User Manual

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Introduction

Overview

Just like many other popular websites, Rely POS lets you sign up, create an account and begin. By answering some questions, Rely POS assists you in setting up your menu, your customer database, and your company structure.

Rely is a powerful POS system, credit card interface, restaurant management and marketing system. You can create and print gust checks, manage your employees, and send emails to all of your customers, all from one account.

Speed

Rely POS is fast, we have optimized the POS section for speed. We only send important data back and forth to the server. When you are on the POS section you will not see the pages refresh because they don't. The pages stay the same, only the buttons will change. We have also installed client side code in certain cases to keep the bandwidth as narrow as possible. You'll be amazed at the speed of Rely POS.

Areas

Rely has two areas, they are the POS, and the Manager's Admin. Think of the Manager's Admin as your control Panel. The Managers Admin has everything you need to run your restaurant. Creating and editing the menus, set prices, control employees, reports and marketing.

The POS is the section your employees will be using every day. They can't control your restaurant, but the can start checks order items and print customer bills, and all the other things you expect a POS to do.

Setup

With Rely POS Set up your menu; manage employees, and customers from anywhere. All you need is internet access. We have created a system to help you set up your menu accurately and efficiently. You simply choose your restaurant style and answer some questions during sign up and Rely POS will automatically setup your menu. Then customize the names and prices to your menu and you are ready to go.

All of the setting necessary to operate such as taxes and gratuities are in the Restaurant Settings tab. Next, visit the Manager's Admin Employees tab and Marketing Center for more setup options. With Rely POS you can set up any restaurant configuration.

Maximizing the power of the internet

Rely is a subscription based, software as a service provider. By maximizing the power of the World Wide Web, we are able to make Rely POS your all in one point of sale, restaurant management and marketing solution. Only the internet can make all of this possible, and you can manage your restaurant from anywhere you have internet access. Never before have restaurant owners been able to have this flexibility.

There are many advantages to our model. The first and primary advantage is cost savings; Rely POS will save you thousands in up front set-up costs.

There are also long term cost savings. Rely automatically updates your POS system with new editions as they are introduced. So you'' never be forced to pay for new versions or upgrades.

POS Section

Login

You will recognize the Rely POS login screen as soon as you see it. It's very similar to any other POS system. There is large number pad in the center, simply put in your pin and click the appropriate button. You can clock- In, clock out, or enter the POS. We make managing easy because you can't enter the POS without clocking in first. Employees cannot clock out without declaring tips. PIN numbers are always 4 digits. You create PIN's for each employee in the Manager's Admin

Restaurant Types

Rely POS can accommodate all restaurant types. Restaurant types are the way you serve your customers. For example your restaurant may be dine in, counter (fast food), or delivery. Your restaurant may also serve customers in several ways. For example, you may have dine in, carry out and delivery.

Depending on the way you serve your customers, you will want certain screens to appear at certain times during the functioning of your POS. For example, if you are dine in, you may not need your customers address. It's important to know that with Rely POS, your restaurant can be changed if you need to turn certain areas off, or on for optimal speed and efficiency.

When you sign up the first time with Rely POS you'll be asked which restaurant type best describes your restaurant. If you find that features are missing that you need, email us at support@relysoftware.com or call us and we'll make sure you are set up as the correct restaurant type.

Dashboard

Your restaurant type and your employee access role will determine which functions are available after you login. The Dashboard is the first screen you will see when you login. You'll notice that the functions you need most are at the top of the screen. From here you can begin a guest check, pick up an open guest check or open table (sit-down). Open a closed check (manager only) view reports, view the order screen, view online orders, or exit.

Choose any button and you'll move to that function. Choose exit and you'll logout and go back to the login screen with the PIN pad.

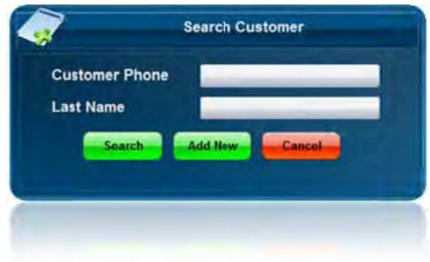
Begin Check

If your restaurant is a sit down restaurant you will begin directed to the Begin Check page after pressing the begin check button. Once you are at the Begin Check page you can enter the number of guests and the table number. If it is a carry out order check the Carry Out box and enter your customer's name.

Next, press the enter button to begin the check and go directly to the order screen. That's it, you started a guest check

Searching / Entering Customer Information

If your restaurant has delivery services, you will have a Search Customer screen when you begin a check. When you begin a check you will need to find your customer in the Rely POS database. Enter your customer's phone number or name and press the search button. You may also press the New Customer button if it is a new customer.



If your customer cannot be found, you will automatically be directed to the new Customer Page. Enter all of your customers important information and press the enter button. If your customer is found you can select delivery or carry out to begin the order.

Order Screen

The order screen is the heart of the POS section. Once you begin a check, directly, or through the begin check screen or from the search customer screen, all of the functions here are the same. On the left you will have up to five icons. In the center right, your items will be displayed as you add them. To the right you'll see buttons for the menu's you have programmed.

Your menu choices will appear there as you are selecting categories and adding items. On the bottom of the screen you'll see all of your main function buttons, many of which will navigate you off of this screen and onto new screens.

The plate icon with a plus sign is to add a special order custom item. Simply press the icon and fill out the form that pops up, and then press enter. The plate icon with the red X is for deleting a previously ordered item. First press the item you want to delete, and it will turn yellow. To delete the item, press the plate icon with the red X. Next you'll find the serving preferences icon. It is the plate with the question mark. You will need to highlight the item you are adding serving preferences to and then press the plate icon with the question mark. Type in your serving preferences and they will be added to your order. The refresh icon is for repeating the round. Highlight the items you want to repeat and press the plate icon with the refresh sign. The last icon looks like a gift box. Use this icon if you want to sell a gift certificate. Do not use this icon to pay using a gift certificate.

In the center area, your items will be displayed as you add them along with their preparations and sides. The preparations and sides will appear indented. If you need to select an item, always select the item itself and not the preparation or side associated with it. You'll notice when you select an item all of the preparations and sides will be highlighted along with the item. Now you can select the appropriate plate icon to the left.

Your menus will be displayed as buttons on the right. First you'll need to choose a menu, if you only have one menu available, this step will be skipped. And you will then first need to choose a category. Once you select a category all of the sub-categories or items associated with it will dial automatically. Now you can choose an item to add to your order. If there are more than twenty you'll need to press the arrows at the bottom to see all of them.

Once you select an item, that items preparation choices will be displayed. If the item does not have any preparation choices the side choices will be displayed. If the item does not have any side choices it will automatically be added to your order and you will be back at the category level. If you need to go back to the menu level hit the up arrow or the home button.

Now you can begin ordering the second item. If you need to change the guest number, press the guest number and a pin pad will appear for you to enter the next gust number.

With the buttons on the bottom of the screen you can send the order, print the order, split the check, or pay for the check. Press finish if you are done but do not want to logout and press exit when you are done and do want to log out. Cancel, will cancel everything you just ordered and void will completely void the check. Void will need manager's approval.

Split Check

The split check screen enables the user to split the check up so that you can give separate checks to separate customers. You can split a check multiple times. However, you can only split the check in two.

To split a check, touch the item on the left that you want to be I a new check and touch the arrow to move it over to the left. If you make a mistake, use the left arrow to move it back. Once you have all the items where you want them press the split check button. The new check number will be displayed. Now, you can split the same check again. If you press the back button you will go back to the original checks order screen. You can also press the Open Check button to access the new check.

Pay Screen

In the pay screen you can print the bill pay the check, settle the check and close the check. If you want to use cash to pay the check, press the cash button. You can enter the amount or use the quick cash buttons. To pay by bank check presses the check button. You can enter the amount, check number and name and phone number on the check. There are two ways to pay by credit card, you can make a payment or pay it in full. You can also key in the number or swipe the credit card.

In the pay screen you can also add a coupon, add a discount, or use a gift certificate to pay the check. All of the appropriate buttons are there. Use the print bill button to print the bill for your customer.

To close a check, simply press the close check button. Remember a check must be paid in full to close. Checks close automatically when they are paid in full by cash, paid in full by check, or paid in full by credit card and then finalized.

Credit Cards

In order to process credit cards with Rely POS, you must first setup a merchant account with Merchant Warehouse. See our website for details, www.relypos.com. Or call merchant warehouse at 800-419-3221. Once you are signed up with merchant warehouse we will enter your account information into Rely POS and your credit cards will automatically be processed through the POS. In the Pay Screen you'll notice there buttons related to Credit cards. They are CC Payment, Charge CC and Finalize CC.

CC Payment allows you to make a partial payment to the check with a credit card. You can enter any amount.

Charge CC will pay the entire bill with one credit card. After you press CC payment or Charge CC you'll need to choose keyed or swipe. To swipe a credit card you will need an encrypted credit card reader, just swipe the card when the screen tells you to. If you need to key in a credit card, you only need to enter the CC Number, Expiration and CVV.

Finalize Credit card lets you add a tip to the Credit card. After you finalize the guest check will automatically close.

Transactions

The transaction page shows all of the transactions associated with a guest check. From the Pay screen you'll see the transaction button on the bottom. Once you press the button you'll be directed to the transactions page. There you can see all of the transactions used to pay the check. From here you can void a transaction if it is incorrect, or reprint a credit card authorization for your customer to sign. You can't change a transaction, but you can void it. Then you can go back to the pay screen and reenter your payment.

Open Checks

The open check screen shows all of your open checks. Choose the check you want by pressing the check number. Once you press the check number, you will be directed to the order screen for that check. Managers’ will have their checks listed and all of the open checks for the entire restaurant. They will be displayed in two separate areas.

Open Table

The Open Table screen shows all of your open check by table number. If your check is carry out or delivery and it does not have a table number, it will not be displayed here. You will need to use the Open Check screen and choose the correct check number. To open a check just select the table number associated with the check you want to open. You will then be directed to the order screen.

Closed Checks

The closed check screen will display all of your closed checks from the last 24 hours. You can open a closed check with a manager’s PIN. Click or press the check number you want to open. Once you open a closed check, you can do anything you need to do with the check just like a new check. Once you are done making changes, remember to close the check again so your reports will be correct

Kitchen and Bar Order Screen

The kitchen and bar order screen display all of the orders placed from the order screen. Each order is displayed once it is placed. Some checks might have items ordered at separate times. The orders will be displayed separately. Orders will displayed whether “Printed” in the POS or “Sent” from the POS. The entire order will be displayed unless it is too large. If the order is too large you’ll see a moving “More” icon.

Each order will have two buttons, the Full Order button enlarges the order, once enlarged you can print the order. The Done Button closes the order.

If there are too many orders to display on the screen, you’ll see two arrow buttons and a “More “icon. Use the arrows to view more orders if the “More” icon is rotating.

Reports

The reports available in the POS are the My Daily Report and the Restaurant Daily Report. Each employee that has access to the orders has access to a My Daily Report. Only managers have access to the Restaurant Daily Report. Both reports look very similar. The My Daily Report only shows the transactions of the employee whose name is on the report. The Restaurant Daily Report has the entire restaurants information.

Net Sales	The Net Sales is the sum of the "net amount" of all the checks begun today. Weather currently open or closed.
Gratuities	Gratuities are the Charged Tips and Automatic Tips, only from checks closed today. Checks that were closed during today's restaurant day. These checks are not always started today, just closed today.
Tax Collected	This is tax collected, so it only comes from closed checks. Any check closed during today's restaurant day.
Total Revenue	This is the sum of the 3 items above Sales, gratuities and taxes.
Discounts	These are todays discount transactions. It includes all checks, begun or carried over. Any discount transaction that occurred today.
Voided Items	Voided Items are any item voided today, the number and total amount. This is all checks, begun, carried over, open and closed.
Voided Checks	Voided checks are checks voided today; they can be carried over or started today. This shows the number of checks and the total "net amount" of the check. This is all checks, begun, carried over, open and closed, but the void must have occurred today.

Coupons	This is the amount of coupons due from all coupon transactions.(only todays transactions) Take all coupon transactions from today whether the check was begun today or carried over, and this is the amount of coupons paid on those checks
Checks Carried Over	These are the checks not started today; they were started before today but were never closed. They were carried over to today because they were never closed. There is the number of checks and the total "amount due" on the checks.
Checks Begun	These are the checks that are begun today, paid or unpaid. There is the number of checks and the total "net amount" of ordered items on all the checks.
Checks Paid	These are checks that are begun today or carried over and have been closed today. There is the number of checks and the "amount paid" on the checks. The "amount paid" is all amounts paid including cash, check and CC transactions.
Open Checks	These are the checks that are begun today or before today, but are not closed. It is the total "net amount" of all the items ordered on these checks.
Check Average	This is the average of all checks closed today, it is the "net amount" of all the checks divided by the number of checks.
No of Guest	This number is the number of guests today. It only includes checks closed today.
Guest Check Average	This is the average that each guest spends it only includes checks closed today. The check average is the total sales divided by the number of guests from the same closed checks
No of Tables	Number of tables this is the number of tables from closed checks.

Gross Receipts	This is the amount paid on all cash, check and CC transactions today and it's the sum of that amount. It will include both Carried Over Checks and Checks Begun today.
Charged Receipts	This includes the amount paid on all checks today by credit cards it's the sum of that amount. It doesn't matter when the check was started or closed, only when the transaction occurred.
Charged Tips	Charge tips are tips that are charged through a credit card. These tips would be from checks closed today. This does not include "Automatic tips" only the Tips added during the Finalize CC process.
Automatic Tips	These tips are different from charged tips. They are charged automatically according to the settings in the Manager's Admin. This amount is only from checks closed today.
Total Tips	This is the sum total of Charged tips and Automatic tips
Food	Food orders only from checks begun today, closed or not, the sum total of all food ordered.
Beverage	Beverage and carbonated beverage orders only from checks begun today, closed or not, sum total of all Beverages and carbonated beverages ordered.
Beer	Beer orders only from checks begun today, closed or not, sum total of all beer ordered.
Wine	Wine orders only from checks begun today, closed or not, sum total of all wine ordered.
Liquor	Liquor orders only from checks begun today, closed or not, sum total of all liquor ordered.
Misc.	Misc. items orders only from checks begun today, closed or not, sum total of all misc. items ordered.
Cash	This is the amount of cash due from all cash transactions.(only todays transactions) It is all cash transactions from today whether the check was started today or carried over, and this is the amount of cash paid on the checks.

Tips paid	Same as total tips, the total of automatic gratuities and charged tips, from checks closed today only.
Total Cash Due	This is the amount from "Cash" minus "Total Tips" (the server will get to keep his charged tips and automatic gratuities).
Checks Due	(BANK CHECKS)This is the amount of checks due from all check transactions.(only todays transactions) It is all of the check transactions from today whether the guest check was started today or carried over, and this is the amount of bank checks paid on the guest checks.
Visa	All Visa transactions posted today, including charged tips.
M/C	All M/C transactions posted today, including charged tips.
Discover	All Discover transactions posted today, including charged tips.
American Express	All American Express transactions posted today, including charged tips.
Other C/C	All other C/C transactions posted today, including charged tips.
Total Credit Cards	Total all C/C transactions posted today, including charged tips.

Manager’s Admin

Introduction

The Restaurant Manager’s Admin is where you will control all of the settings for your POS, manage your restaurant and market your restaurant. Only an owner or manager can login to the Manager’s Admin. In this section we will describe all of the pages and functions in the manager’s Admin. If you need more help, look at the F.A.Q. in this manual. We try to explain the answers to some commonly asked POS questions

Dashboard

The Restaurant Manager’s Dashboard is where you’ll find access to manage different areas of your restaurant. You can click on the tabs above, or the quick link icons in the center. The Manage Menu Tab lets you make changes to your menu. The Manage Employee Tab has everything you need to manage your staff.

You can also change settings for your restaurant in Manage Restaurant Profile.

You'll find informative reports, including sales and inventory reports in the reports tab. The Marketing Center has everything you'll need to effectively market your restaurant.

Menu's Explained

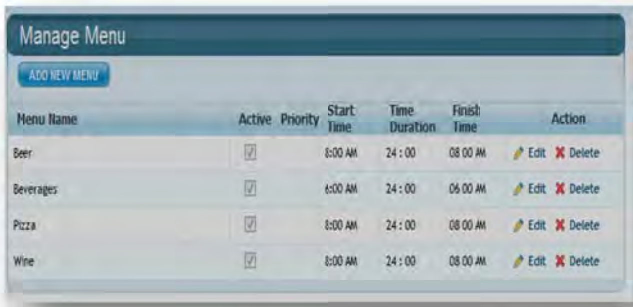
Your menu is all of your items available for order in your POS. In order to set up your menu, you need to understand the war Rely POS categorizes items and options for your menu items. There are seven layers in the Rely POS menu system. The first layer is the menu. Menus can be programmed to display during certain times, no other layer has this feature. The next layer is Category, you will need to put your categories in menus for them to display. If you have a category but it's not inside a menu, it won't display. That is true for every layer in the menu system. The next layer is the Sub-Category. After Subcategory is the Item layer. The item layer in what you are ordering so it will require a price. You're not actually ordering menus categories or subcategories; these ate just for organizing your POS.

You can add preparation preferences to your items, for example if you had eggs you may want preparations such as scrambled, or sunny side up. Your Items can also have sides associated with it. The last layer is Side Preparation.

Display Menu

The Display Menu Page allows you to see the hierarchy of the Menus, Categories, Subcategories, items, Preparations, sides and side preparations you have created. This page can help you by showing you your menu as it is currently configured. If you see problems here, you can go to the area you need to change and make the changes, then come back to the Display Items page and verify the changes you made were correct.

Menu



The menu is the first layer in the level of item categories. The menus are the first choice you will see on your order screen in your pos. If there is only one menu available at a given time, your POS will go to the next level, the category level.

This will save you a step. Use menus to create groups of items categories that can be available at different times.

For example you may want a Lunch Menu available from noon until 5pm. You may want to create a Dinner Menu available from 5pm to midnight. You can also create Happy Hour Menus that are available at only certain times.

Once you create menus, you will have to choose categories that will be available in the menus. Only menus can be programmed to appear at certain times.

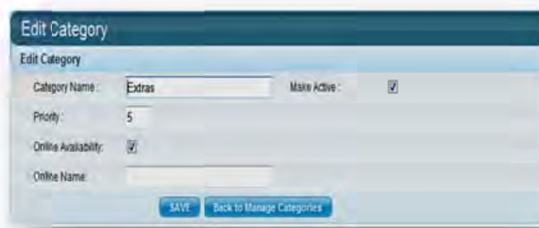
Categories

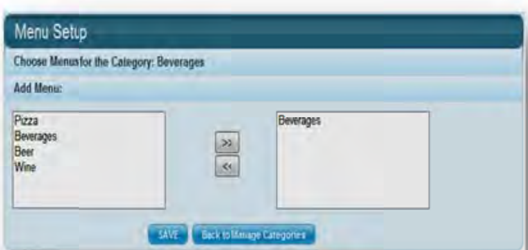
You can use categories to create groups of items that belong together for simplicity. For instance, you may want to create an Appetizer Category and have all your appetizers located there.

You may also want to create a Soup Category for soups. If there are too many items in a category, you may want to create a new category and move some of the items into the new category. If the Categories are too large, it will be difficult to see all the items in the POS application.

The POS can only show 20 items on the screen, the POS does have arrows to move to the next screen but it does create an extra step.

You can also set priorities to your categories. The priority is the display order in your POS. For example if your priority is set to 1, that category is first. So you may want to set your appetizer priority to 1 for example.





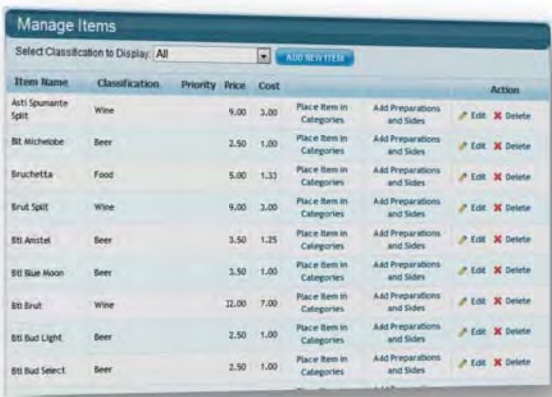
Placing category in menus is very simple. The left list box contains the entire menus name. You will need to select menus from left list box and press right arrow button to place it into right list box. After clicking save button the category will be shown under these selected menus.

Sub-category

Use sub-categories to create groups of items that belong together when your categories are too big. For instance, you may want to create a Large Pizza Sub-Category and have all your large pizzas located there. You may also want to create a Medium Pizza Sub-Category for Medium Pizzas. The example above keeps all of your categories smaller.

Remember, if the Categories are too large, it will be difficult to see all the items in the POS application. Your POS will only show 20 buttons at a time. So it’s best to limit your choices to less than 20 if possible.

Items

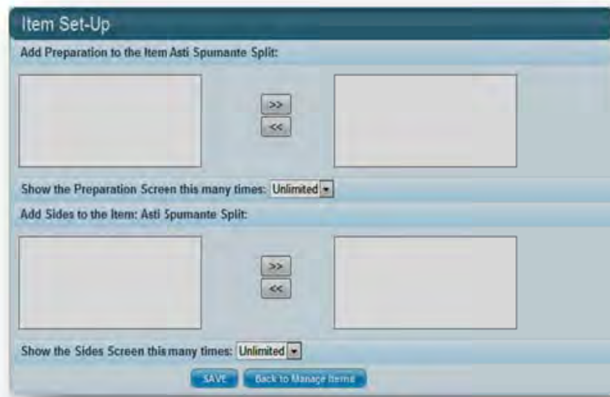


Items are the products you are selling. For example, a burger is an item. When you create an item you will need to choose a category or subcategory for the item to display. You will also have to input a cost and a price. A cost is what you pay for the item, and the price is what you are charging your customer for the item.

You will also need to assign a classification to the item. Classifications are used to determine taxes. Classifications are also used to determine printer settings. We will discuss these functions later in the manual.

Preparations

Use Preparations to add common item preparations to your items. For example, if your item is a steak, you may want to give the customer of choosing how he wants the steak to be prepared such as medium or well. If your item is eggs, you may want to have preparation choices such as over easy or sunny side up.



These are just two examples, but the possibilities are endless.

You can have as many preparations as you need. You can also charge extra for your preparations if you want. When you add a preparation to an item you will need to choose how many times you want your POS to display the options. You can choose 1,2,3,4, or unlimited. If you choose 1, 2, 3 or 4 when you order your item the screen will show that many times. However you will also have a None Button. If you choose unlimited, your screen will keep showing after choices until you press the Done Button.

Sides

(Referred screen: Item Set-Up)
Use sides to add choices or accompaniments to your items. For example, if your item is a burger, you may want to have sides such as fries or onion rings available as an add-on, or included in the price. You can also choose how many times the POS system will ask for a side choice. For example, if your entrées come with two sides, you will choose 2 in the drop down box. If you want to charge for a side, add a price, otherwise, leave it blank. These are just some examples, but the possibilities are endless

You can have as many sides as you need. You can also charge extra for your sides if you want. When you add a side to an item you will need to choose how many times you want your POS to display the options. You can choose 1,2,3,4, or unlimited. If you choose 1, 2, 3 or 4 when you order your item the screen will show that many times. However you will also have a None Button. If you choose unlimited, your screen will keep showing after choices until you press the Done Button.

Side Preparations

Side Preparations are preparation choices you add to sides. Use Side Preparations to add common preparations to your Sides. For example, if your side is a salad, you may want to give the customer a choice of dressing. This is just one example, but the possibilities are endless. You can charge extra for side preparations if you need to.

Employees

Managing Employees

The Manage Employee Page is the lists of all of your employees. Here you can see your employees and their Access Level. Select Edit next to an employee name to edit their information. If you have many employees you can click on the text in the light blue header to sort.

Adding New Employees

You can add or edit your Employees in the Add/Edit Employee Page. This page allows you to add or make changes to the employee you select. If you are adding an employee you will need to add all of your employee's information here. You can also add your employees pay rate. The employees pay rate will be used in your payroll reports. You will also need to give your employee a 4 digit Pin Code. Your employee's access level will determine which sections of the POS section he/she can enter.

Access Roles for Employees

The Access level determines the functions an employee has in the system.

1) Owner/Manager Full Access, Full Access POS, allows full access to the POS application and the Restaurant Manager's Admin.

2) Floor Manager/Head Waiter, Cashier, Full POS, allows full access to the POS system, including other employee's guest checks but not the Restaurant Manager's Admin.

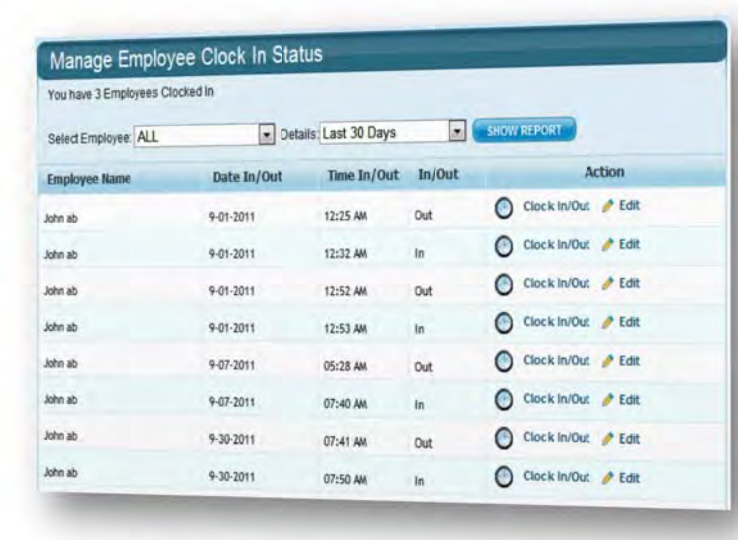
3) Waiter/Server, Limited POS means the employee can use the POS only for guest checks they initiate. They cannot void checks or give discounts.

4) Chef/ Cook, Limited POS means the employee can view the kitchen order screen.

5) Bartender/Limited POS means the employee can use the POS only for guest checks they initiate, and view the bar order screen.

6) General Staff/Clock In/Out means they can only use the POS to clock in and out.

Clock In Status



Employee Clock-In Status Page tells you how many employees are currently clocked in. You can also sort by employee or time period. The list will show all of the actions for the employee, and time period you choose. If there is a discrepancy, you can edit the times by clicking the edit icon for

that action.
You can also clock- In or clock out an employee from here, simply click on the clock icon or the appropriate text. You can then edit that action if you need to.

Restaurant Settings

Restaurant Profile

The Restaurant Detail page will allow you to update the details of your restaurant. The information here appears on your guest checks, credit card receipts, emails, and online ordering page. Please provide the most current information so that we can continue to provide excellent service and your employees have all of your contact information.

Taxes

The Manage Taxes area allows you to create taxes based on your local regulations. These taxes will be charged appropriately and displayed on the guest checks and customer receipts. You can create a tax type by name and then set the rate and choose the categories that apply. For example, in your local jurisdiction you probably have a sales tax, but it may not apply to food items for carry out.

No problem, just check all that apply for the tax you just created. Rely POS will charge the tax and create the necessary reports.

Restaurant Time

The Set Restaurant Time area lets you choose the proper time of your location. This time will be displayed on your POS system, your guest checks and customer receipts.

You'll also need to decide if your area participates in Daylight Savings Time.

Restaurant Start Time

Your daily start time will determine when your restaurant's day starts. This time is very important because it determines when your Daily Report starts.

For example, all daily reports start at the restaurants start time. It is important that you put the restaurant start time when you are closed if that is possible. Your reports show how much money you made that day. Many restaurants are open after 12:00 Midnight. If your restaurant start time is set to midnight, in that case your reports would start at midnight and therefore be difficult to analyze. The systems default restaurant start time is 4 am. If your restaurant is closed at 4 am, you don't have to change anything.

Adding Text to Guest Checks

You can personalize your guest checks with coupons, promotions or thank you messages by adding text to these lines. The text will appear on all of you guest checks and customers receipts.

You have 3 lines to use. The text will automatically center on your receipts. You can change the text anytime and the changes will take effect immediately.

Managing Payment Types

The Manage Acceptable Payment Types page establishes what payment types you want your POS System to accept. Once selected, the appropriate buttons will appear on your P.O.S. Currently you only have the choice of accepting bank checks or not.

Printer Set Up

The printer setup is important for efficiency in your restaurant. You can choose which printer, kitchen or bar each classification is printed at here. The settings also apply to your order screens. Make sure you have configured this page correctly so that the order slip or order is sent to the correct location. Simply click the appropriate circle for each classification and click save.

Automatic Gratuities

You can create an automatically billed gratuity by entering creating it on this page. You will need to first enter the amount of guests that will be billed an automatic gratuity.

Any table that has this many gusts or more will be charged the percentage rate you put in the Charge Percent Box. The automatic gratuity will be displayed on your Daily Reports.

Managing Coupons

All of your coupons are shown on the manage Coupons page. You will also find information such as if the coupon is Active or if the coupon is a discount amount, discount percentage, or manual entry.

Discount Amount is a fixed amount for the coupon, discount percentage is a percentage off the total guest check. Manual entry allows the Waiter or Server to manually choose the amount of the coupon. You can create a new coupon by pressing "Add New Coupon" or edit an existing coupon. Coupons that are checked "Active" will display on the Pay Screen of the POS Section. Only one coupon can be used per guest check. A manager can approve the use of more than one coupon per guest check in the POS Section.

Delivery Charges

If you deliver food and decide it's a good idea to charge a delivery fee, you can establish a fixed delivery fee on the Delivery Charge Screen.

Remember, if you establish a delivery fee here, it will always be charged if the delivery option is chosen in the POS or the Online ordering System. If you do not want to automatically charge a delivery fee, you should establish one as an item in the POS system. Your employees will then have to choose the delivery fee for each check. All delivery fees created here will automatically be charged. To create a delivery fee here, simply enter the amount of the delivery fee here and click Save.

Reports

Daily Restaurant Report

The Restaurant Daily Report will begin at your daily start time. The daily start time will also determine when your restaurant's day ends. For example, all Restaurant Daily Reports refresh at the restaurants start time. It is important that you put the restaurant start time when you are closed if that is possible. Your reports show how much money you made that day. Many restaurants are open after 12:00 Midnight. If your restaurant start time is set to midnight in that case your reports would start at midnight and therefore be difficult to analyze.

Use the Restaurant Daily Report to count your cash for the day and make sure you have collected all of your checks and credit card slips. You should also verify that all the checks are closed. This will ensure all of the money collected that day is in fact turned in.

Sales Report

This sales report can give you a wealth of information. First enter the time frame you are interested in and click “Show Report” There are many items listed that are useful, net sales, gratuities, taxes discounts, and many other fields. You can choose any dates you like. Compare time periods, for example weeks and months to track your growth. You can also use the dates to track promotions and examine their effectiveness.

Inventory Report

The Inventory report is very useful for tracking inventory and managing your cost of goods sold (COGS). Pick the dates you would like to create an inventory report for and click “Show Report” You can then use the report to track you product use against your physical inventory. Match your report dates with your physical usage for portion and cost control. This report is also useful management information, such as the COGS as a percentage of sales. You can verify how you are doing and compare yourself to industry standards. If your COGS as a percentage of sales is too high, you know you have to make adjustments.

Payroll Report

The Payroll Report is very useful in many ways. First you can use it for payroll. Pick the dates you would like to create a payroll for and click “Show Report” You can then use the report to give your payroll company or tax professional. Make sure you always use the same days for this report so you don’t overlap your dates. This report also has useful management information, such as the Payroll as a percentage of sales. You can verify how you are doing and compare yourself to industry standards. If your payroll as a percentage of sales is too high, you know you have to make adjustments.

Managing Credit Cards

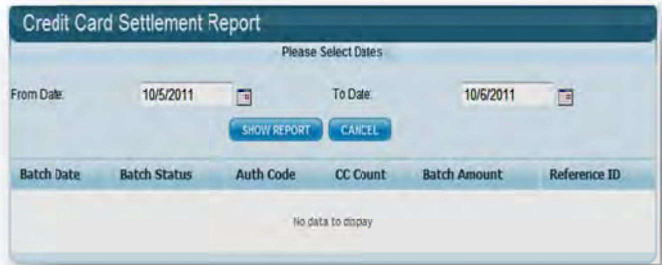
Credit Card Settlement

You should settle your Credit Card Batches daily. The Credit Card Settlement page shows all of your credit card transactions since the last credit card settlement, regardless of date.

You can double check your transactions on this page, if there is an error you can use the POS system to correct any errors. But remember, the POS can only change a tip or void a credit card transaction. If you void a Credit Card Transaction, you will not be able to recharge the customer’s card unless you have it. So it may be better to adjust the tip to get to the correct amount. If you adjust the tip, the new tip will replace the old tip; it will not be added to it. If you have questions or concerns you can call your credit card processor Merchant Warehouse at800-419-3221.

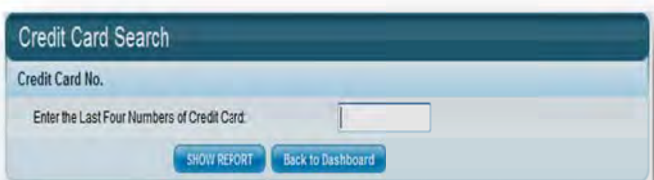
Credit Card Settlement Report

You should settle your Credit Card Batches daily. With the Credit Card Settlement Report you can enter specific dated and view all of your Credit Card Batches between the dates entered.



The report will show the date, status, amount and other useful information. Use this report to verify the records from your bank. But remember, a batch is for all of the credit card transactions since the last batch. Your bank may process the credit cards at different times, for example, it may take longer to receive American Express funds than other Credit Card types.

Credit Card Transaction Search



You may have a customer that disagrees with the amount his/her credit card was charged. In order to see the details of the transaction you can search the last 4 digits of the credit card of your customer.

Rely POS is PCI Compliant, and therefore does not keep complete credit card numbers. However, you can search for the transaction, so that you can discuss it with your customer. For more help you may have to call your Merchant Services Provider merchant Warehouse at 800-498-0823.

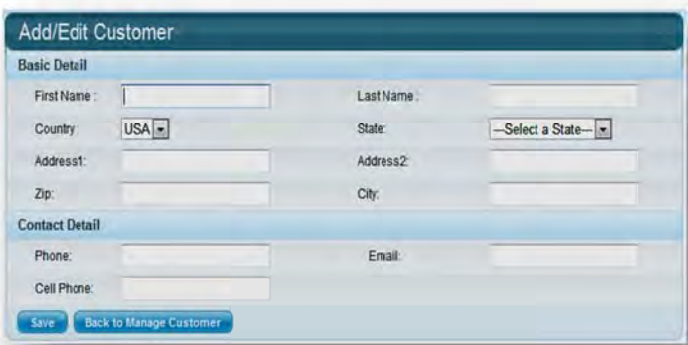
Marketing Center

Managing Customer List

The Manage Customer List Page lists all of your customers. Sort the list by clicking on the text in the light blue header. You can sort any column you wish. With this list you can manage all of your customers.

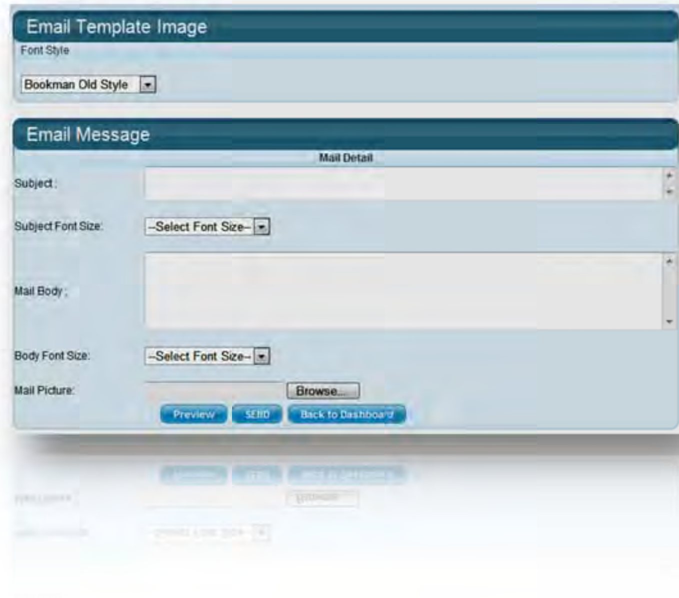
To find a specific customer, if you know their name, click “Name” above all of the names and the names will be in alphabetical order. Then find the name you are looking for and click “Edit” there you will be able to change your customer’s information.

Adding a New Customer



On the Add New Contact Page in the Marketing Center Tab, you can add new customers to your Customer List. Fill out all the information you can. You can use the information later to contact your customers. So it’s best to keep it up to date as much as possible

Sending Mail



Online Ordering System

The Online Order System Page displays your Online Order URL. Copy and paste it into the address bar of your web browser and test it out. Next, insert this link into your website or Facebook Apps Page. Your customers will automatically be able to order from here. All orders created and paid for from the online ordering system will automatically appear as an order in your POS. All sales from the Online Order System will be displayed on your sales reposts. For additional help, go to www.relypos.com and order Website or Facebook Integration and we will help you insert the link.

Promo Codes

Promo Codes are used by your customers when they are ordering from your restaurant online. You can view all of your promo codes and manage them from the Manager's Admin. Click the Marketing Center Tab, then the Promo Code Page. You will have to name your promo code. The name of the promo code can be used in the Online Order section by your customers. Promo Codes are always a percentage and have a date range. You can name your promo codes with relevant names or you can use numbers. It's your choice, but your customer will have to match it exactly.

Integrating with Constant Contact

Constant Contact has great marketing tools that can really help your Restaurant. If you have signed up with constant contact, enter your credentials in the Constant Contact Page in the Marketing Center to automatically integrate your customer list. Don’t forget to click Save. If you have not signed up with Constant Contact, you can do so from the link in our Send Mail Page. Remember, you can sign up for a FREE 60 DAY TRIAL.

Company Logo

You can have your logo displayed in your emails and on your Online Ordering page. You will need to upload your restaurant's logo first. The optimum size for your restaurants logo is 100px x 100px . We recommend a jpg file. You will need to go to the Company logo page in the Marketing Center. First you will need to browse your files for your logo and then click upload and save.

Online Order System

Overview

The Online Order System Page displays your Online Order URL. Copy and paste it into the address bar of your web browser and test it out. Next, insert this link into your website or Facebook Apps Page. Your customers will automatically be able to order from here. All orders created and paid for from the online ordering system will automatically appear as an order in your POS. All sales from the Online Order System will be displayed on your sales reposts. For additional help, go to www.relypos.com and order Website or Facebook Integration and we will help you insert the link.

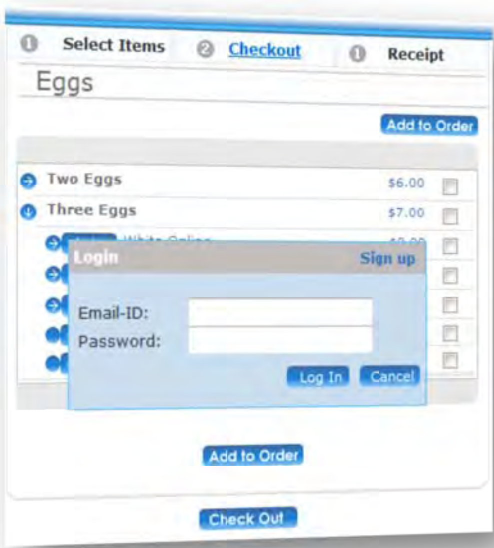
Select Items

On the left you will have the entire menus name. Once you click on the menu, all the categories will be shown under the selected menu. For selecting the subcategory you will have to click on the category of the selected menu. After clicking on the category link all the subcategories will be shown under the selected category. If selected category contains any items, the items will be displayed in the middle section of the page.

Screen: Login

The list of items will be shown in the middle section when you will click on the category or subcategory link from the left menu. The sides and preparation list will be shown when you will click on the item link of the middle section. For selecting the side's preparation you will have to click on sides' link. Each item, sides, preparation and side's preparation contain the checkbox. You will have to check corresponding checkbox if you want to select any items, sides, preparation or sides' preparation. Clicking on the "Add to Order" button, selected items will be placed in "My Order" box in the right side. Each item contains the remove button. After clicking on the remove button the item will be removed from the "My Order" box.

Checkout



Screen: Login

Screen: Checkout

You will need to checkout once your choice is completed. A login box will be display after clicking on checkout link. You will need to sign up, if you do not have login id and password. For sign up, just click on the sign up link displayed in top right of login box or click on the sign up link display top right of the page.

After successfully login, checkout page will be shown to user where he/she can see the details about the ordered items, their price, taxes, and discount. User can select delivery mode. The delivery charge will be added in total amount, if user has selected the delivery mode.

There will be no charge for takeout type mode. Clicking on the pay button, redirect the user on the merchant page.

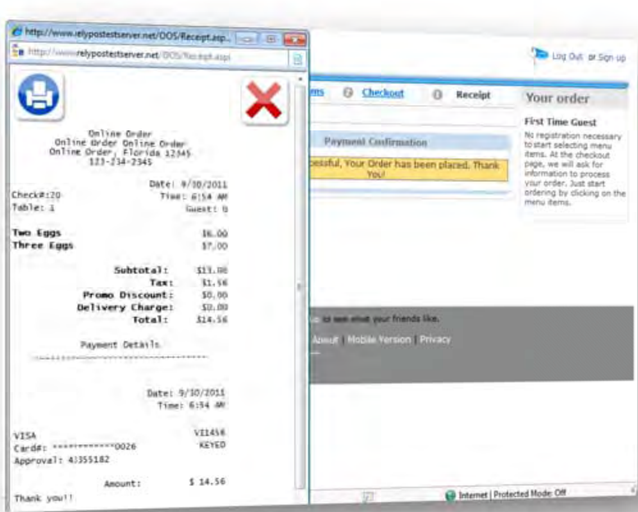
User will be able to see the delivery address on the page. Clicking on Edit button of the address area, he/she will be able to edit their delivery address.

Sign Up

Users will need to sign up with the site if they are not registered with. If users are already registered with the site but they do not have id and password, then they can check it by placing their email id in the email id textbox and after clicking on check button. If any details found in the database for the given email id then rest of the textbox will be populated with the user information. Users will need to put their password in password textbox. After clicking submit button the user will be registered for online order system. Users will need to fill all the details, if there is no any information found in database for the given email id.

Screen: Signup

Customer Receipt



After successful payment, a receipt will be generated, were users can able to see the details about their placed order and their amount.

Hardware

Touch Screen

Your Touch Screen has Windows POS Ready operating system embedded, which is very similar to Windows XP. The Icon and Graphics are normal size and should be increased for touch. Follow the steps below.

1) Right Click in the Center of the screen.
2) Select "Properties" from the menu
3) Click on the "Appearance" Tab
4) For the Font Size select "Extra Large Fonts"
5) Click "Apply"
6) Then click "OK"

The touch screen software must also be configured for best results. The touch screen software controls the screen and its touch properties.

1) Click the " Start Button" with the Window Icon in the bottom left of the screen
2) Click on "Control Panel"
3) Click on the "Elo Touch Monitor" Icon
4) Select the "Mode" tab
5) In the "Mouse Button Emulation Mode" section, select "Click on touch"
6) In the "Options Section" , make sure nothing is selected.

7) Then Click "Apply"

8) Next, select the "Sound Tab" and make sure "Beep on Touch" and "Motherboard Beeper" are selected.

9) Click "Apply"

10) Click "OK"

Your touch screen is now ready and optimized for RELY.

Printer

Printer Driver

After you receive the TP3000 Printer you will need to download and install the Printer Driver Software. This is a simple process and can be done with the following steps.

1) First Visit the website http://www.touchdynamic.com

2) Next, mouse over the Products Button, mouse over Printers and select "Printer TP3000"

3) Click on the "Drivers" Icon

4) Under "Drivers" you'll find "THERMALPOSPrinterDriver-3.7.1.zip, click on it and select "open"

5) When the window opens, select THERMAL POSPrinterDriver-3.7.1.zip by double clicking

6) Next click on "Run"

7) The Install Shield Wizard will pop up, click "next"

8) Next, the setup window will appear and your screen will change several times

9) "Thermal Printer Driver Installation window will appear

10) Select the checkbox for " THERMAL LK_TXXX"

11) Click on "Installation"

12) The next window is "Select OS Information Dialog"

13) You'll need to select the operating system, for the Breeze Touch screen select Windows XP

14) Leave the Code Page

15) Select a Printer Port "USB" for standard configuration.

16) Click "OK"

17) Click "OK" again to reboot

18) Wait for the reboot, and then follow the "Printer Settings" Instructions.

Printer Settings

After installing the TP3000 Printer you will need to change the Page Properties in Internet Explorer for the printer to print correctly.

1) First open up a page and link to the POS section, each customer has their own unique encrypted web address.
2) Next, Clock-in or Clock out and a page will appear.
3) Right click on the center of the page in the white part
4) Click on "Print Preview…"
5) Click on the Gear Icon "Page Setup"
6) Page Size should be "80 x 297mm"

7) Select "Portrait"
8) Enable "Shrink to Fit"
9) All "Headers and Footers" "Empty"
10) All Margins "0"
11) Click "OK"
12) In the "Print Preview" Screen click the printer icon
13) In the "Print" Window make sure the "Thermal LK" printer is selected and press "print" button.
14) The printed receipt should look correct

Cash Drawer

The cash drawer is simple to install. The cash drawer comes with a plug that looks similar to the plug you find on a typical household phone. Simply plug the cash drawer plug into the back of the printer. That’s it! The cash drawer will open every time the printer prints.

F.A.Q.

How do I……

Create Special Orders

Make Multiple Payments

With Rely POS you can make multiple payments on a Guest Check. First sign in the find your check through Open Checks or Pickup Table, next you will land on the Order Screen, next you'll need to enter the payment screen. On the Payment screen you will see multiple payment options. You can pay by Cash, Check, or Credit Card; you can even post partial payments by credit card. To view your payments, and change them, press the transactions button in the payment screen. Here you can view the transactions and even delete them if necessary.

Charge Tips

With rely you can change the tips on a check until the check has been batched by the manager at the end of the day. You enter Credit Card tips by selecting the Finalize Credit Card button in the Payment screen. If you have multiple credit card charges from different credit cards on a check, a screen will display all of the credit card charges for that check. Next select the credit card you wish to enter the tip for. When you are done entering all the tips, close the check. If there is only one credit card charge on a tip, the check will close automatically; once the tip has been entered. If you entered the tip incorrectly, you will need a manager to reopen the check so that you can make the necessary changes.

Change a Closed Check

You can change a closed check up to 24 hours after the check has been closed. Rely POS archives all checks after 24 hours and after they are archived, they can no longer be edited. In order to edit a closed check, you will need to login, and select, open closed checks. Selecta closed check and you will be prompted for a manager PIN. Have the manager enter their PIN and then you can edit the check. You will always need a manager's PIN to edit a closed check. Remember to close the check when you are done so that your reports are accurate.

Balance out at the end of the Day

At the end of the day you will need to print a daily examine report. Sign in and press daily examine. View the report and make sure everything is correct and all the checks are closed, if not, now is the time to make any corrections. Once you have verified everything is correct, and all the checks are closed you can batch the credit cards. You should batch every night, so that you will receive the credit card funds in a timely manner. To batch the day's credit card transactions you'll need to login to the Restaurant Manager's Admin. Then select Manage Credit Cards and next Settle batch. Look over all of the credit card transaction so make sure they are correct and press the Settle Credit Cars Button, That's it you are now balanced out at the end of the day.

Adding or changing user and employee settings

You will need to select the Manage Employees tab where you can add or edit employee settings. There you will find a list of all of your employees. Here you can see your employees and their Access Role. Select Edit next to an employee to edit their information.

Adding and editing new employees. In the manage Employee area you can add and edit employees. You will need to add all of your employee's information here. The role you give your employee will determine their access in the POS application. For example, a manager can open any guest check, a Server cannot. The password you give the employee will be for the employee to use clocking in and using the POS system.

Checking or Changing Employee Clock-In Status

The Employee Clock-In Status page will show you how many employees are currently clocked in. The grid view below area allows you to see the entire clock in and clock out actions of your employees. Use the grid view to check on the current status of a specific employee by looking at their latest action. To make select specific information you can use the dropdowns to be more selective. You can select the actions of a single employee, or you can select by time period. If you need to clock in an employee in or out, simply click the clock icon. You can edit any action by clicking edit. Adjust the time or date to the correct time.

Set Up Automatic Gratuities

You can set an automatic gratuity with Rely POS by clicking on the Restaurant Settings tab and the Set Automatic Gratuity link. There you will find two places to enter information, first the number of guests who will be charged an automatic gratuity. Next You'll have to set the percentage. You may want to enter gratuities for parties of 6 or more at 18%. In that case you would enter 6 for the number of gusts, and then 18 for the percentage,. Lastly you'll have to click on save for the changes to take effect. The gratuity will automatically be charged for all guest checks that are more than that number of guests. You cannot delete an automatic gratuity once applied.

Set up a Happy Hour

You can create a Happy Hour in Rely by first creating a menu named “Happy Hour” You can program the menu according to time. For example if you would like to feature appetizers or cocktails at happy hour with special pricing, you will add the special items to the “Happy Hour” menu

Create Delivery fees

Add merchandise to my POS

With Rely POS it’s easy to add merchandise. You add merchandise just as you would any regular item. You can even add choices if you need to. To create a merchandise item, click on the Manage Menu tab and click on the Manage Items link. Next, click on the Add Item button. When you create the item, don’t forget to choose merchandise as the classification. Also remember to create any taxes associated with merchandise in the Manage Taxes in the Restaurant Settings tab.

For the merchandise to display in the POS, you’ll need to make sure it’s in a category. You may even want to create a special category for merchandise so that it does not interfere with the rest of your menu.

Create an Online menu

Rely is a powerful marketing system, you can have your menu items online very easily with RELY. First you will need to decide which items you would like to promote online. You can select the Display Online checkbox for any item; you will have to add an online name, image, and description to your items.

Integrate my menu on Facebook

Get the most out of my management reports

Rely has reposting tools that will enable you to maximize the profitability of your restaurant. Rely has three reporting categories, sales, inventory and payroll reports. The reports can give you metrics to track your performance.

First there are the sales reports. The sales reports will give you your sales for a given period. First select the dates you are interested in, you'll have to select a start and end date. The report will give you your overall sales and your sales of each item. In the report is a wealth of information. You can see if your sales are trending up or down and which items are most popular.

Next the inventory reports, the inventory report shows how many items you have used for a given period. You can track your usage and verify that you have the inventory you should have.

Sending Emails to my Customer

One of Rely's excellent marketing features is the automated email functionality. Keep your customers informed about special functions and special offers through regular emails. To make a email, enter the Marketing Center in the Restaurant Manager's Admin