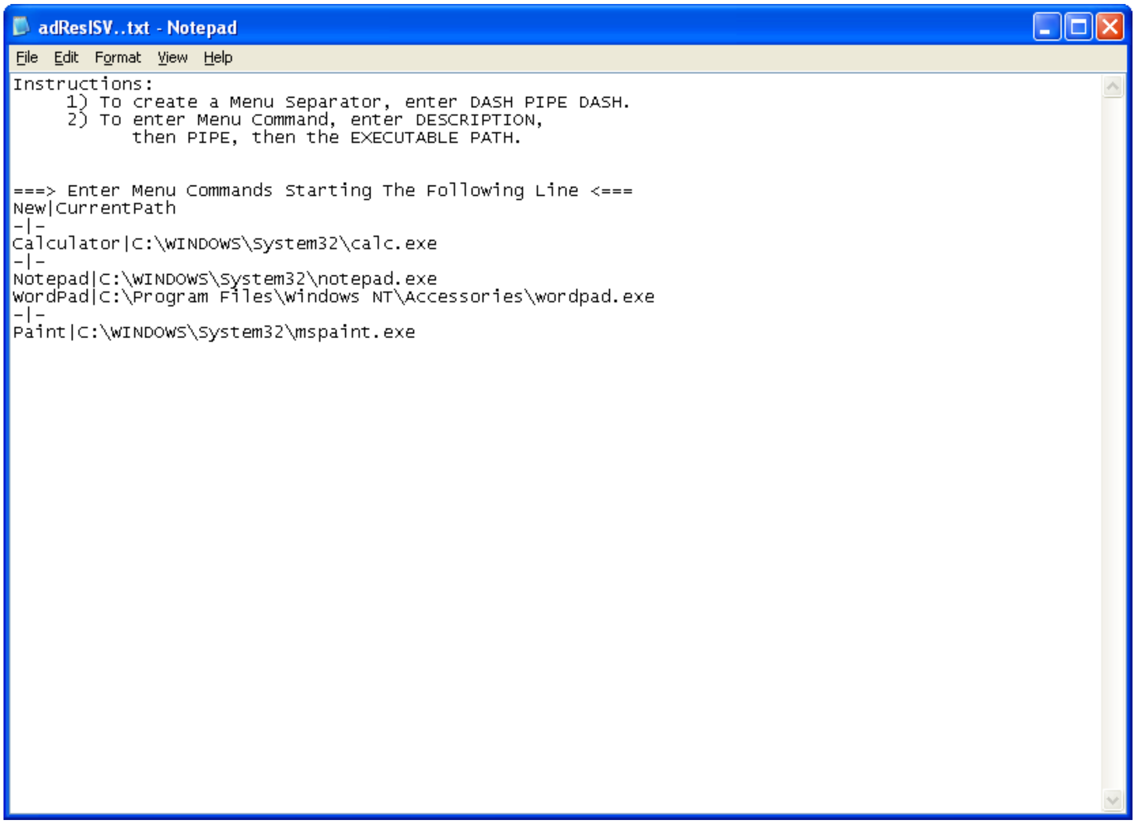


Figure 24-26

CALCULATOR

Clicking this menu item opens the Microsoft Calculator from within Aldelo® For Restaurants.

NOTEPAD

Clicking this menu item opens Microsoft Notepad from within Aldelo® For Restaurants.

WORDPAD

If you added WordPad to your menu as in "New," above, and it resembles Figure 24-27, this menu item opens Microsoft WordPad from within Aldelo® For Restaurants.

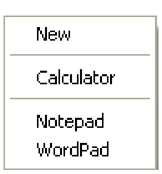


Figure 24-27

Chapter 25 — Database Maintenance

Database Support & Files

ADRESSETTINGS.DAT

The adResSettings.dat file contains all of your database's store settings. Whenever you backup your database, this file is stored along with the database file. This file can be used by the Aldelo Systems technical support team to help diagnose any issues that affect your system.

ADRESISV.DAT

This is the file that we edited in the previous chapter to create an additional shortcut to the Microsoft WordPad tool from the Activities menu. Any program to which you create a link must be installed on the local machine. Please see Third Party Add-Ins – New in Chapter 24 of this manual for detailed instructions on editing this file.

ADRESHOSTESS.DAT

This file holds all of the settings and information related to the Hostess features of Aldelo® For Restaurants.

ADRES.LANG

This file is stored in the Aldelo For Restaurants \ Language folder. The file includes all of the information required to display text. This file must connect to the software. Otherwise, your buttons appear without captions.

Database Engine

Aldelo For Restaurants uses the Microsoft Jet 4 database.

Database Limits

Your restaurant's database file cannot be larger than two gigabytes. If the database reaches this limit, contact Aldelo Systems technical support for help on how to overcome this limit.

No limit exists on the number of client computers that may be connected to the database. However, the system's performance could suffer a great deal if a large number of clients are connected to the database when the database is installed on a relatively slow machine. If your system runs at an unacceptably slow speed, consider upgrading your server to a faster machine.

Compact Database

Your database should be compacted on a regular basis. Compacting the database removes the empty memory space and makes the database run faster and more efficiently. To compact the database, you must first shut down all the client computers connected to the server containing the database. Next, from the main POS screen, click on **Back Office > Compact Database.** A message displays, indicating the compaction was executed successfully.

Jet Compact Utility

The Jet Compact Utility compacts databases created with the Microsoft Jet database 4 engine. This utility may be run for recovering corrupted databases. Although you can run the Compact Database method with the Microsoft Jet database 4 engine, the Jet Compact Utility may be able to recover some databases that these utilities cannot. The reason for this is that the Compact Database method attempts to open and close a database before attempting to compact it. In certain cases where these utilities may not be able to reopen the database, Compact will be unable to proceed, preventing recovery of the database. The Jet Compact Utility does not attempt to open and close the database before compacting, and may therefore be able to recover some databases that the Compact Database method cannot.

To use the Jet Compact Utility, from the main POS screen navigate to **Back Office > Help > Technical Support** and then press the F12 key on your keyboard. Enter **"05338942"** into the password screen and click the "Enter" button. A message asks you to confirm that all client stations are shut down. Double check to make sure that they are shut down and click the "Yes" button. Next, a message asks if any error messages were displayed during the compact process. If none were seen and Jet Compact completed successfully, click the "Yes" button.

Backup Database

The Backup Database feature of Aldelo® For Restaurants allows the user to create backup copies of the database to be used in case your live database somehow becomes corrupted. The backup can only be created on the server computer that contains the database installed locally. The backup must be saved on a media type that has enough capacity to hold the entire file; a floppy disk cannot be used. The file may be saved onto a CD, a tape drive, a DVD, or the hard drive itself. Saving the file onto the hard drive is not recommended unless the file is also backed up to another drive simultaneously, as both the live database file and the backup copy will be lost if the hard drive fails.

To backup the database, you must first shut down all the client computers connected to the server containing the database. Next, from the main POS screen, navigate to **Back Office** and click on **Backup Database** under the Common Tasks section of the screen. After a confirmation screen, the Backup Database screen displays (see Figure 25-1). Select the drive and folder where you want the backup file saved. Next, click the “Backup” button, and then the “Yes” button to confirm the folder location. A message asks if you would like to delete the previous backup copy. Read the message and click the “Yes” button if your current database exhibited no problems in operation. The Backup Successful screen appears. Click the “OK” button to complete the procedure. The files adResSettings.dat and adResHostess.dat are backed up along with the database file.

Backups may also be scheduled to run automatically. To set this up, navigate to **Back Office > Setup > General Settings > Station Settings** and click on the “General” tab. In the Backup Prompt Time field, enter the time you want the backup to occur, and then select the Automatic Backup checkbox. The backup will now happen daily, at the pre-selected time.

Note: Just as with a manual database backup, all client computers must be disconnected from the database before the database can be backed up automatically. This feature should only be scheduled to run when the restaurant is closed. It is not recommended for 24 hour operations.

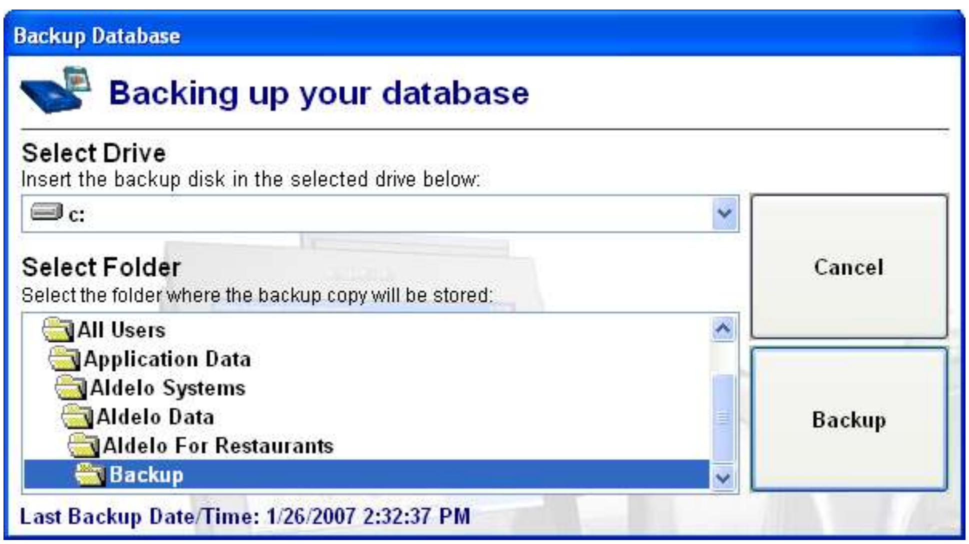


Figure 25-1

Chapter 26 — Import / Export

Exporting Data

This feature of Aldelo® For Restaurants allows the user to export data from the current database into another existing or new database.

From the main POS screen, navigate to **Back Office > File > Import / Export Data.** The Import / Export data screen displays (see Figure 26-1). Click the Export Setup Data radio button and choose the data to export by selecting the respective checkboxes. If you wish to export everything, click the Export Entire Database radio button. Finally, click the “Export” button.

A file is created that contains all of the information you chose to export. The file cannot be edited. If a mistake was made in choosing what data to export, repeat the procedure. The file is saved in the Aldelo Export folder. If the default location was chosen for your initial installation of Aldelo® For Restaurants, the file may be found in the C:\Documents and Settings\All Users\Application Data\Aldelo Systems\Aldelo Data\Aldelo For Restaurants\Export directory.

Import Data

This feature of Aldelo® For Restaurants allows the user to import data that was exported from another Aldelo database. If data is imported into an existing database, any information that cannot be imported is hidden. Create a new item and pick the hidden items to restore them.

From the main POS screen, navigate to **Back Office > File > Import / Export Data.** The Import / Export data screen displays (see Figure 26-1). Click the “Import” button. Navigate to the file to import and click the “Open” button.

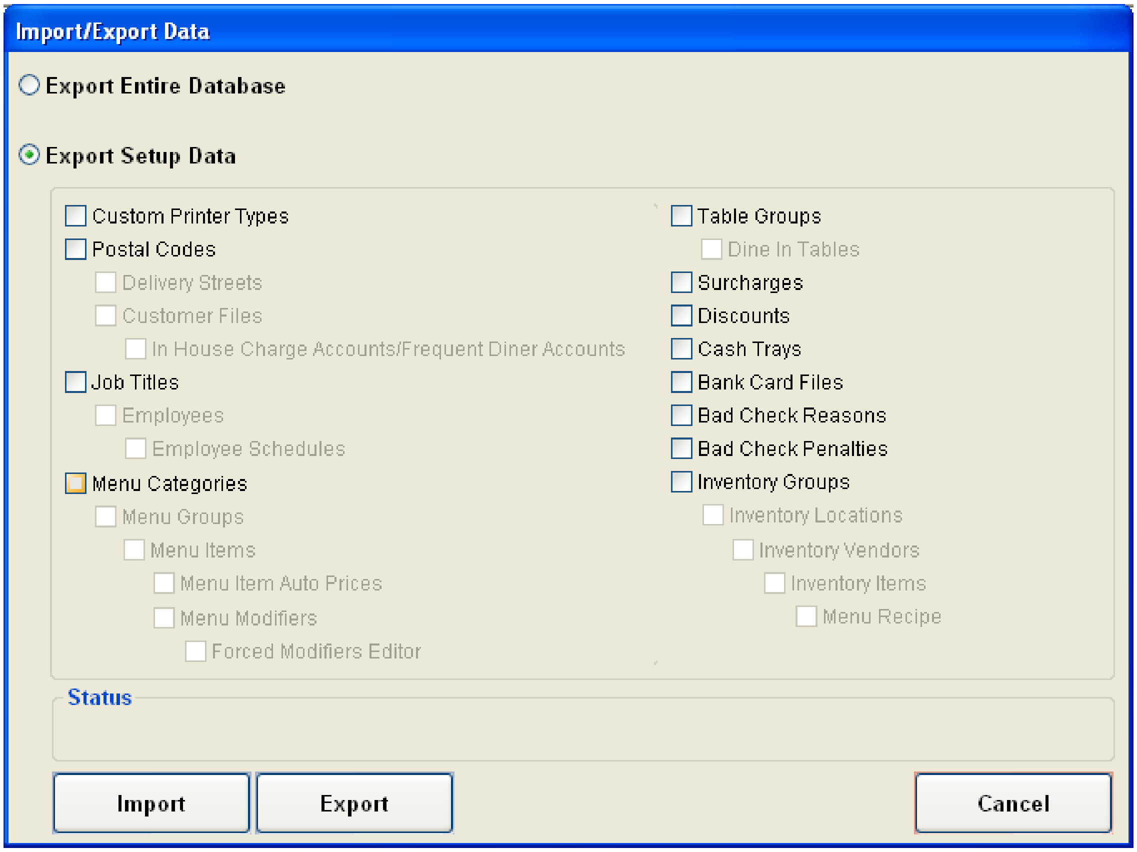


Figure 26-1

Import New Resource Database

This feature of Aldelo® For Restaurants allows the user to import a new language database file, named adRes.imp, created in the Aldelo Localization Utility. This file holds all the strings for the software. Changing the strings lets you run Aldelo® For Restaurants in another language. For detailed information on creating language databases, please see the Aldelo Localization Utility manual.

Reports

Aldelo For Restaurants contains a multitude of built-in reports that may be accessed from the main POS screen by navigating to **Back Office > Reports,** and then clicking on the report type and the report name. To view samples of these reports, please see Reports in Chapter 25 of the User Manual.

Exporting Reports

All of the reports built into Aldelo® For Restaurants may be exported to a Microsoft Excel file. From within the report, click the “Export” button. A screen confirms that the report was exported successfully. View the report with Microsoft Excel.

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