



# Redfish POS®

---

Redfish POS 2.5 User Manual

© 2013 Redfish Point of Sale

[redfishpos.com](http://redfishpos.com)

Thank you for choosing Redfish POS as your Point of Sale system. This user manual was designed to assist you in making changes and processing all the functions and features of Redfish POS. In the first chapter, Back of House (BOH) you are provided with the tools to making changes to menu items, user permissions and kiosk configurations. The second chapter, Front of House (FOH), was designed to assist you with processing the functions created in the BOH. The table of contents will help you navigate through the manual by clicking CTL+ click to follow links. If you have any suggestions or concerns please e-mail [info@redfishpos.com](mailto:info@redfishpos.com)

Copyright 2013 Redfish POS.

All rights reserved. Federal copyright law prohibits unauthorized reproduction by any means and imposes fines up to \$250,000 for violation. No part of the production may be used, duplicated or reused in any form without prior written and approved permission of Redfish Point of Sale or its affiliates.

### Disclaimer

The information in this document is subject to change without notice. Redfish Point of Sale® makes no representation or warranties with respect to contents. Redfish Point Of Sale reserves the right to revise this publication and to make changes from time to time in the content hereof without obligation to notify any person of such revisions or changes.



# Table of Contents

Table of Contents.....	2
Chapter 1 .....	
Back office system setup (BOH).....	4
Job Codes- 1 .....	7
Access Levels- 2.....	9
Pay grades -3.....	12
Users- 4 .....	15
Creating a new user .....	15
User Roles- 5 .....	18
Printers- 6 .....	21
Forced Modifiers- 7.....	27
Exception Modifiers- 8.....	33
Pricing Intervals- 9 .....	39
Products- 10.....	44
Menu Positioning.....	52
Menus- 11.....	56
Auto Gratuity- 12 .....	61
Dayparts- 13.....	63
Credit Configuration- 14 .....	65
System Configuration- 15.....	66
Kiosk Configuration- 16.....	69
Kiosk Gratuity Map- 17 .....	72
Discounts- 18 .....	74
House Accounts- 19 .....	77
System Log Reviewer .....	79
Data Base Tools.....	80
Chapter 2 .....	81
Front of House (FOH) .....	81
Training Mode.....	81
Log-in Screen.....	82



Desktop ..... 83

Order History ..... 85

New Table ..... 87

Payment Screen ..... 92

Time Clock..... 99

Setting Mag Stripe ..... 105

Employee Checkout ..... 107

Finance..... 109

House Closeout/ Preliminary Closeout ..... 112

System ..... 116

Reports..... 116

Emailing Reports ..... 117

Merge Two Tables..... 123

Transfer Table ..... 125

FAQ ..... 127

# Chapter 1

## Back office system setup (BOH)

Please refer back to the Implementation Guide for all topics related to PCI Compliancy.

The Back of House (BOH) is considered to be the System setup. As an administrator, duties such as new user entry, menu updates and changes or Kiosk configuration will be done in the BOH. The security of the BOH is extremely important and only authorized users should be provided with access to the BOH.

\*The green font indicates the field(s) that must be filled before you can save the data.

**Please Note:** This step is only necessary if you have not gained access to your Kiosk during the time of installation.

- 1) After installation is completed obtain a valid license file and start the application. You will be presented with the system configuration page where you must set the administrator's password.
- 2) On the left-hand side of the screen click on "Users".
- 3) At the bottom of the user's page click "Edit".
- 4) Click on the "New User" button.
- 5) Enter the required information indicated by green font.
- 6) Click on the checkboxes to show the "Super-User" password and "General-User" password. **Do not set a "Super User Password". It is depreciated and usually causes more trouble than it's worth.**
  - a. "\*Screen Name" should be a Name that is desired to be displayed on the screen as well as receipts ( i.e. John Doe's Screen name would be John D.)
  - b. "\*User Name" will be used as the entry name for anyone that is granted privileges to the back office. (i.e. JDoe)
- 7) Enter a password for both access levels. Note that the general-user password must be at 4 numbers in length. The super-user password must be 7 or more alpha-numeric characters in length, contain both alphabetic and numeric characters. Characters cannot be the same as the last 4 passwords that have been used.
- 8) Click "Save Data".
- 9) Click "User Roles".
- 10) Refer to User Roles- 5 for further instructions on assigning user roles.
- 11) At this point you will no longer be able to access the BOH page without the administrative username and password.

See Figure 1, Figure 2

### Administration Password

**Create or Edit System Users**

Employee: Cameron, Kelley City: \_\_\_\_\_

\*Last Name: Cameron State: \_\_\_\_\_

\*First Name: Kelley Zipcode: \_\_\_\_\_

\*User Name: kelley Address: \_\_\_\_\_

\*Password(s):  Show Super-User Password Address Continued: \_\_\_\_\_  
 Show General-User Password

\*BOH Password: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_

\*FOH Password: \_\_\_\_\_ Home Phone: \_\_\_\_\_

\*Screen Name: Kelley C SSN: \_\_\_\_\_

\*Hired Date: 07/27/13 Email Address: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Sex:  Male  Female  
 Country: USA

External Payroll ID: \_\_\_\_\_

Figure 1

## Super User Password

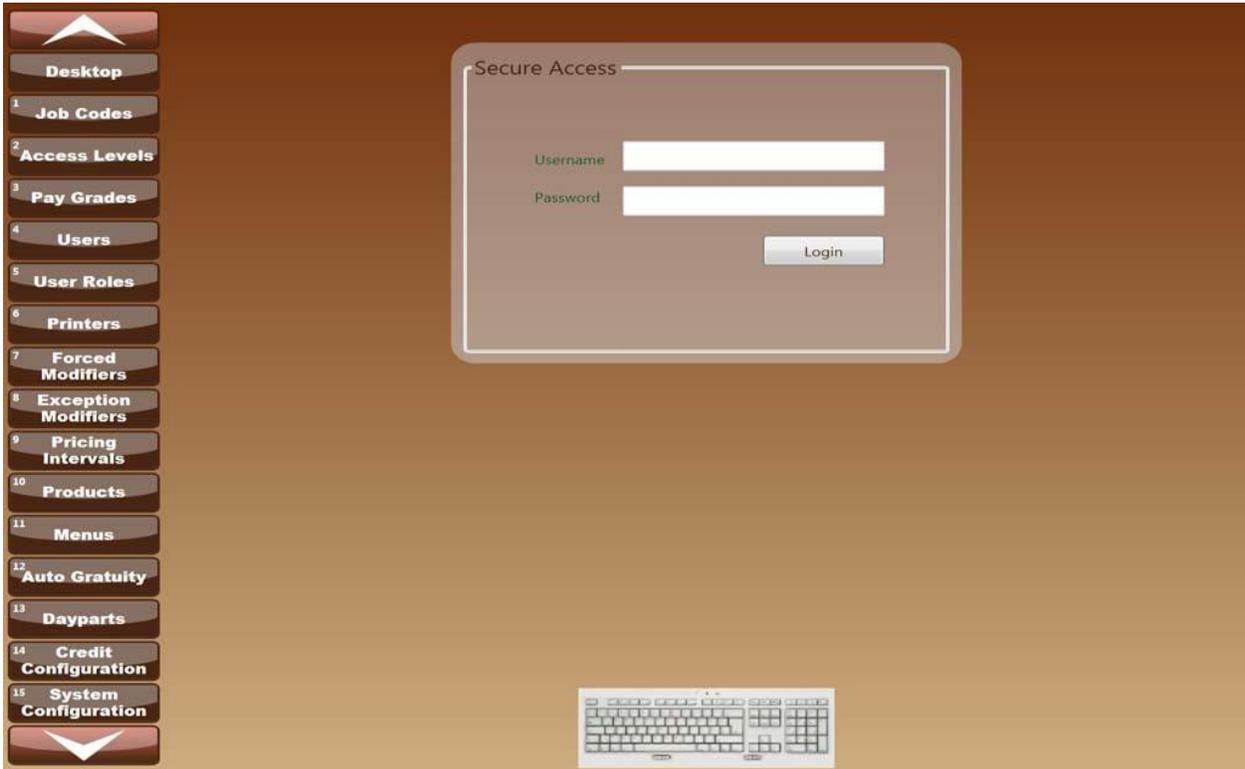


Figure 2

## Job Codes- 1

The Job Code represents the category of the Access Level. The main function of the Job Code is to set names that identify the physical function of its category. (i.e. server, manager or bartender). You will have an opportunity to list the permissions in for each employee in the Access Levels. This is a preliminary step to entering a list to the system about which job codes you will use. **\*The green font indicates the field(s) that must be filled before you can save the data.**

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) Click on "Job Codes".**
- 6) Click on "Edit Form" button.
- 7) Click on "New Job Code" button.
- 8) Click on the keyboard icon.
- 9) Enter a new job code name in the section highlighted in yellow. (I.e. Cook, Host, Server)
- 10) Click "Enter" button.
- 11) Click the appropriate boxes to assign job privileges to the job codes. (Note: Setting a user's job code to "Is Manager" will allow access to all capabilities.)
- 12) Click "Save Data".
- 13) Once the data is saved the system will return to the item located at the very top of the list.
- 14) If you choose not to make any changes, click "Exit Edit" button.

To delete a Job Code

- 1) Click "Edit Form" button.
- 2) Scroll through the Job codes in the very top of the screen.
- 3) Find the correct Job Code to delete.
- 4) Click on it and Click "Delete Job Code".

\* (When deleting a Job Code, make sure there are no users attached to the Job Code. If there are users attached they will not be able to enter into the system with their user password.)

*See Figure 3, Figure 4*

### Job Codes

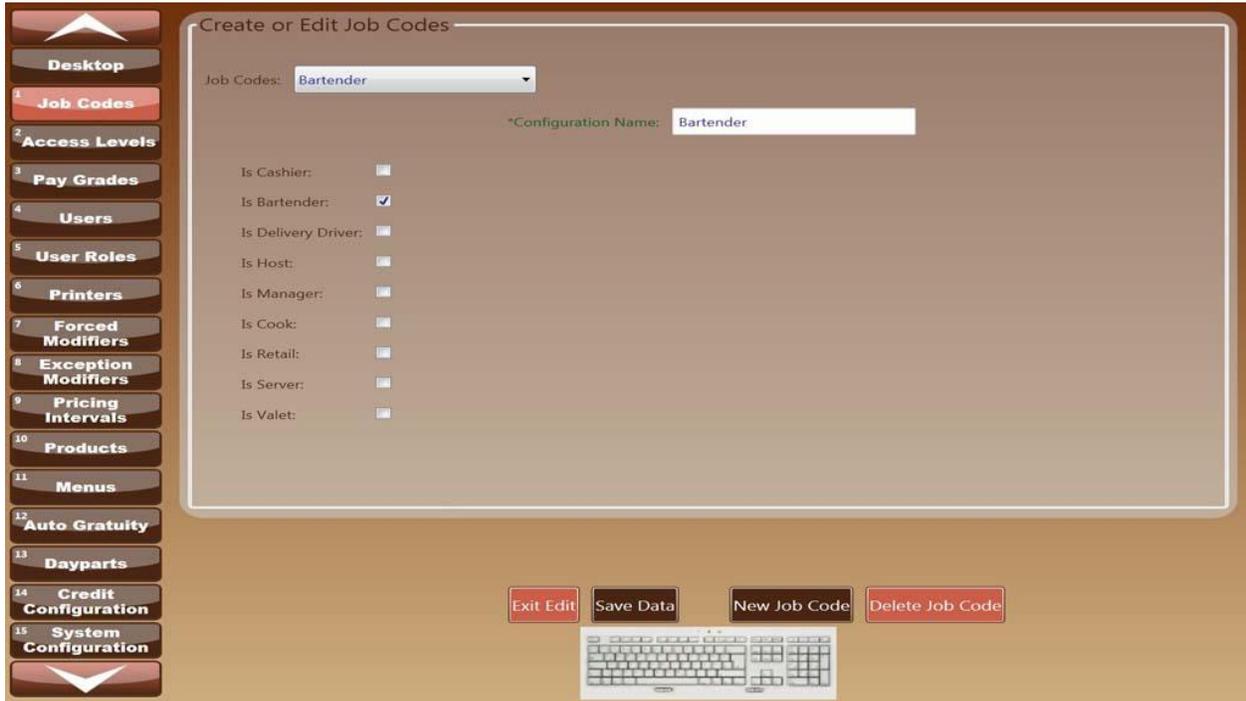


Figure 3



Figure 4

## Access Levels- 2

Access Levels define the permissions associated with the Job Codes. When applying Access Levels to a Job Code, you must name the Access Level the same as the Job Code so that the system recognizes the association between the two. **Managers Access Levels are all enabled. Checking or unchecking a level other than “Require User to use a Magcard to Login” DO NOT apply to the Job Code “Manager”.**

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) **Click “Access Levels” button.**
- 6) Click “Edit Form” button.
- 7) Click “New Access Level” button.
- 8) Click on the keyboard icon.
- 9) Enter the name given for the category (Job Code) into the “Access Level’s” highlighted area. (i.e. Job Code= “Server”, Access level= “Server”).
- 10) Click “Enter”.
- 11) Click on each box to activate preferred levels:
  - a) **Can View Reports-** allows for user to view daily reports, under the reports tab on the open table screen.
  - b) **Require User to use a Magcard Login-** requires that the user be only allowed to use magnetic card reader to sign into any terminal. The user will no longer be able to sign in manually.
  - c) **Can Access System Config-** User is able to access, update and save changes to the system.
  - d) **Can Place Order-** this access allows for the user to place an order and ability to close a check.
  - e) **Can Pay in-** this access allows for the user to deposit cash into the cash drawer at anytime throughout the hours of operation and will be accounted in the House Closeout. In most cases this would be used to provide change for the cash transactions. With this access the cash drawer will automatically open to allow for the user to insert the money.
  - f) **Can Pay Out-**this access allows for the User to withdraw money for the cash drawer that will be accounted for in the House Closeout. Most often this access is used to pay for operation purposes. With this access the cash drawer will automatically open to allow for the user to deposit the money. (Typically you would allow only managers pay in and pay out access)
  - g) **Can Set Mag Stripe Password-** allows user to set another user’s magnetic stripe card. The software will prompt for user to swipe their magnetic card so the user should establish an magnetic stripe card of their own before attempting to set another user’s magnetic stripe password.
  - h) **Can Search all Payments-** User will have access to view all payment history as well as make changes to payments.
  - i) **Can Transfer Order-** User will have capabilities to transfer a table between themselves and other users.

- j) **Can No Sale**- allows for the drawer to open without there being a sale. (This will appear on the screen as “open drawer”)
  - k) **Can Void Payment**- the user has the ability to void a payment received while in the payment screen.
  - l) **Can Apply Additional Surcharge**- allows for additional charges to be entered on the order screen.
  - m) **Can Reopen Orders**- allows the user to view other users open tables through the order history that can be found on the desktop screen.
  - n) **Can see other User’s Orders**- allows the user to view other order’s created by another user. Orders can be viewed through Order History or Finance.
  - o) **Can Close the House**- allows the user to run the end of day reports and “Capture” all electronic payments.
  - p) **Can Apply Promo**- Allows for the user to apply a promotion to the order from the payment screen.
  - q) **Can Apply Void**- Allows for the user to apply a void to the order from the payment screen.
  - r) **Can Apply Comp**- this access allows for the user to apply a comp to the order from the payment screen.
- 12) Click “Save Data” button.
- 13) Once the data is saved the system will return to the item located at the very top of the list.
- 14) If you choose not to make any changes, click “Exit Edit” button.

To delete a Access Level

- 1) Click “Edit Form” button.
- 2) Scroll through the Access Levels in the very top of the screen.
- 3) Find the correct Access Levels to delete.
- 4) Click on it and Click “Delete Access Level”.

\* (When deleting an Access Level, make sure there are no users attached to the Access Level. If they’re users attached they will not be able to enter into the system with their user password.)

*See Figure 5*

## Access Levels

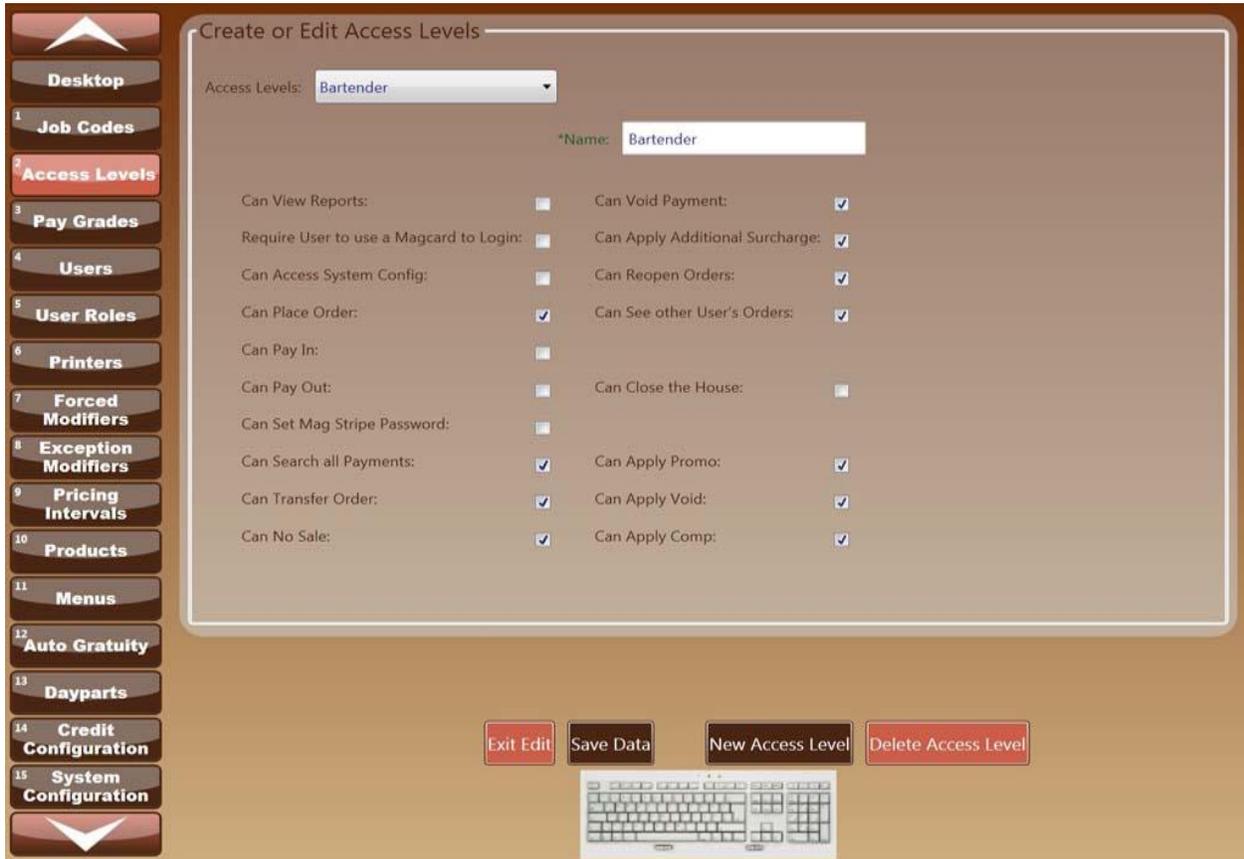


Figure 5

## Pay grades -3

Pay grades are rates at which an Employee is paid. Several Employees can use the same pay grade without it affecting the grade of another. (i.e. if all of your employees are paid \$10 then you can assign them all to that pay grade. In the event you have a Salaried Employee, enter the yearly salary earned.)

\*The green font indicates the field(s) that must be filled before you can save the data.

The red numbers to the right of the Pay grades name is the **unique data base ID number** that helps to



identify items with the same name or similar names.

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) Click "Pay Grades" button.**
- 6) Click "Edit Form" button.
- 7) Click "New Pay Grade" button.
- 8) Click on the keyboard icon.
- 9) Enter the name of the Pay Grade.
- 10) Tab to Enter the Rate of Pay.
- 11) Click "Enter" button.
  - a. If the Employee is Salary, check the box that is labeled "Is Salaried". The screen will automatically remove the boxes that are not applicable.
  - b. If the Employee is eligible to receive overtime, check the Box that is labeled "Is Eligible For Overtime Pay".
- 12) Click "Save Data" button.
- 13) Once the data is saved the system will return to the item located at the very top of the list.
- 14) If you choose not to make any changes, click "Exit Edit" button.

To delete a Pay Grade

- 1) Click "Enter" button.
- 2) Scroll through the Pay Grades in the very top of the screen.
- 3) Find the correct Pay Grade to delete.
- 4) Click on it and Click "Delete Pay Grade".

*See Figure 6, Figure 7, Figure 8, Figure 9*

## Pay Grades

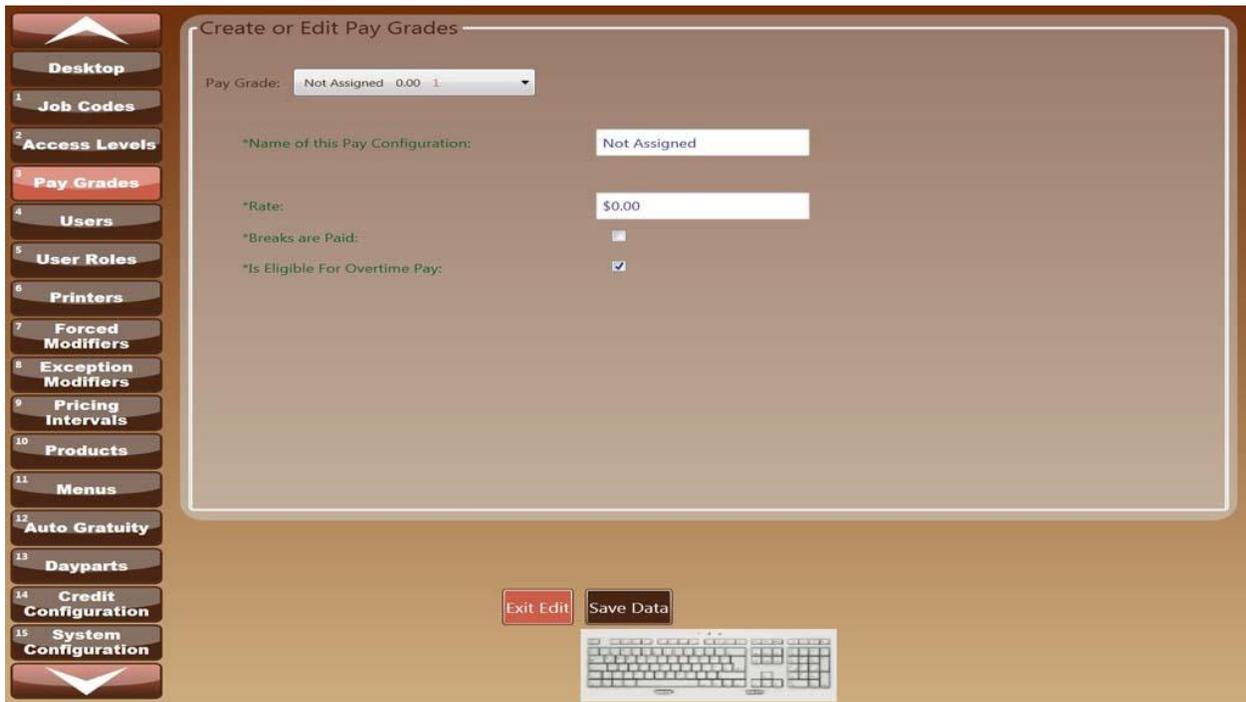


Figure 6

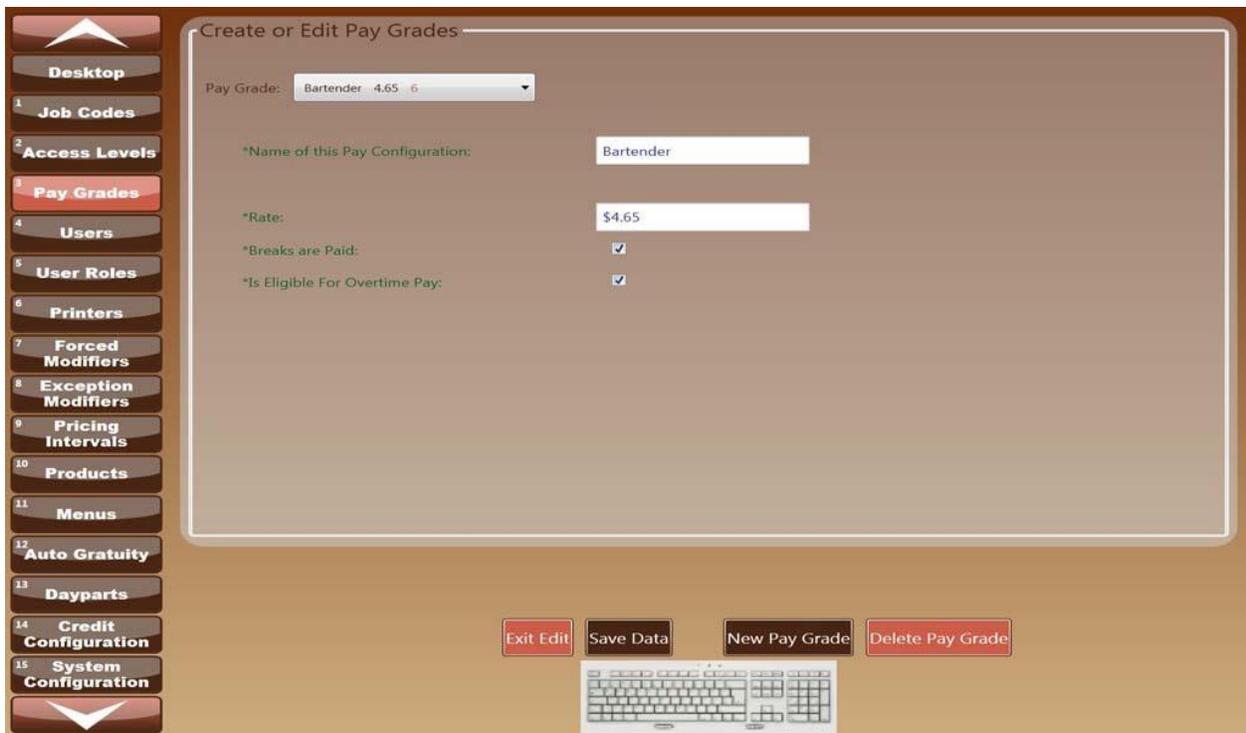


Figure 7

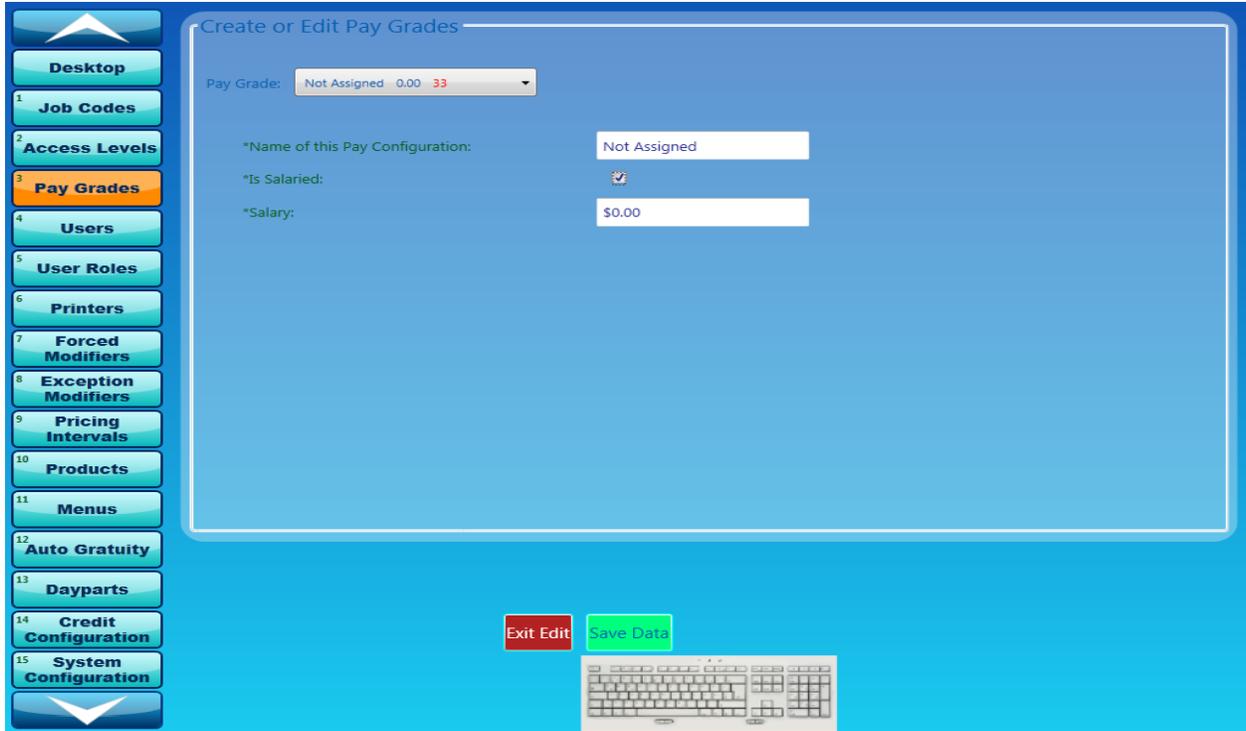


Figure 8

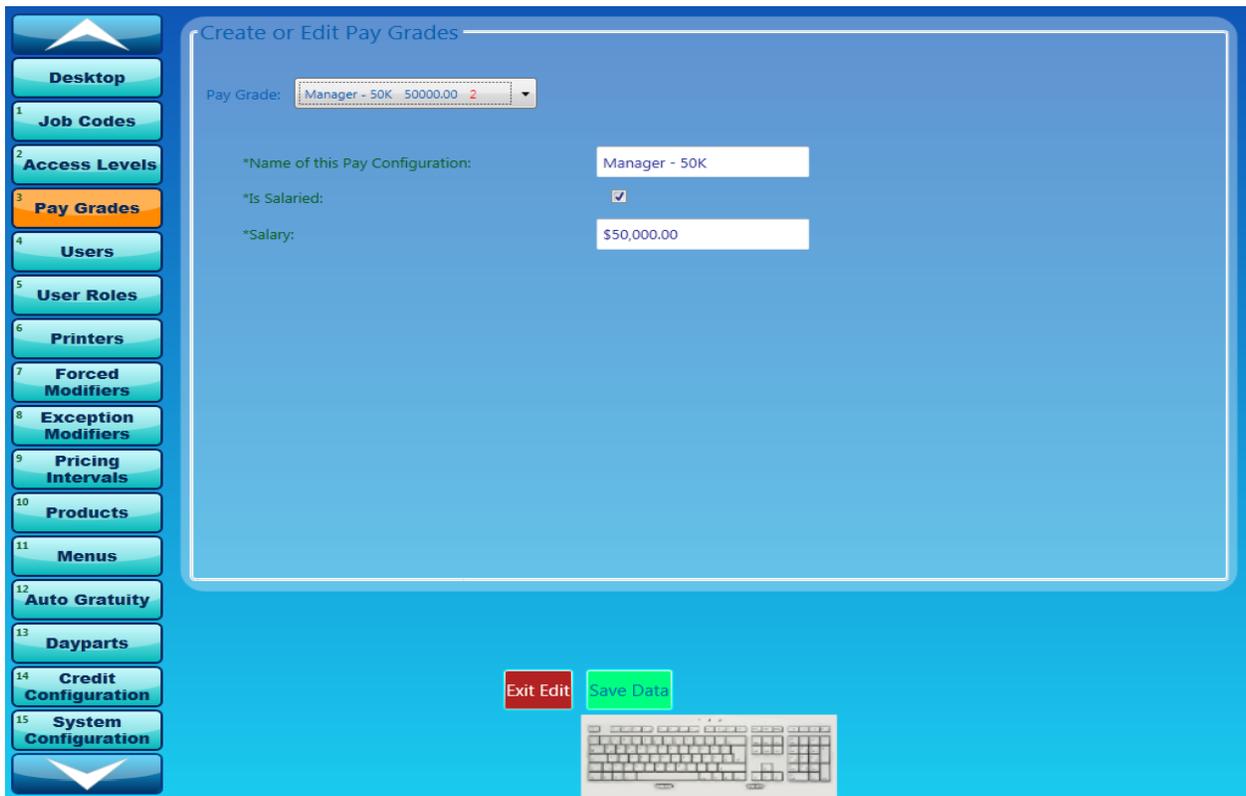


Figure 9

## Users- 4

User setup is designed to allow a super-user to access, edit and save information pertaining to employees. This setting consists of two primary buttons “Users” and “User roles” which establish user roles and their association to the business. Each user may have several different roles that can be added to their profile. \*The green font indicates the field(s) that must be filled before you can save the data.

### Creating a new user

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) **Click “Users” button.**
- 6) Click “Edit Form” button.
- 7) Click “New User” button.
- 8) Check one of the two required boxes for \*Password(s). (This will give a system generated password.)
  - a) **Back of House (BOH)** - If you will be allowing the user to have access to the BOH you will need to: click on the box "Show Super-User Password". This will allow for the super-user password to be entered and saved. Please refer to the implementation guide under “Use unique User ID(s) and Secure Authentication for Admin Access”. This will allow access to make changes to the system. BOH password will be empty and require an entry. The super-user password must be 7 or more alpha-numeric characters in length, contain both alphabetic and numeric characters. Characters cannot be the same as the last 4 passwords that have been used.
  - b) **Front of House (FOH)** - Every user will need a FOH user password. To activate FOH password text box. Click on the box “Show General- User Password”. This password will allow access to open and close orders. FOH password box will contain a computer generated password.
- 9) Click on the keyboard icon.
- 10) If you would like to change the password, tab down until yellow highlighter reaches the area of desired password box.
- 11) Enter the required information into the highlighted areas.
  - a) “\*Screen Name” should be a Name that is desired to be displayed on the screen as well as receipts i.e. John Doe’s Screen name would be John D.)
  - b) “\*User Name” will be used as the entry name for any user that is granted privileges to the back office. *See Figure 2*
- 12) Click “Enter”.
- 13) Click “Save Data” button.

- 14) Once the data is saved the system will return to the item located at the very top of the list.
- 15) If you choose not to make any changes, click “Exit Edit” button.
- 16) Your New User will appear in the “User Roles” section of the back office system.

To delete an Employee

- 1) Click “Edit Form” button.
- 2) Scroll through the Employees in the very top of the screen.
- 3) Find the correct Employee to delete.
- 4) Click on it and Click “Terminate User”.

*See Figure 10, Figure 11*

## User Setup

**Create or Edit System Users**

Employee:  City:

\*Last Name:  State:

\*First Name:  Zipcode:

\*User Name:  Address:

\*Password(s):  Show Super-User Password Address Continued:

Show General-User Password

\*BOH Password:  Mobile Phone:

\*FOH Password:  Home Phone:

\*Screen Name:  SSN:

\*Hired Date:  Email Address:

Country:

Birthdate:  Sex:  Male  Female

External Payroll ID:

Figure 10

**Create or Edit System Users**

Employee:  City:

\*Last Name:  State:

\*First Name:  Zipcode:

\*User Name:  Address:

\*Password(s):  Show Super-User Password Address Continued:

Show General-User Password

\*BOH Password:  Mobile Phone:

\*FOH Password:  Home Phone:

\*Screen Name:  SSN:

\*Hired Date:  Email Address:

Country:

Birthdate:  Sex:  Male  Female

External Payroll ID:

Figure 11

## User Roles- 5

This feature allows for you to create or edit User Roles. Each User must be linked to a Pay Grade, Job Code, Access Level and Display Name on Kiosk. Each user may have several different roles they can be added under. \*The green font indicates the field(s) that must be filled before you can save the data.

The red numbers to the right of the User Role name is the **unique data base ID number** that helps to

identify items with the same name or similar names.



Once a New User is entered into the system through “User”, you are now ready to assign “User Roles”.

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) Click “User Roles” button.**
- 6) Click “Edit Form” button.
- 7) Click on “New User Role”.
- 8) Click on drop down button, and choose desired User.
- 9) Click on the keyboard icon in the bottom center of the screen.
- 10) Enter the required information into the “\*Name of the Selected Employees Role”. (This name will be attached to the user and should display their title for required employee duties ex. Cook, Server, Manager.)
- 11) Click “Enter”.
- 12) Click on drop down button for “\*Job Code” (these options are preset by Admin and should be specific to the display name.)
- 13) Click on drop down button for “\*Access Level” to give access to the predetermined levels established by the “Job Code”.
- 14) Click on drop down button for “\*Pay Grade”. (Pay grade should reflect the pay associated to the Job Code.) To establish a new pay grade, refer back to the “Pay Grade” section.
- 15) Click “Save Data”.
- 16) Once the data is saved the system will return to the item located at the very top of the list.
- 17) If you choose not to make any changes, simply click “Exit Edit” button.
- 18) Your new user will appear in the “User Roles” section of the back office system.

To delete a User Role

- 1) Click “Edit Form”.
- 2) Scroll through the Employees and choose the Employee you want to edit.
- 3) Scroll through “Assigned Roles”.
- 4) Find the correct Role to delete.
- 5) Click on it and Click “Delete User’s Role”.

\* (When deleting a Role, if the User has more than one, the other roles will remain active. If the user has no roles remaining after deleting, you must assign a role before they will be able to enter into the system with their user password).

*See Figure 12*

## User Roles

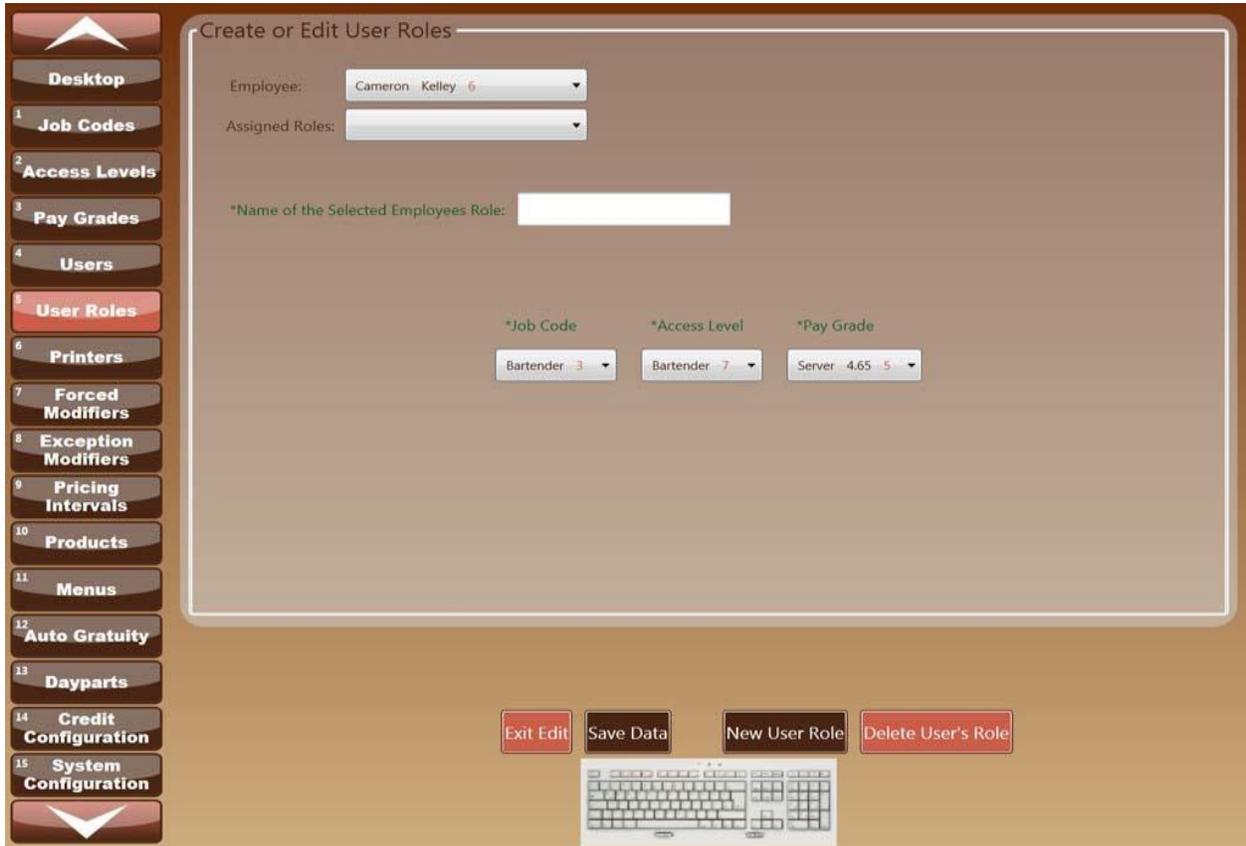


Figure 12

## Printers- 6

### Printers

The Printer section is used to create or edit printers that will be attached to a printer group. Printers can also be a group by itself by selecting the box “Is a Product Group Printer” *See Figure 14* (please be aware that if this box is selected the printer you create will not appear in the available network printers, but will appear under the product printer groups dropdown list.) You must attach a printer to a Product Printer Group if it is not a Printer Group itself.) \*The green font indicates field(s) that must be filled before you can save the data.

To Begin creating printers you will need to:

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) Click on “Printers” button.**
- 6) Click “Edit Form” button.
- 7) Click “New Printer” button.
- 8) Click keyboard icon.
- 9) Enter “\*Printer Location Name” (the name should be the actual location of the printer. If there is more than one in that location, identify them as Kitchen-1, 2, 3 etc....)
- 10) Click “Enter”.
- 11) Select printers under “Printer Path”.
  - a. This will be a network printer path that that is specific to each individual printer and will be recognized by the software once connected to the network. This will be part of the installation setup done by the installation team.
- 12) Select “\*Printer Manufacturer”.
  - a. This will always be Epson.
- 13) Select “\*Printer Model”.
  - a. These are preset model numbers that are set specifically to Oceanside’s specific Printer model requirements. You must choose between thermal or impact.
- 14) Click “Save Data” button.
- 15) Once the data is saved the system will return to the item located at the very top of the list.
- 16) If you choose not to make any changes, click “Exit Edit” button.

*See Figure 13, Figure 14*

To delete a Printer

- 1) Scroll through the Printers and choose the Printer you want to edit.
- 2) Select the correct Printer to delete.
- 3) Click on it and Click “Delete printer”.

\* (When deleting a Printer, you must re-assign a printer to the terminal it was attached to. Refer to the Kiosk Configuration section for further direction.)

### Product Printer Groups

The Printers Groups are attached directly to a product and consist of one or many printers that will print identical data. This feature can be helpful when you would like to send a print job to several different printers at the same time with the same data. This feature sets a group so that when creating a product, the user can simply pair the Printer Group to each Product. *\*The green font indicates the field(s) that must be filled before you can save the data.*

The red numbers to the right of the Printer name is the **unique data base ID number** that helps to



identify items with the same name or similar names.

To begin creating printer Groups:

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) Click on "Printers" button.**
- 6) Click "Edit Form" button.
- 7) Click on drop down tab for "Printer Groups" if editing.
- 8) Click "New Printer Group" button.
- 9) Click keyboard icon.
- 10) Tab over to Printer Group Name field.
- 11) Enter \*Printer Group Name (i.e. Patio, Kitchen, Bar or Null)
  - a. Null indicates a group of items that you choose not to print. A good example of something going to a null printer would be an item that doesn't require preparation by the kitchen or the bartender such as a beverage that can be prepared by the server. (i.e. drink station items.)
- 12) Click "Enter".
- 13) Select printers under "Available Network Printers".
- 14) Click "Add Selected" button.
- 15) Click "Save Data" button.
- 16) Once the data is saved the system will return to the item located at the very top of the list.
- 17) If you choose not to make any changes, click "Exit Edit" button.

*See Figure 15, Figure 16, Figure 17*

To delete a Product Printer Group

- 1) Scroll through the Printers and choose the Printer Group you want to edit.
- 2) Select the correct Printer Group to delete.
- 3) Click on it and Click “Delete printer”.

\* (When deleting a Printer, you must re-assign a printer to the terminal it was attached to. Refer to the Kiosk Configuration section for further direction)

## Printers



Figure 13

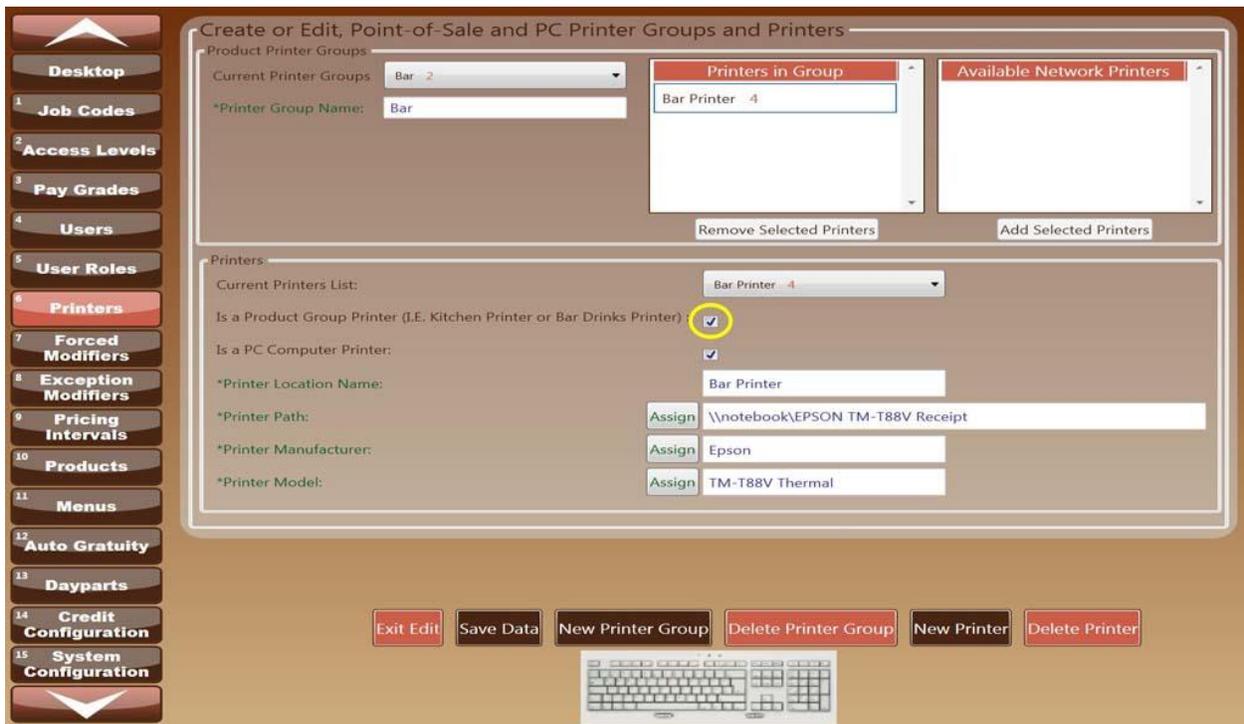


Figure 14



Figure 15

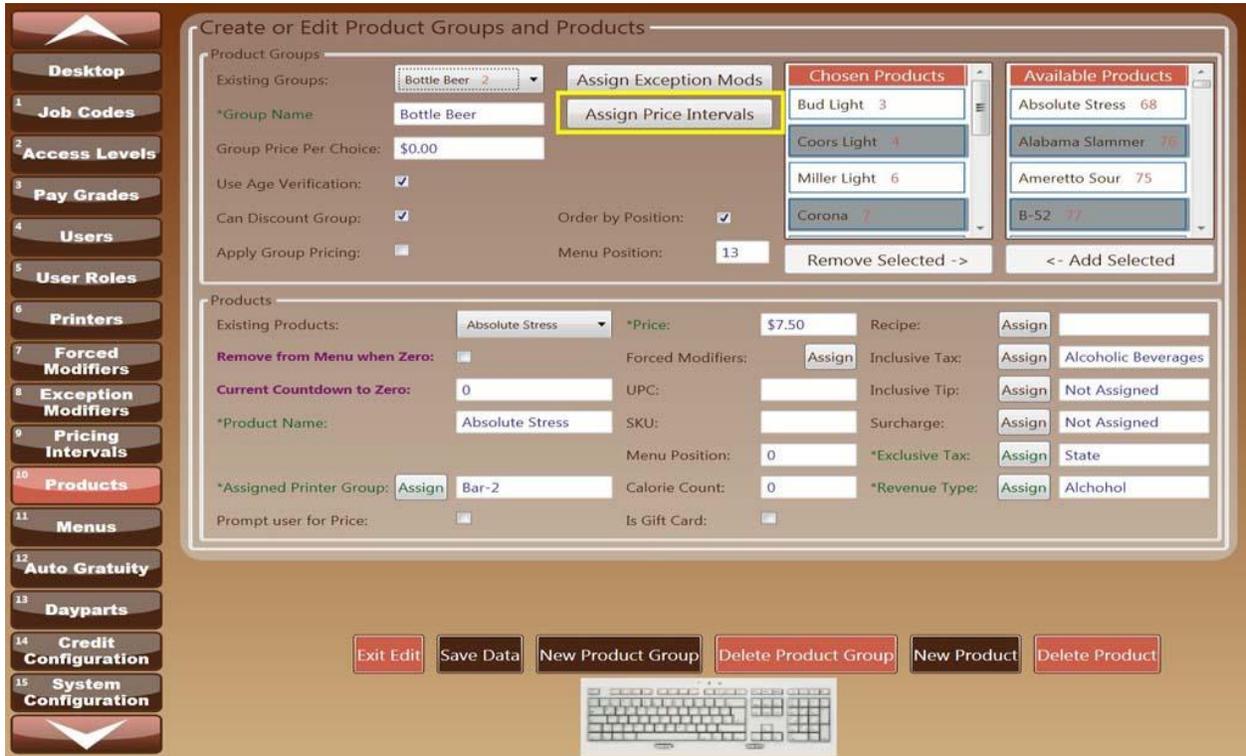


Figure 16

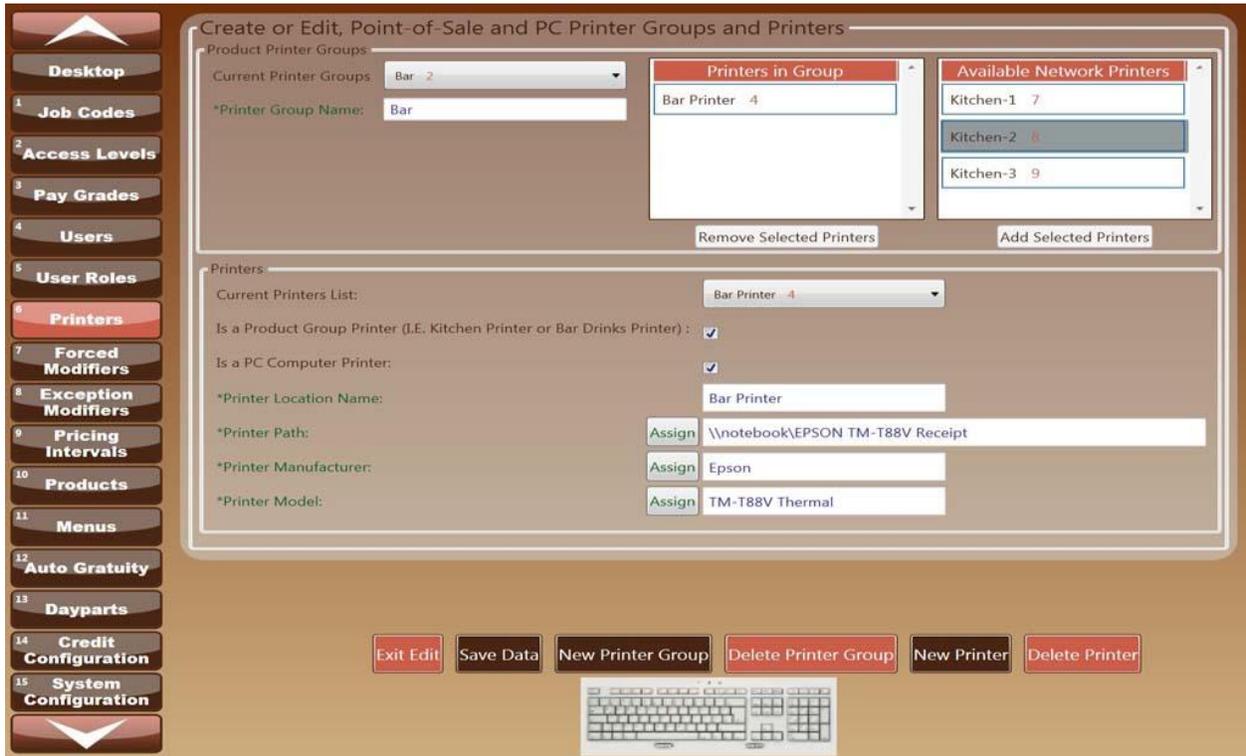


Figure 17

## Menu Setup

### Forced Modifiers- 7

Forced modifiers allow you to force the server to pick from a preset list of suggested or acceptable items on the menu. They are usually added to a main entrée or a choice of food or beverage that requires specific preparation instructions. This feature forces a set number of item choices to be chosen by the server from the order screen. When Forced Modifiers are attached to a particular product, the server will not be allowed to continue the order until a modifier is chosen or they exit out of the Forced Modifier screen. **Forced Modifiers will be attached at the product level.** (Refer to *Products- 10*) This screen will allow you to first create the groups to be able to move on the next steps proceeding. *\*The green font indicates the field(s) that must be filled before you can save the data.*

The red numbers to the right of the Forced Modifier name is the **unique data base ID number** that helps

to identify items with the same name or similar names.



### Forced Modifiers

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) **Click "Forced Modifiers"**
- 6) Click "Edit Form" button.
- 7) Click "New Modifier" button.
- 8) Click on drop down tab for "Existing Forced Modifiers" if editing
- 9) Click keyboard icon.
- 10) Tab down to **"\*Forced Modifier Name"** and complete item information.
  - a. **Existing Forced Modifiers** – are the Modifiers previously entered into the system. To make changes to these, click edit form, select desired item and edit the data. Click Save data.
  - b. **Remove from the menu when Zero-** if you select this box the system will remove the item from the menu when the countdown reaches zero. When the inventory is refreshed, uncheck the box.
  - c. **Current Count down to zero-** in the case you have a limited amount of items in inventory, you may enter the count in the box provided.
  - d. **\*Assigned Printer Group-** is the specific printer you would like the forced modifier to print on. If the kitchen printers are grouped in terms of stations i.e. cold, hot, you will want to indicate that on the printer name under printers.
  - e. **\*Price-** indicates to cost of the item. If the item will be included in a group price, you will not be required to enter a price.

- f. **PLU**- is a feature that allows you to store the PLU information on the product level. This will be used for in-house purposes and is not a required entry.
  - g. **UPC**- is a feature that allows you to store the UPC information on the product level. This will be used for in-house purposes and is not a required entry.
  - h. **SKU**- is a feature that allows you to store the SKU information on the product level. This will be used for in-house purposes and is not a required entry.
  - i. **Menu Position**- is a feature allowing you to place the item in a certain order on the order screen. This is not a required entry and will default to alphabetical order if not selected. (Refer to the section *Menu Positioning*.)
  - j. **Calorie Count**- allows for the user to enter the amount of calories in the item.
  - k. **Recipe**- this feature will be available soon.
  - l. **Inclusive Tax**- selects a tax from the list or create a new one. Inclusive tax rates are built in to the product itself and are often used in conjunction with alcohol sales. This rate will not change the product's price, but will be used in reporting to calculate your net sales.
  - m. **Inclusive Tip**- selects a tip rate from the list or create a new tip rate. Inclusive tip rates are built-in to the price of the product itself and are a form of auto-gratuity. In some instances, establishments may want to include the servers tip into the cost of the product.
  - n. **Surcharge**- Select a surcharge from the list or create a new surcharge. This is an additional charge or payment.
  - o. **Exclusive Tax**- Select a tax rate from the list or create a new tax rate. Exclusive tax is referred to as sales tax. This will be listed on the final payment screen of an order.
  - p. **Revenue Type**- Revenue types can be specific (i.e. Dairy, Meat, and Produce) or General (i.e. Alcohol, Food and Beverage). This data is used for the reporting purposes.
- 11) Click "Save Data" button.
  - 12) Once the data is saved the system will return to the item located at the very top of the list.
  - 13) If you choose not to make any changes, click "Exit Edit" button.

*See Figure 18*

To delete a Forced Modifier

- 1) Scroll through the "Existing Forced Modifiers"
- 2) Select the correct Modifier to delete.
- 3) Click on it and Click "Delete Forced Modifier".

### Forced Modifier Groups

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.

- 4) Enter Super User ID and password.
- 5) **Click “Forced Modifiers”**
- 6) Click “Edit Form” button.
- 7) Click “New Modifier Group” button.
- 8) Click on drop down tab for “Existing Groups” if editing
- 9) Click keyboard icon in the bottom of the screen.
- 10) Enter the \*Group Name
  - a. **Existing Groups**- are the Modifier Groups previously entered into the system. To make changes to these, click edit form, select desired group and edit the data. Click Save data.
  - b. **Max Product Choice**- is the maximum number of items that the server can choose. (i.e. if you would like an entrée to have 2 sides then enter 2.)
  - c. **Min Product Choice**- is the Minimum number of items a server can choose,
  - d. **Group Price Per Choice**- is a price based on the forced modifier chosen. This feature applies a price to each item chosen. If you choose not to use the group pricing, leave it blank and make sure to enter a price for the item in the forced modifier section.
  - e. **Apply Group Pricing**- check this box to apply the price to the whole group. You must first enter the price in the above section, “Group Price Per Choice”.
  - f. **Order by Position**-activates the individual menu position located under Forced Modifier Section of the bottom portion of the screen. *See Figure 19*
  - g. **Menu Position**- allows you to choose the groups place in the menu order screen. This is not a required entry and will default to alphabetical order if not selected. To enter a position of 1 on the menu you must enter the highest number. (i.e. 100 or 1000) the system will recognize this as a weight and will synchronize the products according to their weight. All other items without weights will be categorized alphabetically. To activate this positioning, refer to Menus under “Order Product Groups by Numerical Weighting”.
- 11) Choose Group items from “Available Mods” section
- 12) Click “Add Selected”
- 13) Click “Save Data” button.
- 14) Once the data is saved the system will return to the item located at the very top of the list.
- 15) If you choose not to make any changes, click “Exit Edit” button.

*See Figure 20, Figure 21, Figure 22*

To delete a Forced Modifier Group

- 1) Click “Edit Form” button.
- 2) Scroll through the “Existing Groups”
- 3) Select the correct Modifier to delete.
- 4) Click on it and Click “Delete Modifier Group”.

### Forced Modifiers



Figure 18

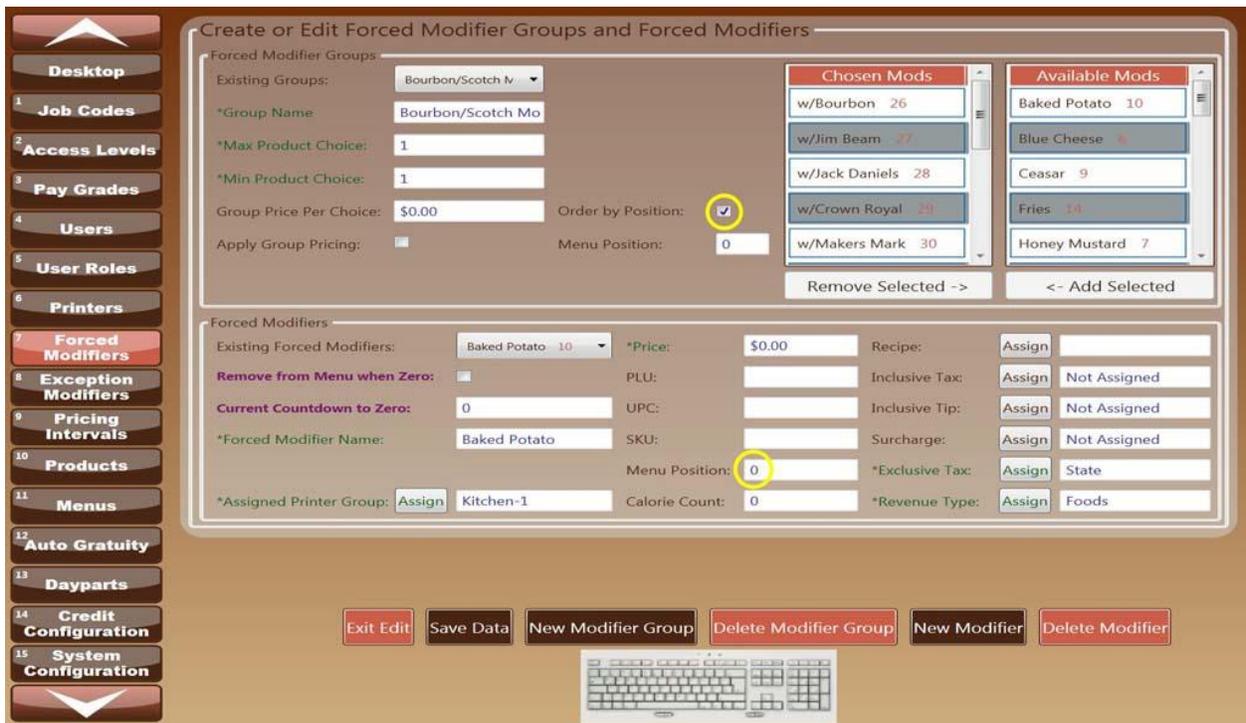


Figure 19



Figure 20

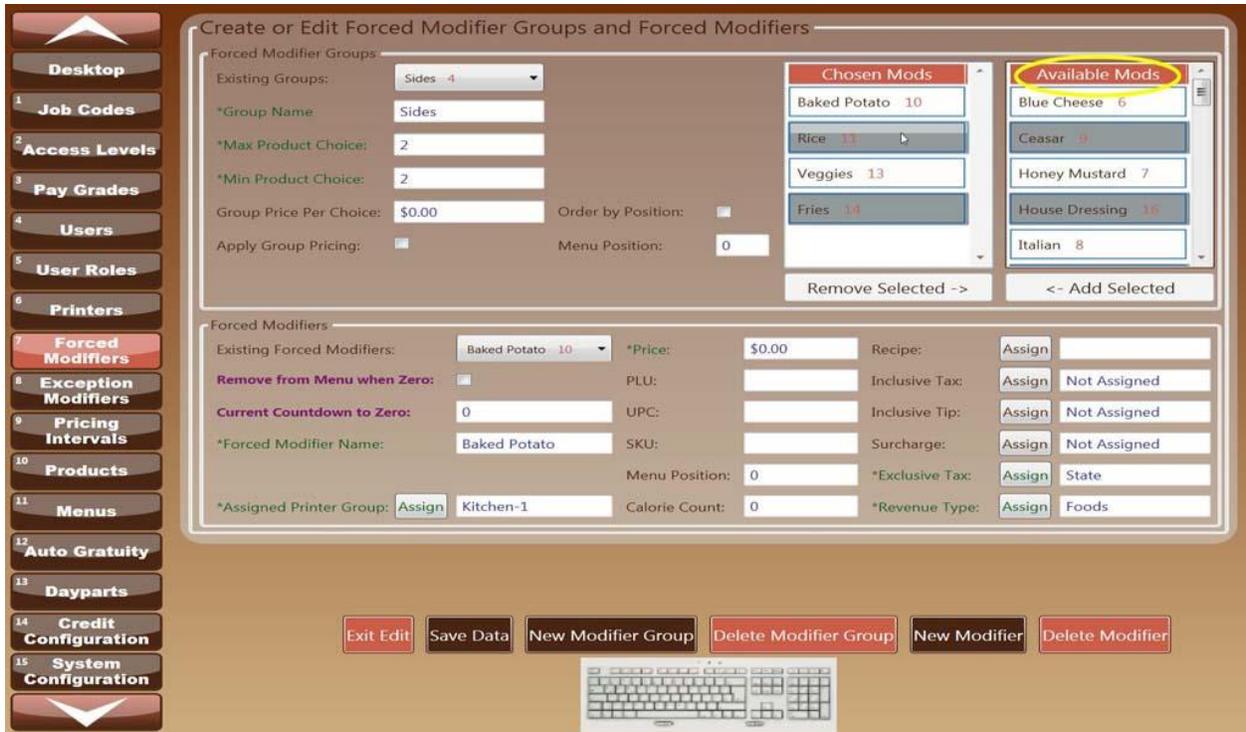


Figure 21

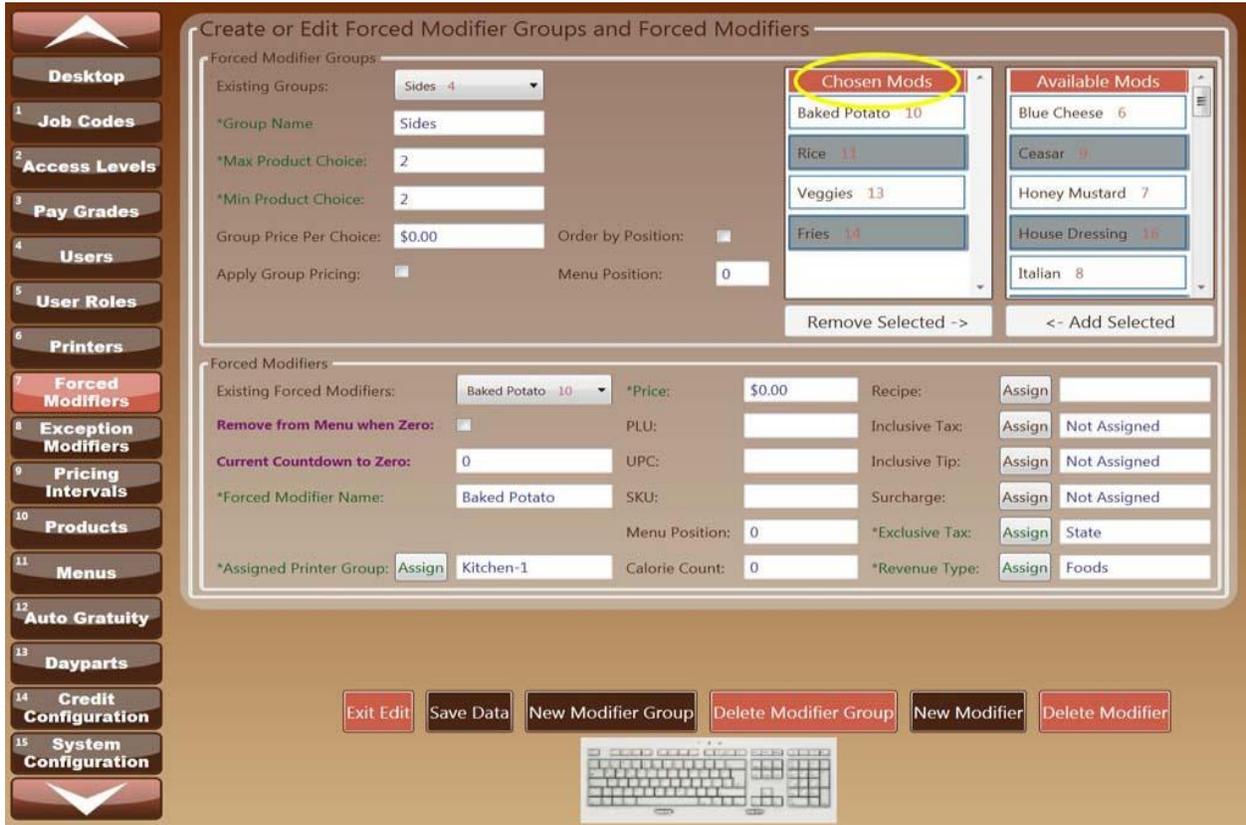


Figure 22

## Exception Modifiers- 8

Exception Modifiers allow you to pick from a preset list of suggested or acceptable items under Exception Modify tab on order screen. This feature is similar to Forced Modifiers with the exception of the server being “Forced” to choose a selection. The server now has options to modify an item or exit modifications and continue with the order. This tab appears on the order screen. Exception Modifiers can be attached on the “Products” page. *\*The green font indicates the field(s) that must be filled before you can save the data.*

The red numbers to the right of the Exception Modifier name is the **unique data base ID number** that



helps to identify items with the same name or similar names.

### Exception Modifiers

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) Click on “Exception Modifiers”.**
- 6) Click “Edit Form” button.
- 7) Click on drop down tab for “Existing Groups” if editing.
- 8) Click “New Modifier” button.
- 9) Click keyboard icon.
- 10) Tab down to “\*Exception Modifier Name” and complete product information.
  - a. **Existing Exception Modifiers** – are the Modifiers previously entered into the system. To make changes to these, click edit form, select desired item and edit the data. Click Save data.
  - b. **Remove from the menu when Zero**- if you select this box the system will remove the item from the menu when the countdown reaches zero. When the inventory is refreshed, uncheck the box.
  - c. **Current Count down to zero**- in the case you have a limited amount of items in inventory; you may enter the count in the box provided.
  - d. **\*Price**- indicates to cost of the item. If the item will be included in a group price then you will not be required to enter a price. It is common to have a price attached to exception modifiers such as extra cheese or some sort of upgrade.
  - e. **PLU**- is a feature that allows you to store the PLU information on the product level. This will be used for in-house purposes and is not a required entry.
  - f. **UPC**- is a feature that allows you to store the UPC information on the product level. This will be used for in-house purposes and is not a required entry.
  - g. **SKU**- is a feature that allows you to store the SKU information on the product level. This will be used for in-house purposes and is not a required entry.

- h. **Menu Position**- is a feature allowing you to place the item in a certain order on the order screen. This is not a required entry and will default to alphabetical order if not selected. To enter a position of 1 on the menu you must enter the highest number. (i.e. 100 or 1000) the system will recognize this as a weight and will synchronize the products according to their weight. All other items without weights will be categorized alphabetically. To activate this positioning, refer to Menus under “Order Product Groups by Numerical Weighting”. *See Figure 23*
  - i. **Calorie Count**- allows for the user to enter the amount of calories in the item.
  - j. **Inclusive Tax**- select a tax from the list or create a new one. Inclusive tax rates are built in to the product itself and are often used in conjunction with alcohol sales. This rate will not change the product’s price, but will be used in reporting to calculate your net sales.
  - k. **Inclusive Tip**- select a tip rate from the list or create a new tip rate. Inclusive tip rates are built-in to the price of the product itself and are a form of auto-gratuity. In some instances, establishments may want to include the servers tip into the cost of the product.
  - l. **Surcharge**- Select a surcharge from the list or create a new surcharge. This is an additional charge or payment.
  - m. **Exclusive Tax**- Select a tax rate from the list or create a new tax rate. Exclusive tax is referred to as sales tax. This will be listed on the final payment screen of an order.
  - n. **Revenue Type**- Revenue types can be specific (i.e. Dairy, Meat, and Produce) or General (i.e. Alcohol, Food and Beverage). This data is used for the reporting purposes.
- 11) Click “Save Data” button.
  - 12) Once the data is saved the system will return to the item located at the very top of the list.
  - 13) If you choose not to make any changes, click “Exit Edit” button.

*See Figure 24*

To delete an Exception Modifier

- 1) Click “Edit Form” button.
- 2) Scroll through the “Existing Exception Modifiers”.
- 3) Find the correct Exception Modifier to delete.
- 4) Click on it and Click “Delete Modifier”.

## Exception Modifier Groups

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) Click on "Exception Modifier Group".
- 6) Click "Edit Form" button.
- 7) Click on drop down tab for "Existing Groups" if editing
- 8) Click "New Modifier" button.
- 9) Click keyboard icon in the bottom center of the screen.
  - a) Group Price Per Choice- is a price based on the forced modifier chosen. If you choose not to use the group pricing, leave it blank and make sure to enter a price for the item in the forced modifier section.
  - b) Apply Group Pricing- check this box to apply the price to the whole group.
  - c) Order by Position-activates the individual menu position located under Forced Modifier Section of the bottom portion of the screen. *See Figure 23*
  - d) Menu Position- allows you to choose the groups place in the menu order screen. This is not a required entry and will default to alphabetical order if not selected. To enter a position of 1 on the menu you must enter the highest number. (i.e. 100 or 1000) the system will recognize this as a weight and will synchronize the products according to their weight. All other items without weights will be categorized alphabetically. To activate this positioning, refer to *Menus- 11* under "Order Product Groups by Numerical Weighting".
- 10) Choose Group items from "Available Mods" section.
- 11) Click "Add Selected" button.
- 12) Click "Save Data" button.
- 13) Once the data is saved the system will return to the item located at the very top of the list.
- 14) If you choose not to make any changes, click "Exit Edit" button.

*See Figure 24, Figure 26, Figure 27*

To delete an Exception Modifier Group

- 1) Click "Edit Form" button.
- 2) Scroll through the "Existing Groups".
- 3) Find the correct Exception Modifier Group to delete.
- 4) Click on it and Click "Delete Modifier Group".

### Exemption Modifiers

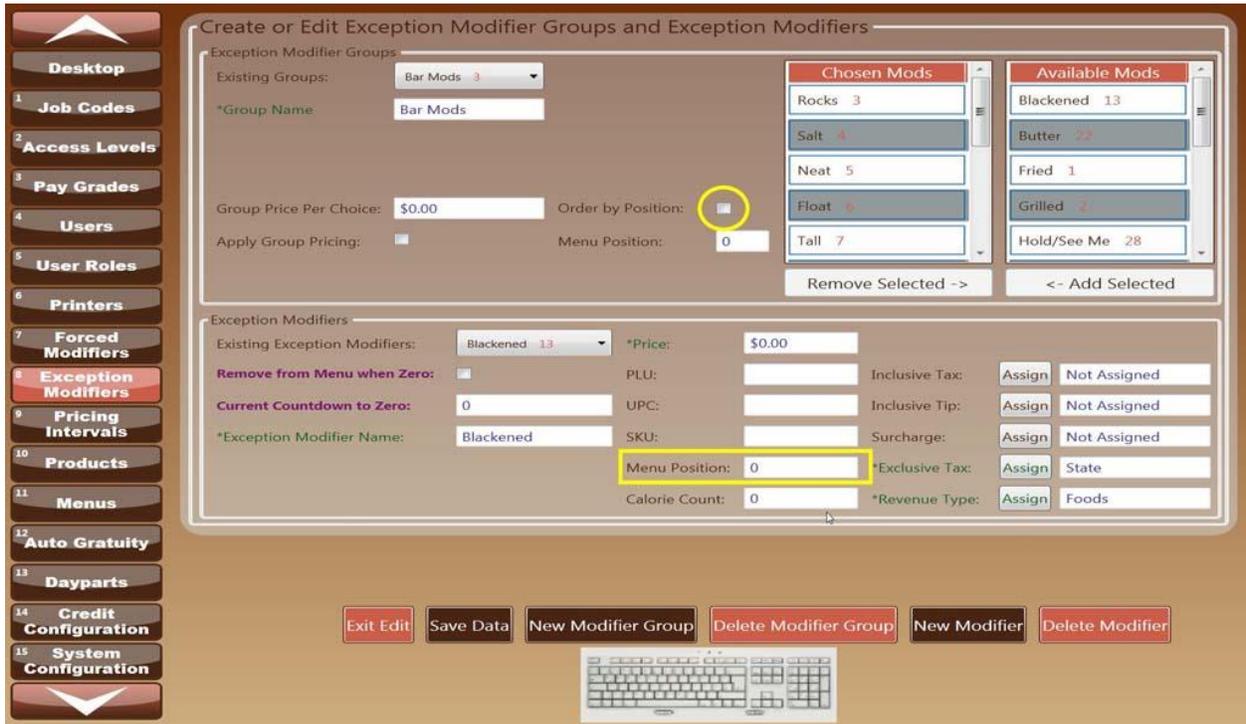


Figure 23

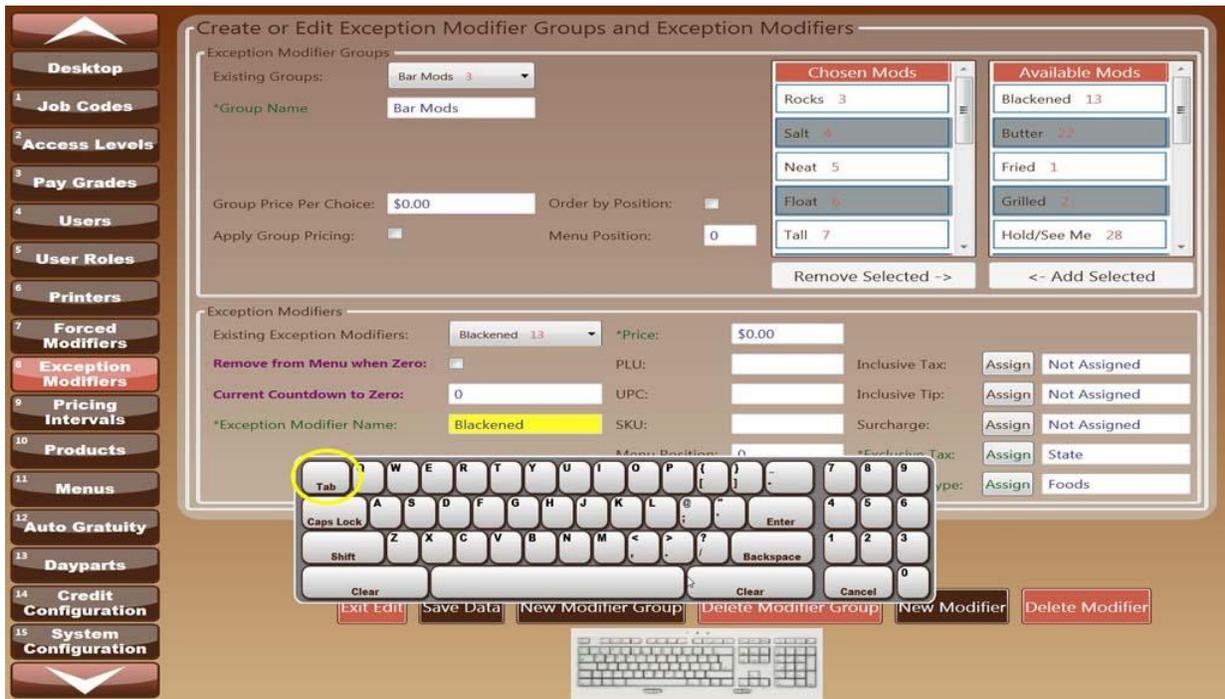


Figure 24

### Exception Modifier Groups

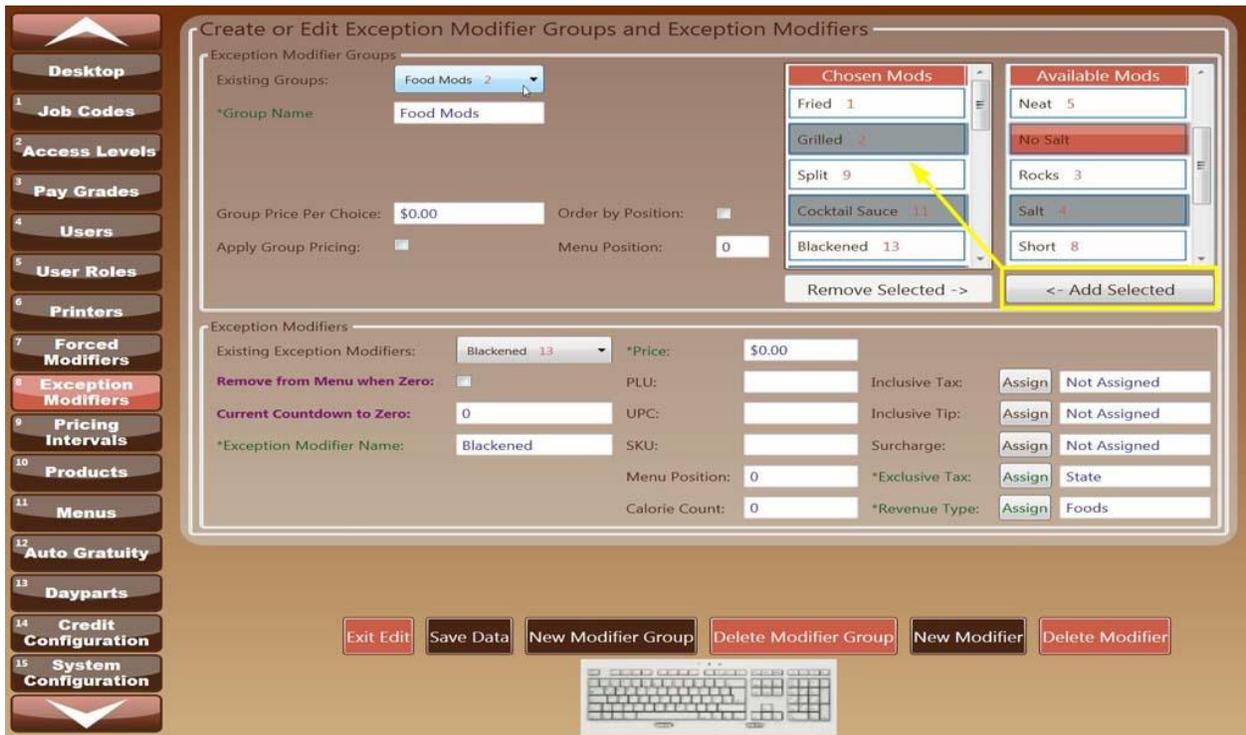


Figure 25

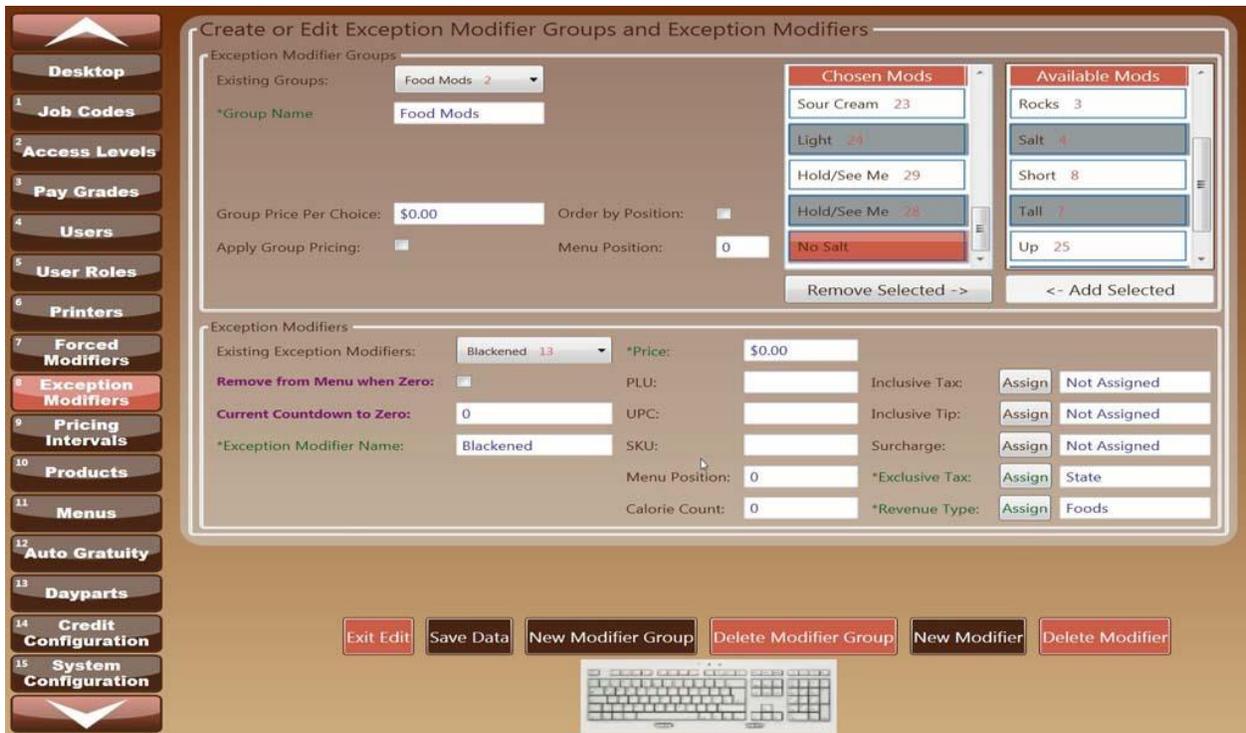


Figure 26



Figure 27

## Pricing Intervals- 9

Pricing Intervals are periods throughout the day that can be arranged to project a different price than the default. If there is an event, promotion or discount that the establishment wants to automatically program during a certain period throughout the day, this function would allow for that adjustment. Several different Pricing Intervals can be created and attached to one or many product groups. *\*The green font indicates the field(s) that must be filled before you can save the data.*

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) Click "Pricing Intervals".**
- 6) Click "Edit Form" button.
- 7) Click "New Pricing Interval".
- 8) Select a "\*Discount type"
  - a. Discount by Amount- a whole dollar amount will be deducted from each item in a product group.
  - b. Use Specific Price- the original price of an item will be replaced with a new price of the Price interval.
  - c. Discount by Percent- the original price of fan item will be reduced by the percent of the Price Interval.
- 9) Click "Set Start and End Times" and select a start and end Time.
- 10) Click keyboard icon.
- 11) Enter Interval name and tab over to enter the appropriate discount, price or percent.
- 12) Click "Enter".
- 13) Click "Save Data" button.
- 14) Once the data is saved the system will return to the item located at the very top of the list.
- 15) If you choose not to make any changes, click "Exit Edit" button.

*See Figure 28, Figure 29, Figure 30*

To delete an Price Intervals

- 1) Click "Edit Form" button.
- 2) Scroll through the "Pricing Intervals".
- 3) Find the correct Pricing Interval to delete.
- 4) Click on it and Click "Delete Interval".

In order to activate a Pricing Interval you must link the Pricing Interval to a Product Group. If it is a new product group you want to create, create the product group under the section *Products- 10* and return to these directions.

- 1) **Click on “Products” button.**
- 2) Click “Edit Form” button.
- 3) Click on drop down tab for “Product Groups:” and select the appropriate Product Group.
- 4) Click “Assign Pricing Interval”.
- 5) You will see “Available Intervals”. Select desired “Available” Interval.
- 6) Click "Add Selected" button.
- 7) Click “OK”.
- 8) Click “Save Data” button.
- 9) Once the data is saved the system will return to the item located at the very top of the list.
- 10) If you choose not to make any changes, click “Exit Edit” button.

*See Figure 31, Figure 32*

To remove a Pricing Interval from a product group:

- 1) Click “Edit Form” button.
- 2) Select Product Group.
- 3) Click “Assign Pricing Interval”.
- 4) You will see “Chosen Intervals”. Select desired “Chosen” Interval.
- 5) Click "Remove Selected" button.
- 6) Click “OK”.

## Pricing Interval

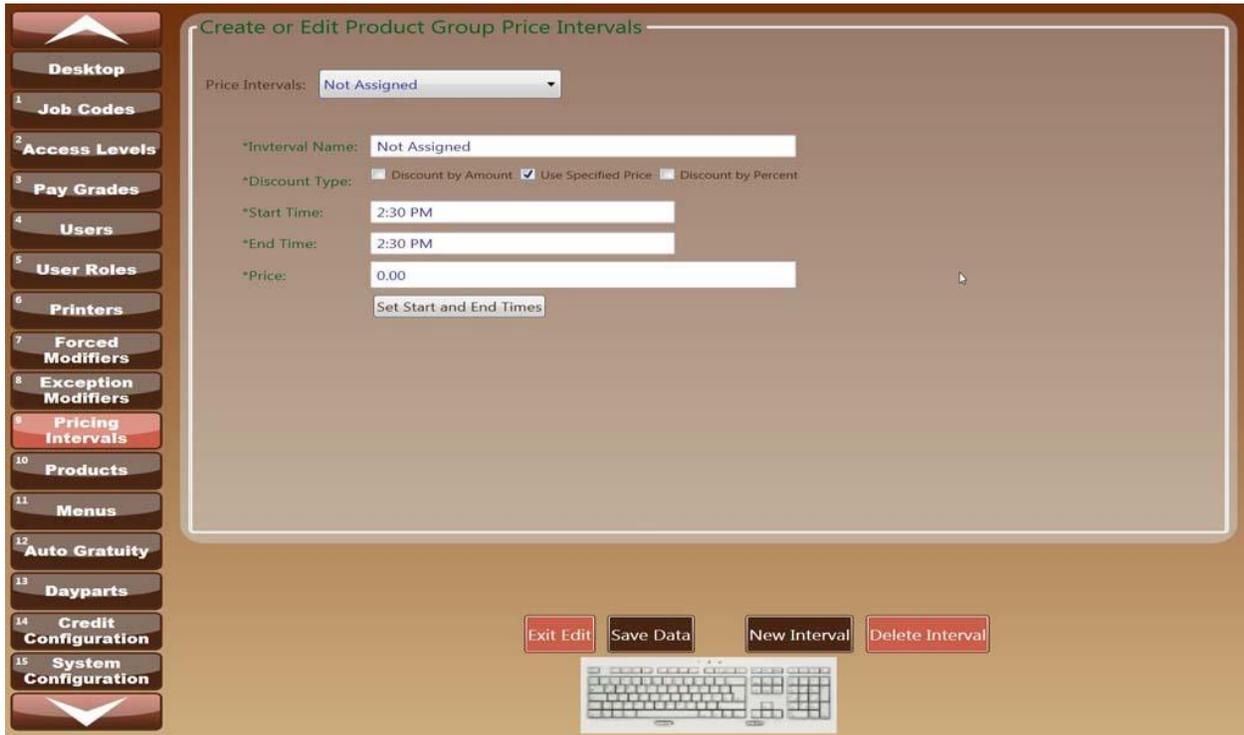


Figure 28



Figure 29

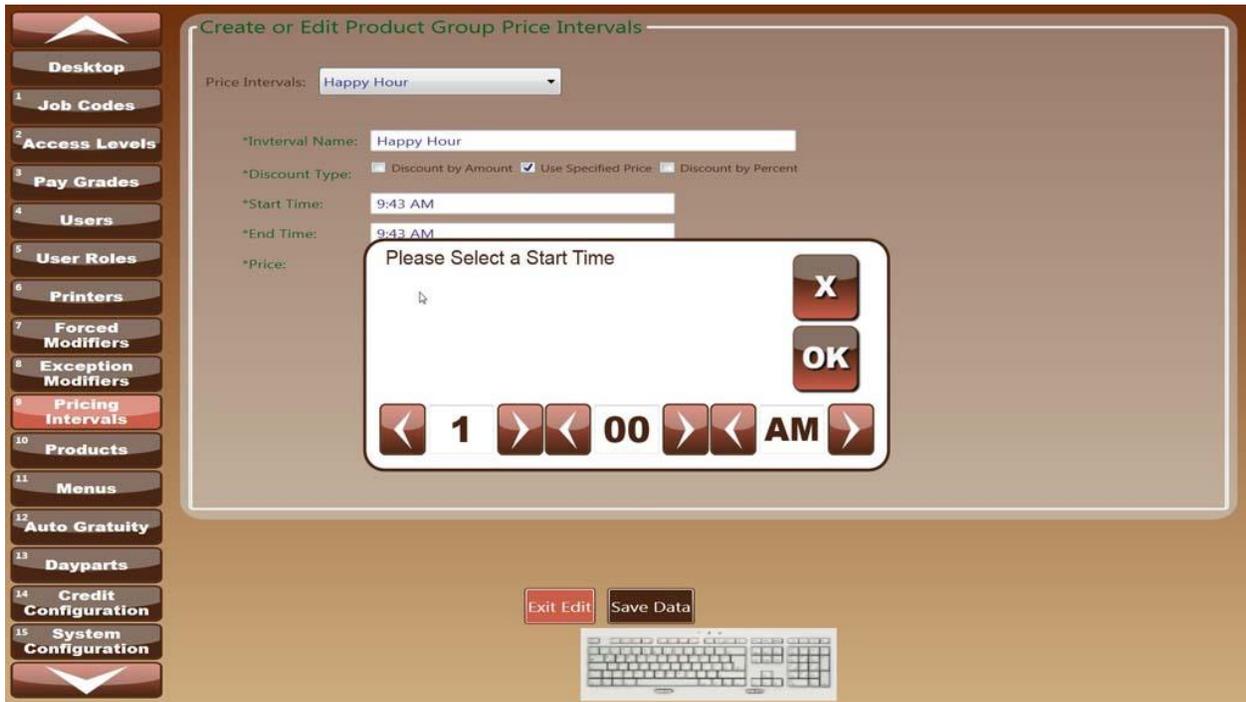


Figure 30

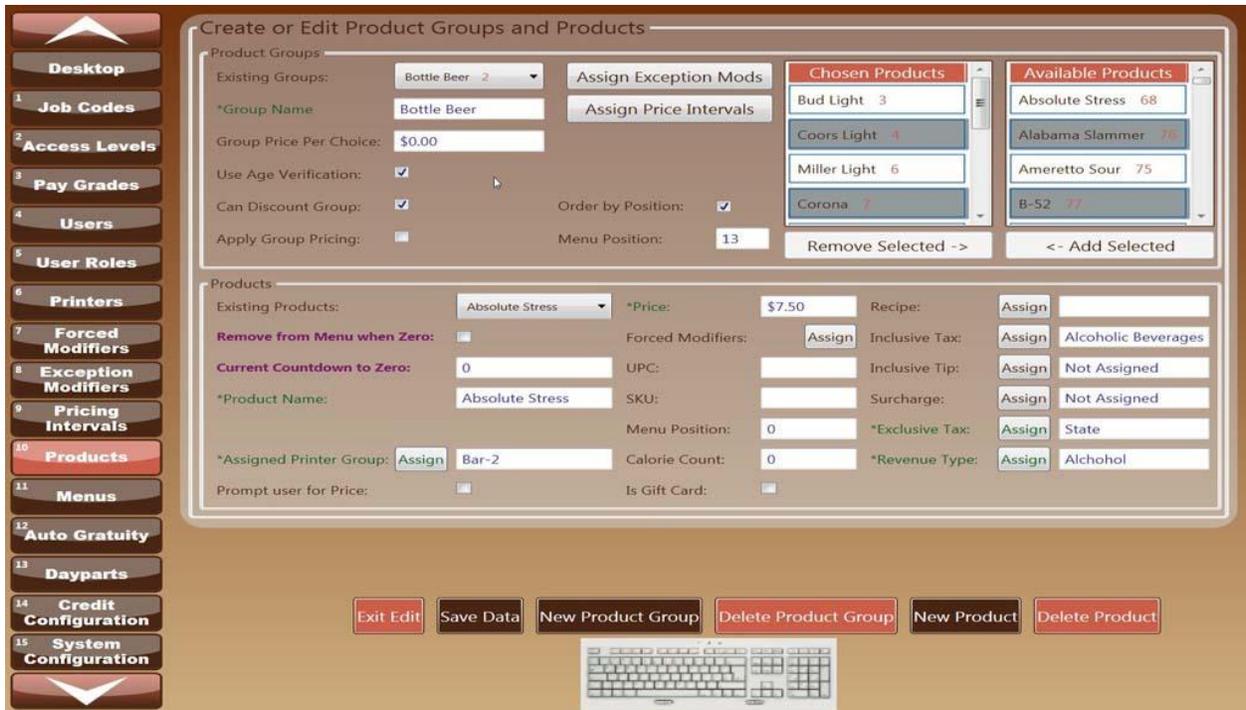


Figure 31

**Create or Edit Product Groups and Products**

**Product Groups**

Existing Groups: Bottle Beer -2    Assign Exception Mods

\*Group Name: Bottle Beer    Assign Price Intervals

Group Price Per Choice: \$0.00

Use Age Verification:

Can Discount Group:     Order by Position:

Apply Group Pricing:

**Chosen Products**

- Bud Light 3
- Coors Light 4
- Miller Light 6
- Corona 7

**Available Products**

- Absolute Stress 68
- Alabama Slammer 76
- Ameretto Sour 75
- B-52 77

Remove Selected ->    <- Add Selected

**Products**

Existing Products:

Remove from Menu when Zero:

Current Countdown to Zero:

\*Product Name:

\*Assigned Printer Group: As

Prompt user for Price:

Recipe: Assign

Inclusive Tax: Assign Alcoholic Beverages

Inclusive Tip: Assign Not Assigned

Surcharge: Assign Not Assigned

\*Exclusive Tax: Assign State

\*Revenue Type: Assign Alcohol

**Chosen Intervals**    **Available Intervals**

Happy Hour

Remove Selected ->    <- Add Selected    **OK**    **X**

Figure 32

## Products- 10

Products consist of all items that will appear on the order screen. \*The green font indicates the field(s) that must be filled before you can save the data.

The red numbers to the right of the Products name is the **unique data base ID number** that helps to



identify items with the same name or similar names.

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) Click "Products" button.**
- 6) Click "Edit Form" button.
- 7) Click "New Product".
- 8) Click on the keyboard icon.
- 9) Tab down to "Product Name".
- 10) Tab down to "\*Product Name" and complete product information. *See Figure 34* to review required entries.
  - a. **Existing Products** – are the Products previously entered into the system. To make changes to these, click edit form, select desired item and edit the data. Click Save data.
  - b. **Remove from the menu when Zero-** if you select this box the system will remove the item from the menu when the countdown reaches zero. When the inventory is refreshed, uncheck the box.
  - c. **Current Count down to zero-** in the case you have a limited amount of items in inventory; you may enter the count in the box provided.
  - d. **\*Assign Printer Group-** this determines where your product will print when ordered from the order screen and sent to be made. Refer to *Printers- 6* to configure the printer paths.
  - e. **\*Price-** indicates the cost of the item. If the item will be included in a group price then you will not be required to enter a price.
  - f. **Forced Modifiers-** Forced modifiers allow you to force the server to pick from a preset list of suggested or acceptable items on the menu. Forced Modifiers are created under the Forced Modifier tab but attached here at the product level. (i.e. if you want an Entrée to have sides you will enter the entrée in the products tab, and then attach the "sides" Forced Modifier to it from the Products screen.) *See Figure 35*
  - g. **UPC-** is a feature that allows you to store the UPC information on the product level. This will be used for in-house purposes and is not a required entry.
  - h. **SKU-** is a feature that allows you to store the SKU information on the product level. This will be used for in-house purposes and is not a required entry.
  - i. **Menu Position-** is a feature allowing you to place the item in a certain order on the order screen. This is not a required entry and will default to alphabetical order if not

selected. To enter a position of 1 on the menu you must enter the highest number. (i.e. 100 or 1000) the system will recognize this as a weight and will synchronize the products according to their weight. All other items without weights will be categorized alphabetically. To activate this positioning, refer to Menus under “Order Product Groups by Numerical Weighting”. *See Figure 23*

- j. **Calorie Count**- allows for the user to enter the amount of calories in the item.
  - k. **Is a Gift Card**- check this box if the product is a Gift Card.
    - i. Assign this product to a null Printer Group and enter the price as \$0.00.
    - ii. Create a Product group “Gift Card” and only attach the product Gift card to it.
  - l. **Inclusive Tax**- select a tax from the list or create a new one. Inclusive tax rates are built in to the product itself and are often used in conjunction with alcohol sales. This rate will not change the product’s price, but will be used in reporting to calculate your net sales.
  - m. **Inclusive Tip**- select a tip rate from the list or create a new tip rate. Inclusive tip rates are built-in to the price of the product itself and are a form of auto-gratuity. In some instances, establishments may want to include the servers tip into the cost of the product.
  - n. **Surcharge**- Select a surcharge from the list or create a new surcharge. This is an additional charge or payment.
  - o. **\*Exclusive Tax**- Select a tax rate from the list or create a new tax rate. Exclusive tax is referred to as sales tax. This will be listed on the final payment screen of an order.
  - p. **\*Revenue Type**- Revenue types can be specific (i.e. Dairy, Meat, and Produce) or General (i.e. Alcohol, Food and Beverage). This data is used for the reporting purposes.
- 11) Click “Save Data” button.
  - 12) Once the data is saved the system will return to the item located at the very top of the list.
  - 13) If you choose not to make any changes, click “Exit Edit” button.

*See Figure 33, Figure 34, Figure 35*

To delete a Product

- 1) Scroll through the “Existing Products”.
- 2) Find the correct Product to delete.
- 3) Click on it and Click “Delete Product”.

## Product Groups

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) **Click “Products”**
- 6) Click “Edit Form” button.
- 7) Click “New Modifier Group”.
- 8) Click on drop down tab for “Existing Groups” if editing
- 9) Click keyboard icon.
- 10) Enter the \*Group Name
  - a. **Existing Groups**- are the Modifier Groups previously entered into the system. To make changes to these, click edit form, select desired group and edit the data. Click Save data.
  - b. **Group Price Per Choice**- is a price based on the forced modifier chosen. If you choose not to use the group pricing, leave it blank and make sure to enter a price for the item in the forced modifier section.
  - c. **Use Age Verification**- For legal reasons this feature has not been activated.
  - d. Can Discount Group- allows a user with the proper access levels to discount the items included in the group.
  - e. **Apply Group Pricing**- check this box to apply the price to the whole group.
  - f. Order by Position-activates the individual menu position located under Forced Modifier Section of the bottom portion of the screen.
  - g. **Menu Position**- allows you to choose the groups place in the menu order screen. This is not a required entry and will default to alphabetical order if not selected. To enter a position of 1 on the menu you must enter the highest number. (i.e. 100 or 1000) the system will recognize this as a weight and will synchronize the products according to their weight. All other items without weights will be categorized alphabetically. **To activate this positioning, refer to Menus under “Order Product Groups by Numerical Weighting”.**
- 11) Choose Group items from “Available Products” section.
- 12) Click “Add Selected”.
- 13) Click “Save Data” button.
- 14) Once the data is saved the system will return to the item located at the very top of the list.
- 15) If you choose not to make any changes, click “Exit Edit” button.

*See Figure 36, Figure 37, Figure 38*

To delete a Product Group

- 1) Click “Edit Form” button.
- 2) Scroll through the “Existing Groups”
- 3) Select the correct Group to delete.
- 4) Click on it and Click “Delete Product Group”.

## Products



Figure 33

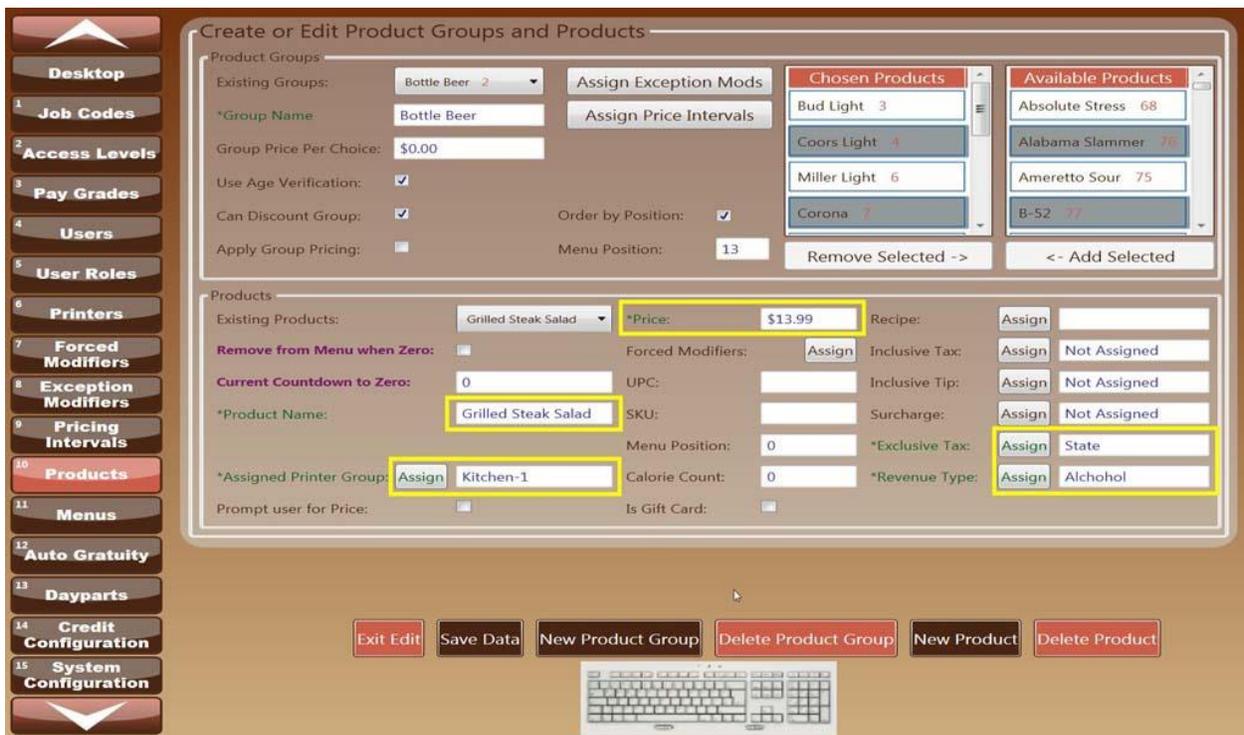


Figure 34

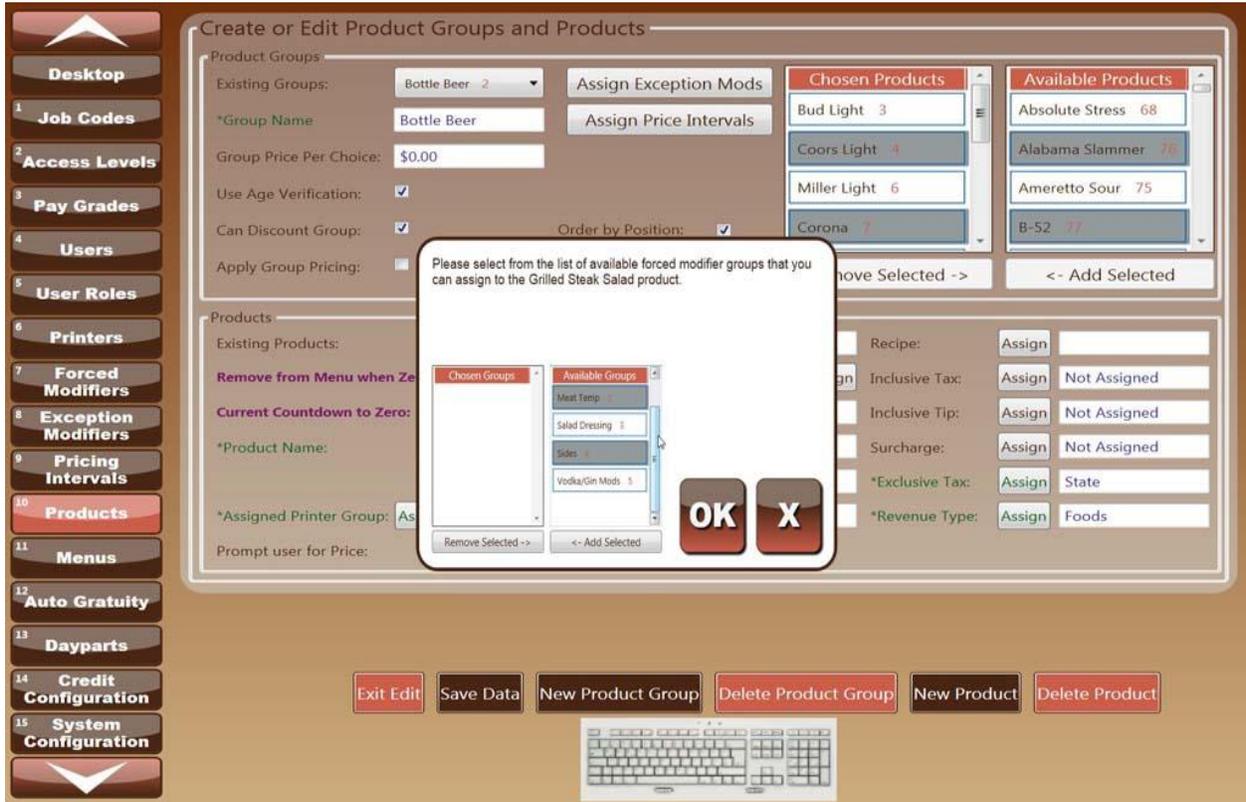


Figure 35

## Product Groups



Figure 36

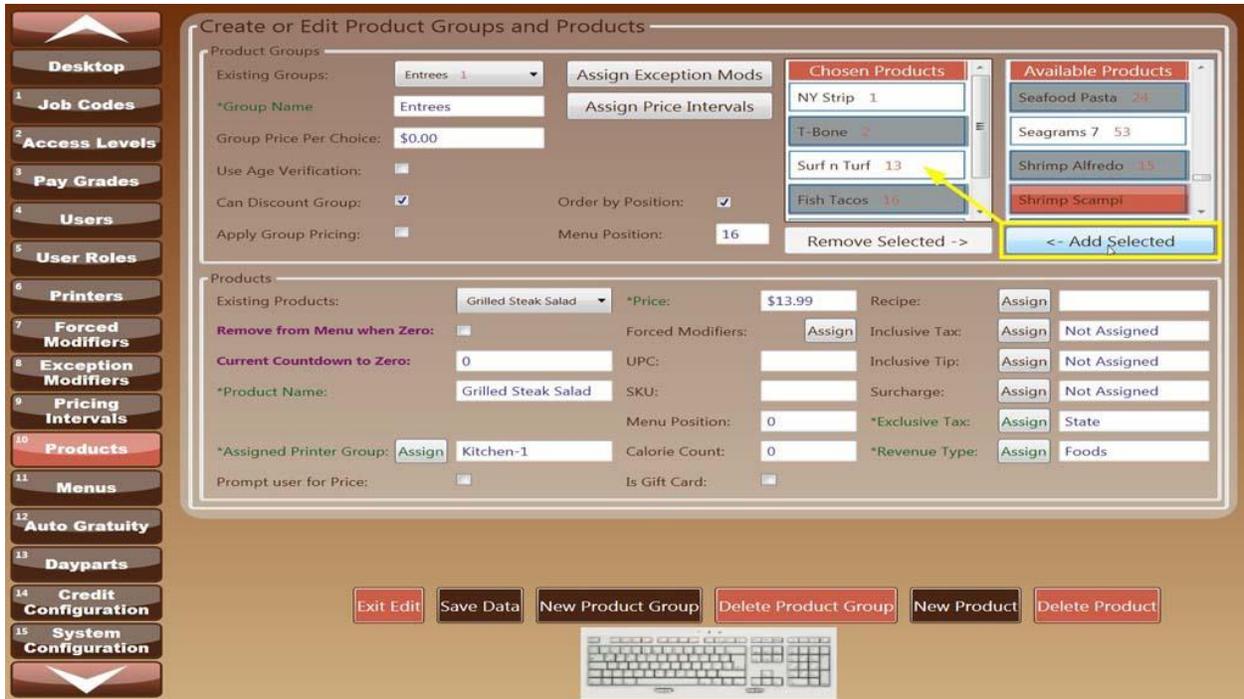


Figure 37

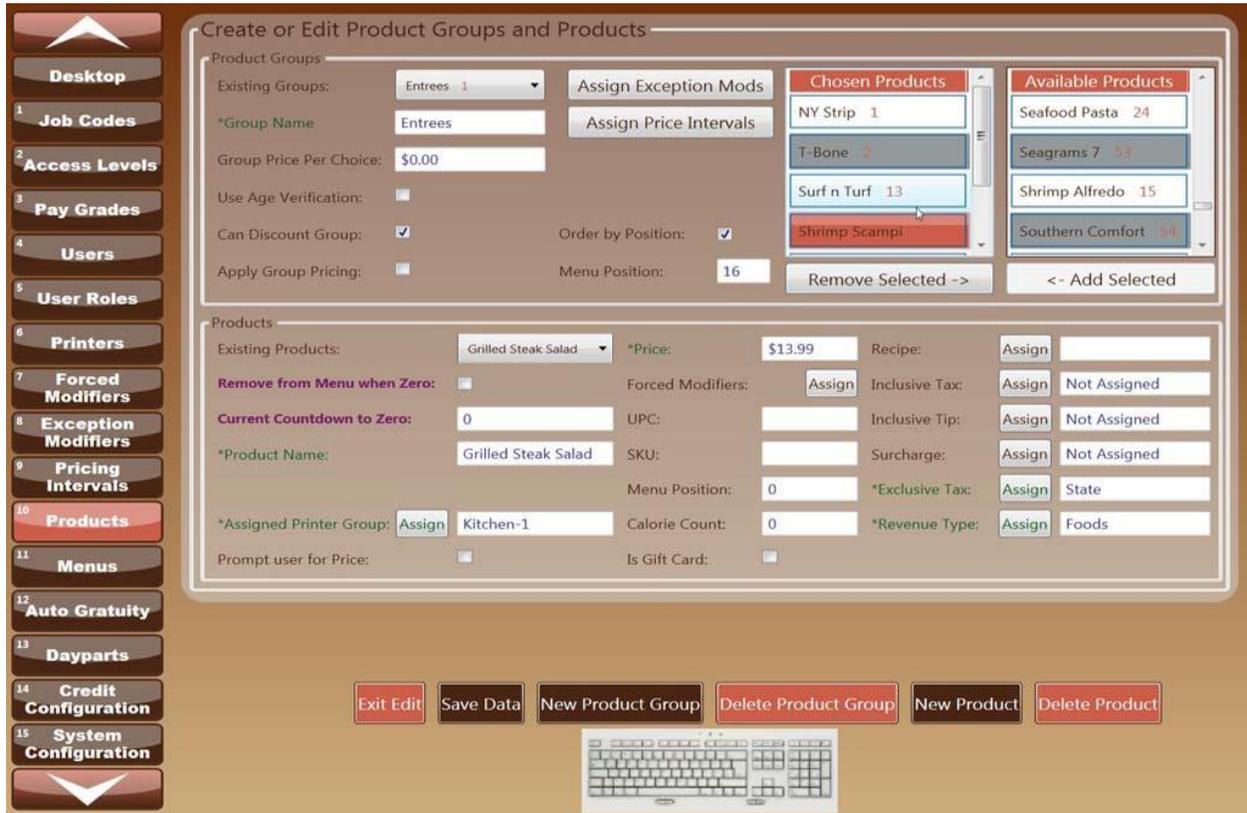


Figure 38

## Menu Positioning

Menu positioning is a feature that allows you to position Product, Forced Modifiers and Exception Modifiers and their groups in a certain order based on the numerical weighting given. This is not a required entry and will default to alphabetical order if not selected. To enter a position of 1 on the menu you must enter the highest number (i.e. 100) and the system will recognize this as a weight and will categorize the products according to their weight. The Order of priority is Highest to Lowest. All other items with lower numbers will be listed in descending order. Without weights, the items will be categorized alphabetically. To begin weighting your groups, you must first determine what level at which you want them weighted:

1. The item level (i.e. Product, Exception Modifier, Forced Modifier)
2. The Group Level (i.e. Product Group, Exception Modifier Group, Forced Modifier Group)
3. The Menu Level (i.e. choosing a Menu to apply the weightings)

### Item Level

Menu positions for products, exception modifiers and forced modifiers can be applied to each of the three pages. Enter a weighting number in the Menu Position, Select the Group the product is in (Entrée's) and check the box: "order by position" *Figure 39*. This will place T-bone steak at the top of the product list as seen in *Figure 40*.

The screenshot displays the 'Create or Edit Product Groups and Products' window. On the left is a sidebar with menu items: Desktop, Job Codes, Access Levels, Pay Grades, Users, User Roles, Printers, Forced Modifiers, Exception Modifiers, Pricing Intervals, Products, Menus, Auto Gratuity, Dayparts, Credit Configuration, and System Configuration. The main window is divided into two sections: 'Product Groups' and 'Products'.

**Product Groups Section:**

- Existing Groups: Entrees 1
- \*Group Name: Entrees
- Group Price Per Choice: \$0.00
- Use Age Verification:
- Can Discount Group:
- Apply Group Pricing:
- Order by Position:  (highlighted in yellow)
- Menu Position: 16
- Chosen Products: NY Strip 1, T-Bone 2, Surf n Turf 13, Shrimp Scampi 14
- Available Products: Absolute Stress 68, Alabama Slammer 76, Ameretto Sour 75, B-52 77

**Products Section:**

- Existing Products: Grilled Steak Salad
- \*Price: \$13.99
- Recipe: Assign
- Remove from Menu when Zero:
- Forced Modifiers: Assign
- Inclusive Tax: Assign Not Assigned
- Current Countdown to Zero: 0
- UPC:
- Inclusive Tip: Assign Not Assigned
- \*Product Name: Grilled Steak Salad
- SKU:
- Surcharge: Assign Not Assigned
- Menu Position: 100 (highlighted in yellow)
- \*Exclusive Tax: Assign State
- \*Assigned Printer Group: Assign Kitchen-1
- Calorie Count: 0
- \*Revenue Type: Assign Foods
- Prompt user for Price:
- Is Gift Card:

At the bottom of the window are buttons: Exit Edit, Save Data, New Product Group, Delete Product Group, New Product, and Delete Product.

Figure 39



Figure 40

## Group level

Menu positions for products groups, exception modifier groups and forced modifier group can be applied to each of the three pages. Select the Product Group you want to apply weighting to, enter a weighting number in the Menu Position. *Figure 41* save the Data then Click on Menus tab, select the correct menu and Check the box: “Order Products Groups by Numerical Weighting” *Figure 42*. Entrée’s will appear first in the Product Groups. *Figure 43*

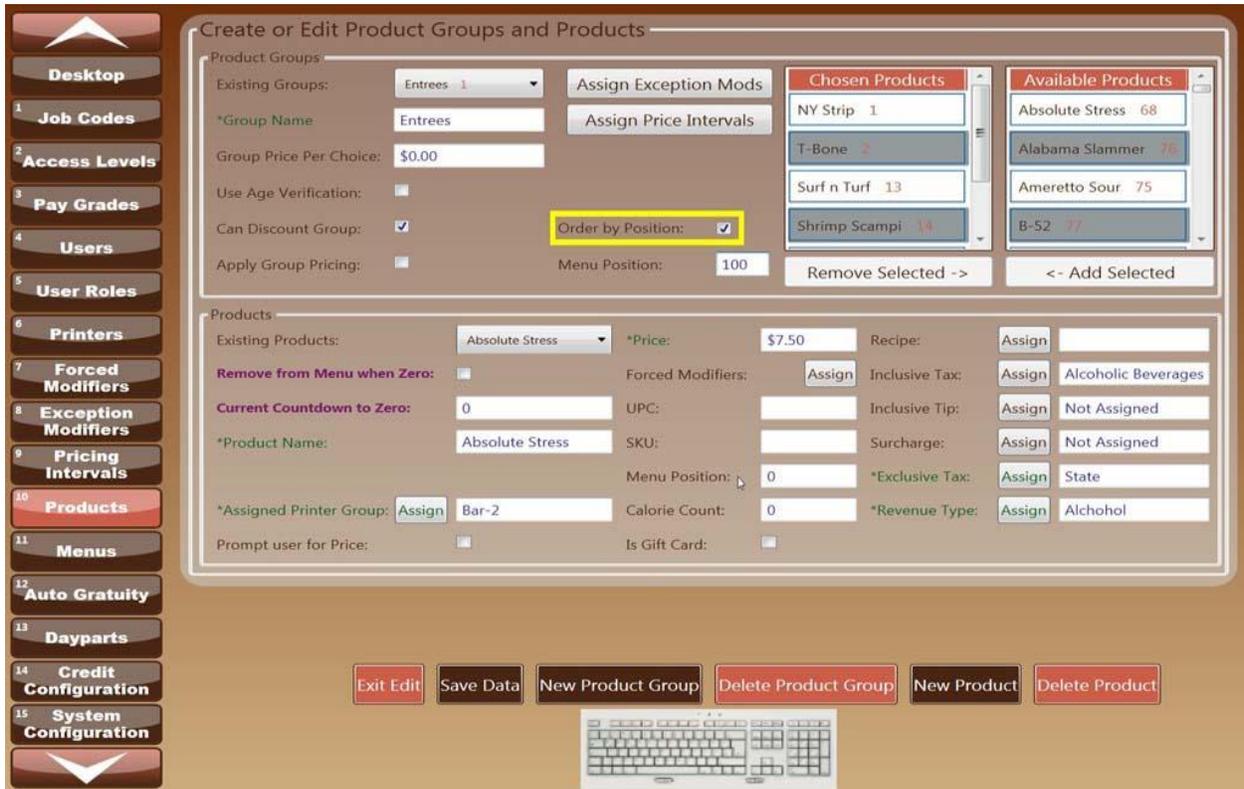


Figure 41

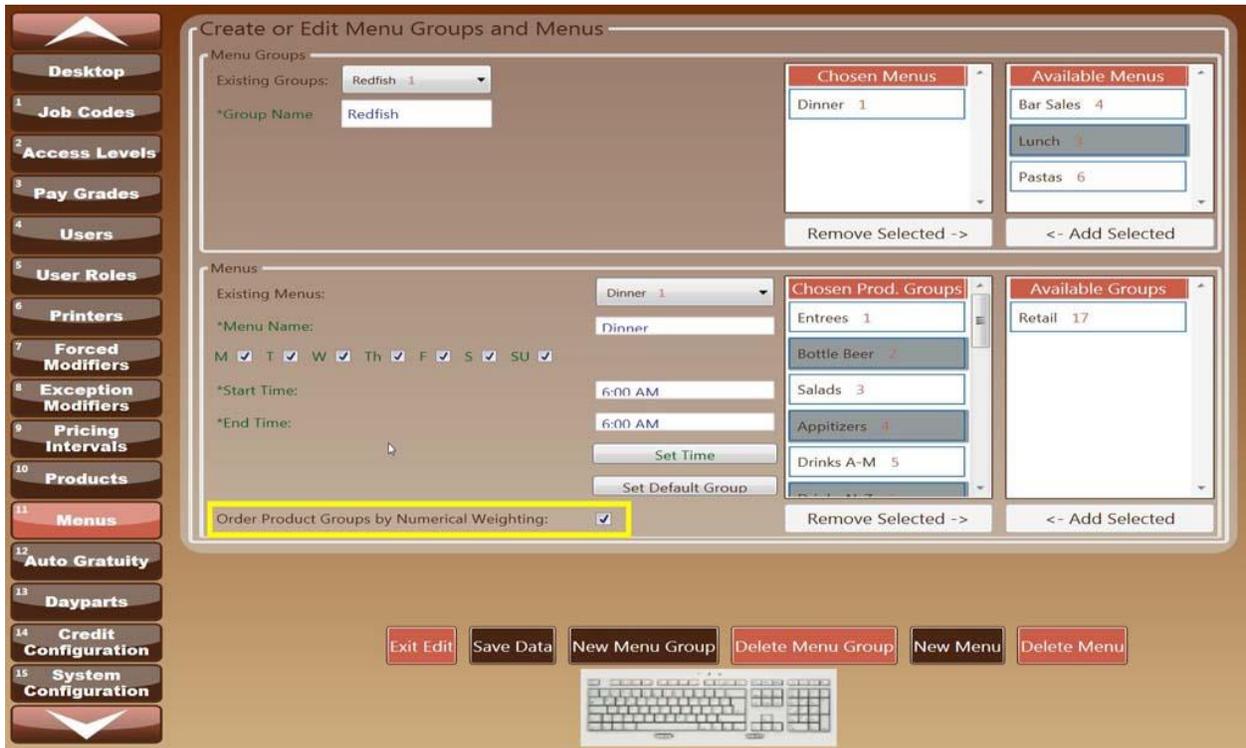


Figure 42



Figure 43

## Menus- 11

This option is necessary to connect the previous sections of the BOH to the FOH and allows you to link Main Product Groups to the appropriate User's order screen. Menus must have Product Groups and a Menu Group must have a menu. This may come in handy when you would like to restrict users from ordering as well as allowing users to only order specific menu items. Begin by deciding how many menus you would like to have. \*The green font indicates the field(s) that must be filled before you can save the data.

The red numbers to the right of the Menu name is the **unique data base ID number** that helps to identify items with the same name or similar names.

 A screenshot of a web application interface showing a dropdown menu. The dropdown is open, displaying the text 'Servers 1' in a blue font. The number '1' is red, indicating it is a unique database ID number. The dropdown has a blue border and a small downward-pointing arrow on the right side.

### Menus

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) **Click on "Menus" button.**
- 6) Click "Edit Form" button.
- 7) Click "New Menu" button.
- 8) Click keyboard icon.
- 9) Tab down to "\*Menu Name"
- 10) Click on drop down tab for "Existing Menus:" if editing.
- 11) Enter \*Menu Name.
  - a. **Order Product Groups by Numerical Weighting-** checking this box activates the preset weighting chosen on the Forced Modifier, Exception Modifier or Products page. Weighting represents the amount of significance you attach to an item in terms of its appearance on the order screen. A low number weight represents that the Item is not going to be shown as the first on the list. A high number represents that the item needs to be near the beginning of the list. The higher the number, the more range you have to work with, so make sure your highest number is 100 or 1000 so that you have plenty of room to add other weightings.
- 12) Click "Assign Start date and End Times"
- 13) Enter the appropriate times you want the menu to be accessible. (The times can overlap if the menu will be available all day. i.e. 1:00am-1:00am).
- 14) Choose "Available Menus" product groups you would like on the user's menu.
- 15) Click "Add Selected".
- 16) Click "Save Data" button.
- 17) Once the data is saved the system will return to the item located at the very top of the list.
- 18) If you choose not to make any changes, click "Exit Edit" button.

See Figure 44, Figure 45, Figure 46

To delete a Menu

- 1) Click "Edit Form" button.
- 2) Scroll through the "Existing Menus"
- 3) Select the correct Menu to delete.
- 4) Click on it and Click "Delete Product Group".

### Menu Groups

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) Click on "Menus" button.**
- 6) Click "Edit Form" button.
- 7) Click "New Menu Group" button.
- 8) Click keyboard icon in the bottom center of the screen
- 9) Click on drop down tab for "Existing Groups:" if editing
- 10) Enter \*Menu Group Name".
- 11) Choose "Available Menus" you would like on the Menu Group.
- 12) Click "Add Selected" button.
- 13) Click "Save Data" button.
- 14) Once the data is saved the system will return to the item located at the very top of the list.
- 15) If you choose not to make any changes, click "Exit Edit" button.

*See Figure 47, Figure 48*

To delete a Menu Group

- 1) Click "Edit Form" button.
- 2) Scroll through the "Existing Groups"
- 3) Select the correct Group to delete.
- 4) Click on it and Click "Delete Menu Group".

## Menus



Figure 44

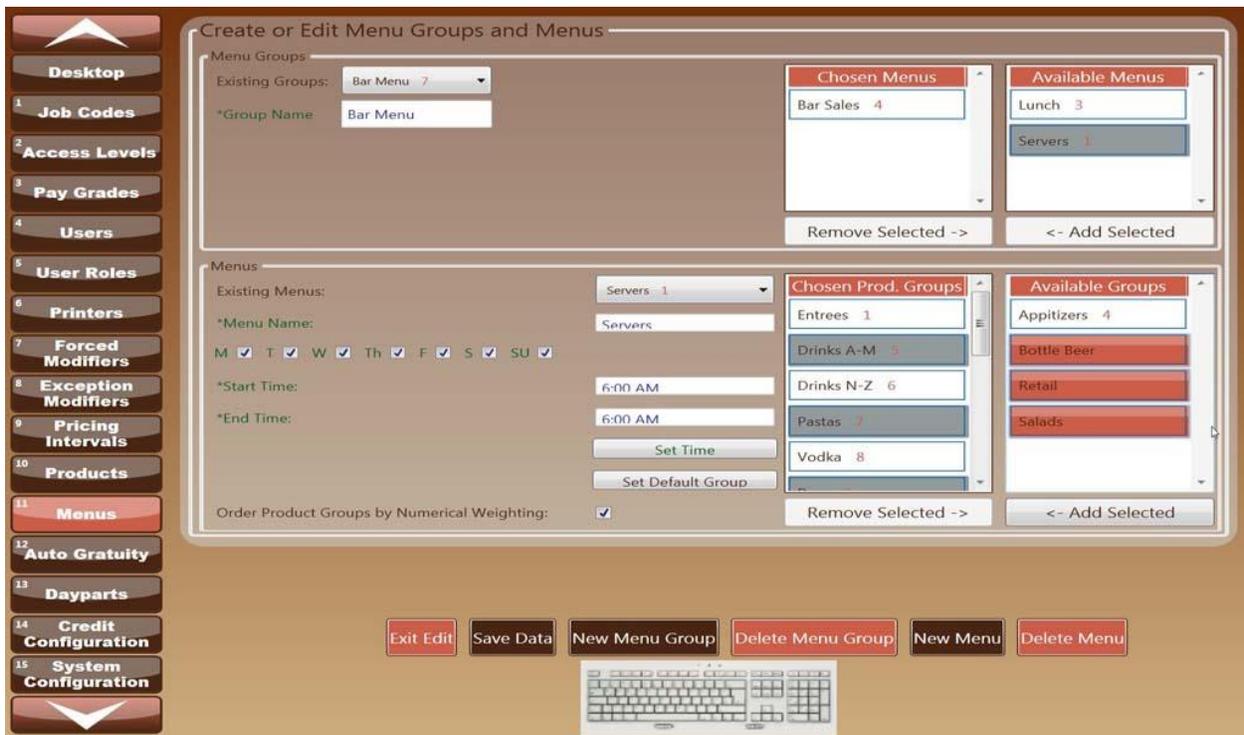


Figure 45

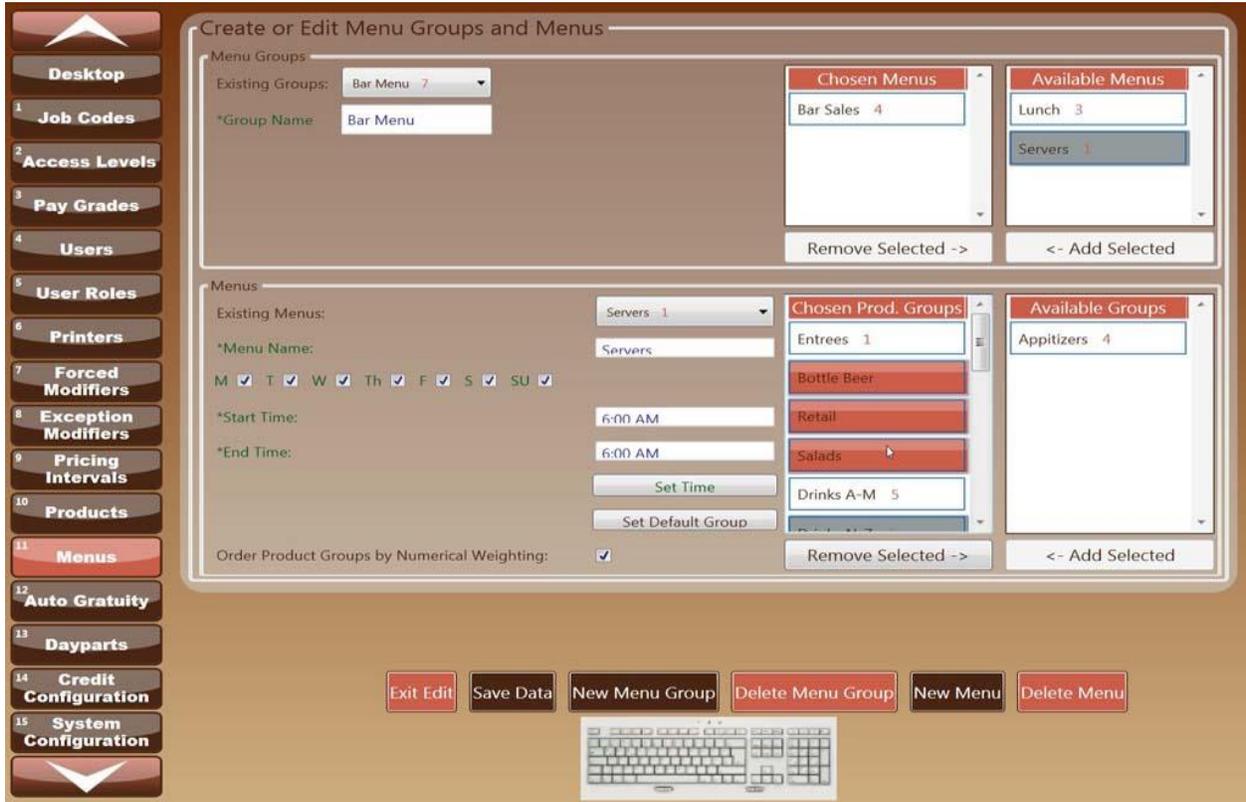


Figure 46

## Menu Groups

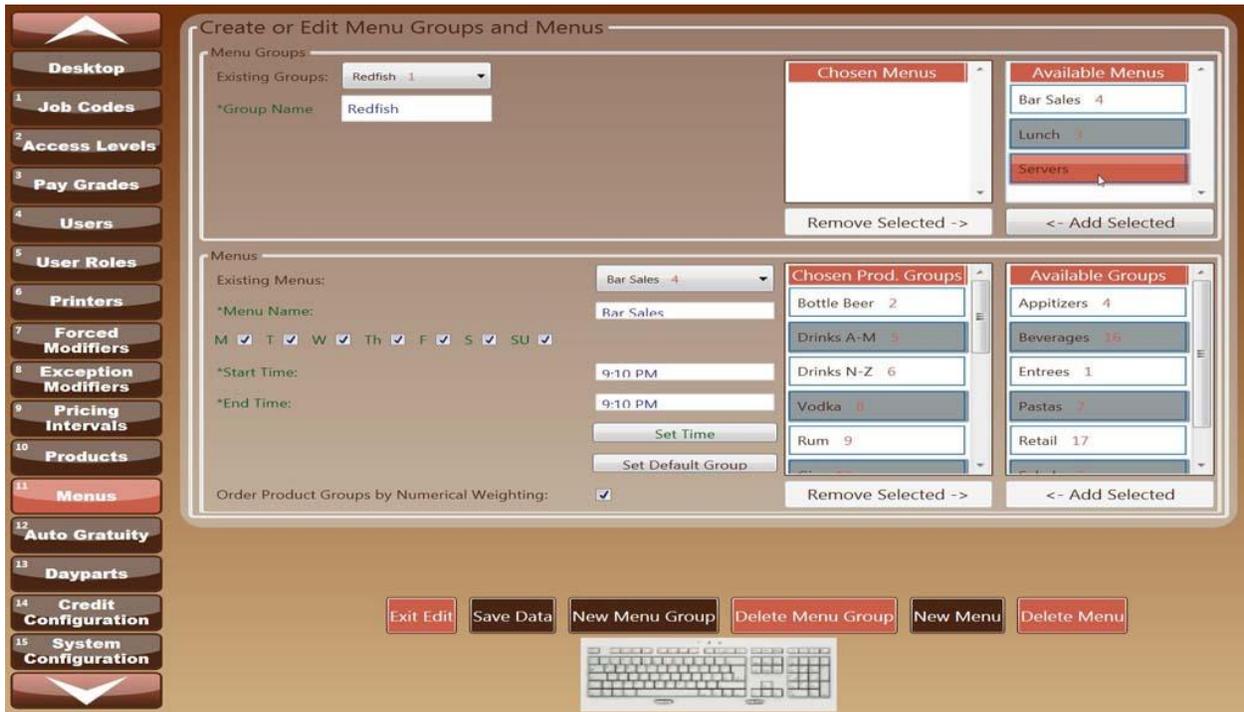


Figure 47

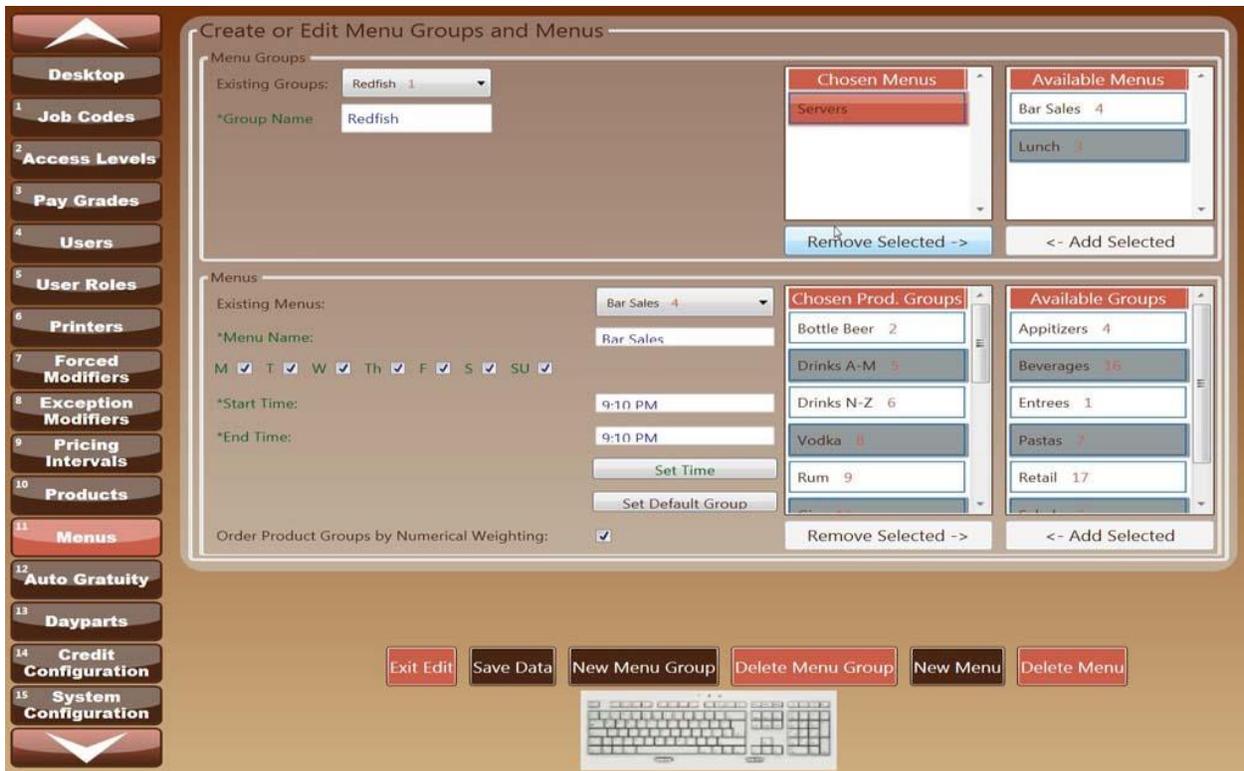


Figure 48

## Auto Gratuity- 12

Auto Gratuity can be set to automatically be added to the order. This feature has the option to set to a specific day, time and party count. Gratuity % or amount can also be reset. To set the Auto Gratuity to a certain party count:

Click the day box to enable that day, click on the “Set Time” button to set the time you want the Auto Gratuity to run. Proceed to the Section *Kiosk Gratuity Map- 17* for directions on how to attach an Auto Gratuity to a Kiosk.

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) Click “Auto Gratuity” button.**
- 6) Click “Edit Form” button.
- 7) Click “New Auto Gratuity” button.
- 8) Click keyboard icon.
- 9) Click on drop down tab for “Auto Gratuity time frame” if editing.
- 10) Enter “\*Name”.
- 11) Click “Tab” to move through fields.
- 12) Click “Enter” button.
- 13) Check all days that apply, and set the Days’ time by clicking on the button that says “Set (Day) Time”. To set all days, Click on the “Set All Times” button.
  - a. Apply at Purchase Upper Limit- Check this box to activate an Auto Gratuity at a certain check/ ticket total.
  - b. Upper Ticket Amount- Choose a total that will be the minimum amount that the Gratuity will be charged.
- 14) Click “Save” button.
- 15) Once the data is saved the system will return to the item located at the very top of the list.
- 16) If you choose not to make any changes, click “Exit Edit” button.

See *Figure 49, Figure 50*

To delete an Auto Gratuity

- 1) Click “Edit Form” button.
- 2) Scroll through the “Auto-Gratuity Timeframe”
- 3) Select the correct Timeframe to delete.
- 4) Click on it and Click “Delete Auto Gratuity”.

### Auto Gratuity

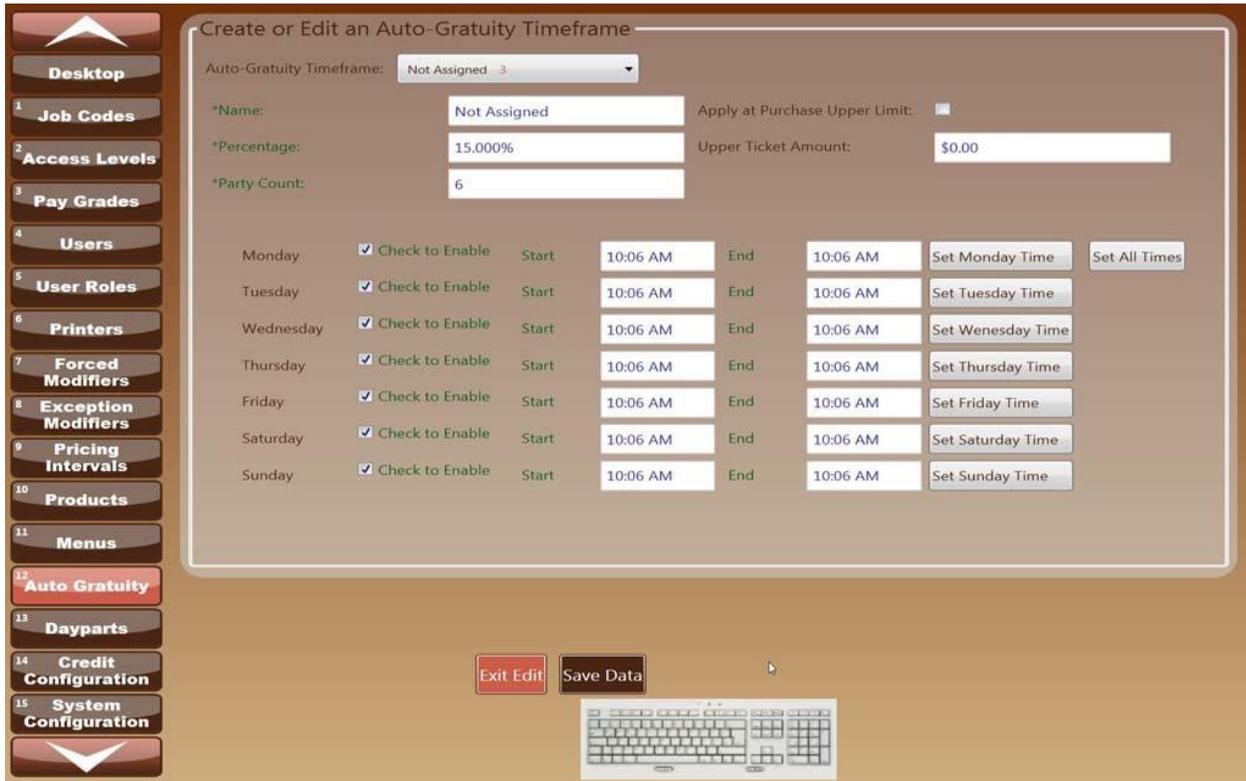


Figure 49

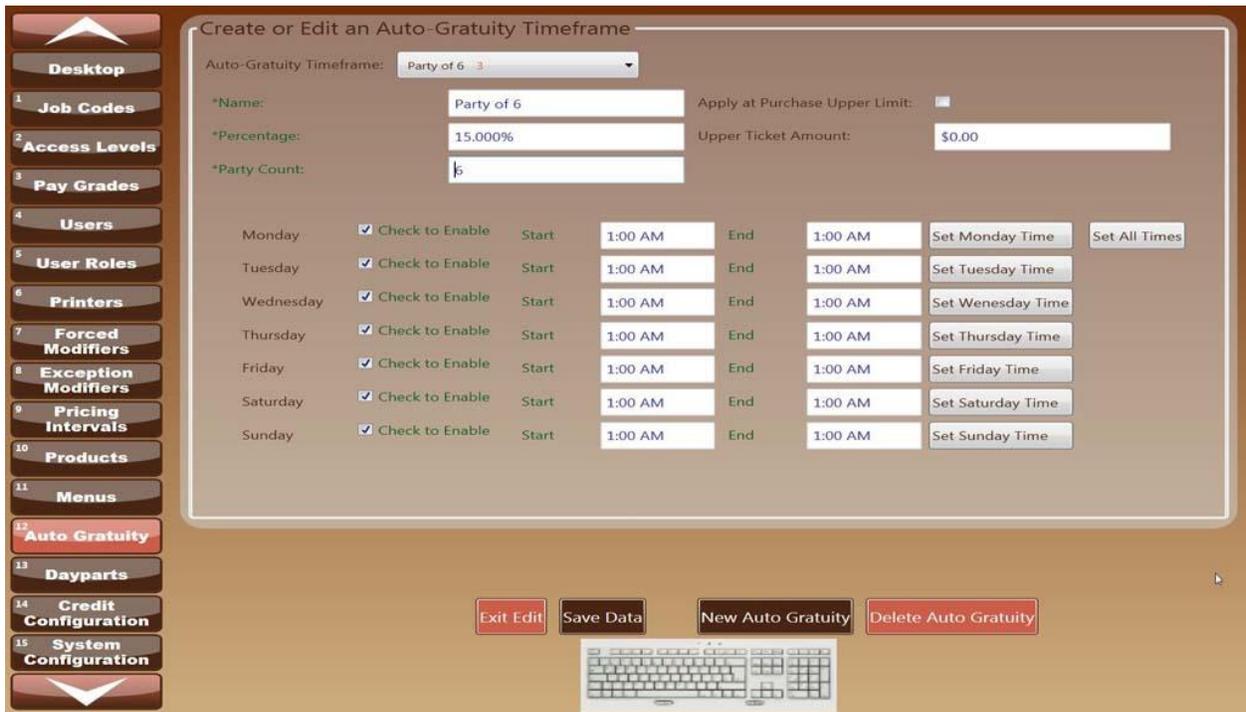


Figure 50

## Dayparts- 13

Daypart descriptions are designed to allow the user to acquire sales reports based on the time of day. In analyzing your business this will be helpful in learning which parts of the day are most profitable and the ones that are not bringing in revenue. \*The green font indicates the field(s) that must be filled before you can save the data.

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) Click "Dayparts" button.**
- 6) Click "Edit Form" button.
- 7) Click "New Day part" button.
- 8) Click keyboard icon.
- 9) Click on drop down tab for "Auto Gratuity time frame" if editing.
- 10) Enter "\*Name (i.e. Breakfast, Lunch, Dinner)".
- 11) Click "Enter".
- 12) Click "Assign Start and End Times" and chose times.
  - a. \*Is Default Daypart- A default Day part is the Daypart that will be available if there is a portion of the day a Daypart is not assigned.
  - b. \*Daypart Order # (i.e. for Breakfast use 0, Lunch use 1, Dinner use 2). - this feature helps the system to decide between Dayparts that may lap over into the next day (i.e. 10am-12am and 12:01 am-9:59am. Daypart order would need to be defined.)
- 13) Click "Save Data" button.
- 14) Once the data is saved the system will return to the item located at the very top of the list.
- 15) If you choose not to make any changes, click "Exit Edit" button.

*See Figure 51, Figure 52*

To delete a Daypart

- 1) Click "Edit Form" button.
- 2) Scroll through the "Existing Daypart Names"
- 3) Select the correct Name to delete.
- 4) Click on it and Click "Delete Day Part".

## Dayparts



Figure 51



Figure 52

## Kiosk Configuration

### Credit Configuration- 14

This feature determines the way in which you will be processing credit card transactions. Editing the processor configuration more than likely will be entered in by the representative initially setting up your POS system. A representative will have provided you with the processing Gateway URL, Gate way ID and Transaction Center ID information. This information is critical to the performance of your system and should not be edited.

See Figure 53

Figure 53

## System Configuration- 15

This section defines the software's processes, and devices that compose the system and its boundaries. The following functions are controlled by the System Configuration; Printers, receipt information, default timers, screen saver, house checkout options and screen calibration. *\*The green font indicates the field(s) that must be filled before you can save the data.*

\*Store Identifier- this number uniquely identifies your location and should not be edited or deleted. This information will be installed initially by your installation representative.

\*Screen Saver Timeout (Seconds) - this feature allows for a variable time to be selected before POS screen saver default turns on. If there is a steal screen with no interaction for the allotted time, the system will detect no activity and lock the user screen for protection.

\*Print Job Timeout (Seconds) - This feature sets a limit to the amount of time a printer can print a job before it times out.

\*Business Start Day of Week- Insert the beginning day of your business week.

\*Business Start Time of Day- Insert the start time of your business week.

Print Employee Checkout with \$0 sales: This feature is designed to acknowledge all employee's that have a 0 total in sales and print the employee checkout. Without this option checked, the employee checkouts that have \$0 in sales will not print.

Send Order on Screen Saver Timeout: This feature gives an option to send an order to be filled if a newly placed order has been detected with no activity. Choosing this option will only affect orders that are interrupted by screensaver timeout mode, due to inactivity.

Can Accept Tips: allows for the tip entry to be included on the receipt.

Receipt Top: Line1, 2, 3 and 4 are formulated to put the company address, phone number, fax number or any information company would like. If section is left blank nothing will appear in place of it.

Receipt Top Message- Insert any information you would like to appear on the top of the receipt.

Receipt Bottom Message- Insert any information you would like to appear on the bottom of the receipt.

Calibrate Touch Screen: This setting is required upon initial setup. The software for the touch-screen interface must learn which spots on the touch sensor overlay are aligned to spots on the screen. This is called touch-screen calibration. To calibrate the machine normally, you go through a procedure where you are asked to touch a target in three locations on the screen, two

opposite corners and one central spot. If a mis-calibration occurs, you must recalibrate to align the touch-interface mechanism.

*See Figure 54, Figure 55*

## System Configuration



Figure 54

## Calibrate

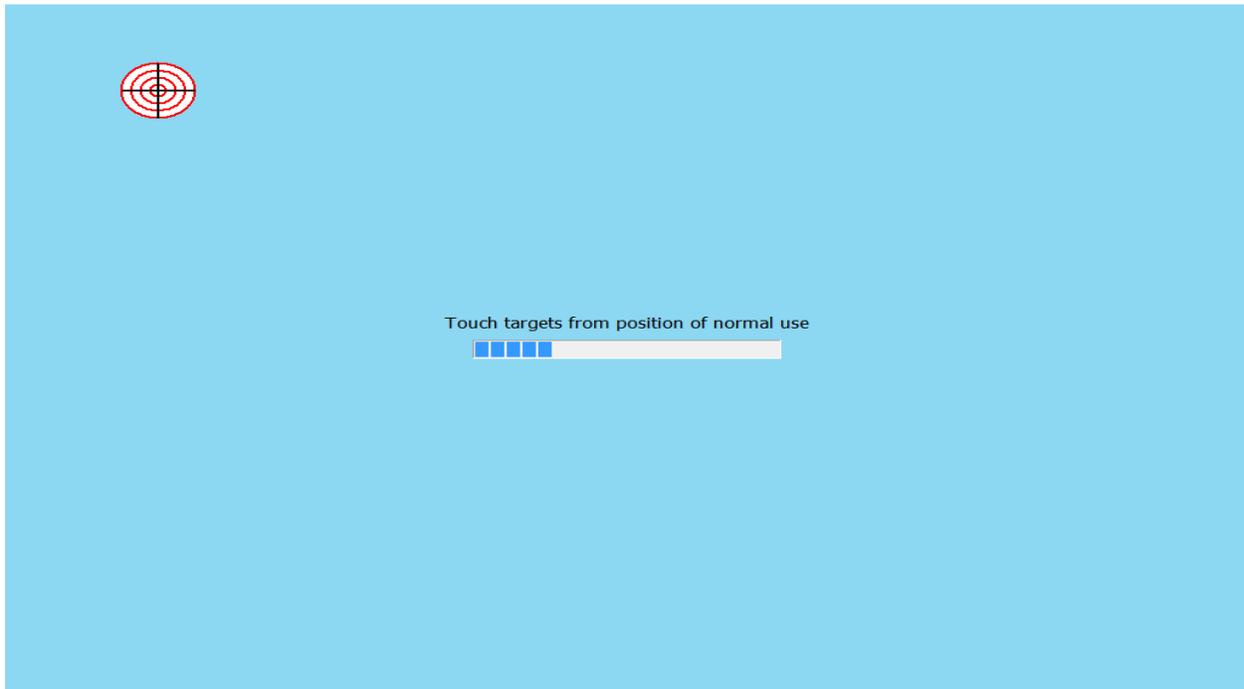


Figure 55

## Kiosk Configuration- 16

Each Kiosk represents a POS terminal. This page is where all the preceding configurations are attached to a specific Kiosk. *\*The green font indicates the field(s) that must be filled before you can save the data.*

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) Click on "Kiosk Configuration" button.**
- 6) Click "Edit Form" button.
- 7) Click "New Kiosk" button.
- 8) Click keyboard icon in the bottom of the screen.
- 9) Click on drop down tab for "Kiosks" if editing
- 10) Enter \*Kiosk Name.
- 11) Click tab to continue.
- 12) Click "Enter" button.
  - a. **\*Name:** Should begin with the default "Kiosk-"
  - b. **\*Revenue Center:** refers to the location of the Kiosk in reference to your establishment. (i.e. Dining room, Bar, Patio or Main.) This information will be projected in the detailed reporting.
  - c. **\*Number of Cash Drawers:** this feature allows Kiosk to have more than one cash drawer.
  - d. **\*First Cash Drawer Number:** detects the first cash drawer. The count will start at 0. (i.e. there are 2 cash drawers. The first drawer number will be 0. The second drawer number will be 1.)
  - e. **\*Menu Group:** menu groups are groups of Product Groups that are attached to one menu. Menu Groups must be attached to product groups in order to display on the order screen. You can attach a group of products to the Menu Group under the tab "Products". By attaching a Menu Group to a Kiosk, the Kiosk displays the saved Menu and the user has access to order from the Product Groups inside of the Menu.
  - f. **Force the Order of a Product from a Chosen Group:** this feature is used to force a certain Product Group to the order screen for the server to choose from. This feature might be helpful if there is a prerequisite for service. The first box is designed to choose the product group. The second box is designed to choose the product from the selected group. Each seat or party count will be charged for forced item.
  - g. **Auto Cash Receipt:** this feature allows you to print the receipt after every paid transaction.
  - h. **Auto Itemized Receipt:** this feature allows you to print an itemized receipt after every paid transaction.

- i. **Auto Credit Receipt:** this feature allows the user to set the printer to print a specified number of receipts after a payment of a credit card.
  - j. **Auto Open Drawer:** this feature allows user to set the drawer to be opened after a payment has been received.
  - k. **Prompt for Party Count (Required for Auto Gratuity):** this feature enables a pop up window to appear after the opening of a new table. A party count must be entered and seats will be automatically made to the party quantity.
  - l. **Local Printer Interface:** attaches a printer to a Kiosk system. The printer will be located next to the terminal and will be connected at the time of the initial setup.
  - m. **Product Groups to Skip Printing on this Kiosk:** each Kiosk can be configured to printer exceptions that will not be sent to the kitchen printer. This button will list the available product groups and allow you to choose them.
  - n. **Mode:** Allows you to switch your POS configuration to Table service or Quick service. This option will restart your terminal and will change the functionality of the POS.
- 13) Click “Save Data” button.
- 14) Once the data is saved the system will return to the item located at the very top of the list.
- 15) If you choose not to make any changes, click “Exit Edit” button.

*See Figure 56*

To delete a Kiosk

- 1) Click “Edit Form” button.
- 2) Scroll through the “Kiosks”.
- 3) Select the correct Kiosk to delete.
- 4) Click on it and Click “Delete Kiosk”.

## Kiosk Configuration

**Create or Edit a KIOSK**

KIOSKS: Not Assigned

\*Name: Not Assigned

\*Revenue Center: Not Assigned

\*Number of Cash Drawers: 0

\*First Cash Drawer Number: 0

\*Menu Group: Not Assigned

Force the Order of a Product from a Chosen Group: Not Assigned

Auto Cash Receipt:  1      Auto Credit Receipt:  2

Auto Itemized Receipt:       Auto Open Drawer:

Prompt for Party Count (Required for Auto-Gratuity):

Local Printer: Not Assigned

Product Groups to Skip Printing on this KIOSK:

Mode:

Figure 56

## Kiosk Gratuity Map- 17

This feature pairs a Kiosk to an Auto Gratuity. When orders are made under a Kiosk that is enabled with Auto Gratuity, the percentage chosen will appear on the customer receipt and factored into the total check amount. Refer to *Auto Gratuity- 12* to create a new Gratuity. After you have created an Auto-Gratuity, it will appear in the “Available Auto- Gratuity” window.

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) Click on “Kiosk Gratuity Map”**
- 6) Click “Edit Form” button.
- 7) Click on drop down tab for “Kiosk” and choose desired Kiosk.
- 8) Choose from the “Available Auto-Gratuity “window.
- 9) Click “Add Selected” button.
- 10) Click “Save Data” button.
- 11) Once the data is saved the system will return to the item located at the very top of the list.
- 12) If you choose not to make any changes, click “Exit Edit” button.

*See Figure 57, Figure 58*

To Remove an Auto Gratuity

- 1) Click on “Kiosk Gratuity Map”**
- 2) Click “Edit Form” button.
- 3) Click on drop down tab for “Kiosk” and choose desired Kiosk.
- 4) Choose from the “Selected Auto-Gratuity “window.
- 5) Click “Remove Selected” button.
- 6) Click “Save Data” button.
- 7) If you choose not to make any changes, click “Exit Edit” button.

### Kiosk Gratuity Mapping

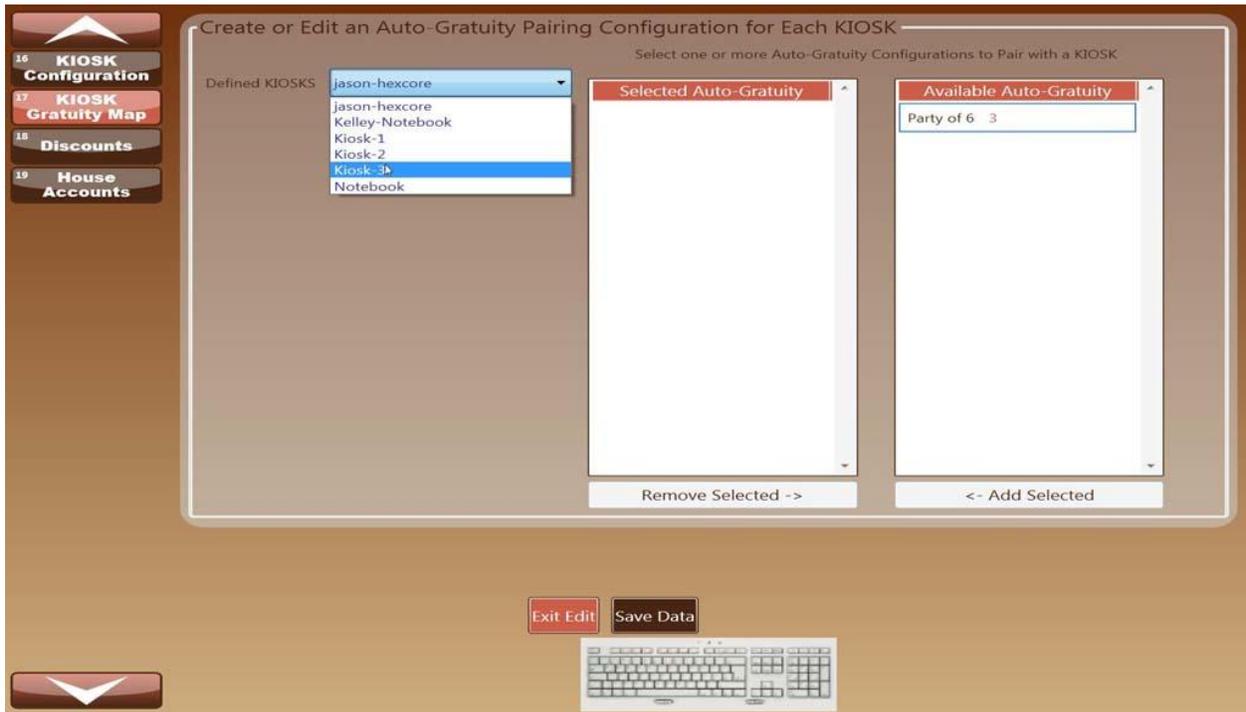


Figure 57

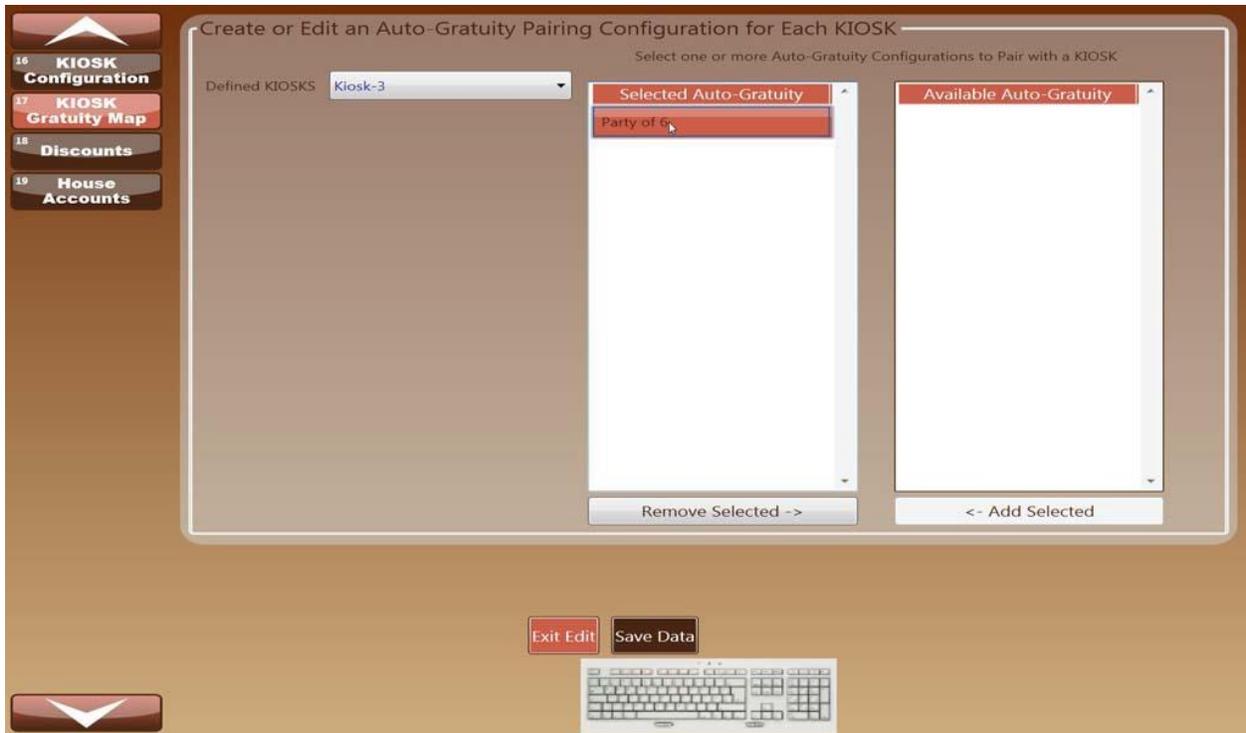


Figure 58

## Discounts- 18

Discounts are considered to be credits applied to the final payment screen. Comp Reasons are items ordered that require a discount. Discounts can work in a few different ways, they can be totaled as a percentage of the total bill, an individual item or and actual amount. This section refers to the Reason Name the Discount will be listed under in the Reports screen. Please remember to check all Product Groups that you want to allow Discounts on. This box can be found under the Tab Products. Check the Box “Can Discount Group” Refer to [Figure 59](#) to view the correct box to check under Product Groups. \*The green font indicates the field(s) that must be filled before you can save the data.

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) **Click “Discounts” button.**
- 6) Click “Edit Form” button.
- 7) Click “New Discount” button.
- 8) Click the keyboard icon in bottom of screen.
- 9) Enter a \*Reason.
- 10) Tab down to enter the “Percent Discount When not Exact Dollar Amount” if applicable.
- 11) Click “Enter” button.
- 12) Check applicable boxes.
  - a. **\*Reason-** a reason is the actual name of the Discount. i.e. Spillage, Employee Meal or Void/ Never made.
  - b. **Check Here if this is a Promotion-** a Promotion is a discount that runs for a certain period of time. Options to prompt the user for exact dollar amount, notes or a preset percentage discounted are available.
  - c. **Check Here if this is a Void-** a Void is typically something that was never intended to be placed on the order screen. i.e. Void/ Never Made
  - d. **Check Here if this is a Comp-** There are lots of reasons for a comp; spillage, complimentary accommodations for a customer or if the item was prepared, delivered and sent back to the kitchen. These are only examples of how the Software was prepared to enter comps. A comp automatically reduces the price by 100%.
  - e. **Check Here to Force the User to Enter Notes-** the user will be prompted to enter notes when this box is checked. This feature helps keep a detailed account of the transaction.
  - f. **\*Percent Discount When not Exact Dollar Amounts-** this is a preset calculated percentage of the actually discount. Only check this box if a percent will be the only means of the discount.
- 13) Click “Save Data” button.

- 14) Once the data is saved the system will return to the item located at the very top of the list.
- 15) If you choose not to make any changes, click “Exit Edit” button.

*See Figure 59, Figure 60*

To delete a Discount

- 1) Click “Edit Form” button.
- 2) Scroll through the “Discount Reasons”
- 3) Select the correct Reason to delete.
- 4) Click on it and Click “Delete Discount”.

## Discounts

**Create or Edit Product Groups and Products**

Product Groups

Existing Groups:

\*Group Name:

Group Price Per Choice:

Use Age Verification:

**Can Discount Group:**

Apply Group Pricing:

Order by Position:

Menu Position:

Chosen Products

Available Products

Products

Existing Products:

\*Price:

Recipe:

Remove from Menu when Zero:

Forced Modifiers:

Inclusive Tax:

Current Countdown to Zero:

UPC:

Inclusive Tip:

\*Product Name:

SKU:

Surcharge:

Menu Position:

\*Exclusive Tax:

\*Assigned Printer Group:

Calorie Count:

\*Revenue Type:

Prompt user for Price:

Is Gift Card:

Edit Form

Figure 59

**Create or Edit Discount Type Descriptions**

Discount Reasons:

\*Reason:

Check Here if this is a Promotion:

Check Here if this is a Void:

Check Here if this is a Comp:

Check Here to Force the User to Enter Notes:

Check Here to allow the User to Enter Exact Dollar Amounts:

\*Percent Discount When not Exact Dollar Amounts:

Exit Edit Save Data New Discount Delete Discount

Figure 60

## House Accounts- 19

House Accounts refer to any credit awarded to another company, vendor or patron. This feature insures that you can keep track of the tabs, credits or advances paid by your establishment.

- 1) Enter Employee number.
- 2) Click "Desktop" button.
- 3) Click "System" button.
- 4) Enter Super User ID and password.
- 5) **Click "House Accounts" button.**
- 6) Click "Edit Form" button.
- 7) Click "New House Account" button.
- 8) Click the keyboard icon.
- 9) Tab down to enter the desired information.
- 10) Click Enter.
- 11) Check the applicable boxes.
  - a. **\*Status-** This allows the system to recognize the house as an active Account that will appear on the list displayed from the payment screen.
  - b. **Limit Type-** the no high limit means that there will not be a balance limit on the account. If a limit is set in the \*Limit Amount", a warning box will appear that say "The transaction was declined with a status code of (EXCEEDS HIGH LIMIT)".
- 12) Click "Save Data".
- 13) Once the data is saved the system will return to the item located at the very top of the list.
- 14) If you choose not to make any changes, click "Exit Edit" button.

*See Figure 61*

To delete a House Account

- 1) Scroll through the "Account Name"
- 2) Select the correct Name to delete.
- 3) Click on it and Click "Delete House Account".

## House Accounts

**Create or Edit a House Account**

Account Name:  City:

\*Last Name:  State:

\*First Name:  Zipcode:

\*Company:  Address:

\*Status:  Active

\*Limit Type:  No High Limit

\*Limit Amount:  Email Address:

Account Terms:  Telephone:

Fax:

Tax ID:

Check Here if this is a Voucher:



Figure 61

## System Log Reviewer

System log reviewer provides a graphical interface for most log files. It also provides the ability to search and track the log files. This screen logs critical changes made to the BOH system. Click “Fetch Data” button and scroll through pages with arrow buttons.

See Figure 62

System Log Viewer

The screenshot shows the 'System Log Viewer' interface. On the left is a vertical menu with buttons for 'KIOSK Configuration', 'KIOSK Gratuity Map', 'Discounts', 'House Accounts', 'Syslog Viewer' (highlighted in orange), and 'Database Tools'. The main area contains a table with columns 'USERNAME', 'TIME', and 'ACTION'. Below the table is a 'Fetch Data' button. On the right side of the table area are two arrow buttons for navigation.

USERNAME	TIME	ACTION
jtbrower	8/21/2011 10:41 PM	BOH: Edit PRODUCTS.Name from \$2.00 Shooter to Sloe Gin where Id = 311
jtbrower	8/21/2011 10:40 PM	BOH: Edit PRODUCTS.Name from \$2.00 Shooter to K-Top Rum where Id = 227
jtbrower	8/21/2011 10:40 PM	BOH: Edit PRODUCTS.Price from \$2.00 to \$8.00 where Id = 227
jtbrower	8/21/2011 10:40 PM	BOH: Edit PRODUCTS.Price from \$2.00 to \$9.75 where Id = 209
jtbrower	8/21/2011 10:40 PM	BOH: Edit PRODUCTS.Name from \$2.00 Shooter to K-Killer where Id = 209
jtbrower	8/21/2011 10:40 PM	BOH: Edit PRODUCTS.Price from \$2.00 to \$3.25 where Id = 195
jtbrower	8/21/2011 10:40 PM	BOH: Edit PRODUCTS.Name from \$2.00 Shooter to K-Coors Light where Id = 195
jtbrower	8/21/2011 10:40 PM	BOH: Edit PRODUCTS.Price from \$2.00 to \$9.00 where Id = 181
jtbrower	8/21/2011 10:40 PM	BOH: Edit PRODUCTS.Name from \$2.00 Shooter to K-Absolut where Id = 181
jtbrower	8/21/2011 10:39 PM	BOH: Edit PRODUCTS.Price from \$2.00 to \$8.00 where Id = 167
jtbrower	8/21/2011 10:39 PM	BOH: Edit PRODUCTS.Name from \$2.00 Shooter to Jack Honey where Id = 167
jtbrower	8/21/2011 10:39 PM	BOH: Edit PRODUCTS.Price from \$2.00 to \$7.75 where Id = 15

Figure 62

## Data Base Tools

This tab allows audit trail reports to be exported onto the hard drive or any other external devices.

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “System” button.
- 4) Enter Super User ID and password.
- 5) **Click on “Database Tools” button.**
- 6) Click “Edit Form” button.
- 7) Click “Export Audit Log Trails” button.
- 8) Choose the location of export.
- 9) Enter file name.
- 10) Click “Save Data” button.
- 11) If you choose not to make any changes, click “Exit Edit” button.

See *Figure 63*

### Database Tools



Figure 63

# Chapter 2

## Front of House (FOH)

### Training Mode

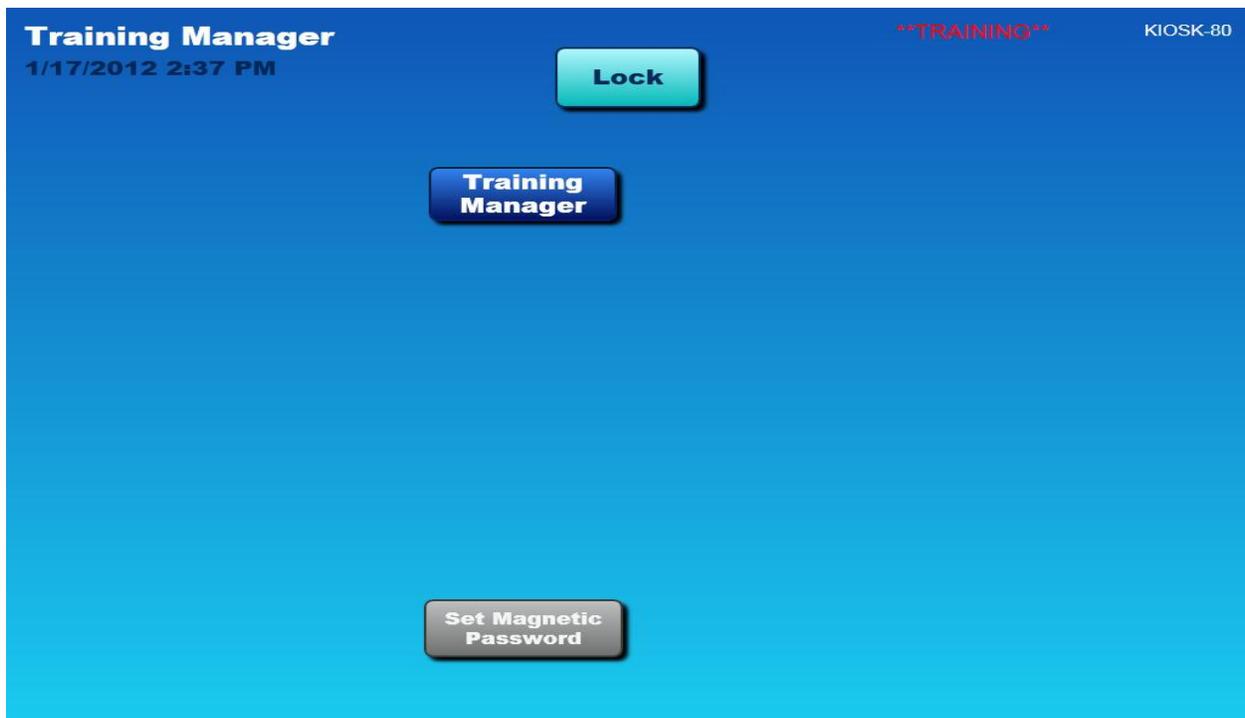
Training Mode is designed to allow users to practice and familiarize themselves with the software. While in training mode, all features and functions are activated except for the credit card payment application. This feature is disabled for security purposes and is in accordance with PA-DSS requirements. All editing in the BOH or FOH will not affect the data on the live database. These two databases have been separated to dissolve any confusion about changes being made while in training mode. To access training mode:

Enter 1-1-1-1 for Training Manager

Enter 2-2-2-2 for Training Server

Enter 3-3-3-3 for Training Time clock user

You will know that you are in training mode by the **\*\*TRAINING\*\*** in red located on each screen. When in doubt, always lock your screen and log back in to begin where you ended. To clear the data base and start fresh you can close out the business day and log-in again. (This will not restart your terminal)



## Log-in Screen

User must enter 4 digit password or swipe magstripe card for entry. To set Magnetic password please refer to the Time Clock section.

See *Figure 64*

Login Screen

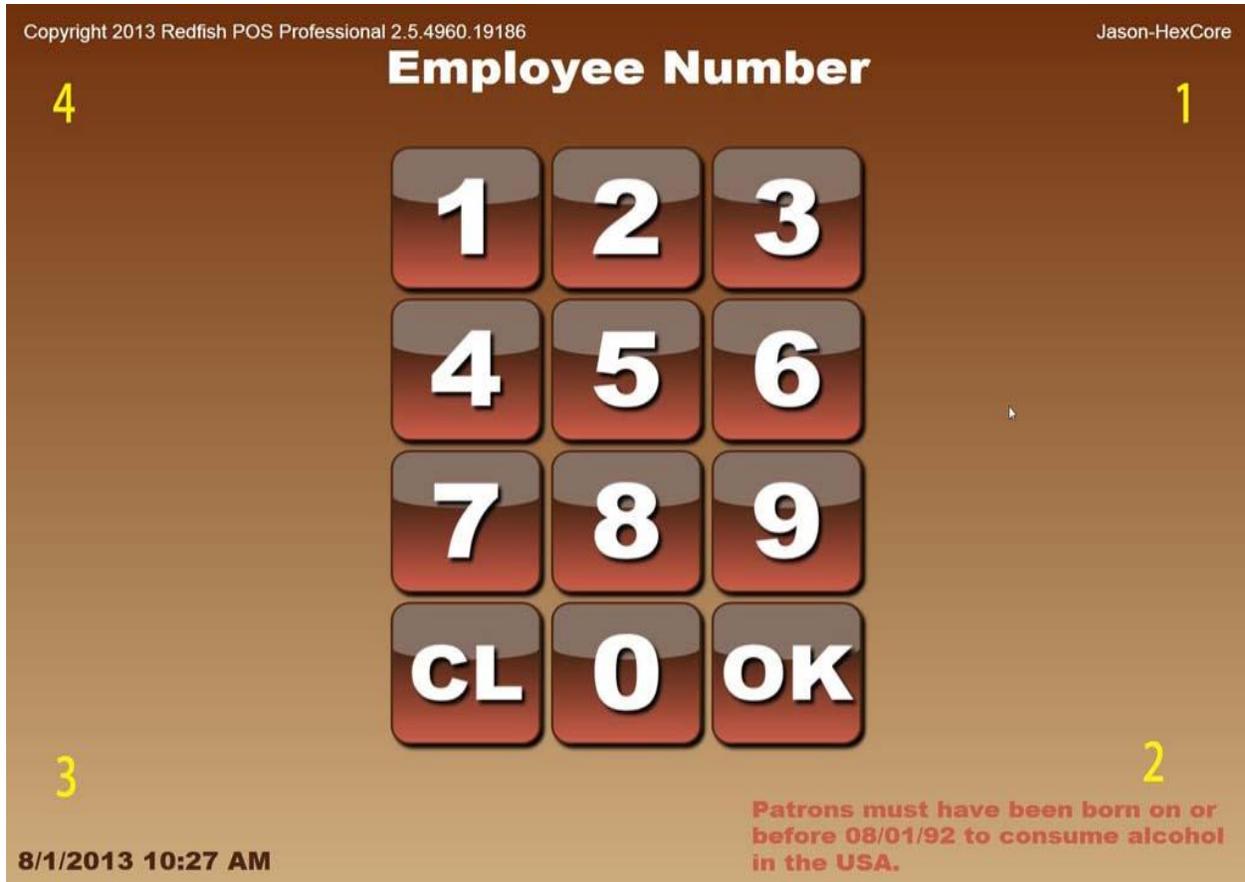


Figure 64

1. Kiosk number
2. Alcohol consumption Age limit notification alert.
3. Date and Time
4. Software Update Version

## Desktop

This screen is the home to all orders being placed and new tables being created as well as the time clock, finance, system (back office), reports, transfer table and merge table tabs.

If there is a table with an item on hold, the table will blink on this page to notify the user that there is a table where items have been ordered, but not prepared.

The logged in users name will appear on the

Managers are able to swipe their mag stripe cards on this screen to allow for a temporary access to tabs that the current user may be restricted to use. To exit access level authorization, the user must lock the kiosk.

**Order History-** the order history keeps track of all orders placed within the current business day.

**New Table-** this section covers the process of opening a new table and placing a new order.

**Time Clock-** this is designed to allow for the user to clock-in and out for breaks and lunches, set magnetic password, open and claim a drawer, pay cash in and out, and print the last employee checkout. This screen is the first screen after entering the employee number.

**Finance-** this screen is used for reviewing or searching previous transactions, checking your tip total, and Closing out the House.

**System-** Back of House Settings will allow the user to make changes to your menu, printers, user permissions and Kiosk configuration.

**Reports-** Reports will allow you to take an extensive look into your Sales, Discounts and Employee Payroll Data.

**Merge Two Tables-** Merging tables will allow the user to merge two tables from any open tables.

**Transfer Table-** Transferring a table is assigning a table to a different user.

*See Figure 65*

Desktop

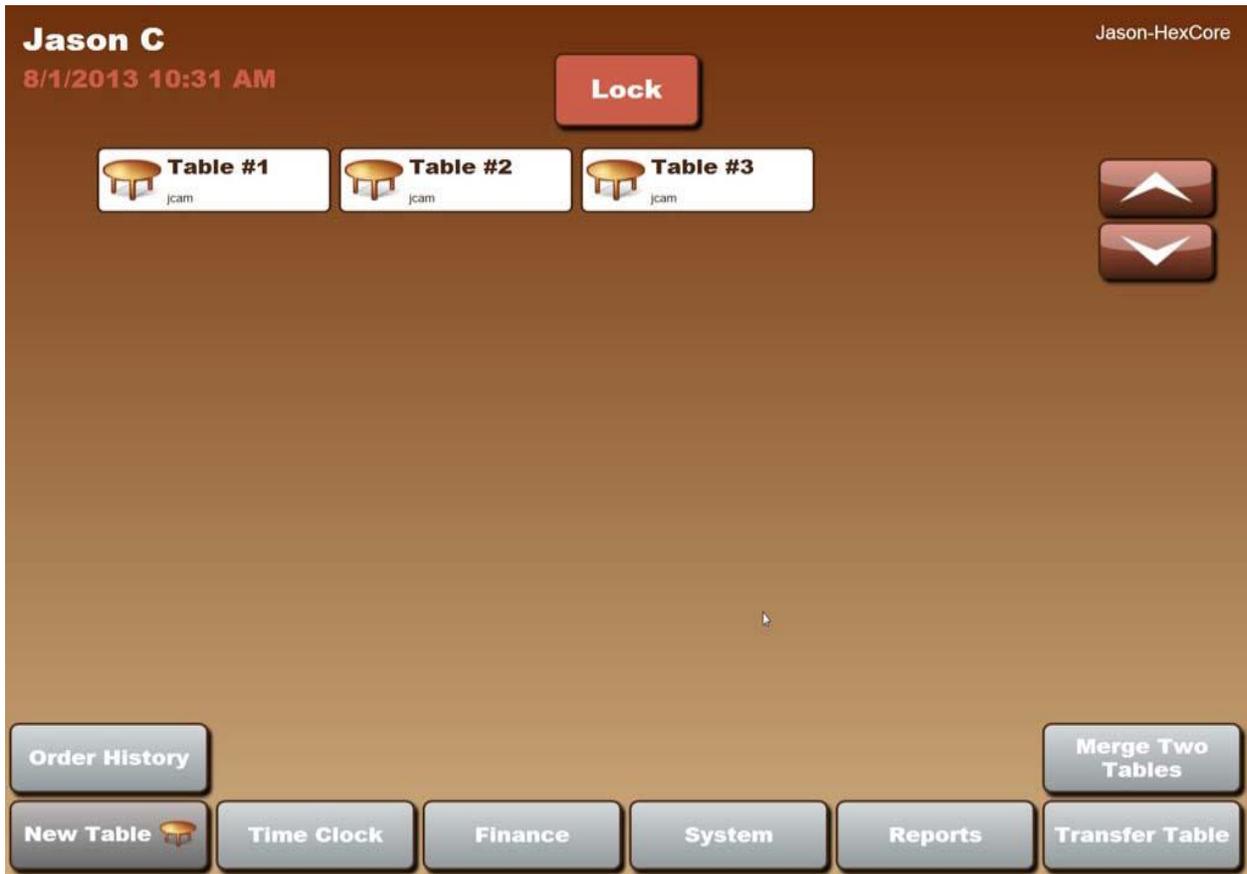


Figure 65

## Order History

### Navigating to the Order History: View Filter

- 1) Enter Employee Number.
- 2) Click “Desktop”.
- 3) **Click “Order History”.**
  - a. Open Orders- All orders that have been closed out. These tables may have a payment applied, but have not been closed by pressing the close table button.
  - b. Closed Orders- all closed orders have had a payment applied to them and have been closed by clicking the Close Table button.
  - c. All Today- displays all the transactions for the day.
  - d. By User- tracks orders by the user’s ID. The UserID can be located in the BOH under the user tab in “user name” section.

### Actions for Order History:

- 1) **View**- allows the user to view the payment screen. Changes cannot be made when viewing the payment screen.
- 2) **Reopen**- to reopen an order allows for the user to view the order screen as well as make changes to the payment screen. With an acceptable access level, Void Payments will void the payment applied to the order and allow for another payment to be applied. Once an order is reopened, the table must be closed before a House Closeout can be performed.

### Order History Data:

- 1) **Order ID**- an order ID is a unique number that helps to identify each table that has been opened. This unique identifying number can be found on the receipt under TRID.
- 2) **Open EID**- (Employee ID or User Name) the employee that opened the Order. Access to the employee ID can be found in the BOH System under “Users”.
- 3) **Close EID**- (Employee ID or User Name) the employee that closed the Order. Access to the employee ID can be found in the BOH System under “Users”.
- 4) **Customer**- the customer refers to the “Table Name” that can be entered from the Order screen. This feature allows for the user to distinguish the guest by a name rather than a table number.
- 5) **Table #**- refers to the number entered when creating a table.
- 6) **Open Date**- the date and time the order was opened.
- 7) **Closed Date**- the time and date the order was closed. For reopened orders, the last close time and date will appear.
- 8) **# Guest**- refers to the number of seats created by the user.
- 9) **# Checks**- represent the number of checks attached to the payment screen. Checks can be duplicated from the payment screen by pressing the “Checks by Seat” button or “Split Check”.
- 10) **Status**- represents whether the table is open or closed.

See Figure 66

Order History

**Jason C**  
8/1/2013 10:32 AM

Jason-HexCore

Desktop

ORDER ID	OPEN EID	CLOSE EID	CUSTOMER	TABLE #	OPEN DATE	CLOSED DATE	# GUESTS	# CHECKS	STATUS
487	jcam	jcam		1	07/31/13 10:00 PM	07/31/13 10:00 PM	1	1	CLOSED
489	jcam	jcam		1	07/31/13 10:05 PM	07/31/13 10:05 PM	1	1	CLOSED
490	jcam	jcam		7	07/31/13 10:06 PM	07/31/13 10:06 PM	1	1	CLOSED
493	jcam	jcam		4	07/31/13 10:19 PM	07/31/13 10:20 PM	1	1	CLOSED
494	jcam	jcam		5	07/31/13 10:20 PM	07/31/13 10:20 PM	1	1	CLOSED
497	kelley	kelley	Jhgg	6	07/31/13 10:20 PM	07/31/13 10:20 PM	1	1	CLOSED
502	jcam	UNKNOWN		1	08/01/13 10:31 AM		1	1	OPEN
503	jcam	UNKNOWN		2	08/01/13 10:32 AM		1	1	OPEN
504	jcam	UNKNOWN		3	08/01/13 10:32 AM		1	1	OPEN

View Filter

Open Orders

Closed Orders

All Today

By User

View

Figure 66

## New Table

Creating a New Table is the same as creating a new order. You must number the table and then choose from the items listed on the order screen. The following lists are definitions for each button located on the order screen.

- 1) **Desktop**-takes user back to menu page
- 2) **Clear Seat**- clears all menu items off of seat on screen.
- 3) **See Server**- allows for user to reference a dish with a memo. The memo will appear under the item it was applied to.
- 4) **Split Seat**- allows user to add an addition seat as well as exchange items from one seat to another
  - a. Two itemized screen columns appear on page, click “New Seat” or Seat number on one side.
  - b. Click seat number of desired seat to adjust.
  - c. Click on the menu item to be transferred and transfer to on opposite side by pressing appropriate arrow key.
- 5) **Lock**- locks the Kiosk to login screen.
- 6) **Send Order**- sends the items ordered on screen without locking/closing order. User can continue to place orders if necessary. Sent items will turn red while unsent items will remain blue.
- 7) **New table**- exits out of the current table and displays dialog box to enter a new table number. Items chosen in previous order will be sent to kitchen at this time.
- 8) **Print Subtotal**- prints the subtotal for all of the items that have been ordered on the current screen.
- 9) **Bar Seat**- opens a bar table. Screen will display dialog box to enter bar table number.
- 10) **Table name** – is an option to enter a name for the table.
- 11) **Delivery**- notes that the item must be delivered. (DLV)
- 12) **Takeout**- notes that the item is a takeout. (TKO)
- 13) **As Appet.** - Notes that the item will be served as an appetizer and should be made and served first. (APP)
- 14) **Don't Make**- notes that the item should not be made. (DTM)
- 15) **Hold**- holds the item being ordered until the hold is removed. Item color will remain blue until the item hold is removed.
- 16) **Product Groups**- refer to the Tabs in center of screen. These tabs are programmed in the back of house system.
- 17) **New Seat**- creates a new seat on the order screen.
- 18) **Payment Screen**- sends order and goes to payment screen.
- 19) **Open Drawer**- opens the cash drawer.
- 20) **Repeat**- item highlighted will be placed on order screen.
- 21) **Repeat Quantity**- allows user to order several of the same item at once.

- 22) **Exception Modify (Excpn. Modify)**- allows user to make partial or minor changes to menu item based on the preset list of items attached in the BOH System. This list can be edited under “Exception Modifiers”.
- 23) **Delete Item**- deletes the item that is heightened.
- 24) **Delete Order**- deletes the entire order. This button is only accessible if there are no items on the order or the items on the order have not been sent to the kitchen.

See *Figure 67, Figure 68*

**Creating a head of table**- requires that you swipe the credit card on the order screen. The credit card holders name will appear on the desktop under the table as shown in *Figure 69, Figure 70*. This card information is stored and ready for when it’s time to pay for the order. Press the “Card on Check” button to pay with the card swiped previously. This payment procedure is not encouraged because the establishments will incur additional processing fees upon using this feature. See *Figure 71*

### How to place an order

- 1) Choose table number.
- 2) System will be asked to enter party count. (If feature is undesired and user would like to switch this feature off, please refer to Kiosk configuration for directions under Prompt for party Count.)
- 3) Party count will appear as seats to switch through seats, click on the seat number.
- 4) To add an additional seat; click “New Seat” button.

### Begin choosing your menu items. Refer to *Figure 68*

- 1) **Order Display Screen**- displays all the items that have been placed on the order. This section is color coded to indicate which items have gone to the printer (**RED**) and which have not (**BLUE**). Notice at the top of the display screen the column
  - a. **Oty**- the number of times the item has been ordered.
  - b. **INS**- is an abbreviation for instruction for the kitchen and refers to the buttons Delivery, Takeout, As Appet., Don’t Make, and Hold.
  - c. **Product**- a description of the product.
  - d. **Price EA**- the price of each item ordered on that line. This is not the sum total price for the quantity.
- 2) **Product Groups**- the middle section of the screen are you main Product Groups. Grouping products on this page makes it easy to navigate through the many products your menu could contain.
- 3) **Products**-Inside of the Product Groups are your Products. These buttons serve as the specific item being ordered.

New table

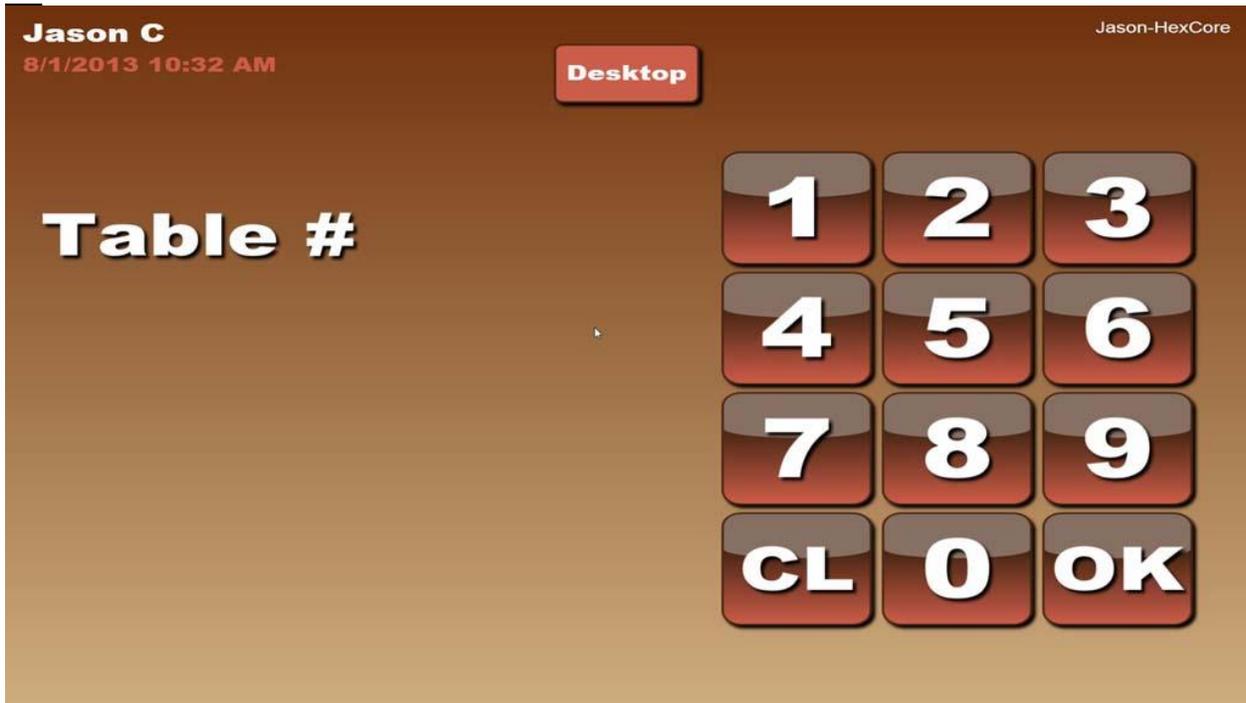


Figure 67



Figure 68



Figure 69



Figure 70

**Jason C** Jason-HexCore  
8/1/2013 12:06 PM **Desktop**

ORDER ID	OPEN EID	CLOSE EID	CUSTOMER	TABLE #	OPEN DATE	CLOSED DATE	# GUESTS	# CHECKS	STATUS
502	jcam	UNKNOWN		1	08/01/13 10:31 AM		1	1	OPEN
503	jcam	UNKNOWN		2	08/01/13 10:32 AM		1	1	OPEN
504	jcam	UNKNOWN	John Harbou	3	08/01/13 10:32 AM		1	1	OPEN
505	jcam	UNKNOWN	Timothy	4	08/01/13 10:34 AM		1	1	OPEN

View Filter  
**Open Orders**  
**Closed Orders**  
**All Today**  
**By User**

Figure 71

## Payment Screen

The Payment screen allows the user to select the type of payment for any transaction. You can use multiple payment types on one order by selecting the type of payment and keying in the specific amount you'd like to pay with that form of payment. Then, perform the same action for the second payment. You can perform as many splits as you want until the ticket is completely paid.

The payment screen is accessed through the order screen.

**Desktop-** returns the user back to the home screen.

**Open Drawer-** Opens the cash drawer without having to make changes to the order.

**Finance-** returns user to finance screen where the user can make changes to the processed orders. Refer back to finance on page 105.

**Order Screen-** returns user to order screen to add items to order.

**Gift card Balance-** to check a gift card balance click "Gift Card Balance" and swipe the Gift Card. The system will show the balance.

**Print Balance-** the balance of the order without tax or any form of payment.

**Itemized Receipt-** the receipt for payments including tax and all other payment forms.

**Pay by Check-** allows for you to enter the amount tendered and opens the drawer to insert the check.

**Split Check-** allows user to add an addition check as well as exchange items from one check to another.

- a. Two itemized screen columns appear on page, click "New Check" or check number on one side.
- b. Click "New Check" or the number of the desired seat to adjust.
- c. Click on the menu item to be transferred.
- d. Transfer to on opposite side by pressing the appropriate arrow key.

**Voice Auth-** a manual form of payment that requires getting an authorization code by calling your payment processor or on-line through your remote processing gateway. This process will typically be the last resort for payment if the card cannot be authorized electronically.

**Payment Methods-** touch/ click directly on image for cash. Swipe the credit card for credit transactions.

**Do not click the credit card icon unless you are paying manually.**

*See Figure 72*

There are 5 forms of Payment:

- 1) Checks-can be applied to the entire check as well as a partial payment.
- 2) Cash- can be applied to the entire check as well as partial payment.
- 3) Credit- can be applied to the entire check as well as partial payment.
  - A. Simply swipe your form of card payment. *See Figure 74*
  - B. Only manual entries will require you to click on the credit card icon and enter the information manually. *See Figure 73*
- 4) Other Payment options:
  - A. **Checks by seat:** each seat created can be paid individually. The system will automatically distribute the check balance throughout the seats so that each seat pays their own check. Several checks will appear in accordance to the exact amount of seats.
  - B. **Equal Receipts-** equally divides the check into equal payments represented on the individual receipts. *See Figure 75, Figure 76*
    - 1) Reprint equal - repeats the quantity entered into the system upon clicking Equal Receipts.
    - 2) Remove equal- removes the equal payments and the system defaults to accept the full amount on the check.
  - C. **Discount:** discounts can be applied to the whole check or an item from the check. A dialog box will prompt the user to “select a preconfigured reason from the list below”. Based on the configuration of your discount, the system will apply the discount automatically or prompt you to enter a certain amount. That discount will show under the Discounts. You can scroll through these and delete them as well. *See Figure 77, Figure 78*
  - D. **Comp Item(s):** this dialog box will prompt the user to “select a preconfigured reason from the list below”. Based on the configuration of your comp, the system will apply the discount automatically. Refer to *Discounts- 18* to learn more about configuring new comp reasons. *See Figure 79*
  - E. **Void item(s):** the system will void the item highlighted. The item voided will be removed from the payment screen.
  - F. **House Payment:** House Accounts refer to any credit awarded to another company, vendor or patron. This feature insures that you can keep track of the credits or advances awarded to your establishment.
- 5) Check on Card- requires that you swipe the credit card on the order screen. This creates a head of table which can be used later on in the payment screen. The credit card holders name will appear on the desktop under the table number. This card information is stored and ready for when it’s time to pay for the order. Press the “Card on Check” button to pay with the card swiped previously. (Note: This payment procedure is not encouraged because the establishments will incur additional processing fees upon using this feature.) *See Figure 80*

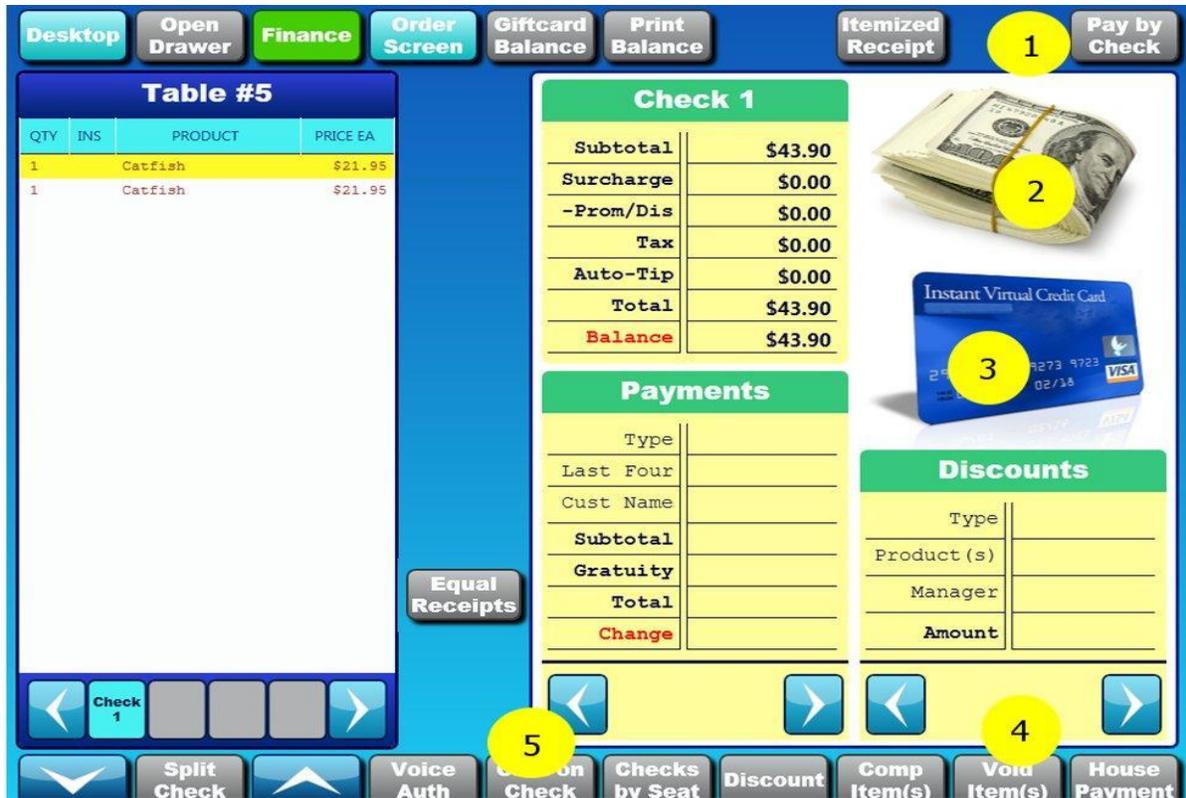


Figure 72

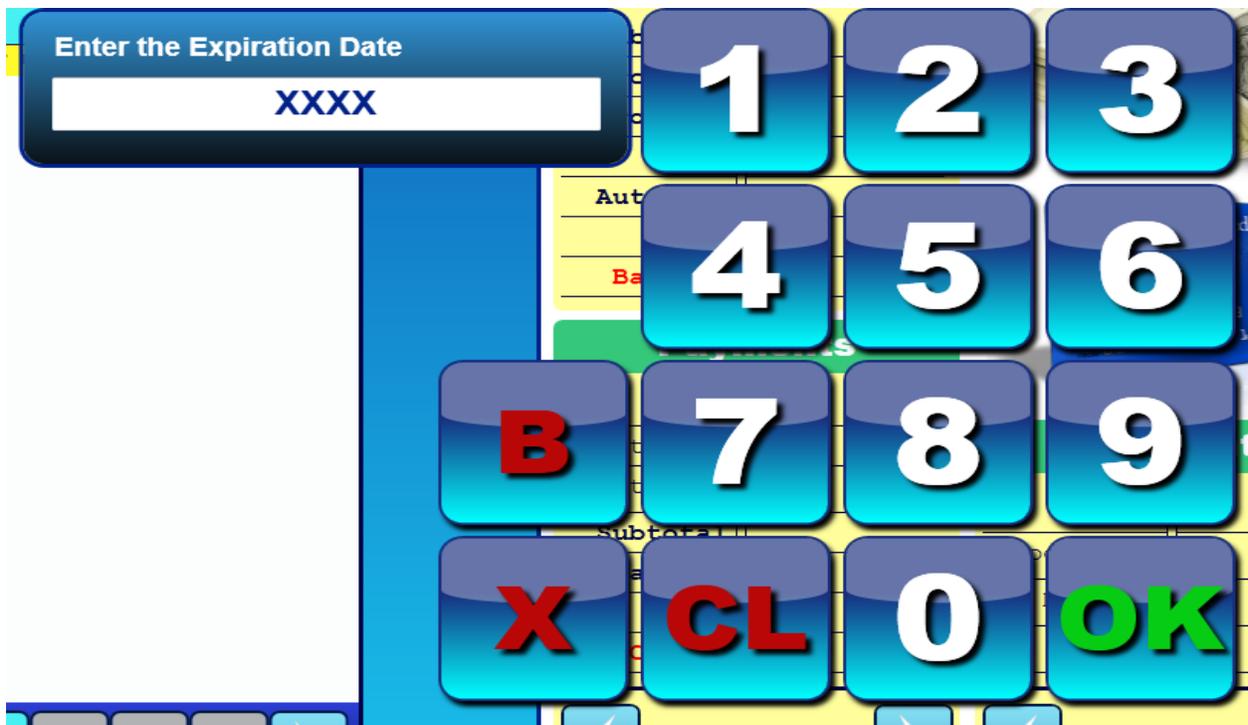


Figure 73



Figure 74

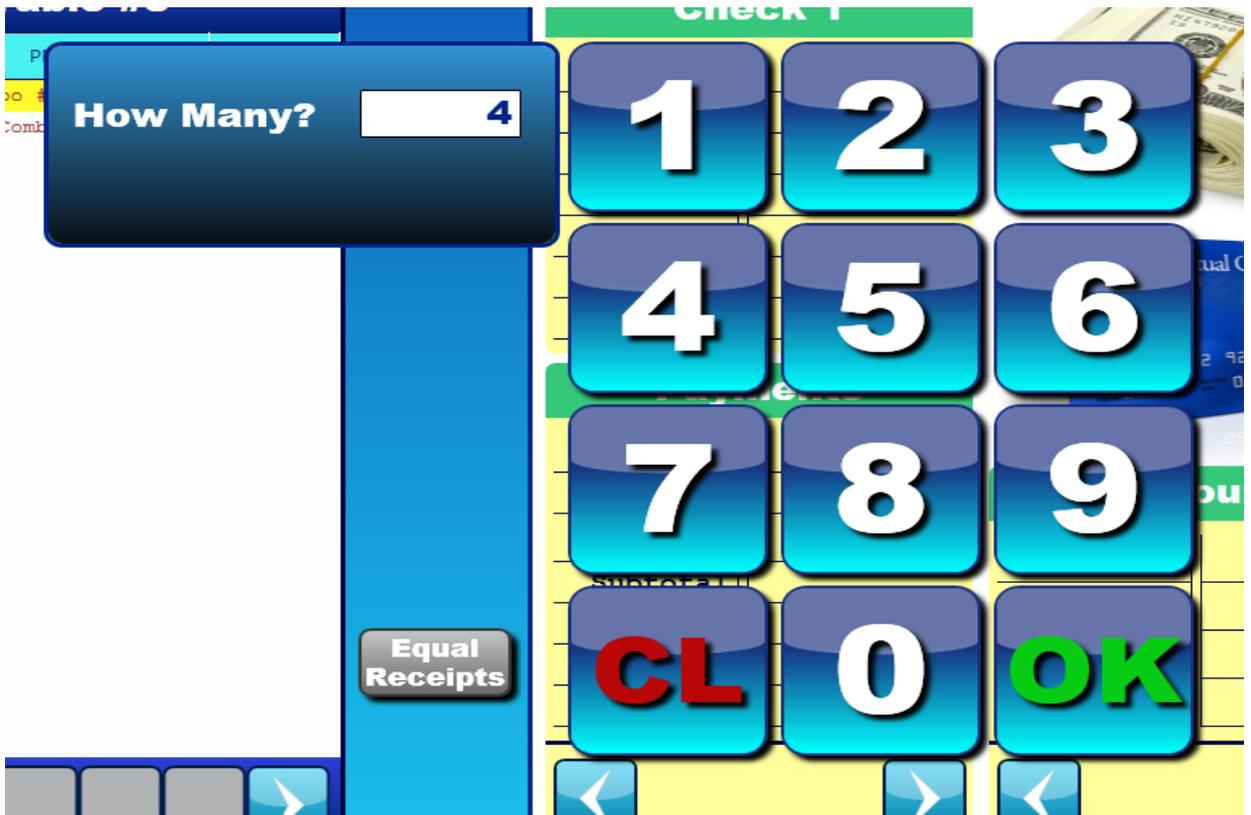


Figure 75



Figure 76

Discounts

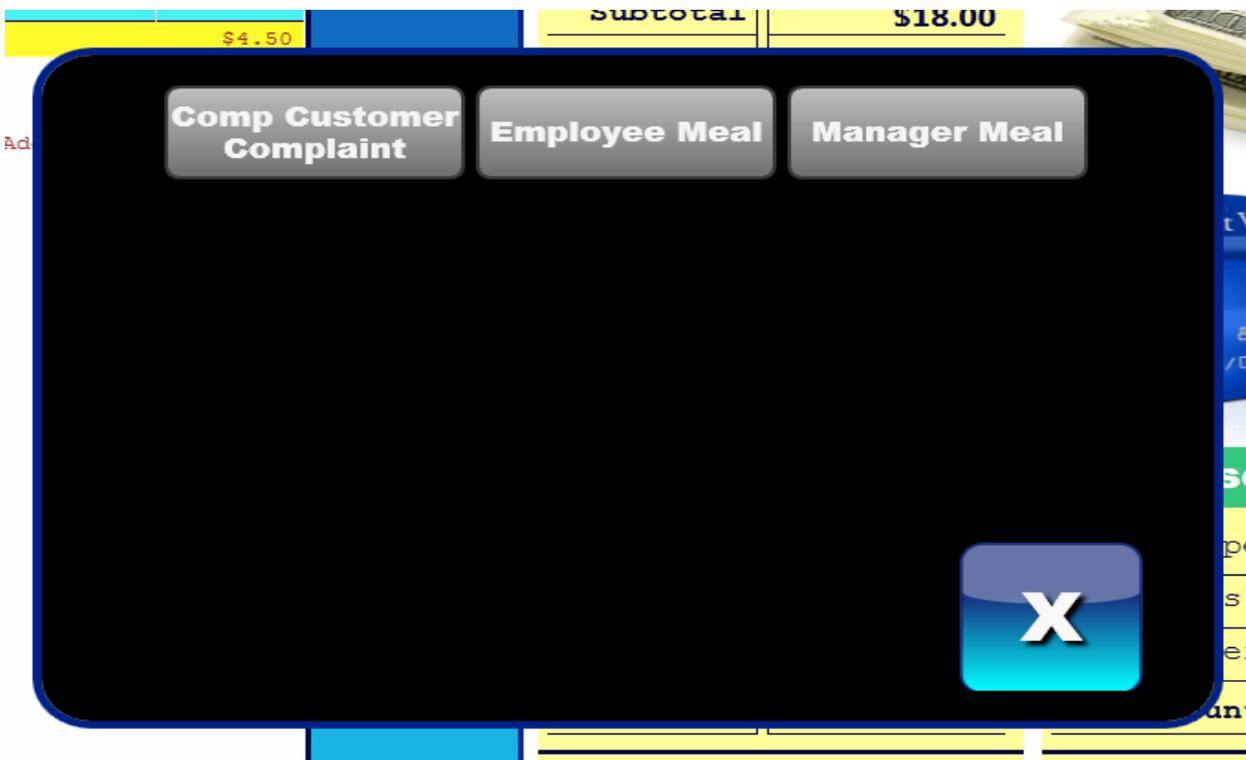


Figure 77

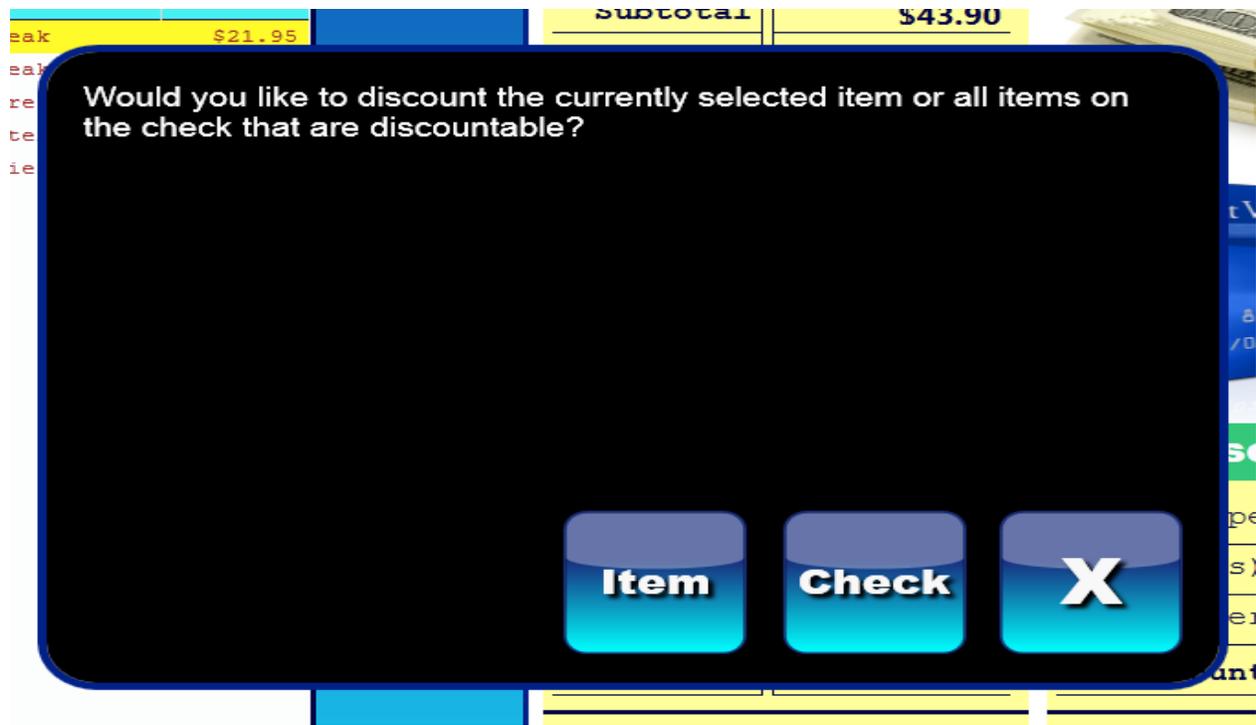


Figure 78  
Comp Items



Figure 79

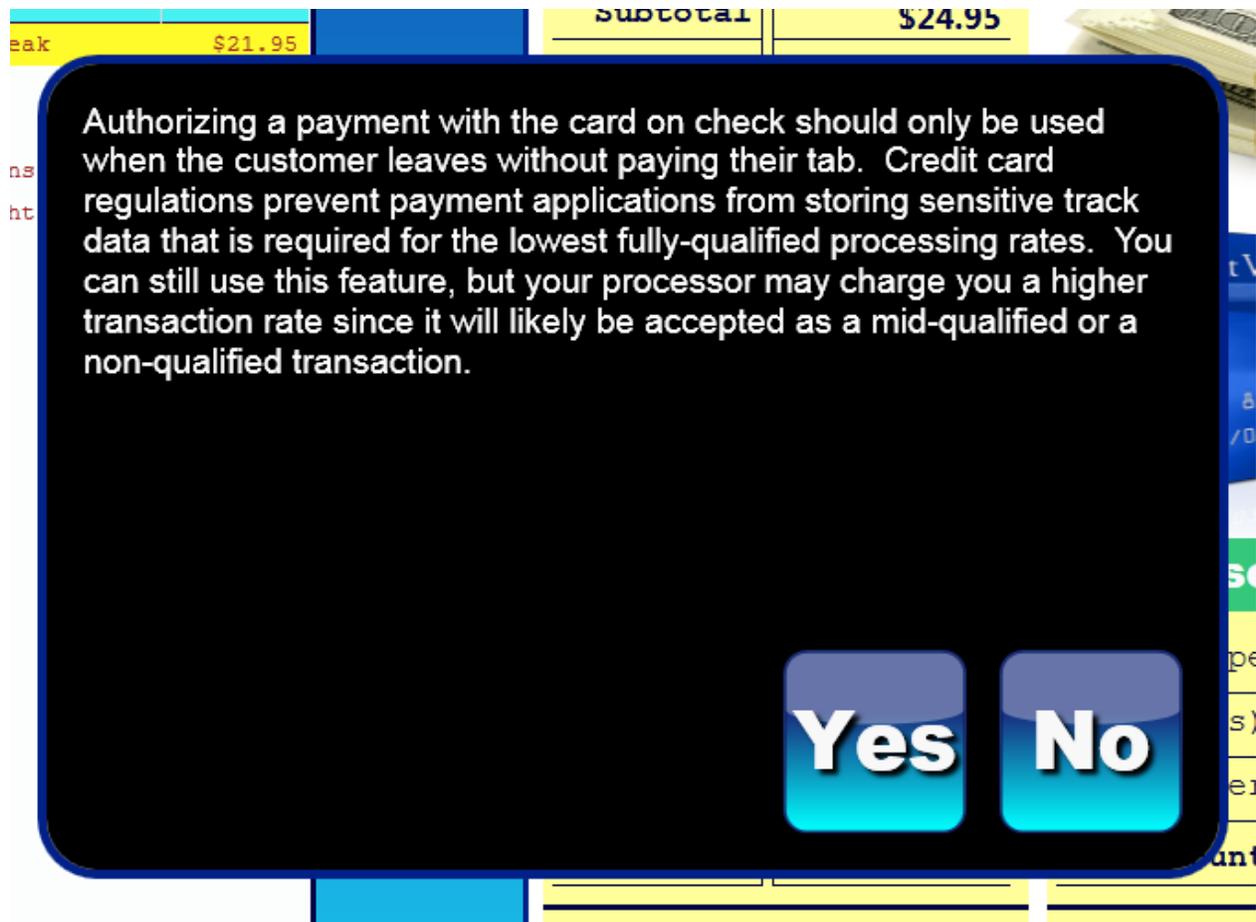


Figure 80

## Time Clock

The Time Clock Screen is designed to allow for the user to:

- Clock-in and out for breaks and lunches
- Set magnetic password
- Open a Drawer
- Enter a Business Day Cash Start
- Make a Cash Drop
- Claim a Drawer
- Pay cash in and out
- Print the last employee Checkout

*See Figure 82*

This screen is the first screen after entering the employee number. The time clock screen will direct the user to the Desktop if their permissions allow. The main functions are to allow the user to switch through the different job codes that a user may have. All job codes will appear on this screen and the user must click on job code to activate the clock out and start break buttons.

**Clock In-** Once the user clocks in under their appropriate Job Code (i.e. Server, Cook or Manager), they will then be clocked in and allowed to enter the desktop as the access level allows. *See Figure 81*

**Clock Out-** will automatically prompt for a Cash Tips entry and then the system will perform an Employee Checkout. This procedure is being implemented to ensure proper employment documentation. It is required to be completed on each employee to account for funds and transactions at the time of the House Closeout.

**Start Break-** notates the beginning and end of an employee's break. This information can be found in reporting.

**Pay Cash In-** this button is used when depositing money into the cash drawer. Typically this is done at the beginning of the business day or when the cash drawer is running low on cash. At the end of the day, when a House Closeout is done the Pay In's will appear on the House Closeout receipt.

- 1) Click "Pay Cash In".
- 2) Choose the cash amount.
- 3) Select or create a pay in reason.
  - a. To create, click the Keyboard Icon and type in the name.
  - b. To delete a reason, Click "Remove Current from Available".
- 4) Click "OK".

**Pay Cash Out-** this button is used when removing cash from the drawer for purposes other than sales. Your balance for cash will be reflected only on the House Closeout Receipt. Cash out balance will be present on an Employee Checkout which will account for the transaction but will not adjust the Total Due on the Employee Checkout.

- 1) Click "Pay Cash Out".
- 2) Choose the cash amount.
- 3) Select or create a payout reason.

- a. To create, click the Keyboard Icon and type in the name.
  - b. To delete a reason, Click “Remove Current from Available”.
- 4) Click “OK”.

**Set Magnetic Password**- this feature allows for a magnetic stripe card to be set under the user’s employee number. Please refer to

- 1) Click “Set Magnetic Password” button.
- 2) System will generate a dialog box that reads “Please Click “OK” then swipe the magnetic card for user and wait for a confirmation dialog box”.
- 3) Click “OK” button.
- 4) Swipe new or previously assigned card.
- 5) System will generate a dialog box that reads "The password has successfully been set for user”.
- 6) Click “OK” button.

**Claim Drawer Lock**- claiming a drawer attaches the cash claimed on the drawer to the user claiming it and prohibits any other user from using opening or claiming the drawer. The drawer can be released from the user’s possession by clicking “Release Drawer Lock”. During a Clock out, the user’s drawer will automatically be released to allow for the next user to claim the drawer. At the end of that user’s shift the drawer’s cash claimed will be the user’s responsibility. Claimed Drawer Locks will not appear on the House Closeout.

- 1) Click “Claim Drawer One”.
- 2) Choose the cash amount.
- 3) Click “OK”.

\*The message at the top left side of the page should read “You own the Drawer 1 Lock”

*See Figure 82*

**Open Drawer One**- opens the Cash drawer. This button is only available to users that have Access Level permissions. The system can configure up to 2 cash drawers.

**Business Day Cash Start**- allows the user to track the amount of cash deposited in the cash drawer at the start of the business day. This amount will reflect in the House Closeout, listing the user that deposited the cash and the amount of cash deposited. One Cash Start deposit is allowed per business day. The button will be disabled upon entering the start deposit and will be enabled at the start of the next business day. Examples of this procedure can be found in *Figure 83, Figure 84.*

**Cash Drop** –a drop is considered to be a removal of cash from the cash drawer. It’s different from a “Pay Cash Out” because it is specifically designed to allow the user to make a drop from the cash drawer to another location. This feature allows the establishment to meet requirements as far as how much cash can be kept in the drawer at one time. The Cash Drop entries will be recorded on the House Closeout. Once the amount of Cash Drop is entered, a message will appear; “\$0.00 was deposited outside the cash drawer”. Click OK. *See Figure 85 Figure 86*

**Print Last Checkout-** this feature prints the most recent checkout by user.

- 1) Click “Print last checkout”.
- 2) System will generate a dialog box that displays checkout.
- 3) Click “OK” button.

Time clock

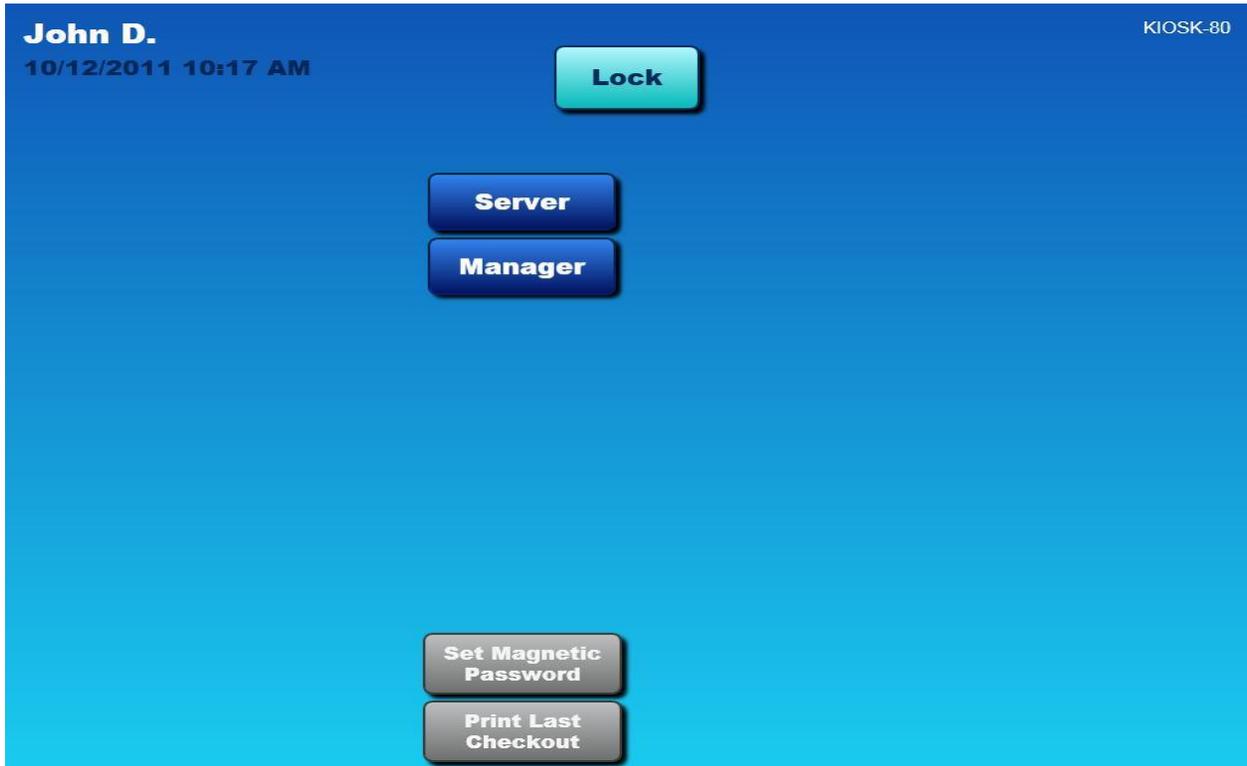


Figure 81



Figure 82



Figure 83

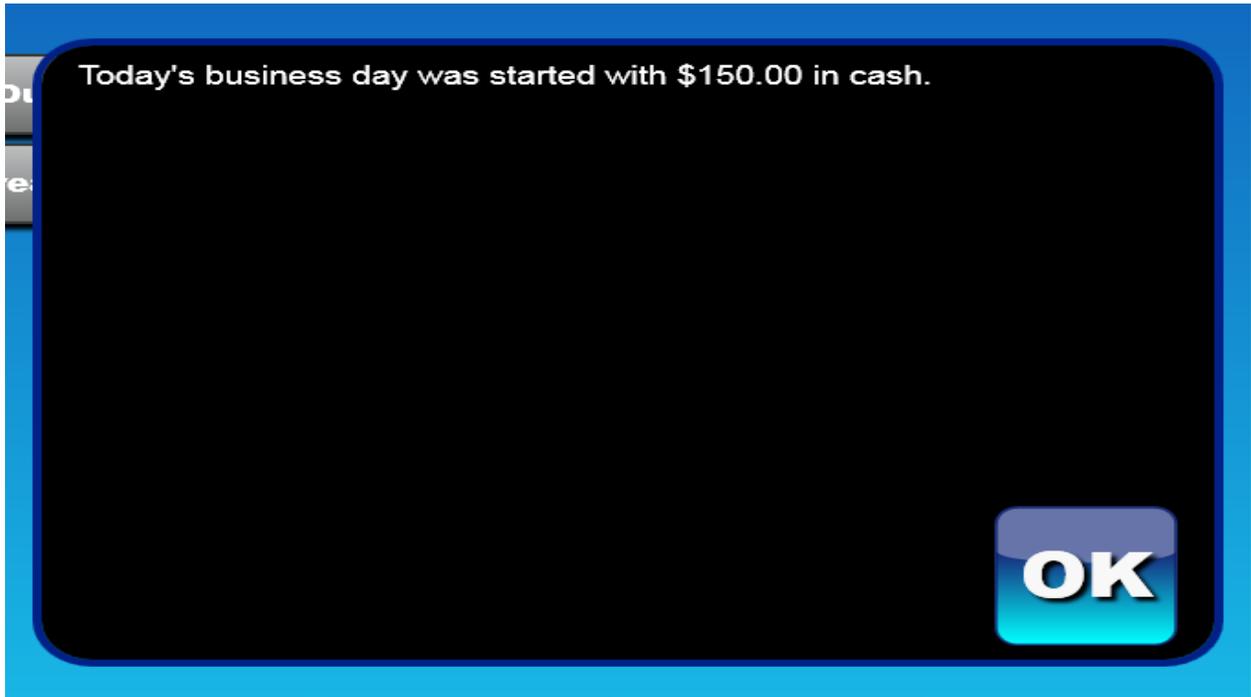


Figure 84

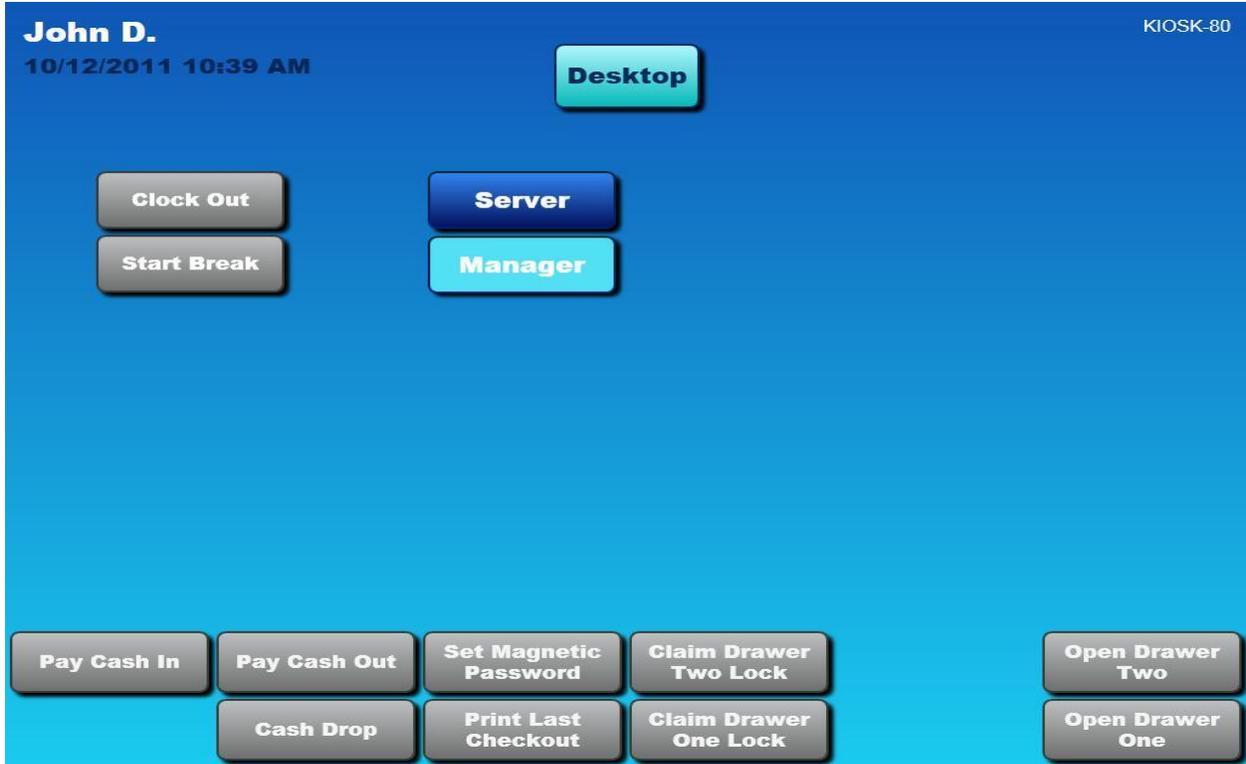


Figure 85

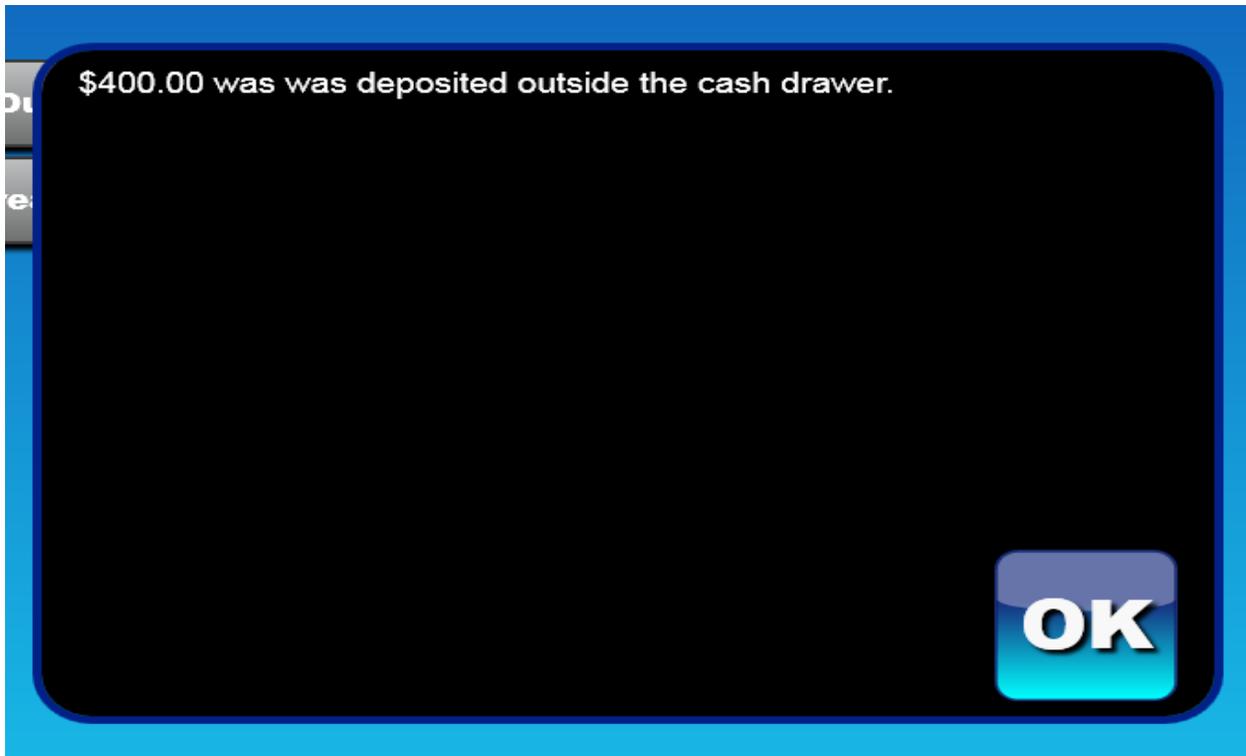


Figure 86

## Setting Mag Stripe

Magnetic stripe cards are used with Oceanside POS systems to sign-in users with manager permissions. These ID cards have a magnetic strip affixed to the back that can be swiped through a Magnetic Stripe Reader for the purpose of identifying the cardholder and the privileges that a user has been assigned to in the system. Users with privileges to set magnetic cards will be able to set their own Mag Stripe and users without permissions must have a user with permissions swipe their Mag Stripe in order to proceed.

### For a user with manager settings:

- 1) Manually enter employee number on login screen.
- 2) Click “Time Clock” button.
- 3) Click “Set Magnetic Password” button.
- 4) Dialog box will read “Please click OK, then swipe the magnetic card for user and wait for confirmation.”
- 5) Click “OK” button.
- 6) Swipe new or previously assigned mag card in card reader.
- 7) Dialog box will read “The password has been successfully set for user.”
- 8) Click “OK” button.

### For a user without manager settings:

- 1) Manually enter the employee number on login screen.
- 2) Click “Time Clock” button.
- 3) Click “Set Magnetic Password” button.
- 4) Dialog box will read “This function requires special access rights. Please click ok and swipe the magnetic card of a user who has such rights configured by the back office control panel software”.
- 5) Click “OK” button.
- 6) Swipe manager’s mag card in card reader.
- 7) Dialog box will read: “Please click ok and swipe the magnetic card for user and wait for a confirmation dialog box.”
- 8) Click “OK” button.
- 9) Swipe new or previously assigned mag card in card reader.
- 10) Dialog box will read “The password has been successfully set for user.”
- 11) Click “OK” button.

See Figure 87

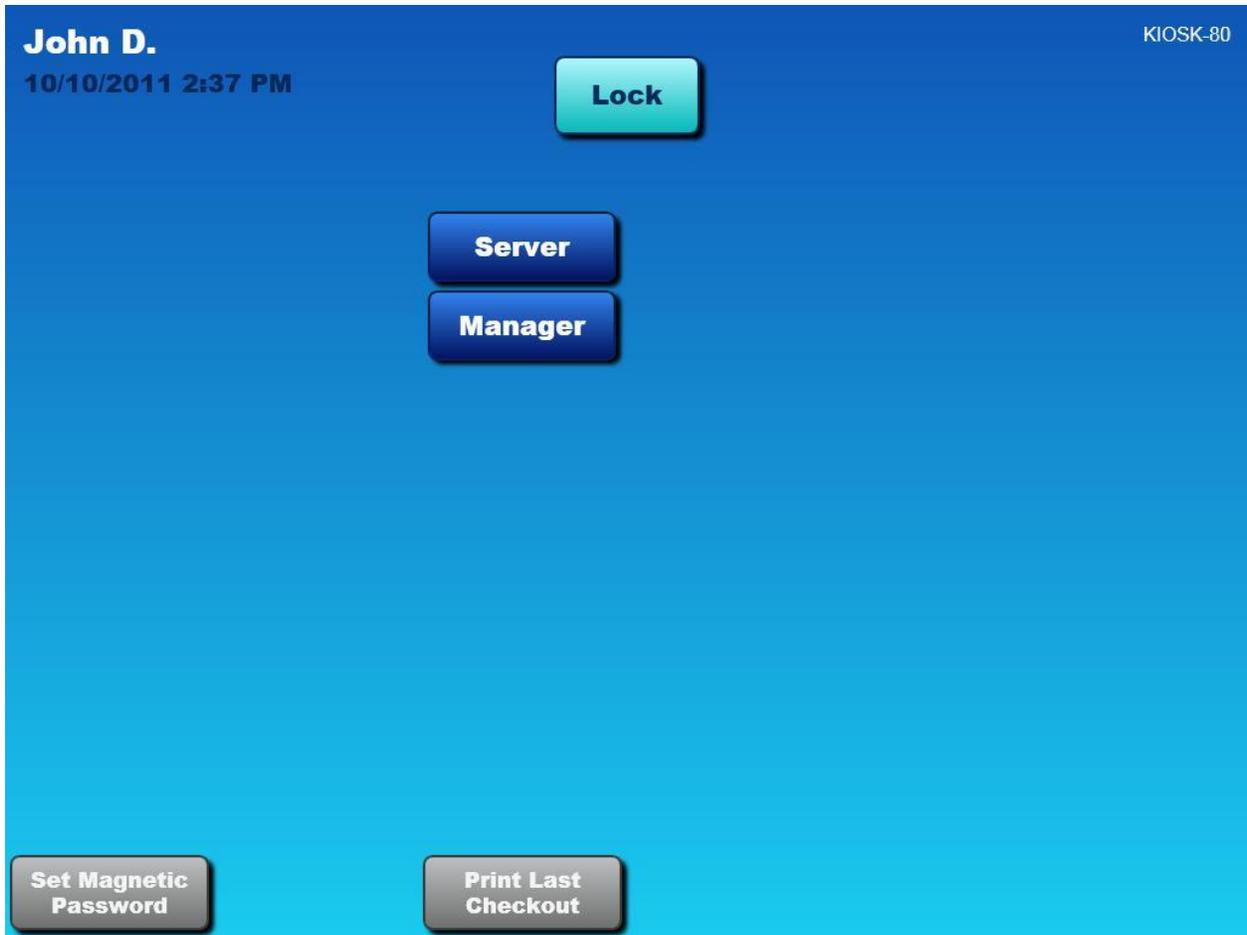


Figure 87

## Employee Checkout

Employee Checkout is designed to keep account of all employee transactions. At the close of the day, the manager will run a House Closeout and balance all Employee Checkouts with the final House Closeout to insure all money is accounted for. A Clock Out will automatically prompt for a Cash Tips entry and then the system will perform an Employee Checkout." This procedure is being implemented to ensure proper employment documentation. All tables must be closed before an Employee Checkout can be performed.

To perform an Employee Checkout:

- 1) Enter Employee number.
- 2) Click "Time Clock" button.
- 3) Click "Clock Out".
- 4) Enter the cash tips.
- 5) Click "OK".
- 6) A print out of the checkout will print.

*See Figure 88, Figure 89*

Employee Checkout

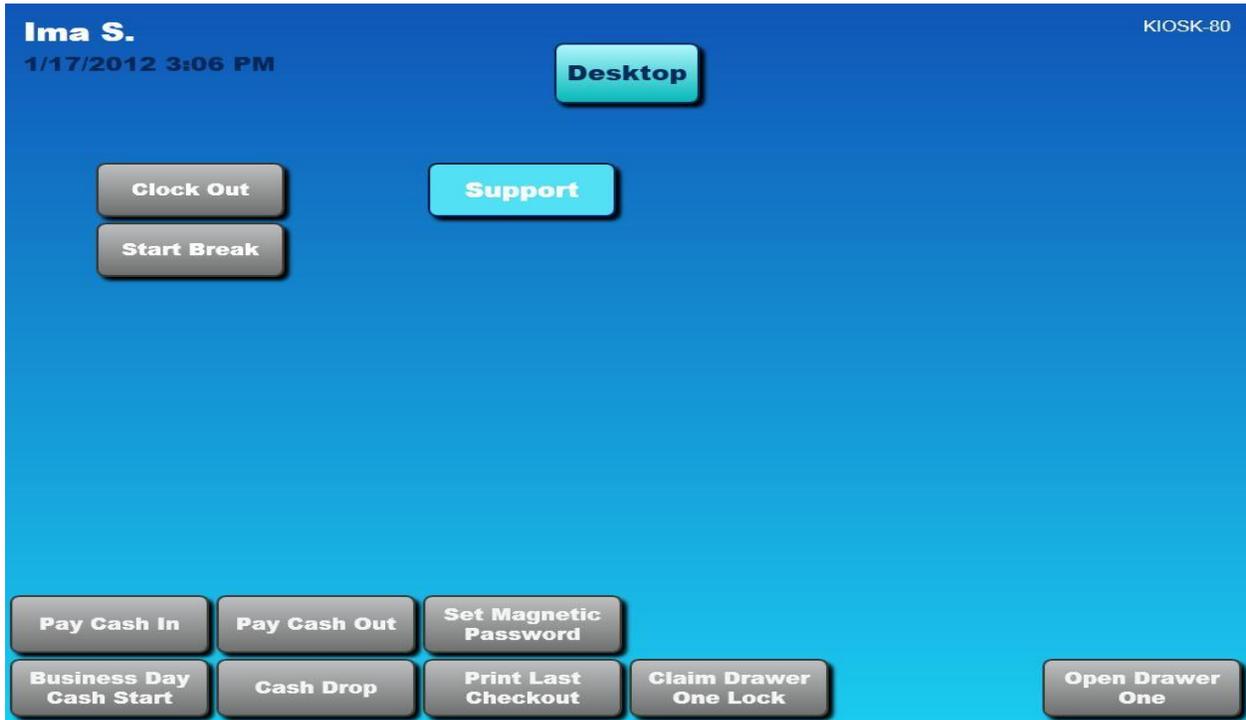


Figure 88

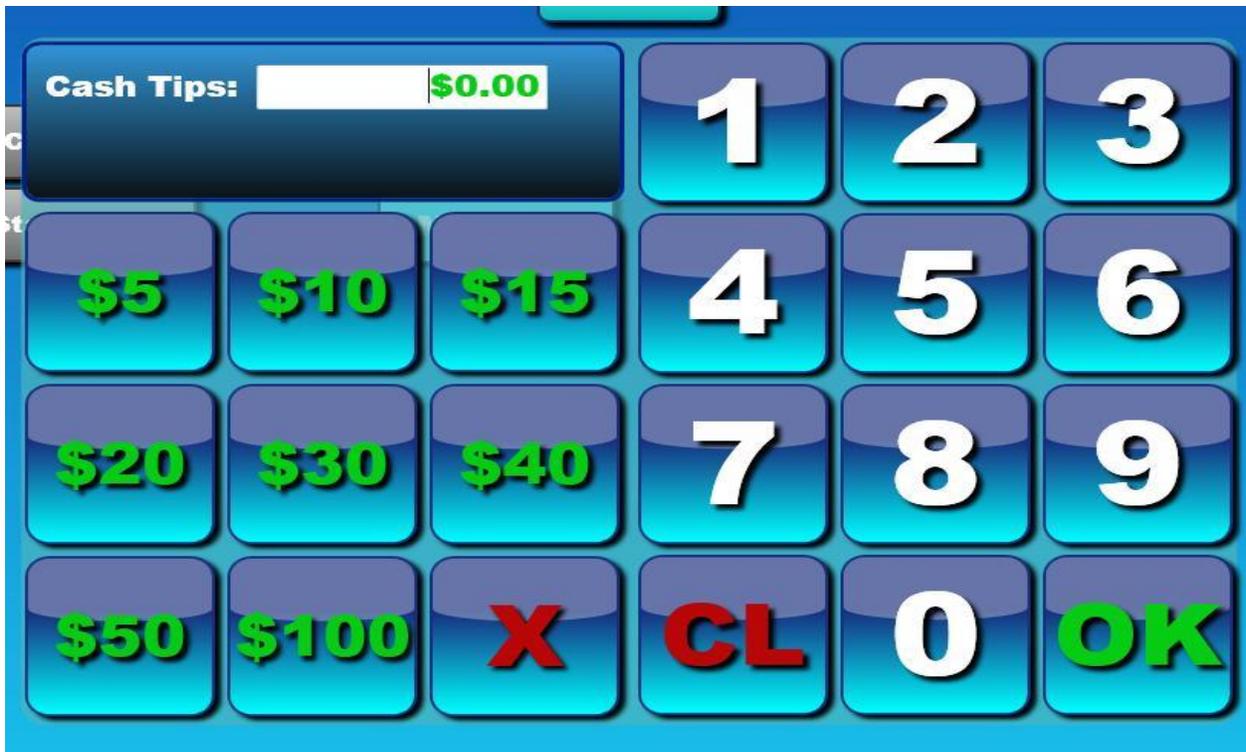


Figure 89

## Finance

The Finance tab can be accessed through the Desktop or on the payment screen:

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “Finance” button.

The Financial screen allows for changes to be made to any financial transaction. All users that have access to place orders will have access to the finances page. The options are listed under “View filters”. View Filters consist of:

**Gift Card-** if your establishment accepts gift cards this screen will allow for the user to check the processed Gift Cards. They may also view the related order by clicking on a transaction.

*See Figure 90*

**Gift- gift** card transactions that have been processed.

**Credit-** All Credit transactions will appear here for the current business day. Choose a transaction to activate the “View Related Order”.

**Cash-** All cash transactions will appear here for the current business day. Choose a transaction to activate the “View Related Order”.

**House-** All House transactions will appear here for the current business day. Choose a transaction to activate the “View Related Order”.

**Checks-** All Check transactions will appear here for the current business day. Choose a transaction to activate the “View Related Order”.

**All-** All transactions will appear here for the current business day. Choose a transaction to activate the “View Related Order”.

On authorized transactions- three option buttons appear. You must highlight a transaction for the “View Related Order” button to appear.

- 1) “Credit tip Total”- allows for the user to check the current balance of their tips.
- 2) “Find Transaction”- to find a transaction, you must have the transaction ID located on the receipt.
- 3) “Closeout House”- at the end of the business day, the Closeout House captures all pending transactions and prints cash balances. At this time all Employee Checkouts should be collected and compared to the House Closeout. This procedure is being implemented to ensure proper employment documentation. It is required that each employee be accountable for funds and transactions they were responsible for during the business day. Warning: If a House Closeout is performed before all tables have been closed, you will not be allowed to continue with the House Closeout until those tables are closed under the user that the system lists. *See Figure 91*

- a. During a House Closeout three receipts may print:
  - i. Employee Checkouts that belong to employees that have not clocked out.
  - ii. The Employee checkout of the Manager who is closing the House.
  - iii. The House Closeout.
- 4) Preliminary Closeout- will print a copy of the closeout for the data stored during the current business day.
- 5) View Related Order-will open to the payment screen so that payments to the chosen transaction are viewable.

Finance

**Ima S.**  
1/4/2012 2:53 PM

KIOSK-80

**Desktop**

TRANS ID	OPEN EID	REOPEN EID	CUSTOMER	ORDER ID	CHECK #	TRANS DATE	TRANS TYPE	SUBTOTAL + TAX	GRAT
3450	samplei	UNKNOWN		3870	1	12/29/11 3:32 PM	Cash	\$81.73	\$0.00
3449	samplei	UNKNOWN		3875	1	12/29/11 3:08 PM	Cash	\$19.47	\$0.00
3451	samplei	UNKNOWN	TEST/MPS	3877	1	01/04/12 2:50 PM	VISA	\$4.88	\$0.00
3452	samplei	UNKNOWN		3877	1	01/04/12 2:50 PM	M/C	\$8.55	\$0.00
3453	samplei	UNKNOWN	TEST/MPS	3877	1	01/04/12 2:50 PM	DCVR	\$6.06	\$0.00
3454	samplei	UNKNOWN		3878	1	01/04/12 2:50 PM	DCVR	\$4.88	\$40.00
3455	samplei	UNKNOWN	TEST/MPS	3878	1	01/04/12 2:50 PM	M/C	\$10.00	\$0.00
3456	samplei	UNKNOWN		3878	1	01/04/12 2:50 PM	VISA	\$9.00	\$0.00
3457	samplei	UNKNOWN	TEST/MPS	3878	1	01/04/12 2:50 PM	AMEX	\$8.00	\$0.00
3462	samplei	UNKNOWN		3878	1	01/04/12 2:53 PM	Cash	\$38.43	\$0.00
3458	samplei	UNKNOWN	TEST/MPS	3879	1	01/04/12 2:51 PM	AMEX	\$5.00	\$0.00
3459	samplei	UNKNOWN		3879	1	01/04/12 2:51 PM	Cash	\$5.00	\$0.00

↑

↓

View Filter

Gift

Credit

Cash

House

Checks

All

Credit Tip Total

Find Transaction

Closeout House

Preliminary Closeout

View Related Order

Figure 90

OPEN EID	CUSTOMER	ORDER ID	CHECK #	TRANS DATE	TRANS TYPE	SUBTOTAL + TAX
----------	----------	----------	---------	------------	------------	----------------

The following users still have open tables and the system cannot close the house until those tables are closed.

←

jdoe

→

X

Figure 91

## House Closeout/ Preliminary Closeout

House Closeout's are performed at the end of the business day. Closing out the house captures all pending transactions and prints cash balances. At this time all Employee Checkouts should be collected and compared to the House Closeout. This procedure is being implemented to ensure proper employment documentation and cash flow balances. It is required that each employee be accountable for funds and transactions they were responsible for during the business day. Warning: If a House Closeout is performed before all tables have been closed, you will not be allowed to continue with the House Closeout until those tables are closed under the user that the system lists. If there are employees that have not completed Employee Checkouts, but have closed all their tables, their employee checkouts will print along with the House Closeout. The manager performing the House closeout will be provided with an employee checkout at this time.

A Preliminary Closeout does not affect your business day data. It is a way to check your cash balance throughout the day. A House Closeout must still be performed at the end of the business day. *See Figure 92*

To perform a House Closeout:

- 1) Enter Employee number.
- 2) Enter the "Desktop".
- 3) Click "Finance" button.
- 4) Click "Closeout House".
- 5) Answer the next few questions:
  - a. Are you ready?:
  - b. Explain today's weather:
  - c. Explains today's business:
  - d. Would you like to continue?:
  - e. The system has determined you should have \$\_\_\_ in total cash from all drawers and cash drops in the house. Count the cash and press [OK]...
  - f. If there are checks, the system will ask you to enter the check amount.
- 6) A message will pop up notifying you that a House Closeout will be performed and the system will perform a reboot. *Figure 93*
- 7) Click OK.
- 8) If there are NOT any tables open the system will print a house closeout along with the managers Employee check out.
- 9) The system will return to the log in screen.

If there are still tables open, the system will list the users that have tables open. Scroll through the user names to take note of the users that need to close their tables. When the tables have been closed, you may proceed with performing a House Closeout. *See Figure 94*

House Closeout

**Ima S.** KIOSK-80  
**1/13/2012 10:55 AM** **Desktop**

TRANS ID	OPEN EID	REOPEN EID	CUSTOMER	ORDER ID	CHECK #	TRANS DATE	TRANS TYPE	SUBTOTAL + TAX	GRAT
3466	samplei	UNKNOWN		3882	1	01/12/12 3:26 PM	Cash	\$28.42	\$0.00
3468	samplei	UNKNOWN		3883	1	01/12/12 3:27 PM	Cash	\$0.40	\$0.00
3469	samplei	UNKNOWN		3883	1	01/12/12 3:27 PM	Cash	\$0.50	\$0.00
3470	samplei	UNKNOWN		3883	1	01/12/12 3:27 PM	Cash	\$83.10	\$0.00
3471	samplei	UNKNOWN		3884	1	01/12/12 3:30 PM	Gift	\$10.53	\$0.00
3472	samplei	UNKNOWN		3885	1	01/12/12 3:31 PM	Cash	\$5.68	\$0.00
3473	samplei	UNKNOWN		3886	1	01/12/12 3:31 PM	Cash	\$1.62	\$0.00
3474	samplei	UNKNOWN		3887	1	01/12/12 3:31 PM	Cash	\$4.32	\$0.00
3475	samplei	UNKNOWN		3888	1	01/12/12 3:31 PM	Cash	\$4.60	\$0.00
3476	samplei	UNKNOWN		3889	1	01/12/12 3:31 PM	Cash	\$2.71	\$0.00
3477	samplei	UNKNOWN		3890	1	01/12/12 3:32 PM	Cash	\$0.06	\$0.00
3478	samplei	UNKNOWN		3890	1	01/12/12 3:32 PM	Cash	\$1.56	\$0.00

View Filter

**Gift**

**Credit**

**Cash**

**House**

**Checks**

**All**

**Credit Tip Total**   **Find Transaction**   **Closeout House**   **Preliminary Closeout**

Figure 92

OPEN EID	CUSTOMER	ORDER ID	CHECK #	TRANS DATE	TRANS TYPE	SUBTOTAL + TAX
----------	----------	----------	---------	------------	------------	----------------

Please remain patient while the house is closed and all pending credit card transactions are captured. This could take up to 5 minutes depending on the amount of credit card transactions processed today.



Figure 93

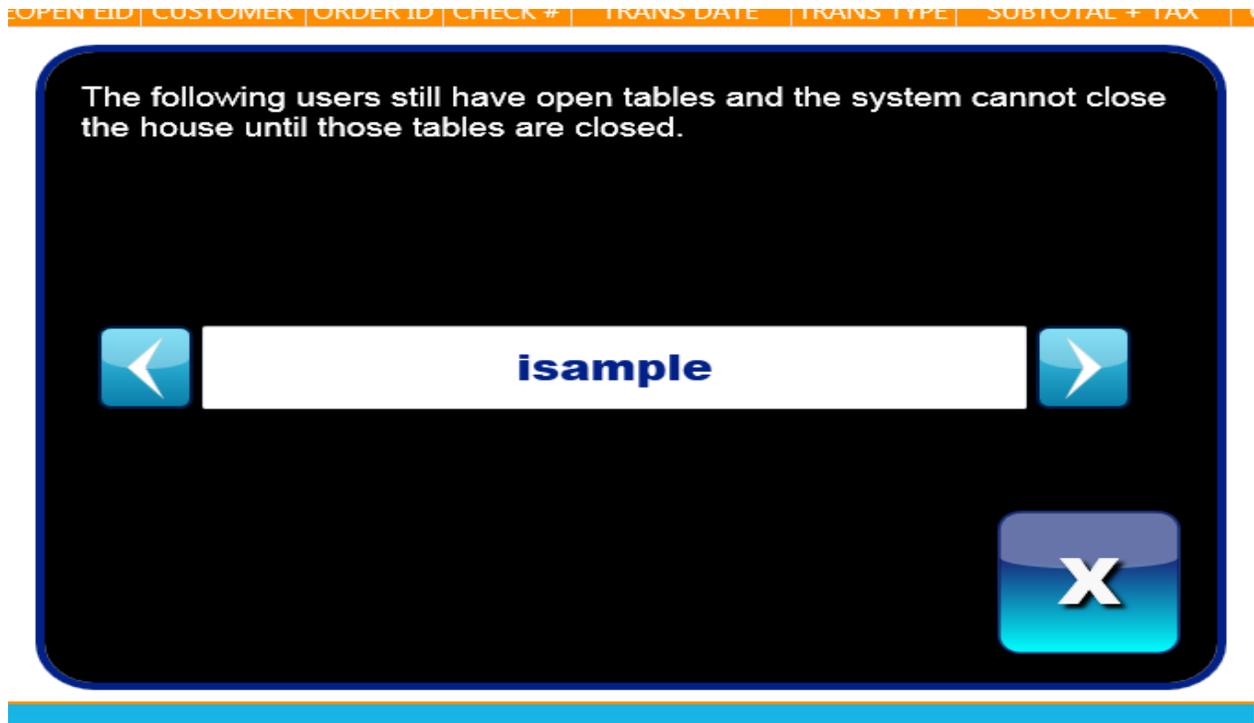


Figure 94

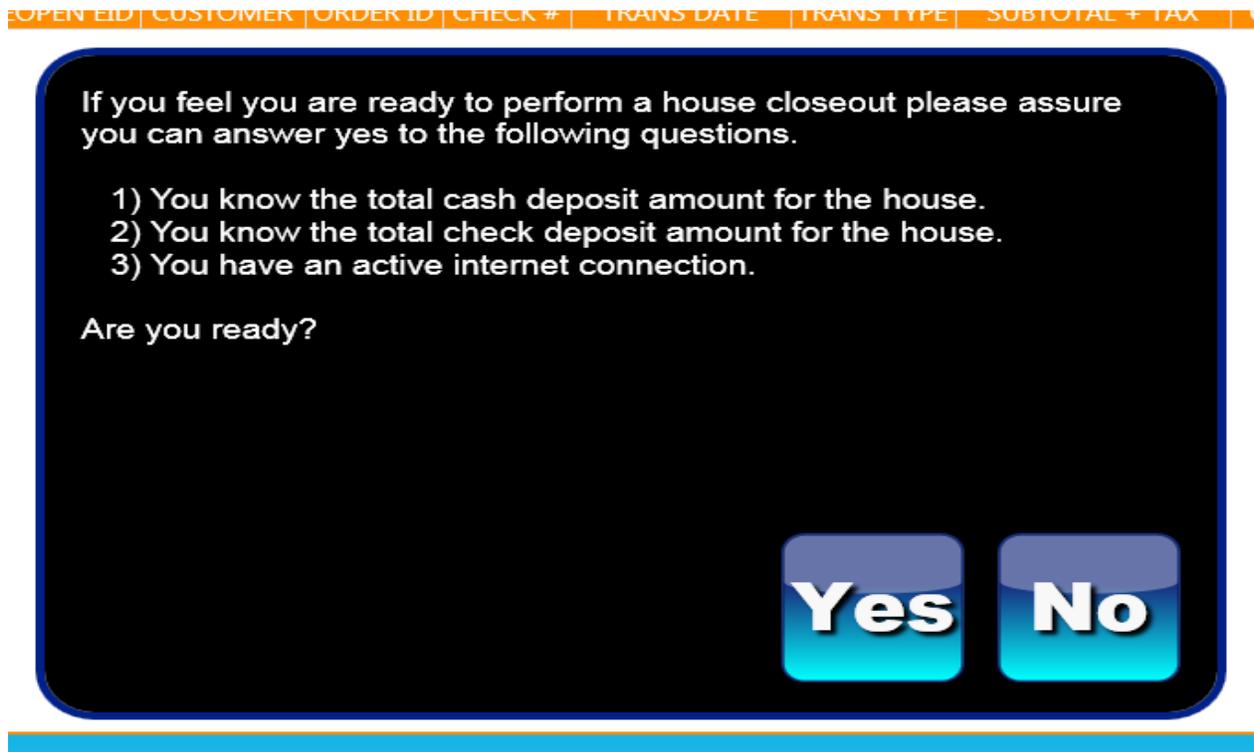


Figure 95

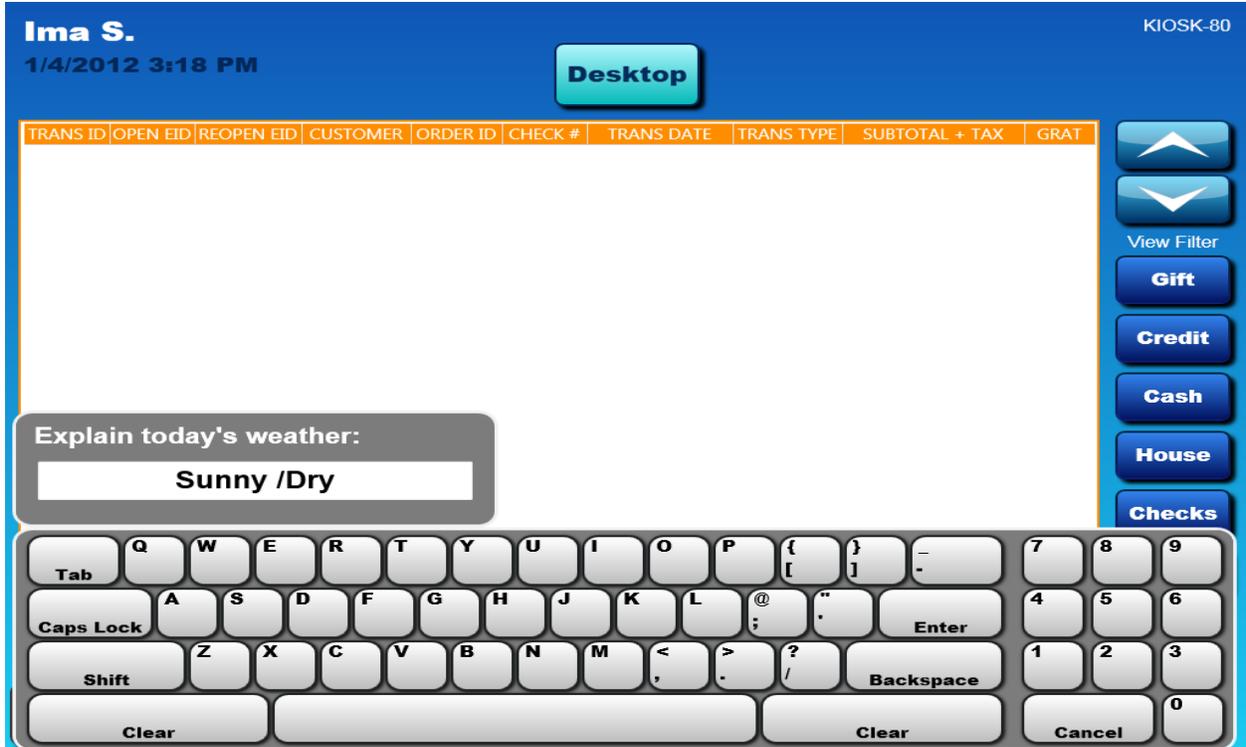


Figure 96

## System

Please refer back to: *Back office system setup* ..... pg. 6

## Reports

The Reports button is located on the desktop:

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “Reports” button.**

Tool Bar for Reports page is numbered for description (hovering the mouse over the icon will display the action. *See Figure 97*

- 1) Print the document
- 2) Navigation button. Two arrows means to scroll to the first page
- 3) Navigation button. Scroll back one page
- 4) Scroll forward one page
- 5) Two arrows means to scroll to the last page
- 6) Exporting Options: PDF, Excel, CSV, Word, PowerPoint
- 7) This Month: presents business days to select *See Figure 100*
- 8) Custom Date: presents calendar days to select

**Sales Reports:** *See, Figure 98*

- 1) **Master Sales Report**- print reports for business days or for a range of calendar dates.
- 2) **Sale by Day of Week**- shows the sales by the day of the week. This report can be generated by choosing a business day or a range of calendar days.
- 3) **Sales by Revenue Center**- print reports of sales between entered dates. A Revenue Center refers to the location of the Kiosk in reference to your establishment. (i.e. Dining room, Bar, Patio or Main). This information will be projected in the detailed reporting.
- 4) **Sales by Revenue Type**- consist of specific products, grouped together within categories that represent their type. (i.e. Dairy, Meat, and Produce) or General (i.e. Alcohol, Food and Beverage).
- 5) **Sales by Daypart**- designed to allow the user to acquire sales reports based on the time of day set in the BOH. Reports can be printed for sales by dayparts between an entered range of dates.
- 6) **Sales by Product Group**- Data rendered: count, product name, % of sales, Gross revenue, Total Discounts, Net Revenue.
- 7) **Sales by Employee**- this report includes the count, product name, % of sales, discounts applied, total revenue for each product and net revenue after discounts.
- 8) **Print Sales Reports**- one click reporting is designed to allow the user to access data from the day with the touch of a button. *See Figure 99*

**Discount Reports:** enter the start and end dates and the system will generate data for the following reports. *See Figure 102*

- 1) **Promos by Employee**
- 2) **Promos by Manager**
- 3) **Promos by Type**
- 4) **Voids by Employee**
- 5) **Voids by Manager**
- 6) **Voids by Type**
- 7) **Comps by Employee**
- 8) **Comps by Manager**
- 9) **Comps by Type**

**Employee Reports:** *See Figure 103*

- 1) **Employees-** List employees, phone numbers and usernames and passwords.
- 2) **Checkout History-** a quick list of the clock in and clock outs of employees.
- 3) **Payroll Report-** features the job tiles, Date and time of clock out, breaks, hours, rate of pay, overtime pay, tips and the total pay for the time period. This report also renders a distribution of pay chart. *See Figure 101*
- 4) **Adjust Time Punches-** adjustments can be made here to the time that an employee clocked out for any set day.
  - a. Select your range of dates to display.
  - b. Select a time to adjust.
  - c. Click "Adjust".
  - d. Select the clock out time and date.

**Emailing Reports-** allows you to email a report to the current logged in user. The user must first be entered in the BOH under the "Users" tab and an email address must be entered in.

- 1) Click on the report you would like to email.
- 2) Select the date.
- 3) Click on the Icon that represents the format type.
- 4) Click "Save or "Email " *See Figure 103, Figure 104*
- 5) If an email address is not listed in the employee's file, the system will prompt you to enter a valid email. *Figure 105, Figure 106*

Reports

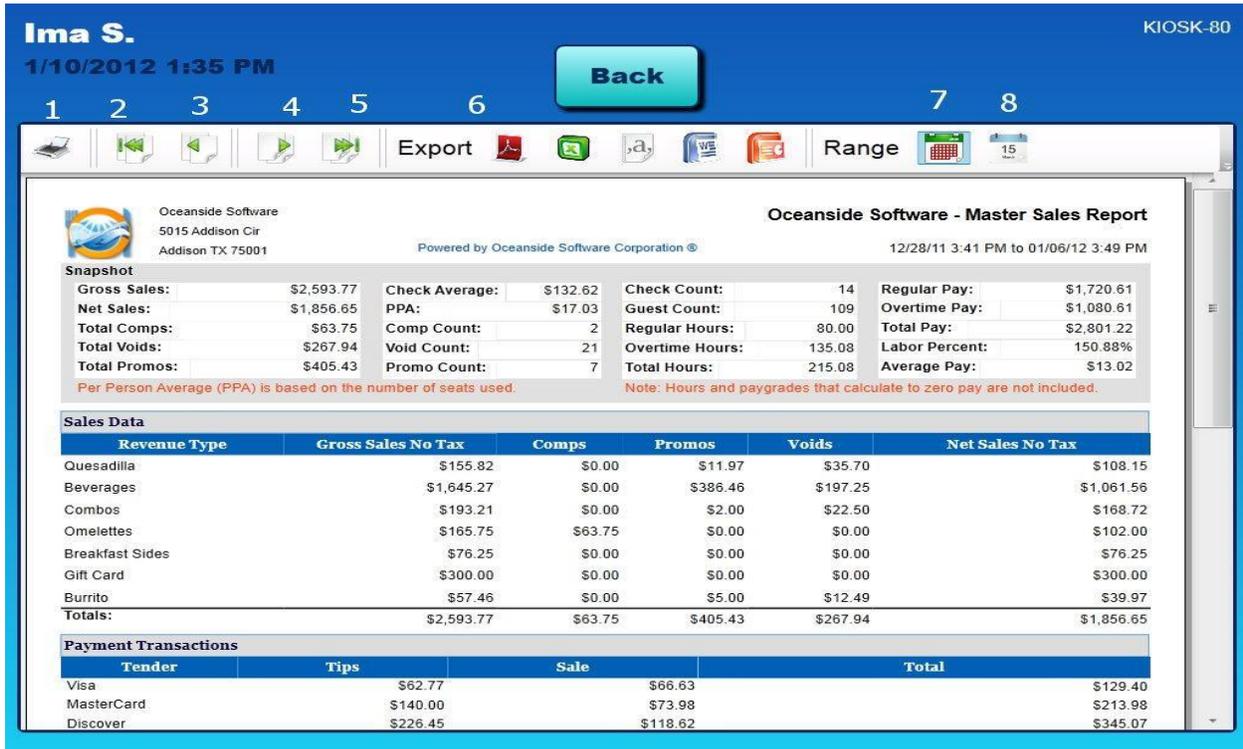


Figure 97



Figure 98



Figure 99

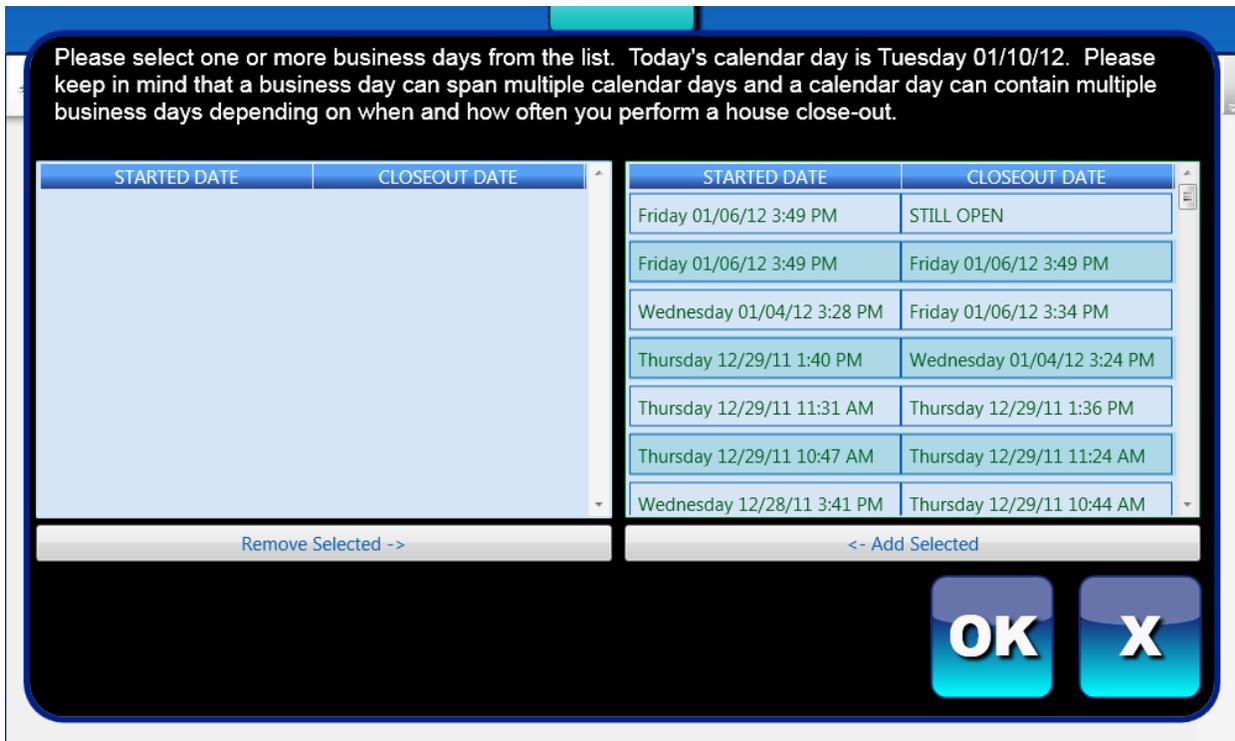


Figure 100

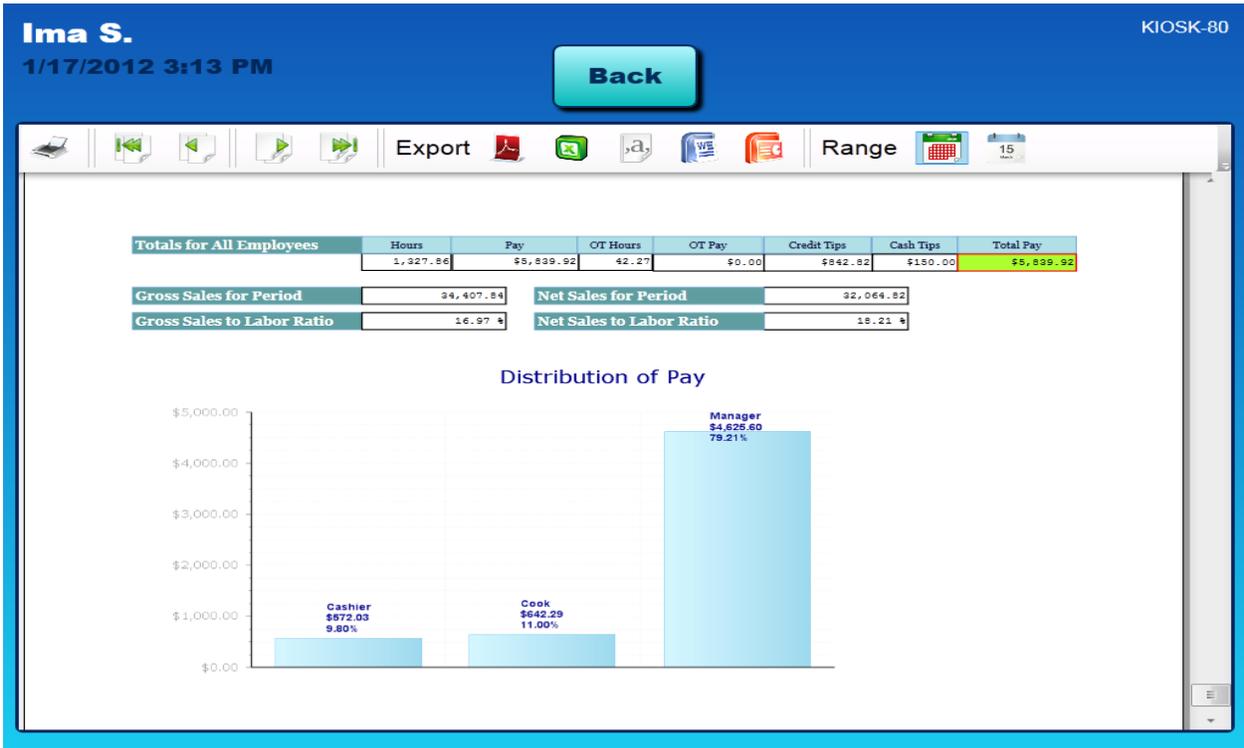


Figure 101

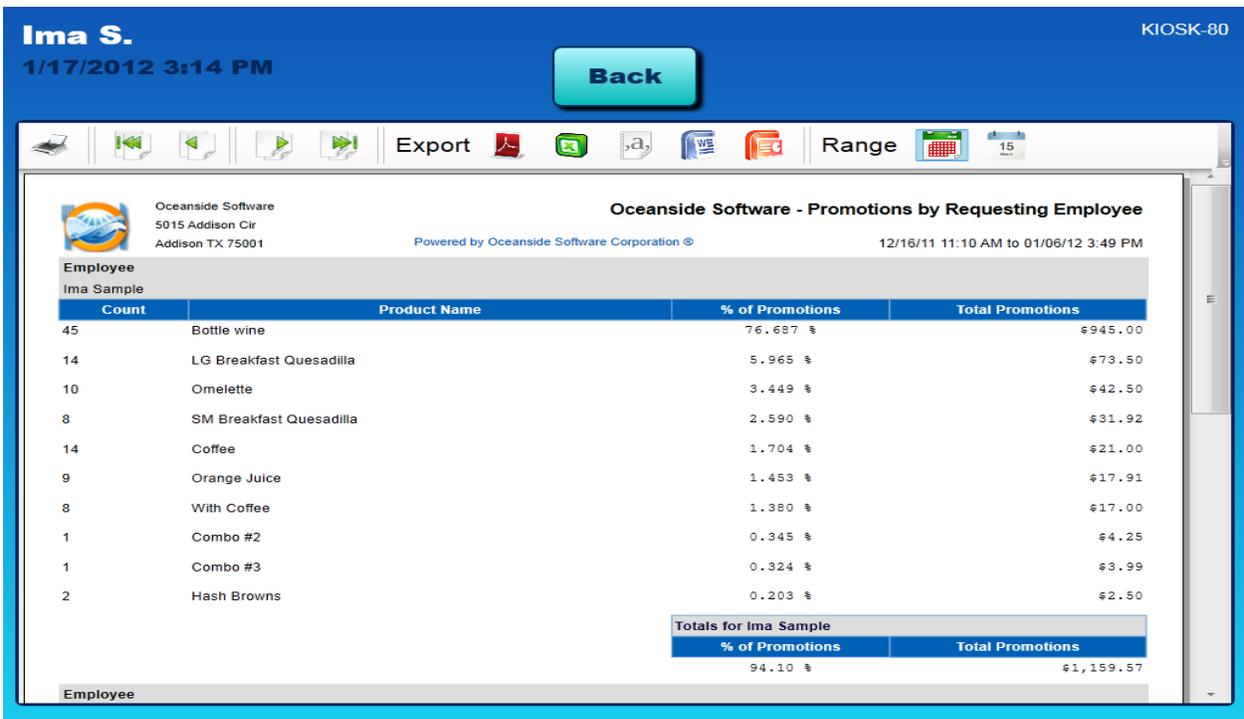


Figure 102

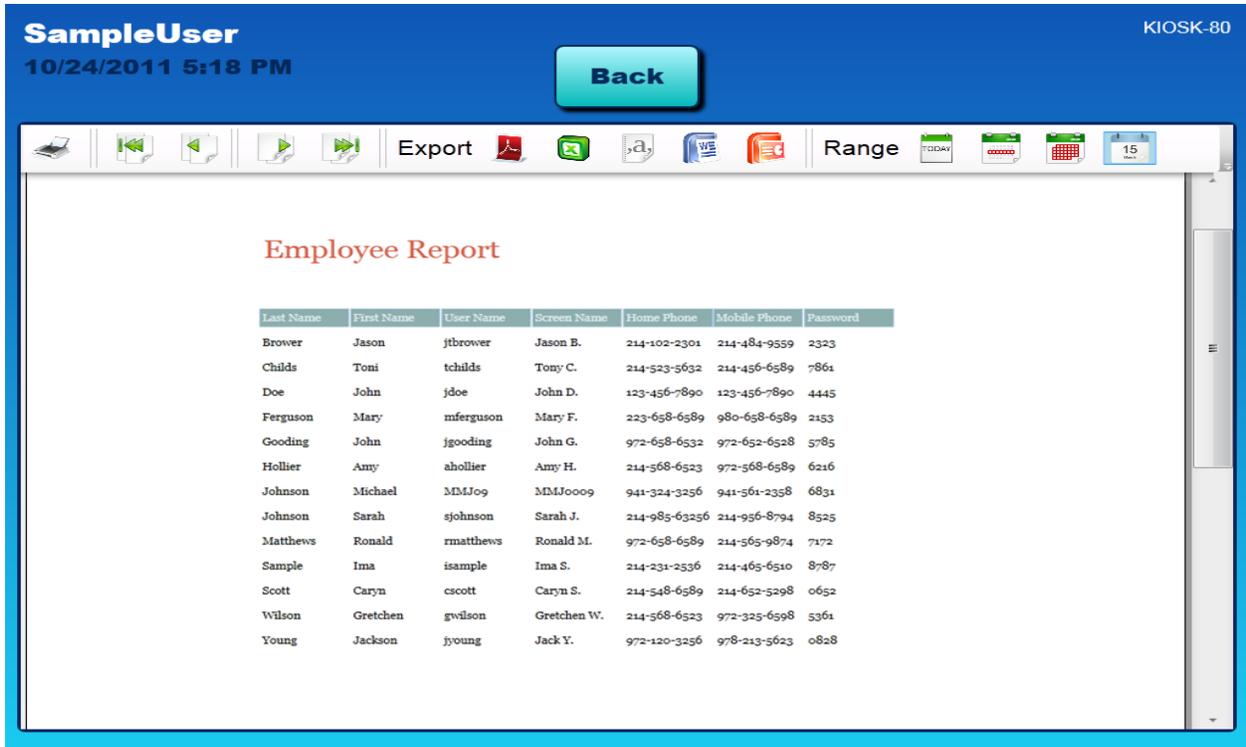


Figure 103

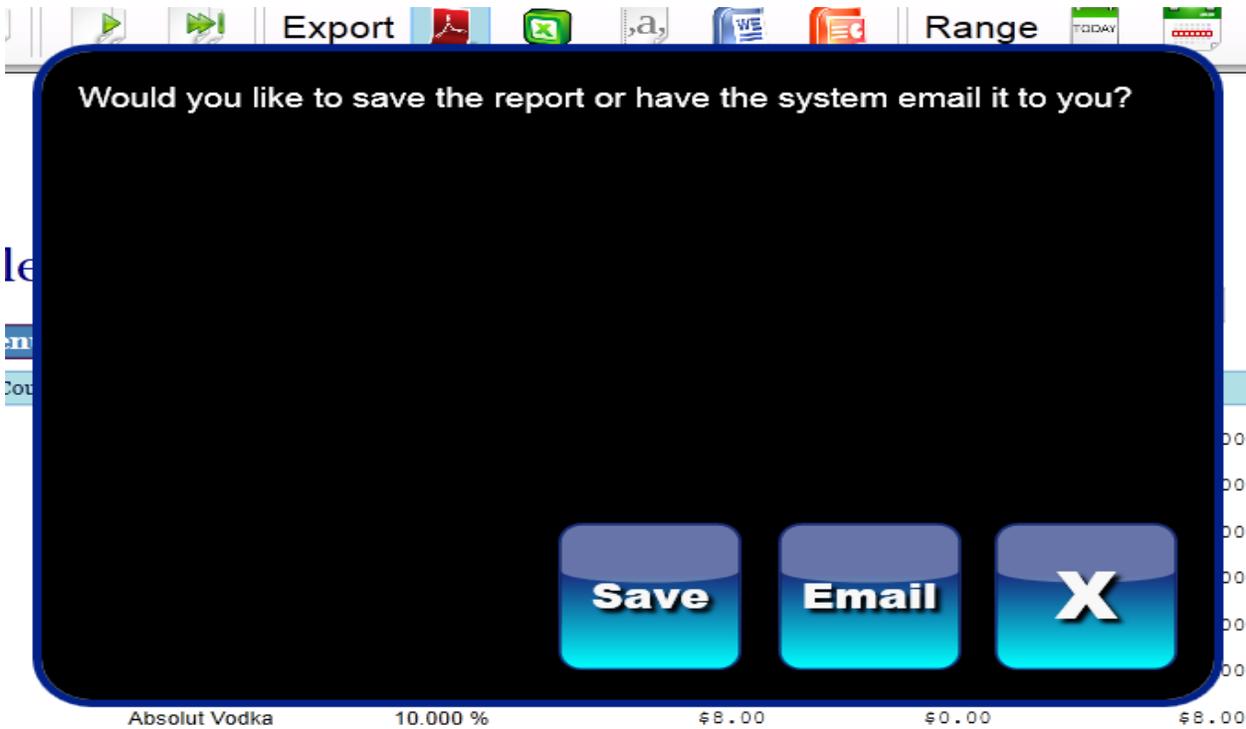


Figure 104



## Merge Two Tables

The Merge Two Tables button is located on the desktop;

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “Merge Two Tables” button.**
- 4) Click the arrow keys to search through the user names and choose the user that contains the table being merged. If there are two users whose tables need merging, choose the users for either side of the tables.
- 5) If the tables being merged are from the same user, choose the user in both tables as seen in *Figure 107*.
- 6) The table will take the name of the table that was chosen first. The table after the word “Into” will be the only table remaining after the tables are merged. *Figure 108*
- 7) Choose the table you want to merge into.
- 8) Choose the table you want the items merged from.
- 9) Click “Merge”.
- 10) A box will appear with the text “Success”.
- 11) Click “OK”.

### Merge Tables



Figure 107



Figure 108

## Transfer Table

The Transfer Tables button is located on the desktop;

- 1) Enter Employee number.
- 2) Click “Desktop” button.
- 3) Click “Transfer Table” button.**
- 4) In the first column on the left side will have the user name that the table is to be transferred from.
- 5) Click the arrow keys to search through the user names.
- 6) The right side will have the same user name so click on the arrow buttons to find the user the table will be transferred to.
- 7) Click on the table to be transferred.
- 8) Click on the arrow located between interface columns.
- 9) Once you see the table under the desired user, you are done and can return to the desktop.

\*To transfer additional tables repeat the process.

\*Managers may access tables on the Desktop by swiping the activated magnetic card. Access to the transfer tables tab will appear on the desktop. The user must lock the screen to deactivate the manager’s access level buttons.

*See Figure 109*

### Transter Table



Figure 109

## FAQ

**Q:** How do I reprint a receipt?

**A:** Printing receipts options are located on the payment screen.

1. From your Desktop;
2. Click "Order History"
3. Click on "All Today"
4. choose the Transaction
5. Click "View"
6. The printing options are located at the top of the screen.

**Q:** How do I open the cash drawer without processing a transaction?

**A:** There are two ways; through the Time Clock Screen as well as the Payments Screen.

**Q:** I don't have my Manager Mag Stripe card. How do I log in?

**A:** Another user with access to the BOH must sign in and change the access settings.

- 1) Access the BOH "System"
- 2) Access Levels- Disable "Require User to use a Mag card to Login" and save.
- 3) Lock the terminal.
- 4) Allow the user without the mag stripe to sign in using their employee ID number.
- 5) Set a new Magnetic Password.

**Q:** I've printed an item under products, but it's not showing on the order screen?

**A:** In order for an item to appear on the order screen, it must first be attached to a Menu. See Products- 10.

**Q:** How do I change the price of an item?

**A:** If the item is a product, you must search through the products, find the product you wish to change and change in the BOH screen under Products. See Products- 10

**Q:** I've changed to product's price and it's still not reflected in the order screen?

**A:** Make sure your product is not attached to a Group Pricing. Group pricing can be located under Product Group. You can remove the product or simply deactivate the group pricing feature. See Products- 10

**Q:** I'm having trouble with the touch screen, how do I calibrate the screen?

**A:** In system Configuration of the BOH. After entering the BOH click on the System config button, then click the button that says "Calibrate". You will then be prompted to perform a series of actions. See System Configuration- 15

**Q:** Why can't I close out the House?

**A:** You may have tables open. If there are tables open but payments have been paid, return to the Desktop, click transfer all open tables to your user and close them one by one. See Transfer Table

**Q:** Why won't my items print to the kitchen after I place an order?

**A:** 1) Check to make sure the printer is on and the ethernet cable is in fact plugged in. 2) Your Product may not be attached to a printer. See Products- 10 to attach a product to the correct printer group.

**Q:** I'm receiving an Error message: Stale Print Jobs. What do I do?

**A:** You have print jobs that have not been able to print because a printer may be out of paper, unplugged or are malfunctioning.

**Q:** My orders are being sent to the kitchen when the screen saver is enabled. I want to have control to send my order to the kitchen. How do I disable this feature?

**A:** This feature can be disabled by accessing the BOH System under System Configuration- 15. Uncheck "Send Order on Screen Saver Timeout". Your orders can now be sent manually or by manually exiting out of the screen.