The Security Screen

Functions

THE SECURITY SCREEN

Covered in This Section

>Functions of the Security Screen
>How to Use It
>Clocking In and Out
>E-Mail (Staff Messaging)
>Printing Logout Reports

The screen that appears whenever System3 is started or restarted, or when a staff member chooses to return to it, is called the 'Security Screen'. It's given this name as it provides secure access only to individuals who have the permission to use it. If for some reason a customer walks up to the screen and types in a random number, chances are that they will be greeted with the large warning message 'Invalid ID'.

The security screen also acts as a tool for staff to clock in and out, to send e-mail (staff messaging), and to print copies of Logout reports.

How to Use It

You may notice the 5 buttons in the top right corner. By default the button labeled '**Use POS**' is highlighted. There is also **'Clock In', 'Clock Out', 'Print Copy'**, and **'Send E-Mail'**. To use one of these other functions, the button needs to be highlighted.

These functions are accessed in one of two ways:

1. The Number Pad

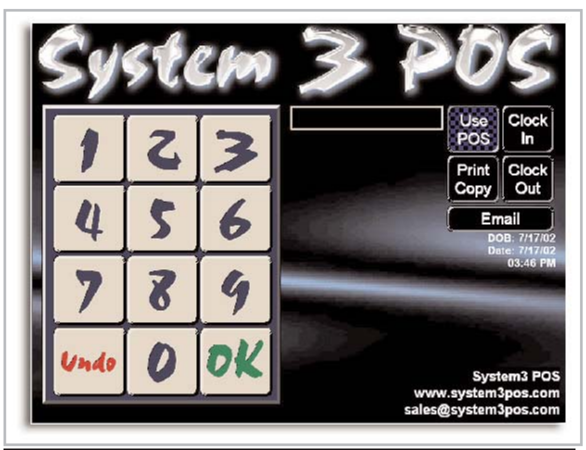

FIGURE 1a: *The Security Screen - Number Pad*

System3 gives the option to either use a magnetic swipe card or the number pad to access its functionality. To use the number pad, a manager MUST give you a valid personal ID number. Simply type in your number using the number pad. If you make a mistake, press the "Undo" button and start over. Once you've typed in your correct Personal ID code, press the 'OK' button to access the function you need.

NOTE: *Unless you select something else, System3 will default to the 'Use POS' function.*

2. Using a Magnetic Swipe Card

Another way to access System3 functions is with a magnetic swipe card reader. This card would have been issued to you by your manager and, like your personal ID number, it is tied directly to your individual security profile. This means anyone who obtains your card would have access to all of the functions that you do, as well as access to your tables (when using POS features). For this reason, it is very important to keep your card in a safe place at all times.
To use your card, the security screen needs to be in swipe card mode. You'll know it's in this mode if you don't see the number pad on the security screen, but rather a store logo, or the default message 'Please swipe your card to gain access to System3' (which appears where the number pad would normally be).

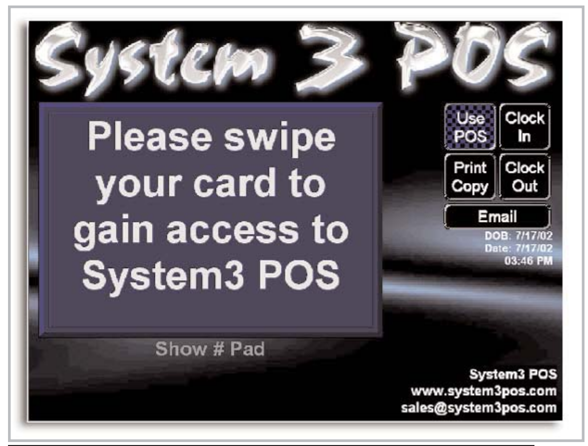

FIGURE 1b: *The Security Screen - Swipe Card*

If you see the number pad, but want to use your card, you can switch to swipe card mode by simply touching the top of the screen, where the System3 logo is.

Swipe the card through the reader. Most card readers will allow you to swipe the card in either direction, as long as the black magnetic stripe passes through the reader. If nothing happens, run the card through again, this time either slower or quicker than you tried previously, as some card readers models, read data at different speeds.

If your card still does not work, which will happen on occasion due to the magnetic stripe wearing out, either have your manager issue you a new card, or use your personal ID in the number pad mode. If you do not know your personal ID number, your manager can provide it to you (from the Employee Setup file)

Clocking In/Out

When starting a shift, highlight the '**Clock In**' button by touching it. Either key in your ID number on the number pad, or swipe your card (as discussed in the previous sections). A confirmation question '***Attempting to Log In [Your Name]? Yes / No***' will appear. If your name appears with that message, choose 'Yes', and a second confirmation message will appear '*You are successfully logged in.'*. This same message will appear if you attempt to use the clock in function again before clocking out.

If a name other than yours appears when attempting to log in, choose 'No' when prompted, and try again. If it happens again, ensure you've got YOUR card, or double check your number. It may have been changed by your manager.

At the end of your shift, highlight the '**Clock Out**' button by touching it. Either key in your ID number on the number pad or swipe your card. The screen will change to 'Please Wait, Gathering Data'. When System3 is finished gathering your time and attendance data, it will print a chit(receipt) detailing your hours. If you've been using System3's POS features, and have accidentally left a bill open, a list of open bills and which terminals they're on will print instead. If this is the case, **you are not clocked out**, and must close **ALL** bills before being allowed to clock out.

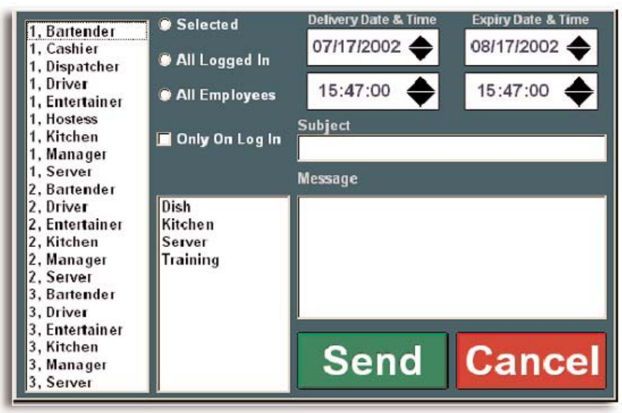

FIGURE 2: *The E-Mail Screen*

If the number of hours on the chit does not match your own calculations, alert a manager in order to correct the situation

E-Mail (Staff Messaging)

Not to be confused with internet based e-mail, System3's E-mail function is designed to be used as a staff to staff, or manager to staff messaging system. To use this feature, you must have been given proper access in your employee security setup.
Highlight the' Send **E-mail'** button by touching it, and either type in your number, or swipe your card. This will bring up a box as shown in **Figure 1-1**. Along the left side is a list of **All Employees**. To the right is a list of **Job Codes**, and above that are a number of **Switches** that you can use to determine who the e-mail is delivered to. The last options to decide on are Delivery Date/Time, and Expiry Date/Time, which determine when the message is sent.
The 'Subject' field allows you to fill in a subject line for the e-mail, and the 'Message' box allows you to type an actual message to be delivered.
There are several different ways to send messages among staff. Once the E-mail window is displayed, choose from the following options:

A. Select Specific Employees
To send a message to a specific employee, or employees:

1. Select the **employee(s**) from the list that you would like the message to go to.

2. Ensure that the '**Selected**' button is filled with a black circle. (If it doesn't have a black circle, just touch it)

3. Check that the '**Delivery Date & Tim**e' are correct. (To correct them, touch the portions of the date or time that you would like to change, and then use the up/down arrows to change them.

4. Check that the '**Expiry Date & Time**' are correct. You can change them as detailed in Step 3 above. The expiry date and time control how long the message will be kept unread in System3 memory, before being deleted.

Eg: If a message is sent to an employee, and they don't read it before the expiry date, the message will be automatically deleted from memory.

5. Fill the subject of the message in the '**Subject**' line, by touching the white box. An on-screen keyboard will pop up, allowing you to type the subject. When done press '**Enter**'

6. Fill the message in the box marked '**Message**' by touching the white box. Again, an on screen keyboard will pop up allowing you to fill in the body of the message.

7. Press the 'Send' button to send the message, or the 'Cancel' button to cancel the message.

B. Select Specific Job Codes
To send a message to all people in a specific Job Code(s),

1. Select the Job Codes from the Job Code list that you would like the message to go to.

2. Make sure that the '**Selected**' button is deselected (no black circle in the box).

3. Follow steps 3-7 above.

C. **To All Employees**
To send a message to all employees.

1. Select the '**All Employees**' button

2. Follow steps 3-7 listed above under '...Selected Employees.'

D. Select All Logged In Employees
To send a message to all employees currently logged-in.

Special Section : Reading The Server Logout

Although different options can be turned on by managers that will vary the look of your log out report, the example to the right shows the two common components that will appear on all log out reports.

i. Time & Attendance Info

The top of the log out report will give you information regarding Clock-In(Log In) time and date, and Clock-Out(Log Out) time and date.

Additionally, the total amount of hours worked is calculated and printed.

The last line 'Run on Shift', indicates how many of the days shifts that you happened to work. So if you started at a time that was defined as 'Shift 1', and finished during 'Shift 2', your 'Run On Shift' would be 2.

ii. Sales & Remittance Info

If your shift overlapped more than one of the restaurants shifts, this info will be broken down by shift, and then totalled.

System3 will break down your sales totals by tender type, and by the amount of transactions that were settled to each tender type. Any gratuities that were rung in, will also appear.

The line labeled 'Total' gives, in order, sales total, gratuity total, and Grand Total (Sales + Gratuities).

The line labeled 'Gratuity' gives a total of gratuities, and is important as it is used to help calculate the server drop.

The line labeled 'ServerDrop' gives the amount of cash that a server needs to remit to management. This amount is derived by subtracting any 'Non-Cash Sales' (Credit Cards, House Accounts, etc.), as well as any gratuities made on Credit Cards or House Accounts, from total cash sales.

As stated before, these amounts will be broken down by shift, and a total will be printed near the bottom of the printout.

To cash out, *servers should verify that they have the correct number of credit card receipts. Once verified, servers need simply remit the amount indicated on the line that reads 'Server Drop'.*

As per IRS legislation, servers need to report 8% of cash sales, as well as total Credit Card sales when filing their individual tax returns. These amounts are calculated and listed on the bottom of the Log Out Report.

Management can also turn on the option to have Department totals, Discounts, and/or Voids printed on the cashout.

Figure 3 : The Server Log Out

```
*******************************
*COPY of Server Log Out Report*
*YOU ARE NOT LOGGED OUT****
*******************************
Name:   Manager 1

Log In:        12:30 PM
Wednesday,     July 03, 2002

Log Out:       03:18 PM
Wednesday,     July 03, 2002

# Hours Worked:     2.80
Run On Shift:       1

Shift:  1
---------------------------Tips--------Total--
5 Cash          64.48    0.00     64.48
2 Visa          79.25    20.75    100.00
1 Master Car    30.16    9.84     40.00
----------------------------------------------
Total:          173.89   30.59    204.48

Gratuity 1:                      $30.59
ServerDrop1:                     $33.89
8% Cash 1:                        $5.16
Total Credit 1:                 $140.00
```

1. Select the 'All Logged In' button by pressing it.

2. Follow steps 3-7 listed above under '...Selected Employees.'

The last option in this window is the 'Only On Log In' check-box. With this selection checked, delivery will be delayed until at least the next time the selected employees log-in.

Print Copy

The 'Print Copy' function is used to print a copy of a server/bartender's logout report. Clocking out with no open orders will produce the same results, but will also stop tracking your Time and Attendance information for that shift. Using the 'Print Copy' function, a Server Logout Report can be produced, while staying logged-in for Time and Attendance purposes.

NOTE: *Using the 'Print Copy' function will cause System3 to print a line reading 'Copy of Logout', this way a manager can tell if a server is actually 'Logged Out'.*

THE RETRIEVE ORDER SCREEN

Covered in This Section

> Introduction
> Screen Layout
i. terminal number ID button
ii. order list window layout
>Function Buttons
i. finding and accessing active orders
ii. other functions
iii. cashing out orders
iv. starting new orders
v. the multiple select button

Introduction

Depending on the options set by your manager, the 'Retrieve Order' screen is probably the first screen you'll be presented with after swiping your card (or keying in your security code). The screen allows you to manage your tables, and to view them all at a glance. It is also one of the screens that will allow you to start a 'New Table'.

If you don't see the 'Retrieve Order' screen upon swipe-in, then your manager has set the terminal to start at the 'Main Menu', in which case you'll see the 'Retrieve Order' screen anytime you need to access an active order.

NOTE: *If you don't ever see the 'Retrieve Order' screen, it's because your manager has decided to use the graphical interface for Table Management. You'll know this is the case if you see a floor plan of your restaurant on the screen. Most of the functions that are available on the 'Retrieve Order' screen are available on the Graphical Table Management screen. Use of Table Management is covered in a separate section.*

Retrieve Order Screen Layout

The screen is organized as follows:

i. TERMINAL NUMBER ID BUTTON

The bright yellow button in the top left corner of the screen indicates, by default, which terminal you are currently working on. Most of the time the name will start with a 'T' (but not always), and will be followed by a number. If you'd like to view/access orders that currently reside on another terminal, you can switch to the Order List for another terminal by touching the button. (the terminal number will change) If you have several terminals on the network, you may have to press it numerous times in order to get to the terminal you'd like to access. See the section on 'Finding and Opening Active Orders' for more details.

ii ORDER LIST WINDOW

Contains a list of current orders in the system. If you've been given access to view others orders, you will see your orders as well as other server/bartenders.

Managers and cashiers will, by default, see ALL active orders in the system

NOTE: *Because of the unique 'Peer-to-Peer' configuration of the System3 network, only orders that were last accessed on this particular terminal will be visible on this terminal. For example, if you started an order on this terminal, but retrieved it on another terminal, and are now back at this terminal, you will not see the order in this list. To see this order, there are a couple of ways to bring it back to the screen. See the section on Finding and Accessing Active Orders'.*

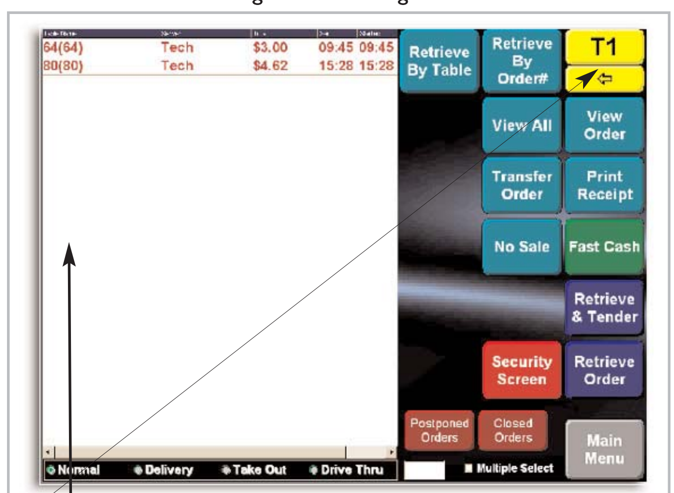

FIGURE 4: *The Retrieve Order Screen*

The Order List Window is the large white box that covers the entire left half of the retrieve order screen. The window is organized in a number of different fashions.

A] Along the top of the window, in white letters on a blue background, you'll notice the headings 'Table Name', 'Server', 'Value', 'Sent', and 'Started'. Orders are listed in time-sorted order, with the most recently accessed order on the bottom of the list, the second most recently accessed order is second from the bottom, and so on. In addition to time info, you'll notice that other crucial information is listed, such as table name (number), the value of the order, and the server who 'owns' the order, all under the corresponding column headings. Another key piece of info to watch for is 'Order Number', if this function is turned on the order number will appear in brackets next to the table name on the 'Order List' window.

B] The **Color Coding** of the orders is very simple. Orders that appear in **Red**, have exceeded the preset warning time *(Manager Side > Terminal Options > Program Flow > Number of minutes before warning on no server access...)* since they were last accessed. This gives both servers and managers a quick visual cue as to which tables have been accessed recently, and which haven't.

If an order appears in **blue**, it has been closed and reopened (by a manager)

If the order is in **black**, it is not in any sort of warning state.

C] Along the bottom of the window, there are 4 'switches' that correspond to Order Types.. By default, System3 shows the order type as '**Normal**'. This includes Dine-In, Delivery, Take-Out, and Drive Thru orders which were last accessed on this terminal.

To see only Takeout, or only Delivery orders, simply highlight the button that corresponds to whichever type of order you'd like to see- for Delivery orders . press the Delivery button, etc.

The reason orders are sorted in this manner is to prevent too many orders from appearing in the window. If you just want to find a specific 'Takeout' order, you don't have to sort through all of the other Order Types also, just press the Takeout button, and only Takeout orders are shown.

NOTE: *If a restaurant is using specific terminals for either Drive-Thru, or Delivery orders, all orders of those types will automatically 'migrate' to their specified terminals, additionally these types of orders will not show up under 'Normal Orders'.*

To see orders that are at the bottom of the window, use the grey scrollbar on the extreme right hand side of the window. The scrollbar will only appear if the length of the order list exceeds the length of the window. To use the scrollbar, simply touch and hold it, and then move it up or down until you see the order you need.

3. Retrieve Order Screen Function Buttons

Following is a summary of the buttons that are located on the right half of the retrieve order screen. We'll group some of the ones that have similar functionality together.

i. FINDING AND ACCESSING ACTIVE ORDERS

a.) **Terminal Number ID** button - As discussed before, by pressing the yellow button in the top right corner, you can switch the order list window to reflect what is on any of the other terminals. For example if you are at a terminal labeled T2, as you press the button, the number will change from T2 to T3, and you will see all of the active orders on T3, Press it again to switch it to T4, etc. When it reaches the last terminal in the network, it will start at the lowest numbered terminal again (T1), and continue on from there. Or, to move back in the list, use the yellow '<' button.

To make the order active on the terminal you're standing at; select the order by highlighting it > press the '**Retrieve Order**' button. The order will then be open for editing on the current terminal, and now '*resides*' on this terminal'.

b.) **Retrieve Order by Table #** button - Use this if you know the table name or number of the table you would like to access. Touch '**Retrieve by Table #**' > Fill in the exact name/number of the table > Press '**Enter**' > The order should now be open for editing.

c.) **The Retrieve by Order #** button - Starting with the first new order of each day as '1', System3 sequentially numbers all orders that have been started, and tags those orders (in addition to their table name/number). The reason for this is that some restaurants/bars that allow servers to use the same table number more than once at the same time (eg. 2 - Table #44s), will often use the

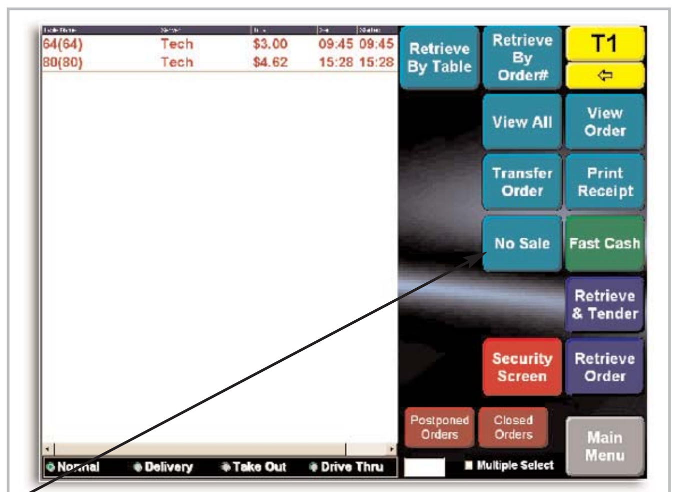

FIGURE 5: *The Retrieve Order Screen*

order number to retrieve the table instead, as it presents less confusion. To use it > press '**Retrieve by Order#**' > Fill in the

order # that you would like to access > press '**Enter**' > The order should now be open for editing.

d.). **View All** - Short for 'View All Orders', the 'View All' Button will collect all active orders on the network, and display their summary info on the current terminal's Order List window. At this point you can highlight one of the orders by touching it (it will turn blue, to indicate that it is selected), and then you can perform most of the following functions.

e.) Retrieve Order- Used to retrieve an order that is currently visible on the screen Select the order you would like to access by touching it (it will turn blue) > press **Retrieve Order.** The order should now be open for editing.

ii. OTHER FUNCTIONS

f.) **View Order** - If you want to see details of an order (actual items ordered), rather than just what appears in the Order List window, you can highlight the order you want to see the details for (touch it and it will turn blue to indicate selection) and then press > View Order. A small window will pop up to the right of the order list, allowing you to see the details of the order. To make the **'View Order'** window disappear, touch anywhere else on the **Order List Window**

g.)**Transfer Order** - Used to transfer ownership of an active order to another server. To transfer an order: Select the order > press **Transfer Order** > Select a **server** from the pop-up window > press '**OK**' > The message '**Are you sure you want to...? Yes/No**' will appear > If you are not sure about transferring the order, select '**No**', and the transfer will be cancelled > If you are sure about the transfer, select '**Yes**' and the order will disappear from the order list (or will at least change the name under the '**Server**' column), and the order is no longer 'owned' by you.

NOTE: *As a security measure, management can turn off a server's ability to transfer orders. You will know this is the case if you see a message appear that says 'Please Enter Your Manager ID. To Cancel - Touch this Box' at any point during the transfer process. If this is the case you will need someone with Manager Override access to complete the transfer.*

h.) **Print Receipt** - Used to print a receipt for a customer. To print a receipt: Select the order > press Print Receipt > a receipt will print on the designated receipt printer

i.) **No Sale** - Used to open a cash drawer without tendering a sale. To use the No Sale function: Ensure no bills are selected > press the 'No Sale' button > if you have access to the cash drawer, it will automatically open.

NOTE: *Any time the 'No Sale' button is pressed, it is registered on the 'No Sale' report, along with specifics regarding server and time.*

j.) **Security Screen** - Used to return quickly to the security screen. In order to prevent others from accessing your orders, a good habit to develop is that of pressing the 'Security Screen' button before walking away from the terminal.

iii CASHING OUT ORDERS

k.) **Fast Cash** - Used to tender a bill (or bills) quickly to cash. To use the Fast Cash button: Select the bill you would like to 'Fast Cash' > press the 'Fast Cash' button > you will be prompted with the message 'Are You Sure You want to Fast Cash this order? Yes/No?' > ensure that you are cashing out the proper order before pressing 'Yes' > if you are unsure about cashing out the order, press 'No'.

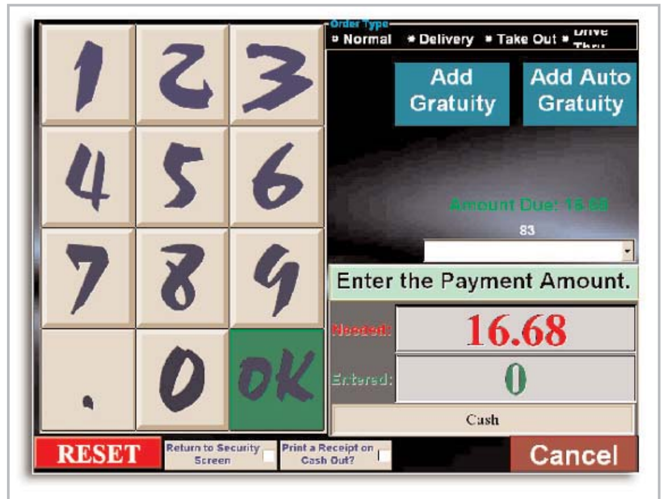

FIGURE 6: *The Payment Amount Screen*

WARNING ! - *If you "Fast Cash' an order in error, it can only be 'reopened' by a manager, so be sure to always check the order name/number before answering 'yes' to the 'Are you Sure...' message.*

l.) **Retrieve & Tender** (Single Tender Type) - Used to tender a bill to any of the tender (payment) types, including cash, Visa, Mastercard, among others. Let's look at a few.

<u>Cash</u> **-** To tender a bill, select the bill you would like to enter a payment for > press

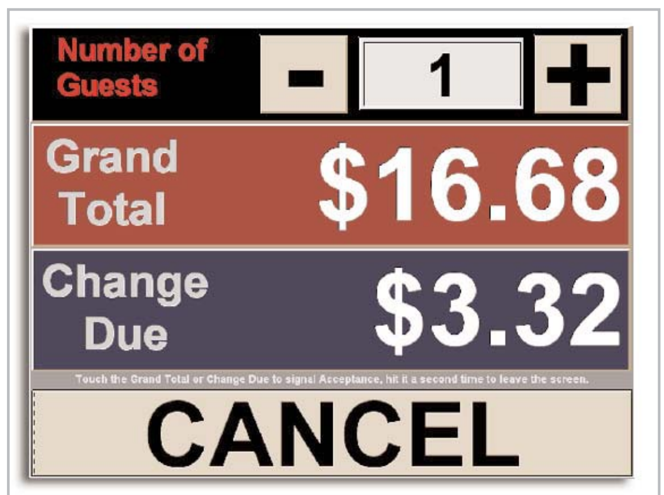

FIGURE 7: *The Change Due Screen*

Retrieve and Tender > select Cash as the payment method > enter the amount (keep in mind that System3 automatically assumes 2 decimal places, so pressing 1-0-0 without pressing the decimal point, will put $100 dollars on the screen. To enter $1.00, you'll need to press 1- then the decimal -then 0-0)> press Reset at any time if you make a mistake entering an amount > verify that the correct amount is entered > press **OK** > a large screen will then be displayed highlighting the **Amount Entered**, and the **Change Due**, as well as the **number of guests** at the table (which can be changed using the +/- keys), and a **Cancel** button >

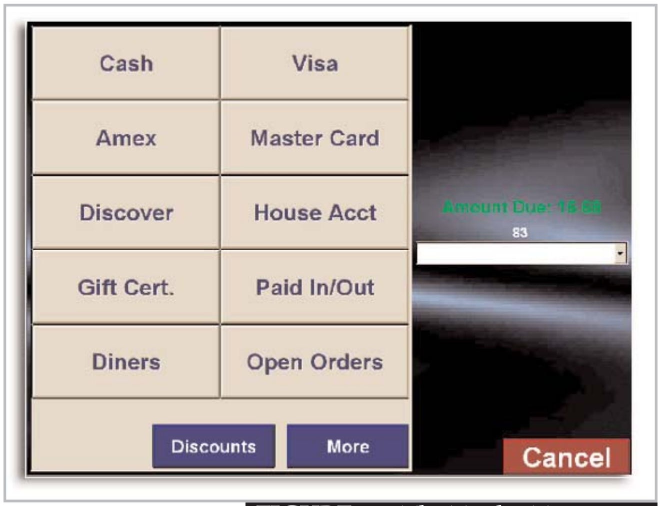

FIGURE 8: *The Tender Type Screen*

Verify that all amounts are correct (if not press **Cancel** to re-enter the amount) > touch the screen anywhere in the **Red/Blue** area to accept the transaction > the order is now closed.

<u>All Credit Cards</u> (Not using Credit Card Interface)- If a customer pays with his credit card, and has signed their slip, and left you a tip, this is how you would settle it > Select the bill you would like to Tender and press Retrieve and Tender > select the Card Type as the payment method > fill in the total amount of the charge slip (including tip) > press Reset at any time if you make a mistake entering the amount > verify that the amount you've punched in is correct > press OK > System3 will ask 'Would you like the difference to be Gratuity?' Yes/No' > Press Yes if you would > Pressing No will assume that the difference will be treated like change.

<u>House No Card</u> - System3 allows the use of **House Accounts**. Some restaurants/bars call them '*Tabs*', others call them '*Credit Accounts*'. They function as an 'Eat Now/ Pay Later' form of payment, but can also be used in a prepaid fashion, where the customer pays a set amount in advance, and then uses this prepaid account whenever they come in.

These **House Accounts** can be tracked using either a Magnetic Card for security, or with no card. The **House No Card** payment type is used to settle an order to a House Account without a card. To do this, accounts will have to have been set up in advance:

Select the bill you would like to Tender > press **Retrieve and Tender** > select **House No Card** as a payment type > a window will pop up with a full list of **Active House Accounts** (if this is an extensive list, you can use the **Alpha Hot Keys** on the left to take you directly to all accounts that start with a particular letter) > select the **House Account** you would like to settle the order to and press **OK** > System3 will then ask 'Would you like to Print a Receipt for The Customer to Sign? Yes/No' > Select **yes**, and a double receipt is printed out, on which a customer can add tip, and sign his name > at this point, **Cancel** the transaction, and bring the customer the receipt to sign. Once they have signed it, repeat the above steps, but when System3 asks if you would like to print a receipt > press **No** > enter the total amount of the receipt (including tip) > verify that the amount is correct > press **OK** > If the amount entered is greater than the amount of the bill, System3 will ask 'Would you like the Difference to be Gratuity? > If you select **No**, the difference will be treated as change for the customer.

<u>House With Card</u> - The steps are identical to those above, except that System3 will require you to swipe the customers card through the magnetic card reader attached to the terminal as soon as you select this as a tender type.

m.) Retrieve & Tender (Multiple Tender Types) - Used when a table is paying a bill with more than one type of payment. For our example, let's assume a $100 tab, and a table wants to pay $50 in cash, and the rest on Visa.
Select the $100 bill from the order list window > press Retrieve and Tender > select Cash as the Tender Type > type in $50 > press OK > System3 pops up a window that says 'The Amount You entered is not enough - What would you like to do? Split Tender / Send the Order with Partial Payment / Try Again ?' > select 'Split Tender' > the tender type screen comes up again > select Visa > enter the amount, including tip > System3 will ask 'Would you Like the Difference to be Gratuity? - Yes/No?' - select Yes if you would like the difference to be treated as tip or select No if you would like the difference to be treated as change for the customer..

NOTE: *If you had chosen 'Send this order with Partial Payment', you would have been brought to either the security screen, or the retrieve order screen (depending on Terminal Options set by your manager) to continue using the system as normal. In this case the bill Total in the order list window would remain $100, but when you get to the*

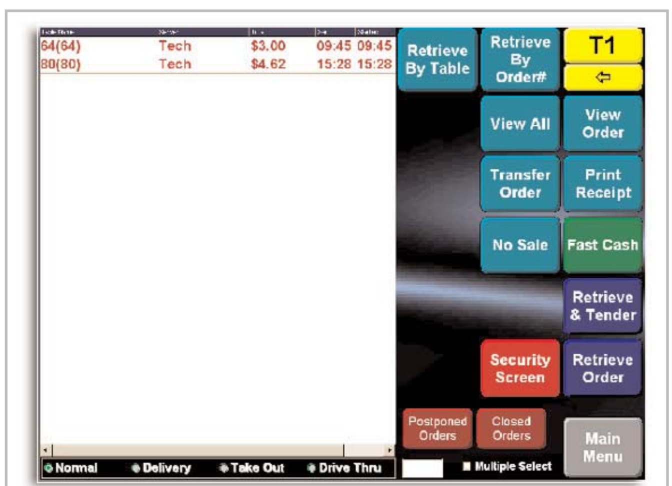

FIGURE 9: *The Retrieve Order Screen*

screen that allows you to enter a Payment amount, the $50 cash will have been deducted from the bill total, leaving you with only $50 to pay. This use of this function is intended for situation, for example, where a customer(s) is leaving a table, and wants to pay part of the bill, but the other people at the table want to keep the tab open.

iv STARTING NEW ORDERS

n.) New Order - When using the Retrieve Order screen as a starting point (as determined by your manager in Terminal Options), this button is used just as you thought it might be. To start a new order(table)

Press the New Order button > the Keyboard Screen will pop up > if the large grey box at the top of the keyboard is blank, fill in a table name by 'typing' on the keyboard > press Enter > or if the box already has a number in it, it's because your manager has set it to automatically generate table names > to accept this table name, press Enter > to change this table name, take your finger and touch and drag over the table name that is already filled in there > when it's highlighted, press Erase > the dark grey box should be blank now > type in the desired table name > press Enter > the main menu screen will appear along with a blank order window, ready for a new order.

v. THE MULTIPLE SELECT BUTTON

On the bottom of the Retrieve Order screen, You'll notice a tiny whit check-box, with the words 'Multiple Select' next to it. When the box is unchecked (default setting) you will only be able to select one order at a time. When the box IS checked, you will be allowed to select as many orders as you like.

NOTE: *Be extra careful when Multiple select is turned on (checked), as you can cause issues by incorrectly combining bills, etc.*

The multi select works with many of the functions on the Retrieve Order screen. For any of the following functions, ensure that the Multiple Select is checked.

a.) Fast Cashing Multiple Orders - Carefully select all of the orders that you would like to quickly settle to cash, and press Fast Cash. You will be prompted with 'Are you sure you want to Fast Cash these orders? Yes/No? > Ensure that you have the correct orders selected, and press Yes. The orders will disappear from the screen. If you close an order in error, you will need a manager to re-open the order.

b.) Combining Multiple Orders into One - Carefully select the orders that you would like to combine > press the Retrieve Order button > 'Retrieving Multiple Orders will cause System3 to combine these orders. Would you like to continue? Yes/No? > ensure that you have the correct orders selected and press Yes. The main menu screen will come up, with the combined order open in the Order Window.

c.) Combining and Cashing out Multiple Orders - If you would like to select a number of bills to combine, and take you directly to the Tender screen > Carefully select the orders > press the Retrieve and Tender button. You will be prompted with 'Retrieving Multiple Orders will cause System3 to combine these orders. Would you like to Continue? Yes/No? >ensure that you have the correct orders selected and press Yes. The tender type screen will come up next, with the combined total of all of the bills that you've selected. Proceed with the tender as described in the section on 'Retrieve and Tender'.

d.) Transferring Multiple Orders - If you would like transfer a number of orders to the same server > Carefully select the orders that you would like Transfer > press the Transfer Order button > you will be prompted with 'This action will transfer multiple orders. Would you like to continue? Yes/No?' > Ensure that you have the correct orders selected and press Yes > you will be prompted with a list of servers to transfer to > select the server from the list > press OK > you will be prompted with 'Are you sure you want to transfer these orders to [Server Name]? Yes/No? > ensure that it is the correct server name > press Yes > the orders will disappear from the screen and are no longer owned by you.

NOTE: *The transfer function can be set to only be authorized by a manager. If this is the case, you'll need a manager to perform the previous function.*

FIGURE 10: *The Retrieve Order Screen*

Introduction

Because the process of ordering can vary substantially, depending on what type of restaurant is being operated (Table Service, Counter Service, Take Out, Delivery), we'll examine the most common one first - Table Service. Most Table Service restaurants will perform the everyday processes (Ordering, sending, printing bills)in much the same way, with only minor variations in the way they do things. If the way you do things in your restaurant are different, consult one of the other sections of the manual.

THE ORDERING PROCESS (TABLE SERVICE)

Covered in This Section

Review

The process of ordering is closely tied in with managing active orders, and closing out bills, so let's review the ordering process that we've already covered in the sections on 'The Security Screen', and on 'The Retrieve Order Screen'. If you need more detail, please refer to those sections:

1. To enter from the security screen > swipe your card, or punch in your number > press OK > you will either be brought to the 'Retrieve Order' screen, in which case follow step 2 > if you are brought directly to the Main Menu screen, skip step 2.

2. You are now on the Retrieve Order screen > press 'New Order' > if the box above the on-screen keyboard is blank, type in a table name/number using the on-screen keyboard > if the box above on-screen has a number already filled, it's because a manager has the option turned on right now to "use current order number as table number" > to change this number touch and drag your finger over the number and press 'Erase', then fill in the new number > to accept the table number, press Enter.

3. You are now on the Main Menu screen, and ready to enter items.

Main Menu Screen Layout

i. ACTIVE ORDER WINDOW

On the left side of the screen you'll see a large white box. This is the actual order window, where items will appear as you order them, as well as where you will be able to make changes. Items will appear in BLACK, and modifiers will appear in RED.

Additionally, if you re-open an order you'll notice that items that

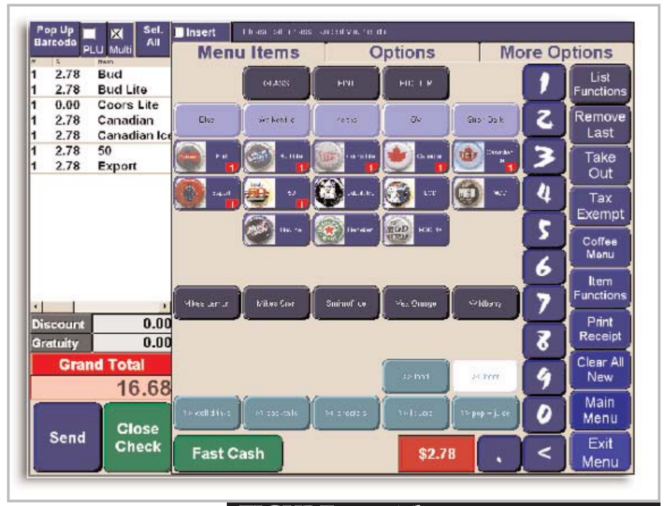

FIGURE 11: *The Main Menu Screen*

were previously sent, have changed color slightly. Previously sent items are now DARK GREY (instead of black), and previously sent modifiers are now PINK (instead of red).

ii. MAIN / SUB MENU BUTTONS

Directly to the right of the order window is the Main Menu. You can't actually order anything directly from the Main Menu, as it is used to organize the menu into different categories. Those categories should closely resemble the breakdown of your actual menu. For example, all pasta would be under the 'Pasta' button, appetizers would fall under an 'Appetizer' button, bottled wines would be found under the 'Wines' section, etc. Obviously your actual menu buttons will vary, but that is the general idea with Main Menu Buttons, as they will be referred to from here on.

Generally, when you touch a main menu button, you will go directly to a page of items, but not always. From time to time a main menu category needs to be broken into sub categories. We call these Submenus. An example of a submenu would be if you have a main menu button 'Beer' > you touch the 'Beer' button > a screen pops up that gives you the choices 'Draught Beers' or 'Bottled Beers' - this is a SubMenu > Once you make a choice, touch the button you want > another screen appears with actual items on it.

iii. MODIFIER BUTTONS

The last type of button that you will encounter underneath the Main Menu is the Modifier button. A modifier is very similar to an item, except that it's specific purpose is to MODIFY the preparation of a particular item. (Thus the name). An example of modifiers would be if you rang in a 'steak' (items), a page of modifiers pops up to allow you to choose meat temp (rare, medium rare,etc.). Another example would be if you rang in a 'vodka' (item), and you want it 'on the rocks' (modifier). The quickest way to know that you have rung in a modifier, is to look at the order window. *Items* will appear in BLACK, and *modifiers* are spaced over from the left and are RED.

iv. FUNCTION BUTTONS

On the far right of the screen, you may notice a number of different buttons organized from the top of the screen, to the bottom. These are called 'Function Buttons'. System3 currently has over 100 functions to choose from (these are covered in a separate section) for use on these 10 buttons. If you need more than 10 of the functions (most will), we recommend putting the 10 most common functions that you perform on these 10 buttons, and put the other ones underneath the 'Options' or 'More Options' tabs. (right next to the Main Menu tab. To get to Options, or More Options, just touch where the words are printed & to get back to the Main Menu, touch where it says 'Main Menu'.) For a full list of these options, and their use, see the section labeled Edit Function Buttons'.

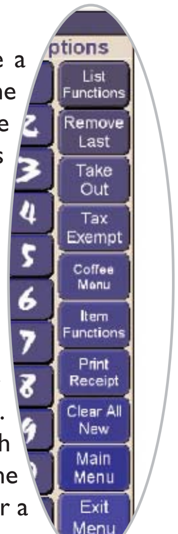

FIGURE 12: *Function Buttons*

v. OTHER BUTTONS

Between the Main Menu Buttons and the Function Buttons, you'll notice number buttons '1' thru '0', plus a decimal and a '<' (which is used for erasing). The numbers can be used for Seat Number, or for quantity of an item, depending on the option your manager has set.

On the bottom left of the screen, there is a button that says 'Recall'. This button will change to 'Send' as soon as items are added to the bill. The 'Recall' function will take you back to the Retrieve Order screen, so that you can access other tables. The 'Send' button will send only NEW (previously unsent) items to the kitchen/bar. One of the most commonly misunderstood concepts when training people in System3, is that ANY TIME an active bill is Retrieved (re-opened), the 'Recall' button will change to 'Send'. If no new items are added to the bill and you hit Send, the items that are already on the bill won't be reprinted at the kitchen/bar, so there is no need to worry of items being remade. Additionally, if you have an order 'open for editing', you can't simply hit the Exit button. You will be greeted with the warning message 'You Currently Have an Order Open for Editing. You must Send this order...'. In order to exit to either the security screen, or to the retrieve order screen, while you have an order open, you'll need to hit the 'Send' button.

Next to the 'Recall' button, you'll notice a button that says 'Close Check'. The 'Close Check' button works identically to the 'Retrieve and Tender' button covered in the previous section, except that it is intended for the check that you are currently editing.

Next to the 'Close Check' button, you may (depending on options set by your manager) see the 'Fast Cash' button. Again, the 'Fast Cash' button works exactly the same as the 'Fast Cash' button on the Retrieve Order screen (covered in the previous section), but is intended for the check that you are currently editing.

To the right of the Fast Cash button, is the Quick Screen button (If this option is turned on). This button will take you directly to the Quick screen, which is a screen used mostly by busy bars and clubs, by the bartender. Sel the section on the Quick Screen for more details.

To the right of the Quick Screen button, is a red box. This box will display the price of the last item selected.

Above the order window, you'll notice a row of blue boxes. The first two 'Pop-up PLU/Barcode', and "PLU' checkbox are intended for use with menus that use Price Look Ups (PLU) for certain items, or that use barcode scanning to input items.

Next you will see a check-box with the word 'Multi' under it. This is short for 'Multi Select'. When this box is unchecked you will only be allowed to select one item (by highlighting it with your finger) before the 'Keep/Delete' screen pops up. (See the section on 'The List Functions' screen for more details.When the box is checked, you will be able to select as many items as you wish, and the 'Keep/Delete' screen will not pop up, until you press the 'List Functions' button. (Which is probably on the far right of the screen, unless it has been changed by a manager).

The last item on the Main Menu screen that we'll discuss, is the 'Sel All' button. To **Sel**ect **All** items in the currently active order, press the Sel All button. This will automatically highlight all of the items in the current order, and will pop up the 'Keep/Delete' screen.

The List Functions Button Window

As mentioned before the 10 buttons on the far right-hand side of the screen are called Function Buttons. Unless changed by your manager, one of those buttons will have the name 'List Functions'. Sometimes to simplify things, the button is renamed 'Keep/Delete', as that is what it is used primarily for. It does, however, offer the option of performing many functions on an item, or a group of items.

NOTE: *It is very important to learn the "List Functions' button thoroughly, as you will probably end up using it frequently.*

The List Functions Button Window (cont'd)

a. **The 'Delete' Button** - As stated above the main purpose of the 'List Functions' button is to delete an item. When you make a mistake in mid-order, and realize that you need to remove an item:

NOTE: *To Delete **previously sent** items, you'll need management authorization.*

If the 'Multi' check-box is turned on, select the item (or items) that you would like to delete, and press the 'List Functions' button. A window will pop-up on the screen that has the name of the item you want to remove at the top. Below the name of the item are 2 large buttons - one red/one green - that read 'Delete' (red) and 'Keep' (green). To the right of these buttons are several blue function buttons (we'll cover those later). If you're sure you want to delete the item, press the 'Delete' button, if you don't want to delete them, press 'Keep'. The item is now removed from the order.

If the 'Multi' check-box is tuned off, as soon as you select an item, the List Functions Window will automatically pop up, allowing you to 'Delete' the item, or to perform one of the other functions listed.

To delete all items in an order, use the Sel All button, and again, the List Functions window will pop up, allowing you to Delete the items.b. **Hold Item/Unhold Item** - Used to time orders to the kitchen. If you want to ring an entire order, but only send part of it to the kitchen, select the items that you wish to HOLD back from printing. They will turn blue to remind you that they are held. To make the items print to the kitchen, select the blue color-coded items and press the UNHOLD button. The items will then print to the kitchen.

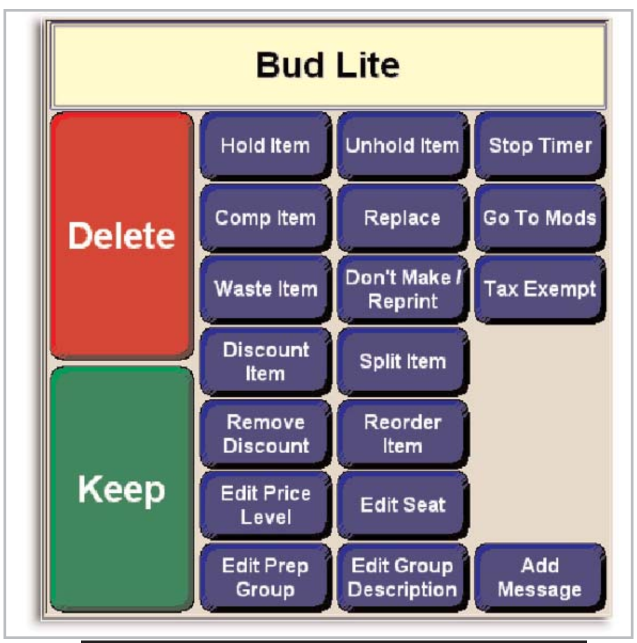

FIGURE 13: *The 'List Functions' Window*

c. **Comp Item** - 'Comp' is short for complementary, so to 'Comp' an item, is to make it free for the guest. Comps require management authorization to perform. Select the item(s) that you want to comp, and press the List Functions button > when the Window pops up select the 'Comp Item' button > the management authorization window will pop up > once authorization is entered > select a reason for the comp from the pop-up list. The item will remain on the bill, but will have a zero charge, this way it can be 'uncomped', and it will show up on reports as a sold item, with a zero total.

d. **Replace** - On occasion, in the middle of the ordering process, you'll realize that you've rung in an incorrect item/modifier (for example 'medium well' instead of 'medium rare', or large pizza instead of small pizza). To take you back to the page that contained the modifier or item that you rang in, highlight the mistake > press the List Functions button > press the 'Replace' button >the item / modifier will be removed > the page that contained the original modifier will pop up > choose the replacement modifier / item > continue with the ordering process.

e. **Waste Item** - If an item is rung in, and is made, but something happens to it (dropped, cold, customer hates it), it will need to come off of the bill, but it will also need to be accounted for, for inventory purposes. This is where the 'Waste Item' function comes in handy. To 'Waste' an item > select the item from the order list window > press 'List Functions' > press 'Waste Item' > the management authorization window will appear > enter authorization > select the reason for the waste from the window that pops up > press OK > the item will disappear from the bill, but will show up in any Waste report run by management.

f. **Don't Make/Reprint** *(formerly the 'Make New/Old' function)* - To ring in an item that you don't want printing at the kitchen/bar, select the item that you don't want to print > press the 'List Functions' button > press the Don't Make/Reprint button > the message 'Do you want this item to print at the Kitchen/Bar? Yes/No?' will appear > select No, and the item will not print to the kitchen/bar.

To force an item to print again to the kitchen or bar, without ringing it in again > select the item(s) that you would like to reprint > answer Yes to the question 'Do you want this item to print at the Kitchen/Bar? Yes/No?' > the management authorization screen will appear > enter management auth > the item will reprint to the kitchen/bar.

g.. **Tax Exempt** - There are certain places (Canada is one) where specific groups of people are exempt from paying sales taxes (in Canada, all native peoples are exempt). In order to make an item, or items, tax exempt > select the item(s) > press the 'List Functions' button > press the 'Tax Exempt' button > the manage-

The List Functions Button Window (cont'd)

ment authorization screen will appear > enter management auth > taxes will be removed from these items.

h. **Discount Item** - Discounts can be applied in a number of different ways. They can be discounted by a specific dollar amount, or they can be discounted by a specific percentage, depending on how it is set up by your manager. Additionally, miscellaneous dollar amount discounts can be applied. If an entire bill can be discounted (instead of item specific), perhaps using the discount function on the 'Close Check' screen may be a better idea.

Select the items that you would like to discount > press the 'List Functions' button > press the 'Discount Item' button > choose the discount you would like to apply > if it is a miscellaneous $ amount discount, press the 'Enter Misc. Amount' button near the bottom of the discounts page > the management authorization screen will appear > enter management auth > the item is now discounted by the selected amount, and will change color to dark purple, to indicate that it has been discounted.

i. Split Item - The best way to explain the 'Split Item' function is by using a couple of examples.

Example 1 - In order to save some time ringing in the same item repeatedly, you've chosen to ring in a quantity of an item, and then the actual item. ie: '3' > 'Miller Lite' , instead of 'Miller Lite' > 'Miller Lite' > 'Miller Lite'. In the order list window you see,

[a]	3	Miller Lite	15.00

and not,

[b]	1	Miller Lite	5.00
	1	Miller Lite	5.00
	1	Miller Lite	5.00

Which was fine, until the customer told you that they want each of the 3 beers on a separate tabs. To make [a] look like [b], select the item you would like to split - in this example the 3 Miller Lite - and press the 'List Functions' button > press the Split Item button > a number pad appears, asking you for how many ways you would like the item split up > in this case, press '3' > now the order list window should look like [b], which will allow you to now separate the tabs.

Example 2 - You've rung in a bottle of wine at a table of 4, and the two couples want to share the cost of the bottle of wine. In the order list window you see;

1 Bottle Valpolicella	35.00

To split the wine bottle two ways, select the bottle > press the 'List Functions' button > press the 'Split Item' button > a number pad will appear asking you how many ways you would like to split the item up > in this example, press '2' > you will then see in the order window

0.5	Bottle Valpolicella	17.50
0.5	Bottle Valpolicella	17.50

Which will now allow you to split the two halves of the bottle of wine, on to two separate bills.

NOTE: *You can split an item into as many ways as you like. An item has to have been sent, before it can be split.*

j. **Remove Discount** - On occasion it will be necessary to remove a previously applied discount from an item. To do this > select the item > press 'List Functions' > press 'Remove Discount' > answer 'Yes' to the question 'Are you sure you want to remove the discount from this item?' > the item will then be regular price.

k. **Reorder Item** - If you would like to re-order an item or items > select the item you would like to reorder > press the 'List Functions' button > press 'Reorder Item' > the items (including any modifiers that were previously rung in) will then appear in the order list window > ring in any other items that you might need > press 'Send'. This function can be used before sending an order. This would be handy in a situation where a customer orders a pizza with numerous toppings, and then says 'Make it 2 pizzas, with the same toppings' > simply select the pizza, and press the 'Reorder Item' button, and the pizza will be reordered, along with all toppings.

l. **Edit Price Level** - Certain (or all) items on a menu might have different "Price Levels'. A simple example of this might be a restaurant that offers the same items at dinner, that they offer during the day, and only the price changes (automatically). Using the same example, there may be situation where a customer comes in at night and wants the Lunch portion (and price). Ring the item in as normal > select it > press the 'List Functions' button > press 'Edit Price Level' > the Management Authorization Window will appear > enter management auth > a keyboard will appear, asking for the new price level > type it in and press OK > the item will be re-priced according to what is filled in for that price level, on that item.

m. Edit Seat - Some restaurants prefer to ring items in using seat numbers, as it is sometimes easier to separate the checks at a a later time. To change the seat number that an item is associated with > select the item > press the 'List Functions' button > press the 'Edit Seat' button > a number pad will appear > fill in the new seat number > press OK > that item will now have the new seat number attached to it.

NOTE: *Unless entered already, all items will have a 'default' seat number of '0'.*

n. Edit Prep Group - The Prep Group of an item describes what it is, and where it will print on a bill. For example, a table orders a 'steak', and an order of 'nachos'. Normally, the ticket in the kitchen would print out '***Appetizers' and all appetizers (including the nachos), would print first, and the ticket would then read '***Entrees', and all entrees would print out (including the steak). If you want the order of 'Nachos' to print out under '***Entrees', simply select the nachos > press the 'List Functions' button > press the 'Edit Prep Group' button > a list of prep groups will appear > select 'Entrees' > press OK.

NOTE: *All items with the same Prep Group will print together, regardless of where on the bill they were rung in.*

o. Edit Group Description - Instead of using seat numbers to keep items on a bill organized, they can be associated to group names.

For example, four people sit down and order some items, and inform you that they will be on two tabs. You ask them their names > 'Jim' and 'Bob' > ring in the items as normal > send to the kitchen > highlight the items for 'JIm' > press 'Edit Group Description' > fill in the name on the keyboard > press 'Enter' > select the items for 'Bob' > press the 'Edit Group Description' > fill in the name on the keyboard > press enter. Now, when you would like to split the bills, go to the options Tab on the Main Menu, and find the 'Split by Group' button > press it > a window with a list of group names associated with this bill appear > select the Group name that you would like to print > press OK > a new window will appear with the items for that group separated > ensure that they are correct (if not, simply touch them to move them back to the bill) > and press OK > the bill for that Group will print out > if you have more than one group > the window that allows you to select the group name will pop up again > if you want to continue splitting and printing the bills, select the group and press OK> if not, press cancel to return to the order

If the 'Group' button is enabled (on the far right side of the main menu screen), you will be able to create a group name AS YOU ORDER. Before you order an item, select the 'Group' button, fill in a name for the group, and ring in the items that you need for that group > press the 'Group' button > the keyboard will pop up again> fill in the name of the next group > and so on.

p. Add Message - On occasion,you will need to add a very specific preparation message to a specific item, and that prep instruction is not available on any of the existing modifier pages. To add a message to an item > select the item that you would like to add the message to > press 'List Functions' > press 'Add Message' > a keyboard will pop up, allowing you to type in a message > when finished press OK > a confirmation message 'You message was successfully attached' will appear > press OK again > you will notice that the message does not appear in the order list window, but WILL BE attached to the item when it prints at the kitchen/bar printer.

NOTE: This function may be disabled by management, and its use will be protected by the management authorization screen. If this is the case, you will need a manager to complete the function.

q. Stop Timer - Certain items can be set to be charged for based on the amount of time used. A good example of this would be a pool table rental. If a person is done playing pool, but would like to continue with an open tab, you would select the pool table from the order list window > press the 'List Functions' button > press the 'Stop Timer' button > the timer on the item is stopped immediately, and the charge is calculated (based on the number of minutes used)

The Ordering Process

STARTING A NEW ORDER

a.) *When using the **Retrieve Order** screen as a starting point* (as determined by your manager in Terminal Options), this button is used just as you thought it might be. To start a new order(table)

Press the New Order button > the Keyboard Screen will pop up > if the large grey box at the top of the keyboard is blank, fill in a table name by 'typing' on the keyboard > press Enter > or if the box already has a number in it, it's because your manager has set it to automatically generate table names > to accept this table name, press Enter > to change this table name, take your finger and touch and drag over the table name that is already filled in there > when it's highlighted, press Erase > the dark grey box should be blank now > type in the desired table name > press Enter > the main menu screen will appear along with a blank order window, ready for a new order.

b.) *You can also start a new order from the **Main Menu** screen* (as determined by your manager in Terminal Options). There is no button to press to start a new order from the Main Menu screen. If the Order List Window is blank, you will start a new order as soon as you ring in items and press the Send button.

Enter your ID number or card > determine which main menu button will have the item you would like to ring in under it > press that Main Menu button > now you can select the items you would like to ring in > the items will appear in the order list window to the left > ring in any modifiers that may pop-up after the item you ring in > to ring an item in that is under another Main Menu button, press the 'Main Menu' button on the right hand side of the screen > select the Main Menu category > continue ringing in the order until you are finished > press 'Send' > the 'Send' screen may now appear (see Figure 14), allowing you to fill in a table number > if there is no Table Number filled in, in the black box near the top of the screen.

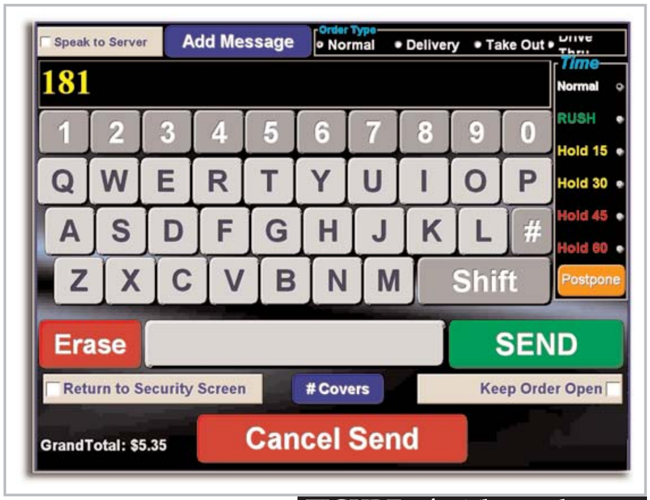

FIGURE 14: *The Send Screen*

The 'Send' screen has a number of different functions which we will discuss in the next section.

ii. SENDING ORDERS / THE 'SEND' SCREEN

Pictured above is the 'Send' screen. Depending on configurations set up by your manager, this screen may or may not appear. The 'Send' screen allows not only the ability to change table name/number, it allows you to change order type, timing options, number of covers (guests). and perform a wide variety of other functions.

a.) To Change a Table Name/ Number - The long rectangular box near the top of the 'Send' screen displays the current table name / number in yellow. If this box is blank, you can type the table name using the keyboard. To change from UPPER to lower case letters, use the 'Shift' button. To make changes, use the 'Erase' key, which will either backspace one character at a time, or will erase any highlighted portion of the name.

If you press the 'Send' key and the message 'That table number is already in use...' appears, it is because your manager has chosen to not allow duplicate table numbers in the system. You can change the table number (by adding a number or letter to it, or change it altogether).

NOTE: *Table Name / Number can be changed at any point by returning to this screen.*

b.) To Change Order Type - Depending on how a terminal is set up, the default Order Type will be 'Normal'. You'll find the Order type 'switches' on the top of the screen. The one that has the black circle filled in is the current order type. Simply highlight one of the other order types in order to change it.

If the Order Type is anything besides 'Normal', a header will print on the kitchen ticket with the order type on it.

NOTE: Keep in mind that changing the order type may affect where the bill prints in the kitchen, as well as possible discounts for that. order type.

c.) To Change Timing Options - The 'switches' near the top right of the screen, are used to time an order. By default, an order will have the 'Normal' switch selected. You can choose to 'Rush', 'Hold 15', 'Hold 30', 'Hold 45', or 'Hold 60'. These options will print a header on the kitchen ticket, requesting that the order be rushed, or held for 15, 30, 45, or 60 minutes. *These switches will not delay the print job in the kitchen.*

To delay the order from printing until a specified time > press the orange 'Postpone' button > change the time using the up down arrows, to whatever time you would like the order to print in the kitchen > press 'OK' > answer 'yes' to the question 'Are you sure...?" > the order will NOT print in the kitchen until the specified time, and will not appear on your Order List window until it has been activated in the kitchen.

NOTE: *The "Postpone' order function can be turned off by management. You'll know that it is turned off if nothing happens when you press the 'Postpone' button.*

d.) To Change # of Covers (Guests) - You can change the number of guests associated with any order by using the blue '# Covers' button on this screen. Simply press the '# Covers' button and fill in the number of covers > answer 'Yes' to the 'Are you sure...?' question.

e.) Speak to Server - This checkbox, when turned on (x) will print 'Please Speak to the Server about This Order' on the top of the kitchen/bar ticket. This function is handy if you need to convey some explicit instructions to the kitchen that are too detailed for the various messaging functions.

f.) Add Message - Will allow you to type in a custom message to the kitchen/bar. The message appears at the bottom of the print ticket.

g.) Return to Security Screen - If this button is highlighted (it may be by default) you will be returned to the Security screen after you press the 'Send' button. If you do not want to return to the Security Screen, ensure that this box is UN-highlighted (you may have to do this yourself by touching it) before you press the 'Send' button

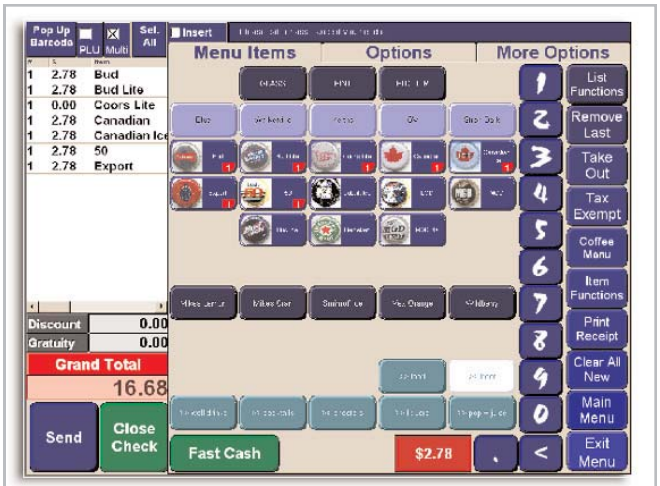

Figure 15 : *The Main Menu Screen*

h.) Keep Order Open - If you would like to keep the order open for editing, and still send items that you have rung in to the kitchen / bar, ensure that the box labeled 'Keep Order Open' is highlighted before pressing the send button.

i.) Send - Used to send the current order to the kitchen/bar. Remember that any items that have already been sent to the kitchen/bar will not reprint. When you are satisfied that all of the options on this page are correct, press the 'Send' button.

Depending on how your manager has set up your terminal, you may see this screen every time you press the 'Send' button on the Main Menu screen.

iii. MAKING CHANGES TO A NEW ORDER

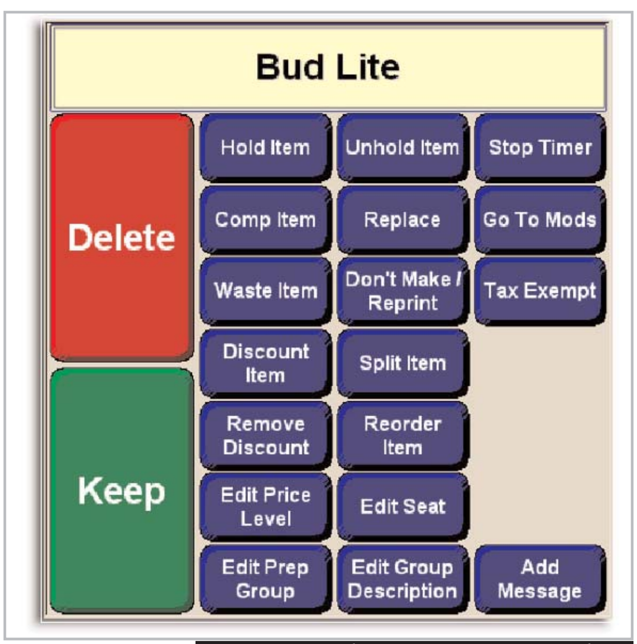

Figure 16: *The List Functions Window*

Often in the middle of making a new order, you will need to make a change, or changes, to the current order. The way you make the change will depend on if the change needs to be made to an **item** (black) or to a **modifier**(red).

a.) Item Changes - To change an item > highlight the item that you want to change > if you have the 'Multi' check box turned on, System3 assumes that you need to change many items, and will not display the 'List Functions Window until you press 'List Functions' on the right side of the screen > if the 'Multi' box is not checked, the 'List Functions' window will appear automatically > if you would like to select all items in the Active Order window, use the 'Sel ALL' button > when the 'List Functions' window appears, press 'Delete' to remove an item > if you chose the wrong item, press 'Keep' > the items chosen will be removed from the active order window > return to the Main Menu page > select the menu category of the item you would like to add > choose the correct items.

b.) Modifier Changes - Changing modifiers can be a little more tricky, as modifier pages may only appear after ringing in certain items, and therefore cannot be accessed from anywhere on the main menu.

To change a modifier > highlight the modifier that you need to replace > if the 'List Functions' window does not appear, press the 'List Functions' button on the right side of the screen > select the 'Replace' button > the modifier will be removed from the order list window > you will automatically be returned to the page of modifiers that you have selected > select the correct modifier > continue with the order as normal.

NOTE: *The 'Replace' button can also be used for items. It works the same way, in that it will remove the currently selected item, and return you to that page of items, allowing you to select a replacement item.*

c.) The 'Remove Last' function, if turned on as one of the 10 functions button on the right side of the screen, can be used to remove the last item rung in on a bill. There is no need to highlight the item > just press 'Remove Last' and the last item rung in will be deleted from the order.

iv. THE SUMMARY SCREEN

The following screen can be accessed one of two ways.(See *next page*) It can be accessed manually by pressing the 'Summary Screen' option button on the Main Menu page, or it can be set to pop up automatically after the 'Send' button is pressed. The latter way is set up by a manger (Terminal Options > Program Flow > Use Summary Screen on Send.)

This screen gives an order taker one more chance to make

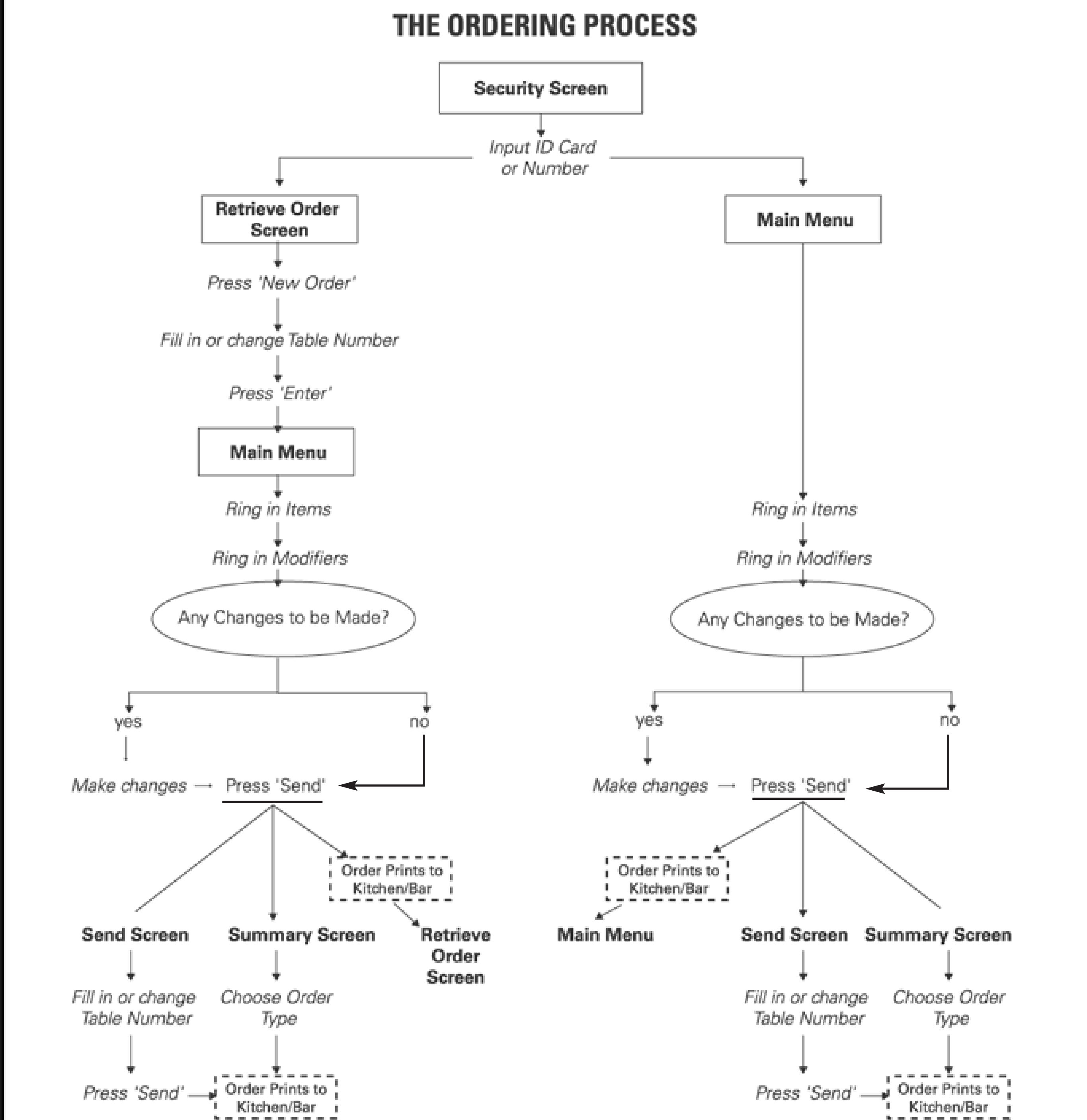

Figure 17: *The Ordering Process Review*

changes to an order. These changes can be to the order itself, or they can modify a number of other things. At this point you can correct customer info by using the 'Correct Info' button. Both the 'Promo' and the 'Discount' buttons display a drop down list of available Promos and Discounts. The user has to simply choose which one to apply and price information is automatically updated and displayed along the bottom of the screen. There may be different prices under different order types because discounts can be set to automatically apply depending on whether it's a delivery, take-out or dine-in order. These prices will also take Delivery Surcharges into consideration.

The 'Pre-Auth' button allows for Charge Card processing on an order, but will only work if using System3 to process credit cards. 'Remove Discount' will cancel any discounts that were applied in error. And 'Print Receipt' allows for check printing before the order is sent.(if enabled) When everything is to the users satisfaction, they simply choose the order type (Drive-Thru, Pick-Up, Delivery, Dine-In) and the order is sent to the appropriate printers/kitchen displays.

If using the 'Retrieve Order' screen as a starting point, chances are the 'Send' screen will not display after hitting the 'Send' button, but will be replaced by the 'Summary' screen.

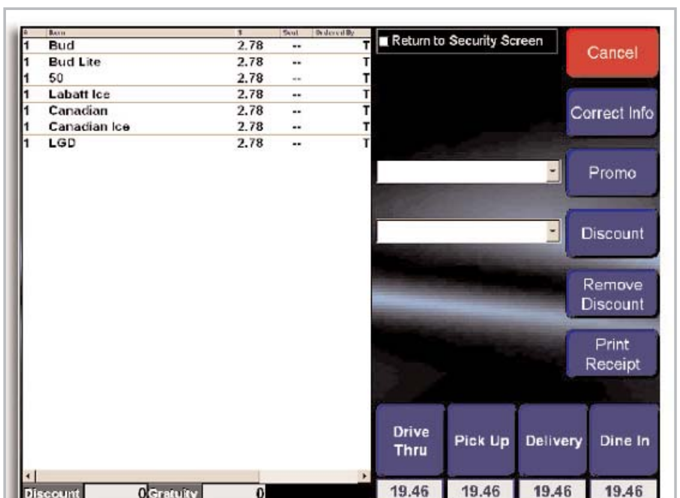

Figure 18: *The Summary Screen*

The Ordering Process - REVIEW

As you can see by viewing the diagram on the preceding page, the ordering process in System3 depends highly on how certain options are set up by your manager.

Certain steps are common;

1. System3 always needs to know **who** is ringing in the order, so at some point, input needs to come in the form of a security card or ID number.

2. System3 always needs to know **what table number** or name is associated with the bill. This can come before (Retrieve Order Screen) or after (Main Menu Screen).

3. System3 needs to know **which items and modifiers** are going on the bill

4. The order needs to be **sent,** whether using the 'Send' screen, the 'Summary' screen, or just the 'Send' button from the Main Menu.

Once the order has been sent - ie. - printed at the kitchen/bar - the process for adding to that order is slightly different than ringing in new orders.

v. ADDING TO / MANAGING EXISTING ORDERS

a.) From the Security Screen - Swipe your card or enter your ID number, press OK > if the table appears in the order list window, highlight it and press 'Retrieve Order' > if the table does not appear in the order list window, press the 'View All' button to see a full list of your active orders > highlight the order > press 'Retrieve Order' or press the 'Retrieve by Table Number' button > fill in the table number, press Enter >> the main menu will appear on the right, with the order open for editing on the left.

b.) From the Retrieve Order Screen - Either highlight the order you want to select and press 'Retrieve Order' > or press the 'Retrieve by Table #' button > fill in the table number and press OK >> the Main Menu screen will appear on the right, and the order list window will have the order open for editing on the left.

c.) From the Main Menu screen - Ensure the order list window is blank > press the 'Recall' button > the Retrieve Order screen will appear > either highlight the order you would like to edit and press 'Retrieve Order' or > press the 'Retrieve by Table #' button > fill in the table number and press OK>> the Main Menu screen will appear on the right, with the order open for editing on the left.

At this point, regardless of where you started, you will have an order open for editing. From here you can add items exactly as you would for a new order. To delete items that were previously sent, however, will require management authorization. > press the 'Send' button > the order will print in the kitchen/bar.

To Change A Table Number

Depending on options, when you press the 'Send' button on **any order that isn't new,** System3 may skip the 'Send' screen. To get to the 'Send' screen, press the 'Options' button (next to the Main Menu button on the Main Menu screen) > there should be a button entitled 'Send {Keyboard}' > press it and the 'Send' screen will appear > change the Table Number > press Send.

To Print a Receipt

a.) From the Retrieve Order Screen - Select the order(s) you would like printed from the Order List window, press the 'Print Receipt' button.

b.) From the Main Menu Screen - With the order open for editing, press the 'Print Receipt' button on the far right side of the screen.

c.) From the Summary Screen - Press the 'Print Receipt' button.

Splitting (Separate) Checks

To split a check, the order must be open for editing. Follow the steps outlined above under 'Adding To / Managing Existing Orders'.

Split Order - Will allow you to create 'Separate Checks'. Press the 'Split Order' button > a new 'window' appears to the right > select items (by touching them) that you want on the new bill > the items will jump to the new bill as you touch them > if you make a mistake, touch the item in the new 'window' to move it back > when satisfied with an order > press OK > this bill prints out, and a new blank window appears, allowing you to continue with the splitting > continue splitting until done > press OK > bills will be numbered the same as they were originally but the first bill will have an 'A' at the end of it, the second

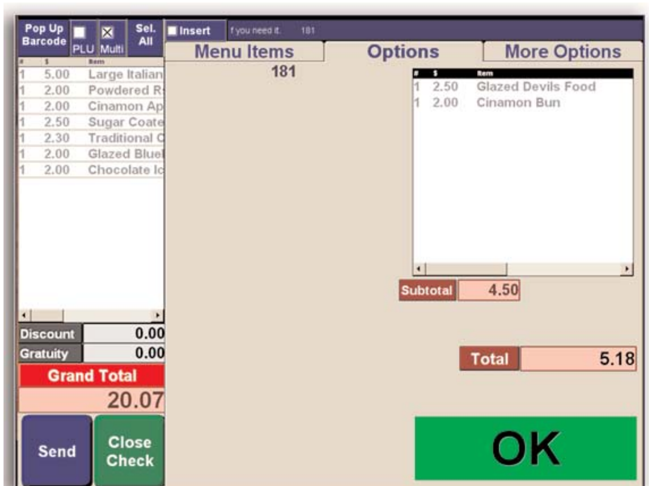

Figure 19: *The 'Split Order' Window*

bill will have a 'B' at the end of it, and so on.

Split Order by Group - If you have entered items using Group names you can now split them > press 'Split Order by Group' > a list of available groups appears > select the group (or groups) > press OK > all items ordered for that group will appear in the new window > ensure that they are correct > press OK > continue splitting at will.

Split Order by Seat # - See the explanation above on 'Splitting by Group', but use 'Seat #' instead.

Split Order Evenly - Will split the bill in as many ways as you specify > press 'Split Order Evenly' > select how many ways you would like the bill split > press OK > System3 tells you 'The bills have been split evenly. You can retrieve them…Would you like to print copies of the bill?' > press 'Yes' if you want the bills printed. NOTE: Splitting bills this way may result in some ITEMS being split into fractions, as System3 splits the bill EXACTLY as you specify.

Split Order Screen - Now, instead of having to choose one of the options above to split a bill, the 'Split Order Screen' will provide you with all of these options on one screen. The current bill will appear on the left side of the screen with several blank boxes next to it. To split the bill manually > drag items from the original bill to a blank window > each window represents 1 new bill > continue dragging items to the different bills until satisfied > if you have more than three new bills to create, use the arrows to navigate left and right to more new bills > press 'Done' > the new bills will print. The screen also allows you all of the other splitting options (by Group, by Seat #, Evenly). It places the items automatically into the new windows, but does not print until you

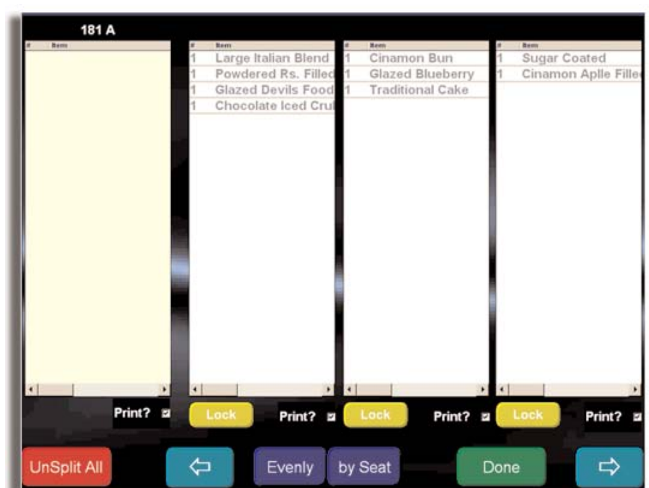

Figure 20: *The 'Split Order' Screen*

hit done. This way, you can ensure accuracy of the new bills before printing them.