



**POS-5700-R4**

**Release 4.01.003**

**OWNER'S MANUAL**

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POS-5700  
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# ***Chapter***

# ***1***

## ***POS-5700*** ***Overview***

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## 1.1 Introduction

The POS 5700 is a touch screen POS system for use in the hospitality industry. The POS 5700 can be used in a system of up to 32 Terminals operating off a network. A Backoffice PC running the Windows XP Professional operating system can be integrated in a system to run software for additional maintenance and reporting.

This manual describes guest check processing and adjustments. Details of programming and configuring the POS-5700 system are in the [POS-5700 Programming Manual](#).

The POS-5700 system offers a wide array of features that make it easily adaptable to all types of food service applications – including fine dine table service, dual drive-thru quick service, full-service bars, cafeterias, delis and school lunchrooms.

- ❑ The POS-5700 system can be easily tailored for individual restaurant menus, personnel and operating procedures. Menus and prices can be changed to accommodate daily changes in meal period prices.
- ❑ The POS-5700 touch terminal offers custom programming for any application through its unique system of soft-programmed POS touch screens.
- ❑ A list summarizing POS Key Functions follows in this chapter. Detailed explanations of the more common functions are included in subsequent chapters of this manual.

## 1.2 Hardware Overview



### **WARNING**

The terminal has been tested and found to comply with the limits for a Class A digital device, pursuant to Part 15 of the FCC rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment can generate and radiate radio frequency energy and, if not installed and used according to the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur under particular installation. If this equipment does cause harmful interference to radio or television reception, which is found by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna
- Increase the distance between the equipment or device
- Connect the equipment to an outlet other than the receiver's
- Consult a dealer or an experienced radio/TV technician for assistance

### **CAUTION**

The system is provided with a battery-powered Real-Time Clock circuit. There is a danger of exposing and personal injury if the battery is incorrectly replaced or mistreated. Do not attempt to disassemble the battery, immerse it in the water or expose it to fire.

### **IMPORTANT SAFETY INFORMATION**

Read all these instructions carefully.

- Use only parts, especially power adapter, recommended by the manufacturer; unapproved parts may be hazardous.
- Before plugging the power cord into the AC inlet of the power supply unit, make sure the voltage (110V) is properly applied to the power switch. Improper voltage will cause damage to the power supply unit.
- Power off the system and remove the power adapter while cleaning the system.
- Before powering on the system, check if all the peripherals are firmly installed.
- Do not use the system near water, such as a bathtub, a washbowl, a kitchen sink, a laundry tub, and a swimming pool. Keep the system away from direct sunlight, heating or a radiator.
- Do not place the system on an unstable cart, stand or table. If the machine falls, it may injure a person or cause serious damage to the appliance.
- The system is equipped with a three-wire grounded plug with a third (grounding) pin. This is a safety feature. If your outlet does not accommodate the three-wire plug, have an electrician install a correct outlet, or use an adapter to ground the appliance safely.
- Do not allow anything to rest on the power cord. Do not locate the system where people may walk on the cord.
- Do not overload the power outlet. Overload can result in fire or electric shock.

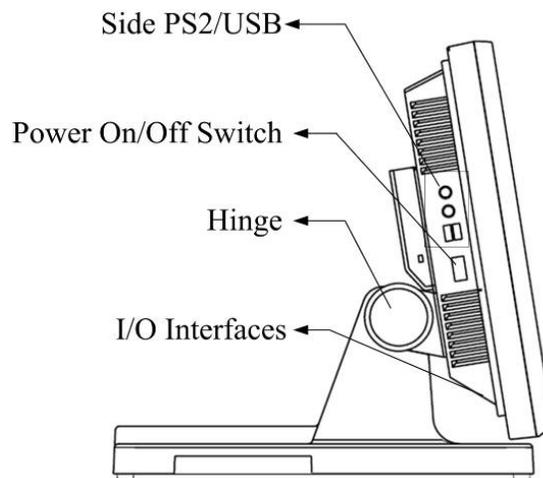
- Do not push any object into the computer cabinet. Dangerous voltage points may be touched and the parts may be shorted out resulting in fire or electric shock.
- Do not attempt to service the system on your own. Opening or removing cover can expose you to dangerous voltage or other hazards.
- Power off the system before installing or removing non-PNP (plug and play) devices.
- If any of the following situations occurs, unplug the systems from the power outlet immediately and consult with a qualified service person:
  - The power cord or plug is damaged or frayed.
  - Liquid is spilled into the system.
  - The system is dropped or the cabinet is damaged.
- When the system is not in use, cover the system and store it with care.

### 1.2.1 Unpacking

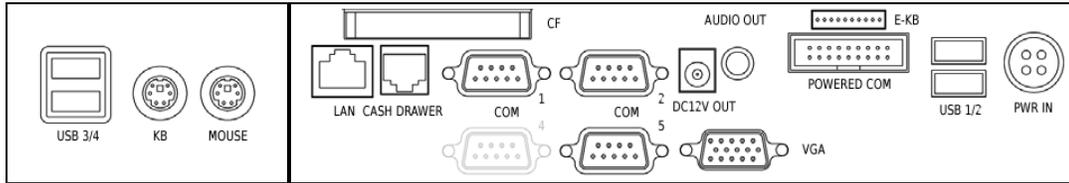
The contents may vary with different options. If there's any physical damage or missing parts, please contact your supplier immediately. Please keep all packing materials in case you need to ship back the device for service.

- POS-5700 main system
  - Compact Flash (CF, pre-installed)
  - SODIMM DDR266/333, 256MB/512MB/1GB (Pre-installed)
  - CPU Celeron 1.0GHz (Mounted)
  - Magnetic stripe card reader (Option)
  - Customer display (Option)
  - Power adapter
  - AC power cord

### 1.2.2 Side View



### 1.2.3 I/O Ports



- USB** Connect devices with USB connectors. There are 2 internal USB ports reserved and one external port is for connecting touch panel
- Mouse** PS/2 Mouse Connector
- KB** PS/2 Keyboard Connector
- PWR IN** A 4 din rounded-power-jack for AC to DC +12V power adapter
- POWERED COM<sup>1</sup>** COM 1 and 2 can provide RI, +5V, or +12V on pin 9 by switching the power COM jumpers (Refer to the PWR COM Jumper Setting figure below)
- Extend KB** 8-pin pitch 2.0 for keyboard
- AUDIO OUT** Earphone or speaker connector with 2 internal speakers
- DC12V OUT** 12VDC jack for customer display (VFD)
- Serial 4 x DB9 RS-232<sup>1</sup>** COM 1 and 2: pin 9 RI/5V/12V selected by jumper  
COM 5: pin 9 RI
- CASH DRAWER** RJ-11 connector with DC +12V
- LAN** RJ-45 connector with link/ack integrates speed LED and supports wake-from-LAN function
- CF** A slot for inserting CF card
- VGA** A 15 pin D-type connector for external VGA

<sup>1</sup> COM4 is reserved for internal use

#### PWR COM Jumper Settings

Voltage/COM	COM1	COM2
R1 (Default)	Pin 5-6	Pin 11-12
5V	Pin 3-4	Pin 9-10
12V	Pin 1-2	Pin 7-8

## 1.2.4 Specifications

### Main Board

- CPU Intel Celeron M 1.0GHz BGA Type Core Logic Intel 852GM + ICH4
- System Memory 200-pin SODIMM, DDR266/333, 512MB

### Display

- 15" TFT LCD
- Brightness 250 nits
- Resolution 1024 x 768
- Touch Screen 5 Wire Resistive Type
- Tilting Angle 15 ~ 80 Degrees

### Storage Device

- Compact Flash

### I/O Ports

- Serial 3 x RS-232 DB-9. COM1/2: Pin 9 RI/5/12V Selected by Jumper (COM4 reserved for internal use)
- USB 4 x USB2.0 External
- 2 x USB2.0 Internal Reserved
- PS/2 Mouse 1 x 6-pin Mini DIN
- PS/2 Key Board 1 x 6-pin Mini DIN
- Extend KB 1 x 8-pin Pitch 2.0
- LAN 1 x RJ45, 10/100 Base-T
- VGA 1 x DB-15, Female
- DC Out 1 x 12VDC Jack for Customer Display
- Cash Drawer 1 x RJ11 , 12VDC
- Audio Out 1 x Audio Jack with Internal Speaker 2W x 2

### Others

- Power Input Power Adapter 12VDC 90W, 4-pin Connector with Lock
- Color Black
- Compliance FCC / CE / WEEE / RoHS
- Weight 6.5kg / 14.3lb
- Dimension 14.4" (w) x 14.2" (h) x 12.6" (d)
- Operating Temperature 5°C ~ 40°C
- Storage Temperature -20°C ~ 60°C
- Storage Humidity 20% - 80% RH, Non-condensing

### Optional Accessories

- Customer Display VFD, RS232 I/F

### 1.3 Sample Screens

#### Order Entry Screen



1	Message window
2	Check window
3	Status bar <ul style="list-style-type: none"> <li>- Current date/time</li> <li>- Terminal name</li> <li>- Order type</li> <li>- Meal period</li> <li>- Size level</li> <li>- System information</li> <li>- Network activity LEDs</li> </ul>
4	Programmed button section



### Sample Pay Screen

The screenshot displays the POS-5700 interface for a payment screen. At the top, there are navigation buttons: LOGOUT, Manager Menu, Floor Plan, Table, Guests, Change Seat, + Seat, - Seat, Sales Menu, and Payment Menu. Below these, a header bar shows table numbers 10077 and 10078. The main area is divided into a transaction summary on the left and a keypad on the right. The transaction summary includes a table grid with items like Buffalo Fingers, Burger, and Dr. Pepper, along with a subtotal of 11.07, tax of 0.77, and a total of 11.84. The keypad features a numeric keypad (0-9, Clear, Enter) and function buttons for Credit Authorize, Credit Finalize, House Charge, Gift Card, Check, and CC Offline. To the right of the keypad is a vertical strip of currency images. At the bottom, there are more function buttons: Void, Cancel, Reorder Items, Split by Seat, Split by Item, Combine Check, Xfer Chk To Svr, Hold Order, Fire Order, Print Check, and Total. A status bar at the very bottom shows the date and time (Jan 8 3:39pm), station (Station 1), and other system information.

Table	Guests	Cashier	
21	1	NCC	10077

Item	Qty	Price	Total
S1 Buffalo Fingers	1	4.69	4.69
S1 Burger	1	4.59	4.59
No Onion			
No Pickles			
Fries			
S1 Dr. Pepper	1	1.79	1.79

Subtotal	Tax	Gratuity	Total
11.07	0.77	0.00	11.84

Jan 8 3:39pm | Station 1 | EAT-IN | Lunch | Main | 0.3% 431.297M

## 1.4 POS Key Functions - Summary

Key Function	Number	POS Function Description
<b>Add to Check</b>	<b>042</b>	<ul style="list-style-type: none"> <li>▪ Combines the current check with a <i>stored</i> check.</li> <li>▪ This key function allows the current check to be new (in the first service round).</li> </ul>
<b>Add to Check Order Type #1 - #8</b>	<b>044-051</b>	<ul style="list-style-type: none"> <li>▪ Combines the current check with a <i>stored</i> check of a specified Order Type.</li> <li>▪ These key functions allow the current check to be new (in the first service round).</li> </ul>
<b>Add to Table</b>	<b>043</b>	<ul style="list-style-type: none"> <li>▪ Combines the current check with a <i>stored</i> check that has a table number assigned.</li> <li>▪ This function allows the current check to be new (in the first service round).</li> </ul>
<b>Backup Program</b>	<b>222</b>	<ul style="list-style-type: none"> <li>▪ Used to create a backup of the current program settings.</li> </ul>
<b>Bar Code</b>	<b>105</b>	<ul style="list-style-type: none"> <li>▪ Used to enter a numeric bar code for a product.</li> <li>▪ It can be used when a product fails to scan properly.</li> </ul>
<b>Break Out</b>	<b>082</b>	<ul style="list-style-type: none"> <li>▪ Used to put an employee on break. Records a clock-out for the employee but does not prompt for tips or require that checks be closed.</li> <li>▪ Minimum time allowed for a break is set in System Setup, Labor, #2 Minimum Break Time. If an employee clocks in earlier, manager approval may be required</li> </ul>
<b>Calibrate Touch</b>	<b>225</b>	<ul style="list-style-type: none"> <li>▪ Puts the terminal in calibration mode</li> </ul>
<b>Cancel</b>	<b>019</b>	<ul style="list-style-type: none"> <li>▪ Cancels the current round for a transaction.</li> <li>▪ When a transaction is cancelled, any changes done during the round will be reversed.</li> <li>▪ Any new Menu Items that have been added to the check in this service round will be removed and any items that have been voided from the check in this round will be added back.</li> </ul>

Key Function	Number	POS Function Description
<b>Cash Adjust Refund</b>	<b>099</b>	<ul style="list-style-type: none"> <li>▪ N/A</li> </ul>
<b>Cash Adjust Void</b>	<b>098</b>	<ul style="list-style-type: none"> <li>▪ N/A</li> </ul>
<b>Cash Advance</b>	<b>122</b>	<ul style="list-style-type: none"> <li>▪ Used to process a cash advance in a credit card transaction.</li> </ul>
<b>Cash Tip</b>	<b>084</b>	<ul style="list-style-type: none"> <li>▪ Adds a tip to the check that is recorded in the Cash Tips field of the employee's report.</li> </ul>
<b>Change Modifier</b>	<b>071</b>	<ul style="list-style-type: none"> <li>▪ Used to change modifiers of a Menu Item in the current round without having to void and reenter the Item.</li> <li>▪ When the item is selected on the check, the forced display screen from which it was ordered displays so a different choice can be made.</li> </ul>
<b>Change Prices</b>	<b>143</b>	<ul style="list-style-type: none"> <li>▪ Used to change a Menu Item's price.</li> <li>▪ Alternatively, press and hold a menu item key for 1 second.</li> </ul>
<b>Change Seat</b>	<b>043</b>	<ul style="list-style-type: none"> <li>▪ Used to move an item or items on a check to a different seat.</li> </ul>
<b>Charge Tip</b>	<b>085</b>	<ul style="list-style-type: none"> <li>▪ Adds a tip to the check that is recorded in the Charge Tips field of the employee's report.</li> </ul>
<b>Chg Acct Balance</b>	<b>271</b>	<ul style="list-style-type: none"> <li>▪ Displays the balance on a charge account.</li> </ul>
<b>Clear All Terminals</b>	<b>220</b>	<ul style="list-style-type: none"> <li>▪ Clears totals on all terminals.</li> <li>▪ All other terminals must be in Logged Out state.</li> </ul>
<b>Clear Input</b>	<b>012</b>	<ul style="list-style-type: none"> <li>▪ Clears input of a numeric entry. Example: To clear an incorrect menu item quantity before pressing the menu item key.</li> </ul>
<b>Cleat Totals</b>	<b>219</b>	<ul style="list-style-type: none"> <li>▪ Clears totals on the terminal.</li> <li>▪ Totals will be retrieved from other terminals within the system once networking is re-established.</li> </ul>

Key Function	Number	POS Function Description
<b>Clock In</b>	<b>080</b>	<ul style="list-style-type: none"> <li>▪ Clocks an employee into the system for time and attendance recording.</li> </ul>
<b>Clock Out</b>	<b>081</b>	<ul style="list-style-type: none"> <li>▪ Clocks an employee out of the system for time and attendance recording.</li> </ul>
<b>Combine Check</b>	<b>041</b>	<ul style="list-style-type: none"> <li>▪ Combines one or more stored checks to the <i>current</i> check.</li> <li>▪ Both the current check and the added check(s) must have already been stored (from a previous service round).</li> </ul>
<b>Credit Adjust Tip</b>	<b>113</b>	<ul style="list-style-type: none"> <li>▪ Used to change the tip amount on a check closed with a credit card.</li> <li>▪ This function depends on the credit auth system and processor used.</li> </ul>
<b>Credit Auth End Rnd</b>	<b>275</b>	<ul style="list-style-type: none"> <li>▪ Used to get a pre-authorization for a credit card transaction. This function clears the table number from the transaction and ends the current service round.</li> <li>▪ This function depends on the credit auth system and processor used.</li> </ul>
<b>Credit Authorize</b>	<b>109</b>	<ul style="list-style-type: none"> <li>▪ Used to get a pre-authorization of a credit card transaction.</li> <li>▪ This function depends on the credit auth system and processor used.</li> </ul>
<b>Credit Clear Batch</b>	<b>114</b>	<ul style="list-style-type: none"> <li>▪ Clears the totals from the current credit card batch.</li> <li>▪ This function depends on the credit auth system and processor used.</li> </ul>
<b>Credit Finalize</b>	<b>110</b>	<ul style="list-style-type: none"> <li>▪ Finalizes a transaction where a Credit Authorization has been received. Enter the Total amount from the bottom line of the credit card voucher (including gratuity).</li> <li>▪ A tip can be applied according to the Post to Tip option located in the Media Record.</li> <li>▪ This function depends on the credit auth system and processor used.</li> </ul>

Key Function	Number	POS Function Description
<b>Credit Finalize Tip</b>	<b>254</b>	<ul style="list-style-type: none"> <li>▪ Finalizes a transaction where a Credit Authorization has been received. Enter the Tip amount entered on the credit card voucher.</li> <li>▪ A tip can be applied according to the Post to Tip option located in the Media Record.</li> <li>▪ This function depends on the credit auth system and processor used.</li> </ul>
<b>Credit Sale</b>	<b>111</b>	<ul style="list-style-type: none"> <li>▪ Performs a single-step credit card transaction. An authorization is received and the check is paid out in one step.</li> <li>▪ This function depends on the credit auth system and processor used.</li> </ul>
<b>Credit Settle Auths</b>	<b>274</b>	<ul style="list-style-type: none"> <li>▪ Used to settle some or all open credit authorizations for a server.</li> <li>▪ This function requires that the Multi Check option be enabled in System Setup</li> </ul>
<b>Credit Voice Auth</b>	<b>112</b>	<ul style="list-style-type: none"> <li>▪ Used to manually enter an authorization code received verbally from the credit card processor.</li> <li>▪ This function depends on the credit auth system and processor used.</li> </ul>
<b>Customer Info</b>	<b>245</b>	<ul style="list-style-type: none"> <li>▪ This function will cause the system to prompt the operator to input Customer Information for the current check.</li> </ul>
<b>Diagnostics</b>	<b>224</b>	<ul style="list-style-type: none"> <li>▪ Puts the terminal in Diagnostics mode</li> </ul>
<b>Discount NLU (Number Look Up)</b>	<b>101</b>	<ul style="list-style-type: none"> <li>▪ Used to enter a discount on a check when the specific discount is not preset on a screen. Enter a discount number and press [DISCOUNT NLU] or press [DISCOUNT NLU] select the discount. If the discount does not have an amount or a percentage pre-programmed, a prompt will display to enter the amount.</li> </ul>
<b>Display Sys Info</b>	<b>210</b>	<ul style="list-style-type: none"> <li>▪ Used to display system information</li> </ul>

Key Function	Number	POS Function Description
<b>Downline Database</b>	<b>210</b>	<ul style="list-style-type: none"> <li>Send selected program data to the other terminals within the system. Used in cases where programming changes were made while a terminal was off-line or when a new terminal is introduced to the system.</li> </ul>
<b>Downline to OCB</b>	<b>226</b>	<ul style="list-style-type: none"> <li>Sends the Menu Item table to an order confirmation board.</li> <li>Contact your authorized reseller to determine if this is supported by your specific OCB</li> </ul>
<b>Driver Mgr</b>	<b>267</b>	<ul style="list-style-type: none"> <li>Puts the terminal in Driver Management mode</li> <li>Driver management is used to assign delivery order to drivers and to dispatch drivers to deliver orders.</li> </ul>
<b>Edit Labor Schedules</b>	<b>255</b>	<ul style="list-style-type: none"> <li>Opens the Labor Schedule table for editing.</li> </ul>
<b>Edit Payroll Tot</b>	<b>217</b>	<ul style="list-style-type: none"> <li>Allows adjustments to employee's tips and gross sales.</li> </ul>
<b>Edit Timecards</b>	<b>216</b>	<ul style="list-style-type: none"> <li>Used to change employee punch times.</li> </ul>
<b>Employee Deposits</b>	<b>133</b>	<ul style="list-style-type: none"> <li>Used to enter deposit-type media totals for a specific employee.</li> </ul>
<b>Enable Auto Grat</b>	<b>089</b>	<ul style="list-style-type: none"> <li>Turns on Auto Gratuity for the check.</li> </ul>
<b>Enter Birthdate</b>	<b>263</b>	<ul style="list-style-type: none"> <li>Used to set/change the customer's birthdate associated with a check. This function is used in conjunction with items such as tobacco and alcohol where the sale is restricted to persons of a particular age.</li> </ul>
<b>Enter Limited QTY</b>	<b>218</b>	<ul style="list-style-type: none"> <li>Used to enter how many of a Menu Item is available for sell. The number displays on the Item's button and "counts down" when the item is ordered. When the number reaches zero, the key is disabled so no more can be sold. This function can be used on Menu Items with the Limited QTY flag set to YES.</li> </ul>
<b>Exec Batch 1-5</b>	<b>257-261</b>	<ul style="list-style-type: none"> <li>N/A</li> </ul>

Key Function	Number	POS Function Description
<b>Exempt Auto Grat</b>	<b>088</b>	<ul style="list-style-type: none"> <li>Turns off Auto Gratuity for the check.</li> </ul>
<b>Exit System</b>	<b>005</b>	<ul style="list-style-type: none"> <li>N/A</li> </ul>
<b>Finished Prod Waste #1 - #8</b>	<b>072-079</b>	<ul style="list-style-type: none"> <li>Used to start a Waste transaction. All items registered in the transaction will update waste totals.</li> </ul>
<b>Fire Order</b>	<b>023</b>	<ul style="list-style-type: none"> <li>Sends un-sent items to kitchen printer(s).</li> </ul>
<b>Foreign Currency</b>	<b>118</b>	<ul style="list-style-type: none"> <li>Calculate the amount due on the check in a foreign currency.</li> </ul>
<b>Function NLU (Number Look Up)</b>	<b>102</b>	<ul style="list-style-type: none"> <li>Used to access functions that are not preset on a touch screen. Index the # for the function then press <a href="#">[FUNCTION NLU]</a>.</li> <li>See the POS-5700 Programming Manual for a list of operations that can be done with this key and codes used with each one.</li> </ul>
<b>Gift Card Balance</b>	<b>120</b>	<ul style="list-style-type: none"> <li>Inquires and prints the balance of a Gift Card.</li> <li>Requires 3<sup>rd</sup> party gift card processor.</li> </ul>
<b>Gift Card Cash Out</b>	<b>121</b>	<ul style="list-style-type: none"> <li>Allows cash change from a Gift Card.</li> <li>Requires 3<sup>rd</sup> party gift card processor.</li> </ul>
<b>Gift Card Reload</b>	<b>119</b>	<ul style="list-style-type: none"> <li>Adds additional funds to a Gift Card.</li> <li>Requires 3<sup>rd</sup> party gift card processor.</li> </ul>
<b>Group RKP Order</b>	<b>244</b>	<ul style="list-style-type: none"> <li>Groups a series of Guest Checks into a single RKP check.</li> </ul>
<b>Guests</b>	<b>018</b>	<ul style="list-style-type: none"> <li>Sets the number of guests on a check.</li> </ul>
<b>Hold Order</b>	<b>022</b>	<ul style="list-style-type: none"> <li>End the service round without send items to RKP. The items can be sent when the check is recalled using <a href="#">[FIRE ORDER]</a>.</li> </ul>
<b>Inv Ending Z1</b>	<b>231</b>	<ul style="list-style-type: none"> <li>Used to enter ending counts of Daily Inventory items before the Daily System Z report is performed.</li> </ul>

Key Function	Number	POS Function Description
<b>Inv Ending Z2</b>	<b>232</b>	<ul style="list-style-type: none"> <li>Used to enter ending counts of Period 2 Inventory items before the Week-To-Date System Z report is performed.</li> </ul>
<b>Inv Ending Z3</b>	<b>233</b>	<ul style="list-style-type: none"> <li>Used to enter ending counts of Period 3 Inventory items before the Period-To-Date System Z report is performed.</li> </ul>
<b>Inv Receiving</b>	<b>228</b>	<ul style="list-style-type: none"> <li>Used to record invoicing quantities and values of raw products received from vendors.</li> </ul>
<b>Inv Returns</b>	<b>229</b>	<ul style="list-style-type: none"> <li>Used to enter invoicing quantities and values of raw products returned to vendors.</li> </ul>
<b>Inv Transfer In</b>	<b>277</b>	<ul style="list-style-type: none"> <li>Used to record quantities and values of raw products transferred out of the establishment.</li> </ul>
<b>Inv Transfer Out</b>	<b>278</b>	<ul style="list-style-type: none"> <li>Used to record quantities and values of raw products transferred out of the establishment.</li> </ul>
<b>Inv Waste</b>	<b>230</b>	<ul style="list-style-type: none"> <li>Used to enter Inventory waste of raw products, before they are prepared into a Menu Item.</li> </ul>
<b>Last Item Void</b>	<b>093</b>	<ul style="list-style-type: none"> <li> voids the last item entered on a check. The item being voided must be a new item in the service round.</li> </ul>
<b>Loan</b>	<b>129</b>	<ul style="list-style-type: none"> <li>Adds funds to a cash drawer.</li> </ul>
<b>Login</b>	<b>006</b>	<ul style="list-style-type: none"> <li>Sign an employee into the system for POS operations.</li> </ul>
<b>Logout</b>	<b>007</b>	<ul style="list-style-type: none"> <li>Signs the current employee out of POS operations.</li> </ul>
<b>Media NLU (Number Look Up)</b>	<b>103</b>	<ul style="list-style-type: none"> <li>Used to select a media type to tender a check when the specific media is not preset on a touch screen. Enter a discount number and press [MEDIA NLU] or press [MEDIA NLU] then select the pay type from the displayed list.</li> </ul>
<b>Network Stats</b>	<b>211</b>	<ul style="list-style-type: none"> <li>Displays network and resource statistics</li> </ul>
<b>No Sale</b>	<b>067</b>	<ul style="list-style-type: none"> <li>Used to open the cash drawer outside of a sale transaction.</li> </ul>

Key Function	Number	POS Function Description
<b>Paid In</b>	<b>128</b>	<ul style="list-style-type: none"> <li>▪ Adds cash to the drawer from sources of income other than a sale.</li> </ul>
<b>Paid Outs #1 - #5</b>	<b>123-127</b>	<ul style="list-style-type: none"> <li>▪ Removes cash from the drawer for purposes other than to give change for a sale.</li> </ul>
<b>Pay On Acct</b>	<b>134</b>	<ul style="list-style-type: none"> <li>▪ Posts a payment to a charge account.</li> <li>▪ From within a check, press <b>[PAY ON ACCT]</b>. Select the account. Pay out the check.</li> </ul>
<b>Pickup</b>	<b>130</b>	<ul style="list-style-type: none"> <li>▪ Removes funds from a cash drawer.</li> </ul>
<b>PLU</b>	<b>100</b>	<ul style="list-style-type: none"> <li>▪ Used to add a Menu Item to a check by entering the PLU # rather than pressing a preset key.</li> </ul>
<b>Prep Instr</b>	<b>276</b>	<ul style="list-style-type: none"> <li>▪ Displays prep instructions for an item selected in the check window.</li> <li>▪ Alternatively, press and hold a menu item key for 1 second.</li> </ul>
<b>Previous Screen</b>	<b>013</b>	<ul style="list-style-type: none"> <li>▪ Returns the display to the previous screen.</li> </ul>
<b>Print All Checks</b>	<b>272</b>	<ul style="list-style-type: none"> <li>▪ When used with Multi Check enabled, prints a copy of each guest check on the guest check printer, and ends the current service round.</li> </ul>
<b>Print Check</b>	<b>020</b>	<ul style="list-style-type: none"> <li>▪ Prints a copy of the guest check on the guest check printer, and ends the current service round.</li> </ul>
<b>Print Journal</b>	<b>213</b>	<ul style="list-style-type: none"> <li>▪ Print the terminal electronic journal on the programmed report printer.</li> </ul>
<b>Print Voucher</b>	<b>115</b>	<ul style="list-style-type: none"> <li>▪ Reprints the Credit Card Voucher used with a credit card charge.</li> <li>▪ Must have an active check paid credit card(s)</li> <li>▪ If multiple credit cards were used to tender the check, select the payment line in the check window before pressing <b>[Print Voucher]</b>.</li> </ul>

Key Function	Number	POS Function Description
<b>Print/Reset Journal</b>	<b>215</b>	<ul style="list-style-type: none"> <li>▪ Prints and resets (clear) the terminal's electronic journal.</li> </ul>
<b>Program Mode1</b>	<b>001</b>	<ul style="list-style-type: none"> <li>▪ Puts the terminal in Program Mode1. Program Mode contains the tables into which the database is entered.</li> </ul>
<b>Program Mode2</b>	<b>002</b>	<ul style="list-style-type: none"> <li>▪ Puts the terminal in Program Mode2.</li> <li>▪ Functions programmed with the PGM Menu2 setting enabled will appear on the Program Mode2 screen.</li> </ul>
<b>Reboot All</b>	<b>221</b>	<ul style="list-style-type: none"> <li>▪ Reboots all terminals in the system</li> <li>▪ All other terminals must be in Logged Out state.</li> </ul>
<b>Recall Check</b>	<b>027</b>	<ul style="list-style-type: none"> <li>▪ Recalls a check being tracked by check number.</li> <li>▪ Example: <ul style="list-style-type: none"> <li>* Login</li> <li>* Press [RECALL CHECK]</li> <li>* A list of this employee's open checks displays.</li> <li>* Touch the button of the check wanted.</li> </ul> </li> <li>▪ This key can be used to recall closed checks by indexing the check number followed by Recall Check.</li> <li>▪ When recalling a check at the terminal that created, it a short Check Number can be used.</li> <li>• Example: <ul style="list-style-type: none"> <li>* Index 10009 and press [RECALL CHECK]</li> <li>Or short Check Number</li> </ul> </li> <li>▪ Index 9 and press [RECALL CHECK]</li> </ul>
<b>Recall OT #1- #8</b>	<b>031-038</b>	<ul style="list-style-type: none"> <li>▪ Recalls checks of only the specified Order Type.</li> <li>▪ If pressed without a prefix check number, the checks displayed in the selection window will be filtered by the specified Order Type.</li> </ul>

Key Function	Number	POS Function Description
<b>Recall Table</b>	<b>030</b>	<ul style="list-style-type: none"> <li>▪ Recalls a check being tracked by table number.</li> <li>▪ Example: <ul style="list-style-type: none"> <li>* Login</li> <li>* Press <a href="#">[Recall Table]</a></li> <li>* A list of this employee's open tables displays.</li> </ul> </li> <li>▪ Touch the button of the table wanted.</li> <li>▪ If Multi Check is enabled, all open checks at the table will be recalled</li> </ul>
<b>Refund</b>	<b>097</b>	<ul style="list-style-type: none"> <li>▪ Creates a negative check. All items registered on the check will be part of the refund.</li> </ul>
<b>Reorder AYCE Item</b>	<b>106</b>	<ul style="list-style-type: none"> <li>▪ Enters subsequent orders of an all-you-can-eat menu item on to the check. In the Menu Table, the AYCE item has a setting for a 2<sup>nd</sup> item to use for reordering.</li> <li>▪ Procedure <ul style="list-style-type: none"> <li>* Recall the check</li> <li>* Press <a href="#">[Reorder AYCA]</a></li> <li>* Press the button of the item to be reordered.</li> </ul> </li> </ul>
<b>ReOrder Items</b>	<b>107</b>	<ul style="list-style-type: none"> <li>▪ Used to add another of an item or items that have already been registered on a check. Example, to order another round of drinks.</li> <li>▪ Procedure: <ul style="list-style-type: none"> <li>* Recall the check.</li> <li>* Touch items to be reordered in the check window</li> <li>* Press <a href="#">[ReOrder Items]</a></li> </ul> </li> </ul>
<b>Report Launcher</b>	<b>212</b>	<ul style="list-style-type: none"> <li>▪ Accesses the Reports Menu.</li> </ul>
<b>Report NLU</b>	<b>104</b>	<ul style="list-style-type: none"> <li>▪ Used to select a report when the specific report is not preset on a touch screen. Enter a report number and press <a href="#">[REPORT NLU]</a> or press <a href="#">[REPORT NLU]</a> then select the report from the displayed list.</li> </ul>
<b>Reset Journal</b>	<b>214</b>	<ul style="list-style-type: none"> <li>▪ Resets the terminal's electronic journal.</li> </ul>
<b>Reset USB Printers</b>	<b>273</b>	<ul style="list-style-type: none"> <li>▪ Clears the USB printer table and prompts the operator to power off and on all USB printers available to the terminal.</li> </ul>

Key Function	Number	POS Function Description
<b>Restore Program</b>	<b>223</b>	<ul style="list-style-type: none"> <li>▪ Used to restore program settings from a program backup.</li> </ul>
<b>Review Check</b>	<b>039</b>	<ul style="list-style-type: none"> <li>▪ Display checks that have been closed.</li> </ul>
<b>Review Table</b>	<b>040</b>	<ul style="list-style-type: none"> <li>▪ Display tables that have been closed.</li> </ul>
<b>RKV Mode 1-8</b>	<b>246-253</b>	<ul style="list-style-type: none"> <li>▪ Set the current kitchen video mode to be transmitted in the video packets sent to the video controller.</li> <li>▪ Normally used to select routing scheme during different times of day.</li> </ul>
<b>-Seat</b>	<b>024</b>	<ul style="list-style-type: none"> <li>▪ Used to decrement the current seat number. <ul style="list-style-type: none"> <li>* When a new transaction is started, or a check is recalled, the default seat number is 1.</li> <li>* Any Menu Items entered will be linked to the current seat number selected.</li> </ul> </li> <li>▪ This key type is only used if the Use Seat #'s option is set in the System Setup table.</li> </ul>
<b>+Seat</b>	<b>025</b>	<ul style="list-style-type: none"> <li>▪ Used to increment the current seat number. <ul style="list-style-type: none"> <li>* When a new transaction is started, or a check is recalled, the default seat number is 1.</li> <li>* Any Menu Items entered will be linked to the current seat number selected.</li> </ul> </li> <li>▪ This key type is only used if the Use Seat #'s option is set in the System Setup table.</li> </ul>
<b>Select Customer</b>	<b>264</b>	<ul style="list-style-type: none"> <li>▪ Used to select a customer from the Charge Account table.</li> <li>▪ The customer is linked to the transaction.</li> <li>▪ If the Delivery Svr option is enabled in System Setup, the Order History will be displayed. (Requires PCWorkstation software)</li> </ul>
<b>Sell Media</b>	<b>264</b>	<ul style="list-style-type: none"> <li>▪ Used to sell a gift certificate or a gift card.</li> </ul>
<b>Set Date</b>	<b>234</b>	<ul style="list-style-type: none"> <li>▪ Used to set the system date.</li> </ul>

Key Function	Number	POS Function Description
<b>Set Terminal ID</b>	<b>236</b>	<ul style="list-style-type: none"> <li>▪ Used to set the ID for the current terminal.</li> <li>▪ Requires reboot of the terminal if changed.</li> </ul>
<b>Set Time</b>	<b>235</b>	<ul style="list-style-type: none"> <li>▪ Used to set the system time.</li> </ul>
<b>Split by Amount</b>	<b>057</b>	<ul style="list-style-type: none"> <li>▪ Used to split a single check into multiple checks by entering dollar amounts for each check.</li> </ul>
<b>Split by Item</b>	<b>055</b>	<ul style="list-style-type: none"> <li>▪ Used to split a single check into multiple checks by tagging items to be split.</li> </ul>
<b>Split by Seat</b>	<b>056</b>	<ul style="list-style-type: none"> <li>▪ Used to split a single check into multiple checks by choosing seat numbers.</li> </ul>
<b>Start Order</b>	<b>014</b>	<ul style="list-style-type: none"> <li>▪ Starts a new check. It is required when the Auto Start Order flag in the Job Code table is set to NO.</li> </ul>
<b>Stay Down</b>	<b>068</b>	<ul style="list-style-type: none"> <li>▪ Used to set or change the default Menu Item size level and/or Meal Period.</li> <li>▪ Press [STAY DOWN] and the [MENU ITEM SIZE #]. Screen prompts to broadcast the selection to other stations. The selection becomes the default Menu Size for new checks until a System Z report is taken or another selection is made.</li> <li>▪ Press [STAY DOWN] and the [MEAL PERIOD #]. Screen prompts to broadcast the selection to other stations. The selection becomes the default Meal Period for new checks until a System Z report is taken or another selection is made.</li> </ul>
<b>Subtotal</b>	<b>015</b>	<ul style="list-style-type: none"> <li>▪ Can be set as a requirement prior to paying out a check with Order Type option Req Subtotal.</li> <li>▪ If using Promos, when the Order Type option Check Promos is set, the Subtotal key will scan the check for promo menu items.</li> <li>▪ If using Enable Auto Grat or Exempt Auto Grat, the Subtotal key will reset the gratuity amount and display the new check total.</li> </ul>

Key Function	Number	POS Function Description
<b>System Deposits</b>	<b>131</b>	<ul style="list-style-type: none"> <li>▪ Used to enter deposit-type media totals for the total system.</li> </ul>
<b>Table</b>	<b>017</b>	<ul style="list-style-type: none"> <li>▪ Assign a table number to a check, or to change a table number of a check.</li> <li>* To use [TABLE], the Require Table # flag in the Order Type Setup must be set for the current Order Type.</li> </ul>
<b>Tare Override</b>	<b>069</b>	<ul style="list-style-type: none"> <li>▪ Sets a tare table for a menu item.</li> </ul>
<b>Tax Exempt</b>	<b>058</b>	<ul style="list-style-type: none"> <li>▪ Removes all sales tax from the check. All taxable totals are moved to non-taxable totals.</li> </ul>
<b>Tax Exempt #1 - #8</b>	<b>059-066</b>	<ul style="list-style-type: none"> <li>▪ Remove sales tax applied to the specified Tax Table.</li> <li>▪ Each Menu Item Department is linked to one or more of the eight Tax Tables. When a specific Tax Table is exempt, only the sales tax for items in that Tax Table is removed.</li> <li>▪ The taxable totals for the Tax Table are moved to non-taxable totals.</li> </ul>
<b>Terminal Deposits</b>	<b>132</b>	<ul style="list-style-type: none"> <li>▪ Used to enter deposit-type media totals for a specific terminal.</li> </ul>
<b>Tip Payout</b>	<b>086</b>	<ul style="list-style-type: none"> <li>▪ Transfers tips from one Employee report as a TIPS PAID OUT to another Employee report as a TIPS PAID IN.</li> <li>▪ Index the amount of the Tips being paid out and press [TIP PAYOUT]. At the prompt, select the Employee receiving the payout.</li> </ul>

Key Function	Number	POS Function Description
<b>Total</b>	<b>016</b>	<p>This key is used for several purposes:</p> <ul style="list-style-type: none"> <li>▪ <b>End a service round</b>, storing the check and leaving it unpaid. <ul style="list-style-type: none"> <li>* This is called "Service Totaling" the check.</li> <li>* The Order Type must have option Store Open Check set to allow unpaid checks to be stored in the system.</li> </ul> </li> <li>▪ <b>Finalize an input field</b>, like an Enter key on a keyboard. <ul style="list-style-type: none"> <li>* For example, enter a number for an amount, and then press the [TOTAL] key to indicate completion of the entry.</li> </ul> </li> <li>▪ <b>Accept allowable modifiers</b> for a Menu Item. <ul style="list-style-type: none"> <li>* An allowable modifier is one that has the required quantity set to zero.</li> <li>* When all modifiers from the Department screen are entered, press [TOTAL] to indicate the entry is complete.</li> </ul> </li> </ul>
<b>Trnsfr All Checks</b>	<b>054</b>	<ul style="list-style-type: none"> <li>▪ Used to transfer ALL checks from one employee to another.</li> <li>▪ This key is used by the server who is taking over the checks.</li> </ul>
<b>Trnsfr Chk Frm Svr</b>	<b>053</b>	<ul style="list-style-type: none"> <li>▪ Used to transfer a check <i>from</i> one employee <i>to</i> another.</li> <li>▪ This key type is used by the server who is taking over the check.</li> <li>▪ When a employee is giving a check to another server, use the [TRANSFR CHK TO SVR] key type.</li> </ul>
<b>Trnsfr Chk To Svr</b>	<b>052</b>	<ul style="list-style-type: none"> <li>▪ Used to transfer a check <i>to</i> one employee <i>from</i> another.</li> <li>▪ This key type is used when the server who created the check is giving the check to another server.</li> <li>▪ When a employee is taking the check from another server, use the [TRANSFR CHK FROM SVR] key type.</li> </ul>

Key Function	Number	POS Function Description
<b>Update Software</b>	<b>237</b>	<ul style="list-style-type: none"> <li>▪ Used to install a new version of software on to the terminal</li> <li>▪ When a USB Memory Stick is used to load the new software version, the [ <b>UPDATE SOFTWARE</b> ] function is automatically executed.</li> </ul>
<b>Utility Menu</b>	<b>003</b>	<ul style="list-style-type: none"> <li>▪ Puts the terminal in Utility mode.</li> </ul>
<b>Void</b>	<b>092</b>	<p>This key type has several purposes.</p> <ul style="list-style-type: none"> <li>▪ <b>Void items from a check.</b> <ul style="list-style-type: none"> <li>* Any items that were added in the current service round may be removed using this key type without any reporting.</li> <li>* Items from a prior service round that are voided will be recorded in the Void file.</li> </ul> </li> <li>▪ <b>Backspace key</b> to erase numeric entries. <ul style="list-style-type: none"> <li>* For example, when signing into the system, if an incorrect ID number is entered, press the VOID key one time for each incorrect digit entered.</li> </ul> </li> <li>▪ <b>Backup key</b> when modifiers are being entered for a Menu Item, pressing the VOID key after a modifier entry will remove it and backup to select another choice. <ul style="list-style-type: none"> <li>* After all modifiers for an item have been entered, use the [ <b>CHANGE MODIFIER</b> ] key to replace a modifier.</li> </ul> </li> </ul>
<b>Void All Items</b>	<b>094</b>	<ul style="list-style-type: none"> <li>▪ Used to void all items on a check.</li> </ul>



# ***Chapter***

# **2**

# ***Access the System***

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## 2.1 Processing Payment Transactions

POS-5700 can be configured, in conjunction with the ServiceMgr version 4.1, to process payment transactions and therefore is required to handle sensitive cardholder information. The Payment Card Industry (PCI) has developed security standards for handling cardholder information in a published standard called the PCI Data Security Standard (PCI DSS). The security requirements defined in the PCI DSS apply to all members, merchants, and the service providers that store, process or transmit cardholder data.

The PCI DSS requirements apply to all system components within the payment application environment which is defined as any network device, host, or application included in, or connected to, a network segment where cardholder data is stored, processed or transmitted.

The ***NCC PABP Implementation Guide*** describes the essential guidance for implementing POS-5700 and ServiceMgr in a PCI compliant environment.

## 2.2 Manager Overrides

The POS-5700 system has an extensive security system

- ❑ Security levels can be assigned to almost every key type in the system in Function Setup.
- ❑ Access to different function levels are determined by the Security levels assigned to each Job Code.
- ❑ If an employee attempts using a function for which he has an insufficient security setting, a prompt displays:
  - Enter approval ID
  - A keypad will also display for entering the employee ID of a employee who is allowed to access the function.
  - To proceed, index a Manager's employee ID and press **ENTER**.

## 2.3 Clocking In/Out

The POS-5700 has an optional timekeeping function that tracks attendance records. The Timekeeping system is used only for the purpose of tracking attendance; it does not provide access to POS operations.

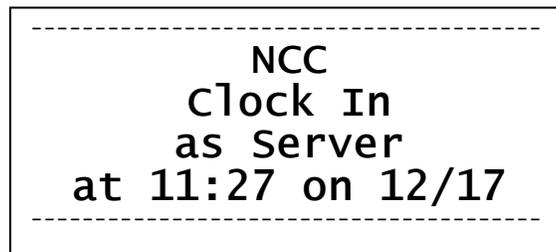
### 2.3.1 Clock In

#### Notes

- The options for using the Timekeeping system are determined by employee in Employee Setup.
  - Required Clock-In – If YES, the employee cannot log in to the system without first clocking in.
  - Clock-In Only – If YES, the Employee cannot log in to the system at all. This option is commonly used for kitchen employees who do not enter guest checks.

#### Procedure

1. Index employee ID #.
2. Press [CLOCK IN].
  - If more than one Job Code is assigned to the employee, options will display for choice.
  - Touch the button of the Job Code wanted.
3. The receipt printer prints the employee's name, Job Code clocked in, the time and date.



### 2.3.2 *Clock Out*

**Notes:**

- ❑ Employees will be required to Declare Tips when clocking out if their Job Code has TIPPED set to YES.
- ❑ A minimum declared tip entry can be required by setting option MIN TIP in the System Setup table to the minimum wanted.

**Procedure**

1. Index employee ID#.
2. Press [CLOCK OUT].
  - If prompted, index amount of cash tips, press **ENTER**.
  - If prompted NOT ENOUGH TIPS, index manager ID # and press **ENTER**.
3. The receipt printer prints a clock out report with the employee's name, Job Code, time/date and the total hours worked both for this shift and this week.

### 2.3.3 *Break Out*

- ❑ [BREAK OUT] records an unpaid break for the employee.
- ❑ It does not prompt for tips or require that checks be closed.
- ❑ The minimum time before the employee may clock back in can be set in System Setup\Labor, #2 Minimum Break Time. If an employee attempts to clock in before the set time a manager approval may be required.

**Procedure**

1. Index employee ID#.
2. Press [BREAK OUT].
3. When the break is over, index the employee ID# and then press [CLOCK IN].

## 2.4 Login/Logout

Logging into the system allows access, as the employee's security level permits, to guest check handling and Manager Functions.

### NOTES

- ❑ An employee can be logged into one station at a time.
- ❑ Only one employee can be logged into a station at one time, and that employee's security level determines what functions are accessible.
- ❑ Automatic log out:
  - The **POS AUTO LOGOUT** function in Job Codes\Main can be set to automatically log the employee out and return to the Job Code's default screen after a check service round is completed.
  - The **PGM AUTOLOGOUT** function in Job Codes\Main will automatically log the employee out from Manager Mode if a station is not active after a set amount of minutes.
- ❑ If the employee is required to Clock In (for time and attendance tracking), the Job Code entered during the clock in will also be used for the Log In.
- ❑ An employee's shift begins when a login is done, and continues until an Employee Z report is ran for the employee.
- ❑ A Job Code can be set to require a bank loan function when an employee logs in with the **REQ INIT LOAN** flag. A prompt will display for entry of the Loan amount.
- ❑ A password can be assigned to an employee in the Employee Setup Table that must be used each time the employee logs in.

## 2.4.1 Login

### Procedure

1. Index employee ID #.
2. Press [LOGIN].
3. If prompted, index the employee's password and press **ENTER**.
4. If prompted, select the Job Code for this shift.
5. If the Job Code requires a Bank Loan, a prompt will automatically display for the loan amount.
  - Index the amount of the loan and press **ENTER**.
  - Press **YES** to confirm the amount.

## 2.4.2 User Assigned Operator Keys

- Operator Keys can be assigned to each required employee on the Login screen set for the terminal.
- To log in, employees press the button assigned with their employee ID.

## 2.4.3 One Touch Login

With this feature, the system generates the operator keys for each applicable employee.

- To set up this feature:
  - Employee Setup\Flags - Set the ONE TCH LOGIN option to YES.
  - Terminal Setup\Flags - Set the ONE TCH LOGIN option to YES for each terminal using this feature.
- The default screen for the station will display buttons for each employee who has a current open shift.
- To log in, employees press the button generated for their employee ID.

## 2.4.4 Logout

NOTE: This procedure is not necessary if the Job Code is set for Auto Logout, or if another employee logs into the workstation.

- To log out, index [0] and press [LOGOUT].

**NOTES**

# ***Chapter***

# **3**

# ***Guest Check Functions***

---



## 3.1 New Guest Checks

### 3.1.1 Guest Check Numbers

- ❑ Guest checks are assigned a check number by the system.
- ❑ Check numbers are 5 digits and begin with the terminal number from which it is entered.

Checks from:	Begin with :
Terminal 1	10001
Terminal 2	20001
. . . and so forth.	

### 3.1.2 Start a New Check

Guest checks are started one of two ways depending on the setting in Job Codes\Main - Auto Start Order.

- ❑ **Auto Start Order = NO**
  - New checks are started using [START ORDER].
- ❑ **Auto Start Order = YES**
  - A new check is automatically started when the employee logs in.

### 3.1.3 Check Flow

1. Start a new check, either by pressing [START ORDER] or logging in.
2. Reply to prompts if used. Prompts can include:
  - Table Number
  - Number of Guest
  - Customer Information
  - Order/Tent Number
3. Enter Menu Items and correct any mistakes.
4. End the Service Round
  - A service round begins when a check is created or recalled.
  - The service round is completed when the check clears the screen by the server pressing [TOTAL] or [PRINT CHECK], or when the check is tendered with a [MEDIA] key.
    - \* If a media is used to partially tender a check, the service round will end using [TOTAL].

## 3.2 New Check Prompts

All checks are tracked by a system-assigned check number. In addition, other check information can be required and attached to the check. These options are Table Number, number of guests, and an order/tent number.

### 3.2.1 Table Number

- A table number can be required for the Order Type by the REQ TABLE flag in the Order Type Setup. The Order Type of the check is determined by the Job Code of the Employee logged in.
  - This setting requires a Table number entry before the check is sent.
    - \* A Table number is not required if immediately paying out the check.
  - An additional setting, PROMPT TABLE in Station Setup, can require a Table number entry before a menu item is entered.
    - \* With this option set, the table number entry *is* required if immediately paying out the check.
  - A table number cannot be assigned to a check unless REQ TABLE is yes.
- When a table number is assigned to a check, it can be recalled by table number as well as the check number.
- Table Select Preset Key
  - Table numbers can be assigned to checks with a [TABLE SELECT] key. Table numbers are pre-assigned to the key and are usually arranged on a screen to represent the layout of the restaurant.

#### Order type set to require and prompt for Table #

1. Start the check.
2. Screen prompts for the table #.
  - Index the table # and press **ENTER** on the keypad.

#### Order Type set to require Table #

1. Start the check.
2. Index the table number and press [TABLE].

OR

3. Enter items.
4. Send the check.
5. Screen prompts for the table #
  - Index the table # and press **ENTER** on the keypad.

### 3.2.2 Guest Count

- A guest count can be required for the Order Type by the REQ GUEST CNT flag Order Type Setup. The Order Type is determined by the Job Code of the Employee logged in.
  - This setting requires a guest count entry before the check is sent.
  - An additional setting, PROMPT # GUEST in Order Type Setup, can require a guest count entry before a menu item is entered.
- The Order Type can be set to enter a default number of guest with Order Type Setup\Options2 DEFAULT GUESTS flag set, so the server does not have to make an entry.
- The [GUEST COUNT] key does not apply if the Terminal Setup\Main option CUST CNT METHOD is set for tracking by Meal Count rather than Guest Count.

#### Order Type set to require and prompt for number of guest

1. Start the check.
  - Screen prompts for guest count.
2. Index the number of guest and press **ENTER** on the keypad.

#### Order Type set to require number of guest

With [GUEST]

1. Start the check.
2. Index the number of guest and press [GUEST]

OR

1. Press [GUEST]
  - Screen prompts for guest count.
2. Index the number of guest and press **ENTER** on the keypad.

Without [GUEST]

1. Enter items.
2. Press [PRINT] or [TOTAL] to send the check.
3. Screen prompts for the guest count.
  - Index the number of guests and press **ENTER** on the keypad.

### 3.2.3 *Order Type*

- ❑ All checks must be assigned to an Order Type. Most Job Codes will be assigned a default Order Type. Or, the employee can be prompted to enter the Order Type for each guest check.
- ❑ An Order Type can be required as an entry for a particular workstation.
  - The DEFAULT ORDER TYPE in Job Code Setup for the employee's Job Code must be set to NONE.
- ❑ An entry for the Order Type must be completed before a menu item can be entered on the check.

#### **Procedure**

1. Before entering a menu item, press an [ORDER TYPE] key for this check.
  - Pressing an [ORDER TYPE] key will also override a default Order Type assigned to the Job Code for one order only.

### 3.2.4 *Order Number*

- ❑ Order numbers are also known as TENT numbers. They can be used when pre-numbered order cards are given to guests to place on the table so food can be delivered to the correct table.
- ❑ An Order Number can be required for checks by setting the Order Type Setup\Options 1 USER ENTRD ORD# flag.
- ❑ When an Order Number is required for a check, a prompt will automatically display when the service round is completed.

#### **Procedure**

1. Enter menu items on to the check.
2. End the service round by pressing [TOTAL], [PRINT CHECK] or a [MEDIA] key.
3. A window displays prompting:  
Enter order number
4. Index the order number on the keypad and press **ENTER**.
5. The service round is completed.

### 3.2.5 *Override Meal Period*

Meal Periods are set up by time for each day of the week in the Meal Period Setup table. The current setting can be overridden for the current check only or for all checks until the System Z report is done. The change can affect one terminal or all terminals.

#### **For One Check Only**

1. Press a [MEAL PERIOD #] key which has been set for the Meal Period wanted for this check.
  - The override setting reverts back to the preset Meal Period after the check is sent.

#### **For All Checks Today**

1. Press [STAY DOWN].
2. Press the [MEAL PERIOD #] key wanted.
3. Screen prompts:  
Broadcast changes?
4. Press **YES** for the change to be effective at all stations in the system.

Press **NO** for the change to affect this station only.

- The override setting will be effective until the Meal Period is changed again, or until the next System Z report is done.

### 3.2.6 *Add Guest Information*

A 18 character field can be added to a check using the Order Type Setup\Main PRMPT CUST INFO flag.

- The information entered is saved with the check. It prints on the remote kitchen slip and the guest receipt.
- When the check is recalled using [RECALL CHECK], the information entered displays on the check's button instead of the check number.

#### **Procedure**

1. Press an [ORDER TYPE] key which has PRMPT CUST INFO flag turned on.
2. Keyboard displays. Enter up to 18-characters of Guest Information for this check.
3. Press **ENTER**.
4. Enter menu items.

### 3.3 *Entering Menu Items*

Menu items can be entered after any new-check prompts have been satisfied.

Screens may be organized by Menu Department, with a “main” order entry screen containing screen select buttons that display each menu item within that Department. An example would be a screen with buttons for Soup/Salads, Apps, Entrees, Desserts, and Beverages.

#### 3.3.1 *Preset Menu Item*

1. Press the [MENU ITEM] key for the item wanted.
2. If prompted, index a Manager Code and press **ENTER**.
3. The menu item is added to the check.

#### 3.3.2 *More than One Preset Item*

1. Index the quantity of the item wanted, using a numeric keypad.
2. Press the [MENU ITEM] key for the item.
  - If the quantity entered exceeds the HALO setting for the item from Menu Items\Main, a message displays:  
Amount too large

#### 3.3.3 *Menu by PLU #*

1. Index the PLU # of the item wanted, using a numeric keypad.
2. Press [PLU].

### 3.3.4 *Open Priced Menu Item*

An open priced Menu Item is one that has the option in Menu Item Setup\Options 1 OPEN PRICE set. If the flag PREFIX PRICE is set to YES, the price is entered prior to entering the item.

#### **With PREFIX PRICE to Yes**

1. Index the price for this item.
2. Press the [MENU ITEM] key for the Open Priced Menu Item.

#### **With PREFIX PRICE to No**

1. Press the [MENU ITEM] key for the Open Priced Menu Item.
2. Screen prompts:  
Enter sales price
3. Index the price for this item and press **ENTER**.

### 3.3.5 *Scalable Menu Item*

Use the SCALEABLE flag in Menu Item Setup\Options 1, to set an item as requiring a weight entry.

#### **Procedure**

1. Press the preset [MENU ITEM].
2. If a scale is connected to the POS-5700, the weight will be entered from the scale.
3. If a scale is not connected, prompt will display:  
Enter weight
4. Index the number of pounds of the item using the keypad which automatically displays.
5. Press **ENTER**.

### **3.3.6 Enter Modifiers with Forced Display**

A modifier can only be entered on a check following a Menu Item. The number of items that may be entered from a modifier screen is set in Menu Item Setup.

#### **Procedure**

1. Press the [MENU ITEM] key for the item wanted.
  - It is added to the check.
2. A list of modifiers displays. Press a key to choose a modifier. The modifier screen will clear according to its setting in the Menu Item's programming.
  - If this Forced Display allows one selection, the screen will clear after one choice is made.
  - If this Forced Display allows more than one selection, the screen will clear after that number of choices is made.
  - If there is no limit to the number of selections from the Forced Display, a [TOTAL] key should be on the screen to indicate all wanted choices have been made.
3. When all choices are made from the Forced Display(s), the screen returns to the one from which the Menu Item was entered.

### **3.3.7 Enter Modifiers with Special Instructions**

If a Menu Item's Department has the USAGE field set to Special Instructions, the item can be used as a modifier but preset on the screen rather than be included on a Forced Display.

#### **Procedure**

1. Enter the primary [MENU ITEM].
2. Press the preset special instruction [MENU ITEM].
  - Special Instruction items cannot be entered on a check before a primary Menu Item is entered.

### 3.3.8 *Enter Modifiers with Spell-It Instructions*

Spell-It Instructions are added to the check by entering a Menu Item with SPELL-IT INSTR set to YES.

#### **Procedure**

1. Enter the Menu Item.
  - A keyboard displays.
2. Type the message for the kitchen, up to 18 alphanumeric characters.
  - The entry is added to the check as an item.
3. Press **ENTER**.
  - The entry will print on remote printers and display when the check is recalled.

### 3.3.9 *Enter Items by Seat Numbers*

Seat numbers enable items on the check to be sorted and printed on the remote printers by table position. Entering checks by seat numbers is also very helpful when splitting the check into separate checks for payment.

- To use Seat numbers for sorting on remote printers, the following options should be set:
  - The option in System Setup\Check Options 1, USE SEAT # must be YES.
  - The option in System Setup\Check Options 1, CHK SORT ORDER should be set to the *Seat* option.

#### *With +SEAT and -SEAT*

#### **Procedure**

1. When using seat numbers, the system assigns the current seat number to 1. The next menu item entered will be assigned to the current seat number.
  - Use the [+ SEAT] to change the seat number from 1 if necessary.
2. Enter the menu item(s) for this seat number.
3. Use the [+ SEAT] and [- SEAT] keys to change the seat number as needed for the next menu item(s).
4. Enter the menu items(s) for this seat number.
5. Continue until all items are entered on the check.

### ***With Seat Select***

[SEAT SELECT] presets seat numbers on the screen. Each preset key is programmed with a specific seat number.

#### **Procedure**

1. Press [SEAT SELECT #].
2. Enter menu item(s).
3. Continue until all items are entered.

### ***Change Seat Number***

#### **Procedure**

1. Enter items, assigning seat numbers as each is entered, or enter all items with the default seat number of 1.
2. Touch the line of a Menu Item.
3. Press [CHANGE SEAT].
4. A screen displays prompting for the seat number.
5. Index the new seat number for the item and press **ENTER**.
6. Continue until all items wanted are reassigned to the correct seat number.
7. Continue with the order.

### 3.3.10 Enter by Menu Item Size

Menu Item Size Levels are used for ordering Menu Items, such as soft drinks, which come in different sizes.

- Two ways to enter a different size menu item:
  - Press the [MENU ITEM SIZE #] key prior to the first modifier item in order to change its size level. Example:
    - \* [MENU ITEM SIZE 2] then [F.FRIES].
  - Press a preset menu item of a certain size.
- When ordering priced modifiers through Forced Displays, an option in the Menu Item Setup\Sizing, Stay Down Size can be set so the size level remains the same until all modifiers from the Forced Display are entered.

#### Sample Procedure

1. Press a menu item, for example: [BURGER].
2. A Forced Display gives choice of [MED FRIES] (size 2 in this example) or [LGR FRIES](size 3).
  - Enter MED FRIES
  - The STAYDOWN SIZE is set to YES in the Menu Item Setup Table.
3. The next Forced Display shows choice of soft drinks and [MENU ITEM SIZE #] keys for each price size.
  - Select a soft drink. The size will default to Menu Item Size 2.
  - Or, to order a Size 3 soft drink, press the [MENU ITEM SIZE #] key, and then select the soft drink wanted.

## 3.4 Check Corrections before Sending

### 3.4.1 Remove Items from Checks

#### *Remove Last Item*

1. Enter menu items.
2. Press [LAST ITEM VOID].
3. The menu item is removed from the check.

#### *Remove One or More Items*

- There are two items in the Function Setup table that controls the security level for the [VOID] key.
  - Function #95 – Void Current Round
  - Function #96 – Void Prior Round

Enter menu items on a new check or recall a check from a previous round.

8. Touch the item(s) to be removed from the check. The item(s) touched becomes highlighted.
  - If an item is highlighted by mistake, touch it again.
9. Press [VOID].
10. If prompted, index a Manager Code and press **ENTER** on the keypad.

#### *Remove All Items before Sending*

After a menu item has been sent to remote printers, the [VOID ALL ITEMS] key can only be used according to the security level set in the Function Setup table.

#### **Procedure**

1. Enter menu items.
2. Press [VOID ALL ITEMS].
  - The entire check is voided.

### 3.4.2 Add a Modifier

This procedure adds an item whose Department is set to Special Instructions. Special Instructions are modifiers that can be entered but are not on the Item's Forced Display.

1. Enter menu items with modifiers.
2. Press [**CHANGE MODIFIER**].
  - The screen display shows the guest check with command keys: **EDIT**, **INSTR** and **DELETE**.
3. Touch the modifier wanted to change.
4. Press **INSTR**.
  - Buttons display for each Department set as a *Special Instruction*.
5. Touch the button for the Department wanted.
  - Items in that Department display.
6. Touch a modifier. It is added to the check after the modifier selected in #3.
  - The display returns to previous screen.
7. When done, press **BACK** to return to the check.

### 3.4.3 Delete a Modifier

NOTE: A required modifier cannot be deleted.

1. Enter menu items with modifiers.
2. Press [**CHANGE MODIFIER**].
3. Touch the modifier wanted to remove from the check.
4. Press **DELETE**.
5. When done, press **BACK** to return to the check.

### **3.4.4 Replace a Modifier**

1. Enter menu items with modifiers.
2. Press [CHANGE MODIFIER].
3. Touch the modifier wanted to replace.
4. Press **EDIT**.
  - The forced display from which the modifier was entered displays.
5. Select the correct modifier.
6. When done, press **BACK** to return to the check.

### 3.4.5 End Service Round

Ending the service round sends menu items to kitchen printers (if they have not already been printed) and clears the check from the screen.

- If the flag the Order Type Setup\Main, STORE OPEN CHECK is NO, the service round can only be finalized by tendering the check with a [MEDIA] key.

#### Procedure

1. Enter all items for this service round.
2. Complete any required prompts (i.e. Table #, # Guest, Order #).
3. End the service round by pressing one of the following key types.
  - [TOTAL]
    - \* Sends menu items entered this round to remote printers.
    - \* Clears the check from the screen.
    - \* Prints the guest receipt if Order Type Setup\Options 1, PRINT GUEST CHECK is YES.
    - \* Check remains open.
  - [PRINT CHECK]
    - \* Sends menu items entered this round to remote printers.
    - \* Clears the check from the screen.
    - \* Prints the guest receipt.
    - \* Check remains open.
  - [MEDIA]
    - \* Sends menu items entered this round to remote printers.
    - \* Clears the check from the screen.
    - \* Prints the guest receipt if Order Type Setup\Options 1, PRINT CLOSED CHECK is YES.
    - \* Closes the check.

### 3.5 *Recall a Check*

- ❑ The RECALL OTHER CHECK field in Job Code Setup\Options can be set to allow employees such as cashiers to recall checks entered by other employees.
- ❑ Recall Mode Terminal
  - Terminal Setup\Flags, Recall at Login = YES
  - This should be used only when the server is responsible for recalling and tendering checks started by other servers.
  - Example: The server is the cashier for a dual drive-thru.
- ❑ NOTE: Checks can only be opened at one workstation at a time.

#### 3.5.1 *By Check Number*

Checks with Order Types requiring a table number can also be recalled by check number.

##### **Using the Number Pad**

1. Using the number pad, index the check number.
2. Press [RECALL CHECK].

##### **Using List of Open Checks**

1. Press [RECALL CHECK].
2. A list of all open checks accessible by this server displays.
3. Press the key of the check wanted to recall.

### **3.5.2 By Table Number**

#### **Using the Number Pad**

1. Using the number pad, index the table number.
2. Press [RECALL TABLE].

#### **Using List of Open Checks**

1. Press [RECALL TABLE].
2. A list of all open checks accessible by this server displays.
3. Press the key of the table wanted to recall.
  - If the table has separate checks a list of each check will display. Press the key of the separate check wanted.

### **3.5.3 Recall by Order Type**

1. Press [RECALL ORDER TYPE #] of the Order Type wanted.
2. A list of all open checks accessible by this server displays.
3. Touch the button of the check wanted.

### **3.5.4 Recall Table with Separate Checks**

1. Use either the number pad or the list of checks to recall the table.
2. List of separate check numbers display.
3. Touch the button of the check wanted.

### **3.5.5 Recall with a Bar Code Scanner**

If the workstation is connected to a bar code scanner and bar codes are being printed on the guest checks, scan the guest check.

### **3.5.6 Recall with Dual Drive Thru**

A Dual-Drive Thru application uses two options:

- The Terminal Setup\Main, Monitor Term field enables a terminal's orders of a certain Order Type to be recalled at either another specific station, or at all terminals.
- The [RECALL OT#] key type which is used to recall checks of a specific order type.

#### **Example**

MONITOR TERM is set for Terminal #2.

1. Order is entered at Terminal #1.
2. Cashier at Terminal #2 presses [RECALL OT] key programmed for an Order Type named DRIVE THRU.
3. Orders display on Terminal #2 in the order they were entered.

## 3.6 *Split a Check*

Only items that have been sent can be split to separate checks.

### 3.6.1 *Split by Item*

#### Procedure

1. Recall the check.
2. Press **[SPLIT BY ITEM]**.
3. Screen prompts:  
Enter number of checks
4. Index the number of new checks to create from this check and press **ENTER**.
  - A screen displays with a check window for the number of new checks entered.
  - Use the scroll bar if necessary to view all check windows.
5. Touch a menu item to highlight it.
  - Highlighting a primary Menu Item automatically highlights its modifiers.
6. Touch the window of the check where the item is to be moved.
7. Continue until all items are on the correct separate checks.
8. Press **OK**.
9. A button for each new check displays. Touch a button to view the contents.
10. To print one check, touch the check's button and press **PRINT**.  
To print all checks, press **PRINT ALL**.
11. Press **DONE** to exit the split check screen.
12. End the service round by pressing **[MEDIA]**, **[PRINT CHECK]** or **[TOTAL]**.

### 3.6.2 *Split by Seat Number*

To split checks into separate checks using [SEAT NUMBER] requires the option System Setup\Check Options 1, Use Seat Number to be set YES.

#### Procedure

1. Recall the check.
  - If seat numbers were not entered prior to sending the check (i.e. all items are assigned to seat #1), items can be reassigned using the [CHANGE SEAT] key (see procedure on page 3-13).
2. Press [SPLIT BY SEAT]. Screen prompts:  
Enter number of checks
3. Index the number of new checks to create from this check and press **ENTER**.
  - A screen displays with a check window for the number of new checks entered.
  - Use the scroll bar if necessary to view all check windows.
4. Touch a menu item to highlight it. All items tagged to that seat number is highlighted.
  - Highlighting a primary Menu Item automatically highlights it's modifiers.
5. Touch the window of the check where the item(s) is to be moved.
6. Continue until all items are on the correct separate check.
7. Press **OK**.
8. A button for each new check displays. Touch a button to view the contents.
9. To print one check, touch the check's button and press **PRINT**.  
To print all checks, press **PRINT ALL**.
10. Press **DONE** to exit the split check screen.
11. End the service round by pressing [MEDIA], [PRINT CHECK] or [TOTAL].

### 3.6.3 *Split by Amount*

#### Procedure

1. Recall the check.
2. Press **[SPLIT BY AMOUNT]**. Screen prompts:  
Enter number of checks
3. Index the total number of checks to create from this check and press **ENTER**.
4. Prompt displays:  
Enter amount - Check 1
5. Index the amount for the first check and press **ENTER**.
6. Continue entering the amount for each check as prompted.
  - When there is one check remaining, the system puts the balance on it (the last check).
7. The system displays buttons for each resulting check.
  - The first (original) check contains all the menu items, tax and gratuity and shows the total amount that was transferred.
  - Each new check contains an item “Bal Transfer” and the amount transferred to it from the original check.
8. To print one check, touch the check’s button and press **PRINT**.  
To print all checks, press **PRINT ALL**.
9. Press **DONE** to exit the split check screen.
10. End the service round by pressing **[MEDIA]**, **[PRINT CHECK]** or **[TOTAL]**

## 3.7 *Transfer a Guest Check*

### 3.7.1 *Transfer to a Server*

This procedure is done by the server who created the check.

#### **Procedure**

1. Recall the check. Should be done by the server responsible for the check or a manager.
2. Press [**TRNSFR CHK TO SVR**].
3. Screen displays a list of employees. Touch the employee name of the server who the check is being transferred TO.
4. If the default Order Type for the new server requires a table number and the check does not have one assigned, screen prompts:  
Enter table number
5. Index the table number on the keypad and press **ENTER**.
6. If the default Order Type for the new server requires a # of guest entry and the check does not have one assigned, screen prompts:  
Enter guest count
7. Index the number of guests and press **ENTER**.
8. Press the [**TOTAL**] key to end the procedure. Check is transferred.

### 3.7.2 *Transfer from a Server*

This procedure is used by the new server, who takes the check from the server/bartender who created it.

#### **Procedure**

1. Press [**TRNSFR CHK FROM SVR**].
2. Screen prompts:  
Enter check number
3. Index the check number being picked up and press **ENTER**.
4. If the default Order Type for the new server requires a table number and the check does not have one assigned, screen prompts:  
Enter table number
5. Index the table number on the keypad and press **ENTER**.
6. If the default Order Type for the server picking up the check requires a number of guest entry and the check does not have one assigned, screen prompts:  
Enter guest count
7. Index the number of guests and press **ENTER**.
8. Press the [**TOTAL**] key the end the procedure. Check is transferred.

### 3.7.3 *Transfer all Checks*

This procedure is used by the server who takes all open checks from the server/bartender who created them.

#### **Procedure**

1. The server picking up the checks should be logged in to the terminal.
2. Press [**TRNSFR ALL CHKS**].
3. Screen displays a list of employees. Touch the employee name of the server to whom the checks are currently assigned.
4. All checks from the originating server are transferred.

## 3.8 *Combine Checks*

### 3.8.1 *Combine Stored Checks*

This procedure combines two or more checks that have already been stored into one check.

1. Recall the first check.
2. Press [COMBINE CHECK].
3. Screen displays check numbers for this server's checks.
4. Press the button of the check number to add to the current check.
  - Items from the check number entered are added to the first check.
5. End the service round by pressing [TOTAL], [MEDIA] or [PRINT CHECK].

### 3.8.2 *Add New Check to Stored Check*

This procedure is used to add the current check to a stored check. The current check must be a new check (in the first service round).

1. Enter items for a new check.
2. Press [ADD TO CHECK].
3. Screen displays check numbers for this server's checks.
4. Press the button of the check number that the current check will be combined with.
  - Items from the current check are added to the check number entered. That check now displays on the screen.
5. Repeat steps 2 – 5 as needed to combine more checks.
6. End the service round by pressing [TOTAL], [MEDIA] or [PRINT CHECK].

### **3.8.3 Add to Stored Check by Order Type**

This procedure is identical to using [ADD TO CHECK] except it restricts the choices to the server's open checks of a certain Order Type. The current check must be new (in the first service round).

1. Enter items for a new check.
2. Press [ADD TO CHK OT#].
3. Screen displays check numbers for this server's checks.
4. Press the button of the check number that the current check will be combined with.
  - Items from the current check are added to the check number entered. That check now displays on the screen.
5. Repeat steps 2 – 5 as needed to combine more checks.
6. End the service round by pressing [TOTAL], [MEDIA] or [PRINT CHECK].

### **3.8.4 Add New Check to Stored Check with Table #**

This procedure is identical to using [ADD TO CHECK] except it is used on checks with assigned table numbers. The current check must be new (in the first service round).

1. Enter items for a new check.
2. Press [ADD TO TABLE].
3. Screen displays table numbers for this server's checks.
4. Press the button of the table number that the current check will be combined with.
  - If there are separate checks for the table, the screen will display a list of the checks. Touch the check wanted.
  - Items from the current check are added to the check of the table number entered. That check now displays on the screen.
5. Repeat steps 2 – 5 as needed to combine more checks.
6. End the service round by pressing [TOTAL], [MEDIA] or [PRINT CHECK].

### 3.8.5 *Combine Stored Checks to One Table*

This procedure is identical to using [ADD TO TABLE] except it depends on how the option in System Setup\Check Options 1, ONE CHK PER TBL is set.

- YES will add items from both checks to the resulting check.
- NO will add a separate check to the table number.

#### **ONE CHK PER TBL set to NO**

1. Enter items for a new check or recall a stored check.
2. Index the table number of the check to which the current check will be combined.
3. Press [TABLE #].
  - For a recalled check, the screen prompts:  
Change Table?
  - Press **YES**.
4. Press [TOTAL] to clear the screen.
5. When the table is recalled, it contains two separate checks.

#### **ONE CHK PER TBL set to YES**

1. Enter items for a new check, or recall a stored check.
2. Index the table number of the check to which the current check will be combined.
3. Press [TABLE #].
  - For a recalled check, the screen prompts:  
Change Table?
  - Press **YES**.
4. Screen prompts:  
Combine Checks?
5. Items from the current check are added to the check number entered. That check now displays on the screen.

## 3.9 Check Adjustments

### 3.9.1 Void Items on Stored Checks

#### Remove Single Items

The same procedure is used to void items before or after sending. After a menu item has been sent/stored and the check recalled, the [VOID] key can only be used according to the security level set in the Function Setup table for Void, Void Current Round, and Void Prior Round.

1. Recall the check.
2. Touch the item(s) to be removed from the check.
  - Highlighting a primary Menu Item automatically highlights its modifiers.
3. Press [VOID].
4. If prompted, index a manager approval ID and press **ENTER**.
5. The item(s) is removed from the check.

#### Remove All Items

The same procedure is used to void all items before or after sending. After a check has been sent/stored and the check recalled, the [VOID ALL ITEMS] key can only be used according to the security level set in the Function Setup table.

1. Recall the check.
2. Press [VOID ALL ITEMS].
3. If prompted, index a manager approval ID and press **ENTER**.
4. The entire check is voided.

### 3.9.2 Add a Discount or Surcharge

#### Notes

##### ❑ Dollar or Percent

- Discounts can be programmed to adjust the check by either a dollar amount or a percentage amount using the PERCENT option in Discount Setup/Main.

##### ❑ Discount Tax Status

- For a discount to apply to a menu item, the discount must be set to the same tax status as the menu item.
- A menu item's tax status is set by its Department and the Order Type under which the check is entered.

##### ❑ Discount or Surcharge

- A discount can be programmed as a surcharge with the SVC CHARGE option, so the amount is added to the check rather than subtracted.

##### ❑ Item or Subtotal

- A discount is set as an Item or Subtotal discount with the ITEM DISC option in Discount Setup/Main.
- An Item Discount applies only to the selected item entered on the check. The item can be a specific Menu Item or any item of a specific Department.
- A Subtotal or ticket Discount applies to all items on the check that are *discountable*. Items discountable are those set to the same Tax status as the discount.

##### ❑ Reset Totals Flag on Subtotal Discounts

- Keep in mind that any discount will only apply to Menu Items set to the same tax status as the discount.
- The RESET TOTALS flag in Discount Setup/Options determines the amount of each item that is available for discounting after a discount has already been applied to the item.
  - \* YES – after a discount has been applied to items, further discounting of those items is not allowed.
  - \* NO – after a discount has been applied, additional discounts can be entered and applied to the same items.

**❑ Automatic Discount**

- A discount can also be linked to a Media type so it is automatically entered on a check when the check is tendered. This is set using Media Setup/Main, Discount Link.

**❑ Enter a Discount**

- A discount can be entered on a check using a preset [DISCOUNT] key.
- A discount can also be entered by indexing the Discount ID number then pressing the [DISCOUNT NLU] key.

***Item Discount***

An item discount is one programmed to one item or one Department. It is entered on a check immediately following the item.

1. Touch the item on the check.
2. Press the [DISCOUNT] key wanted or press [DISCOUNT NLU] then touch the discount wanted.
3. If prompted, index a manager ID and press **ENTER**.
4. If prompted, index the amount for the discount and press **ENTER**.
5. Continue entering items to the check.

***Subtotal Discount***

A subtotal discount is one programmed to adjust all discountable items on the check.

1. Enter item(s) to the check.
2. Press the [DISCOUNT] key wanted or press [DISCOUNT NLU] then touch the discount wanted.
3. If prompted, index a manager ID and press **ENTER**.
4. If prompted, index the amount for the discount and press **ENTER**.
5. End the service round by pressing [TOTAL], [MEDIA] or [PRINT CHECK].

### ***Discount for Recipient***

This procedure is commonly used for Employee Meal discounts.

- The RECIPIENT field in the Discount table is used to prompt the server for an ID number, and the CHK RECIP ID field is used to check the Employee Setup table for a valid ID number.

#### **Procedure**

1. Enter item(s) to the check.
2. Press the [DISCOUNT] key programmed for Recipient, or press [DISCOUNT NLU] then touch the discount wanted.
3. If prompted, index a manager ID and press **ENTER**.
4. If prompted, index the amount for the discount and press **ENTER**.
5. Screen prompts:  
Enter recipient ID
6. Index the ID number of the employee receiving the discount.
7. End the service round by pressing [TOTAL], [MEDIA] or [PRINT CHECK].
  - The employee's name, the discount name and the discounted amount is listed on the Discount Recipient Report.

### **3.9.3 Exempt Tax from a Check**

Additional menu items cannot be added to a check after using a tax exempt key.

#### **Procedure**

1. Enter item(s) or recall the check.
2. To exempt tax:
  - Press [TAX EXEMPT] to remove all tax from the check.
  - Press a [TAX EXEMPT #] to remove a specific tax rate (1 through 8) from the check.
3. End the service round by pressing [TOTAL], [MEDIA] or [PRINT CHECK].

### 3.9.4 Add a Tip

A tip can also be entered when the check is tendered by defaulting an over tender entry to the tip amount. This is set in Media Setup, POST TO TIP. It can be applied to either charge or cash checks.

#### Auto Gratuity

This feature automatically enters a gratuity as items are put on the check.

- The Auto Gratuity feature is set using the AUTO GRAT GSTS field in the Order Type Setup\Options 2. When the number of guests is at least the number entered there, the system automatically adds a gratuity to the check.
- The Order Type Setup table should have options set to Require Guest Count, Prompt Guest Count, and the Default Guests should be zero.
- The amount of gratuity automatically entered is set in System Setup\Gratuity, Tip%.

#### Procedure

1. Start a check.
2. Screen prompts:  
Enter Guests
3. Index the number of guest and press **ENTER**.
  - The number of guests must be equal to or greater than the entry in the AUTO GRAT GSTS field.
4. Enters item(s) to the check.
  - Note that a gratuity entry is added as menu items are ordered.
5. End the service round by pressing [MEDIA], [PRINT CHECK] or [TOTAL].

### ***Add Cash or Charge Tip***

The default tip percentage is set in the TIP field of System Setup\Gratuity.

#### **Procedure**

1. Enter item(s) or recall the check.
2. Press the [CASH TIP] or [CHARGE TIP] key.
3. Screen prompts:  
Enter tip
  - Note that the default tip amount for the check is already entered in the prompt screen.
4. Press **ENTER** to accept the default amount or index a new amount then press **ENTER**.
5. End the service round by pressing [TOTAL], [MEDIA] or [PRINT CHECK].

### ***Remove Tip Amount***

#### **Procedure**

1. Enter item(s) or recall the check.
2. Press [CASH TIP] or [CHARGE TIP].
3. Index [0].
4. Press **ENTER**.
5. End the service round by pressing [TOTAL], [MEDIA] or [PRINT CHECK].

### 3.10 Tender the Check

- An Amount Tendered can be entered prior to pressing a preset [MEDIA] key.
- If an amount tendered is not entered prior to pressing a preset [MEDIA] key, operations are determined by the settings of Media Setup\Options, SPEED TENDER and PAY IN FULL.

Speed Tender	Pay In Full	[MEDIA] Key Tenders for:
YES	YES	Amount of transaction.
YES	NO	The default DENOMINATION setting.
NO	YES	Screen prompts: Enter Amount? Index the tender amount and press <b>ENTER</b> , OR Press <b>ENTER</b> to tender for the transaction amount.
NO	NO	Screen prompts: Enter Amount? Index tender amount and press <b>ENTER</b> .

- If Promos\Combos are being used, the [SUBTOTAL] key can be required before a media key is pressed. This will scan the check to see if items entered satisfy a programmed Promo.
  - Promos can be programmed to:
    - \* Sell a group of items at a set price.
    - \* Sell a certain item at a reduced price
    - \* Apply a discount to a group of items
    - \* Apply a discount to a specific item

### **3.10.1 Tender a Check with Preset Key**

1. Enter item(s) or recall the check.
2. Index the amount tendered.
3. Press the **[MEDIA]** key for the media type used.
  - Press **ENTER** if needed for the media type.
  - Change due displays on the screen.

### **3.10.2 Tender with Tip Entry**

1. Enter item(s) or recall the check.
2. Index the amount of the tip received and press **[CASH TIP]** or **[CHARGE TIP]**.
3. Press the **[MEDIA]** key.

### **3.10.3 Over Tender to Tip**

This option uses POST TO TIP field in Media Setup\Change.

1. Enter item(s) or recall the check.
2. Index the total amount received, including the amount of the tip.
3. Press the **[MEDIA]** key.
  - The amount over tendered is automatically posted as the cash or charge tip.

### **3.10.4 Split Tender**

1. Enter item(s) or recall the check.
2. Index the amount for the first media type, press the **[MEDIA]** key wanted.
  - The new amount due displays.
3. Index the amount for the next media type and press the **[MEDIA]** key for that type.
  - The new amount due displays.
4. Continue until the check is paid.

### 3.10.5 *Partial Tender*

This feature enables tendering part of the check but keeps the check open. Two options are used:

- The PAY IN FULL flag in Media Setup\Options must be set to NO.

#### **Procedure**

1. Enter item(s) or recall the check.
2. Index the amount tendered for the partial payment, press the [MEDIA] key.
  - The check remains on the screen.
3. Press [PRINT CHECK] or [TOTAL] to end the service round.

### 3.10.6 *Tender to House Charge*

House/Charge accounts are entered in the Charge Account Setup Table. The media used should have the CHARGE ACCT field set in Media Setup\Options.

#### **Procedure**

1. Enter item(s) or recall the check.
2. Press the [MEDIA] key programmed for the charge account.
3. Screen prompts:  
Enter amount
4. Index the amount to be posted to the charge account and press **ENTER**.
5. A window displays listing all house accounts.
  - Scroll thru the list and touch the account wanted.
  - Press **OK**.
  - The account number, media type and amount are posted to the Charge Account Balance Report.

### 3.10.7 *Tender with [MEDIA NLU]*

- See the chart on page 3-37 for how the SPEED TENDER and PAY IN FULL options work since the amount tendered cannot be entered prior to selecting the pay type with the [\[MEDIA NLU\]](#) key.

#### **Procedure**

1. Enter item(s) or recall the check.
2. Press [\[MEDIA NLU\]](#).
3. Touch the media type wanted.
  - If SPEED TENDER is NO, screen prompts:  
Enter amount:
4. Index the amount and press **ENTER**.

### 3.10.8 *Over Tender to Tip with [MEDIA NLU]*

- Set SPEED TENDER and PAY IN FULL in Media Setup\Options to NO.
- POST TO TIP in Media Setup\Change should be set to Cash Tips or Charge Tips.

#### **Procedure**

1. Enter item(s) or recall the check.
2. Press [\[MEDIA NLU\]](#).
3. Screen prompts:  
Enter amount:
4. Index the total amount received, including the amount of the tip.
5. Press **ENTER**.

### **3.10.9 Split Tender with [MEDIA NLU]**

- Set SPEED TENDER in Media Setup\Options to NO.
  1. Enter item(s) or recall the check.
  2. Press [MEDIA NLU].
  3. Screen prompts:  
Enter amount:
  4. Index the amount received in this media including the amount of the tip.
  5. Press **ENTER**.
  6. Repeat until the check is paid out.

### 3.11 Enter a Refund Check

This function creates a “negative” check. Items entered are subtracted from reports. This function can also be used to refund individual items from a check.

#### Procedure

1. Login the server who rang the original items.
2. Press **[REFUND]**.
  - A Refund check is started. All values will be negative.
3. If prompted, index a manager ID number and press **ENTER**.
4. Enter items to be refunded.
5. Press the **[MEDIA]** key from which to subtract the item’s totals.

### 3.12 Review a Closed Check

This function is used to display and/or print checks that have been tendered.

#### Procedure

1. Press **[REVIEW CHECK]** or **[REVIEW TABLE]**.
2. The last check to which the employee has access displays.
3. Press **MORE** to scroll through the closed checks.
4. To print a check press **PRINT**.
5. To exit, press **BACK**.

# ***Chapter***

# ***4***

# ***Functions Outside of a Sale***

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## 4.1 *Finished Product Waste*

This is an inventory function. Items entered in this transaction type will update the waste totals.

- This procedure is used when an item is entered on a check and prepared, but then voided from the check. It is used so the raw products of the menu items can be subtracted from inventory totals.

### **Procedure**

1. Press [FINISHED PROD WAS] (#1 through #8).
2. Enter items that were prepared for serving to customers but then were wasted.
3. Press cash [MEDIA] to close the check.

## 4.2 *Loan and Pickup*

A Loan adds an amount to the Employee and to the Terminal's Media Report.

- The ALLOW BANK LOAN field in Job Code Setup\Options allows the employee to receive a Bank Loan.
  - The function can be set to prompt automatically when the employee logs into the system with the REQUIRE LOAN option in the Job Code Setup\Options.
- The PRINT LPU CHIT option in System Setup\Options 2 can be set so a receipt is printed with each Loan or Pickup.

### 4.2.1 *Loan*

#### **Procedure**

1. Press [**LOAN**].
2. If prompted, index a manager ID number and press **ENTER**.
  - NOTE: The Loan will be posted to the employee logged on to the workstation, not the approving manager.
3. Screen prompts:  
Enter amount
4. Index the amount of the Loan on the keypad which displays and press **ENTER**.
5. Screen displays the amount entered for verification and prompts to choose YES or NO.
6. To accept the amount, press **YES**.
7. If set to print, a receipt prints on the receipt printer.

## 4.2.2 Pickup

A Pickup subtracts an amount from the Employee and from the Terminal's Media Report.

- The PRINT LPU CHIT option in System Setup\Options 2 can be set so a receipt is printed with each Loan or Pickup.
- The PRMPT P/U INFO option in System Setup\Options 2 can be set to prompt for a 20-character line of information.

### Procedure

1. Press [**PICKUP**].
2. If prompted, index a manager ID number and press **ENTER**.
  - NOTE: The Pickup will be posted to the employee logged on to the workstation, not the approving manager.
3. Screen prompts:  
Enter amount
4. Index the amount of the Pickup on the keypad which displays and press **ENTER**.
5. Screen displays the amount entered for verification and prompts to choose YES or NO.
6. To accept the amount, press **YES**.
7. If PROMPT PICKUP INFO option is set, the screen prompts for an alphanumeric description of the Pickup.
8. If set to print, a receipt prints on the receipt printer.

## 4.3 *Paid In / Paid Out*

### 4.3.1 *Paid Out*

Up to five Paid Out keys can be used to record cash taken out of the drawer outside of a sale.

#### **Procedure**

1. Index [PAID OUT #].
2. Screen prompts:  
Enter amount
3. Index amount of the cash being taken out of the drawer and press **ENTER**.
4. Screen displays amount entered and prompts YES or NO to confirm the amount.
5. Press **YES** to confirm the amount.
6. Receipt prints on the report printer.

### 4.3.2 *Paid In*

The Paid In key is used to record cash put into the drawer outside of a sale.

#### **Procedure**

1. Press [PAID IN].
2. Screen prompts:  
Enter amount
3. Index amount of cash being put into the drawer and press **ENTER**.
4. Screen displays amount entered and prompts YES or NO to confirm.
5. Press **YES** to confirm the amount.
6. Receipt prints on the report printer.

## 4.4 Price Changes

This function changes the price of a Menu Item.

### Procedure

1. Press [**CHANGE PRICES**].
2. The Prices page of the Menu Item Setup Table displays.
3. Select the menu items wanted. Options for finding a menu item are:
  - **JUMP**
    - \* Index the menu item ID number and press **ENTER**.
  - **SELECT**
    - \* List of Departments display. Press **ID** to list the department in ID order or **DESCRIPTION** to list the departments in alphabetical order.
    - \* Select a Department to display its menu items.
    - \* Search – this option can be used to further define the display.
  - Touch the name of the Menu Item wanted.
4. Index the number of the Meal Period price to change.
  - If USE PRICE LEVELS on Menu Item Setup\Activate Prices is set to no, only the first line will be selectable.
  - To change that option, touch the Activate Prices button.
5. Index the new price and press **ENTER**.
6. Press **BACK** to exit.

## 4.5 *Tip Payout*

### Procedure

1. Press [**TIP PAYOUT**].
2. If prompted, index a manager ID number and press **ENTER**.
3. Screen prompts:  
Select Employee
4. Index the ID number of the employee receiving the tip.
5. Screen prompts:  
Enter Amount
6. Index the amount of the tip payout and press **ENTER**.
7. Receipt prints on the receipt printer.
8. The amount is recorded in the Tip Payout field of the employee's Financial Report.

## 4.6 Timekeeping

After a change is made to a record, a slip prints with the Employee's name, the Job Code changes and a signature line. The item that was changed will display with an asterisk and the end of the information.

### 4.6.1 Edit Timecards

1. Press [EDIT TIMECARDS]
  - A list of employees displays on the left side of the screen.
2. Select the employee.
  - The employee's current shifts display on the right side of the screen.
3. Touch the shift to be changed.
4. From the menu bar at the top of the screen, select the change type:
  - New
  - Delete
  - Job Codes
  - Clock In
  - Clock Out

#### Add a Shift

This option is not valid when there is an open shift.

1. Select **NEW**.
  - A list of the employee's assigned Job Codes Display.
2. Touch the correct Job Code for the shift.
3. A shift is added for the selected Job Code with the current time and date for the Clock In field.

#### Delete a Shift

1. Press **DELETE**.
2. The entry in the Deleted Column is changed from NO to YES.

**Change a Job Code**

1. Press **JOB CODE**.
  - A list of the employee's assigned Job Codes Display.
2. Touch the correct Job Code for the shift.

**Change a Clock In Date/Time**

1. Press **CLOCK IN**.
2. A prompt displays for the date.
  - Enter the new date, or press **ENTER** to use the default date displayed.
3. A prompt displays for the time.
  - Enter the time for the Clock In using military time.

**Change a Clock Out Date/Time**

1. Press **CLOCK OUT**.
2. A prompt displays for the date.
  - Enter the new date, or press **ENTER** to use the default date displayed.
3. A prompt displays for the time.
  - Enter the time for the Clock Out using military time.

### 4.6.2 *Edit Payroll Totals*

This function is used to change an Employee's Cash Tips, Charge Tips and Gross Receipts.

1. Press [EDIT PAYROLL TOTALS].
  - A list of employees displays on the left side of the screen.
2. Select the employee.
3. Select the Period to be changed, Daily, Weekly or Period.
4. Index the number for the Function to change. Options are:

Function	Daily	Weekly	Period
Reg Hours		✓	✓
Reg Pay		✓	✓
OT Hours		✓	✓
OT Pay		✓	✓
Cash Tips	✓	✓	✓
Charge Tips	✓	✓	✓

5. Enter the new data and press **ENTER**.



***Chapter***

***5***

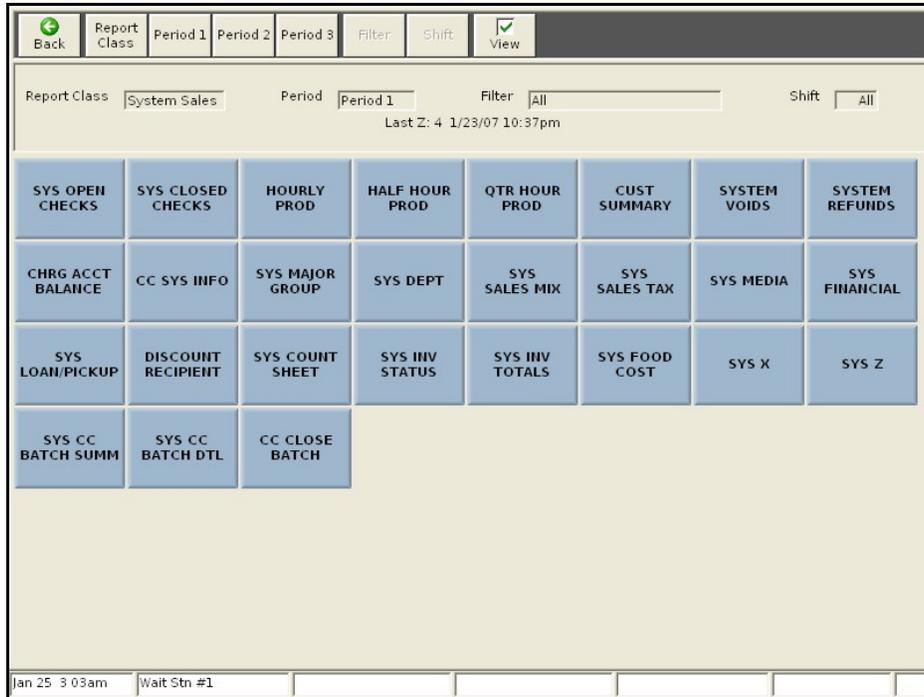
***Reports***

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## 5.1 Reports Overview

The Reports menu is accessed by pressing the [\[Report Launcher\]](#) key.



Menu Option	Function
<b>Report Class</b>	Selects a type of report. See the next page for Report Class descriptions.
<b>Period 1, 2 or 3</b>	Select a specific period for System Sales reports.
<b>Filter</b>	Selects a specific value for Revenue Center Sales, Terminal Sales and Employee Sales reports.
<b>Shift</b>	Selects a specific shift report for Revenue Center Sales, Terminal Sales and Employee Sales reports.
<b>View</b>	Check VIEW to display the report on the screen. It can then be printed if wanted.  If VIEW is not checked, the report will print without displaying on the screen.

### 5.1.1 Report Class Descriptions

Report Class	Description
<b>System Sales</b>	<ul style="list-style-type: none"> <li>▪ Reports in this group include totals from the entire system.</li> <li>▪ Weekly and Period-to-Date totals are also available for the Sales Mix, Department, Major Groups, Media, Financial and Sales Tax reports.</li> <li>▪ Inventory reports are available if Inventory is being used. They are explained in the POS-5700 Inventory Module Operations Guide.</li> </ul>
<b>Revenue Center Sales</b>	<p>Reports from this group include totals from all stations included in a Revenue Center.</p> <ul style="list-style-type: none"> <li>▪ Daily Reports only.</li> <li>▪ Revenue Centers are assigned in the Terminal Setup table.</li> <li>▪ If a Revenue Center Z report is done, it will reset all Terminals set to the Revenue Center for the next shift, but will not print individual Terminal reports. The previous shift totals will still be included in the System Report.</li> </ul>
<b>Terminal Sales</b>	<p>This report group is totals of each individual POS Terminal in the system.</p> <ul style="list-style-type: none"> <li>▪ Daily reports only.</li> </ul>
<b>Employee Sales</b>	<p>Reports from this group provide a detailed look at the sales activities of each employee of the system.</p> <ul style="list-style-type: none"> <li>▪ Daily reports only.</li> </ul>
<b>System Labor</b>	<p>This report group shows details of employee timecard activity. These reports are explained in a separate document, POS-5700 Labor Module Operations Guide.</p>
<b>Listing Summary</b>	<p>Shows the number and name of the Department, Discounts, Employee, Inventory, Inventory Category, Major Groups, Media, Menu Item and Meal Period Setup Tables.</p>
<b>Listing Detail</b>	<p>Shows the options settings for each record in the Department, Discount, Employee, Media and Meal Period Setup report.</p>

## 5.1.2 List of Reports

Report	Report Class - Sales					
	System			Rev Ctr	Term	Emp
	Per1	Per 2	Per 3			
Charge Account	✓					
Closed Checks	✓					✓
Credit Card Batch Detail	✓					✓
Credit Card Batch Summary	✓					✓
Credit Card Close Batch	✓					
Credit Card System Info	✓					
Customer Summary	✓					
Department Sales	✓	✓	✓			
Discount Recipient	✓					
Financial	✓	✓	✓	✓	✓	✓
Half Hour Productivity	✓					
Hourly Productivity	✓					
Inventory Count Sheets	✓	✓	✓			
Inventory Food Coast	✓	✓	✓			
Inventory Status	✓	✓	✓			
Inventory Totals	✓	✓	✓			
Loan/Pickup	✓					✓
Major Group	✓	✓	✓	✓	✓	✓
Media	✓	✓	✓	✓	✓	✓
Open Checks	✓					✓
Quarter Hour Productivity	✓					
Refund	✓					✓
Sales Mix	✓	✓	✓	✓	✓	✓
Sales Tax	✓	✓	✓	✓	✓	✓
Voids	✓					
X Report	✓	✓	✓	✓	✓	✓
Z Report	✓	✓	✓	✓	✓	✓

Report	Report Class – System Labor		
	Period 1	Period 2	Period 3
Clocked In	✓		
Timecards	✓	✓	
Employee Pay	✓	✓	✓
Employee Tips	✓	✓	✓
Job Code Labor	✓	✓	✓
Hourly Labor	✓	✓	
Labor X	✓	✓	✓
Labor Z	✓	✓	✓

Setup Tables Programming	Report Class - Listing	
	Summary	Detail
Department Setup	✓	✓
Discount Setup	✓	✓
Employee Setup	✓	✓
Inventory Setup	✓	
Inventory Category Setup	✓	
Major Group	✓	
Media	✓	✓
Menu Item	✓	
Meal Period	✓	✓

---

---

### 5.1.3 *Report Balancing Notes*

- ❑ **Menu Item Sales**
  - Sales of menu items update all reports as they are entered on to checks. So, reports always represent real-time, up-to-the-minute store activity.
- ❑ **Carried Over**
  - Amounts of checks left open during a Reset are included on the next day's reports and are labeled "Carried Over".

### 5.1.4 *Print or View Reports*

- ❑ **[Report Launcher] key**
  - All reports are available from the [\[Report Launcher\]](#) key.
- ❑ **Preset Keys**
  - Keys for a specific report can be assigned to the touch screens. Press the preset key to print the report.
- ❑ **Report Number Look up (NLU) Key**
  - The [\[Report NLU\]](#) key can also be used. It displays a list of all available reports.

### 5.1.5 Report Sample Formats

The following pages show details of each report option.

- The table beneath each report title indicates if the report is included in System, Revenue, Terminal and/or Employee totals.
- The reports shown are samples and do not all balance with each other.
- Any extra notes included for a particular line is right justified close to that line in the report.
- A wavy line in the middle of a report indicates that part of it was “cut out” so a total could be included on the same page.



#### Report Headers

①	1/22/07 11:20pm	001
②	SYS FINANCIAL	
③	From 1/22/07 0:35 To 1/22/07 23:20	
④	Greenville SC - Restaurant	

- ① The date and time the report was taken and the terminal on which the report was taken.
  - ② The report name.
  - ③ The period covered in the report.
  - ④ The store name and location.
-

## 5.2 Open Check Report

System	Revenue Center	Terminal	Employee
✓			✓

The Open Check Report is a summary of the open checks in the system. An open check is one that has been stored in the system, but has not yet been paid.

```

-----
1/22/07 11:07pm                                001
      SYS OPEN CHK
From 1/22/07 0:35 To 1/22/07 23:07
      Greenville SC - Restaurant
-----
  ①  ②      ③    ④          ⑤
  0 010003  3:09 0009      16.82
  0 010004  3:09 0009      11.21
  0 010009 22:49 0003         5.61
  0 010010 23:03 0003         3.49
  7 010012 23:06 0003         7.50

  5 Total                                44.63
Total number and amount of Open Checks
  
```

- ① **Table #** - The table number of this check if one is assigned.
- ② **Check #** - The unique ticket number associated with the check.
- ③ **Time** - The time that the check was created.
- ④ **Employee ID** - The employee ID of the server who currently owns the check. If the check has been transferred using the Transfer Check function, then the ID will be the employee ID of the new owner of the check.
- ⑤ **Check Total** - including all menu items, discounts, tax and gratuity.

### 5.3 Closed Check Report

System	Revenue Center	Terminal	Employee
✓			✓

The Closed Check Report is a summary of checks that have been paid out.

```

-----
1/22/07 11:08pm                                001
          SYS CLOSED CHK
From 1/22/07 0:35 To 1/22/07 23:08
      Greenville SC - Restaurant
-----

```

①	②	③	④	⑤
010001	0003	2:00	0.00	14.49
010002	0003	2:03	0.00	5.61
010005	0009	3:19	0.00	11.21
010006	0001	3:44	0.00	6.92
010007	0001	3:45	0.00	8.66
010008	0009	4:32	0.00	5.61-
010011	0003	23:04	0.00	5.38
Total			0.00	46.66

Total number and amount of Open Checks

- ① **Check #** - The unique ticket number associated with the check.
  - ② **Employee ID** - The employee ID of the server who owned the check when it was closed.
  - ③ **Time** - The time that the check was created.
  - ④ **Gratuity** – The amount of gratuity included on the check.
  - ⑤ **Check Total** including all menu items, discounts, tax and gratuity.
-

## 5.4 Hour Productivity Report

System	Revenue Center	Terminal	Employee
✓			

The Hourly Productivity Report provides a sales breakdown by times of day. Subtotals are provided by Meal Period.

```

-----
1/25/07 11:53am                                001
          HOURLY PROD
From 1/25/07 9:00 To 1/25/07 11:53
          Greenville SC - Restaurant
-----

```

①	②	③	④
09-10	3	18.66	29.27 %
10-11	2	34.52	54.14 %
Breakfast	5	53.18	83.41 %
Total	6	63.76	

- ① **Time Periods** – determined by OPEN and CLOSE options in the System Setup table. If any sales are outside those business hours, the report hours are adjusted to include all sales.
- ② **Number of Guests** – The guest count included in all checks for the interval.
- ③ **Gross Revenue** – Sales for each period = Menu Item sales adjusted for discounts.
- ④ **Percent of Sales** - Shows percentages that each interval and Meal Period represents for the day.

## 5.5 Half Hour Productivity Report

System	Revenue Center	Terminal	Employee
✓			

The Half Hourly Productivity Report provides a sales breakdown by times of day. Subtotals are provided by Meal Period.

```

-----
1/25/07 11:54am                                001
      HALF HOUR PROD
From 1/25/07 9:00 To 1/25/07 11:54
      Greenville SC - Restaurant
-----

```

①	②	③	④
09-10	3	18.66	29.27 %
:30	0	0.00	0.00 %
:60	3	18.66	100.00 %
10-11	2	34.52	54.14 %
:30	0	0.00	0.00 %
:60	2	34.52	100.00 %
Breakfast	5	53.18	83.41 %
Total	6	63.76	

- ① **Time Periods** –determined by OPEN and CLOSE options in System Setup table. If any sales are outside those business hours, the report hours are adjusted to include all sales.
  - ② **Number of Guests** – The guest count included in all checks for the interval.
  - ③ **Gross Revenue** – Sales for each period = Menu Item sales adjusted for discounts.
  - ④ **Percent of Sales** - Shows percentages that each interval and Meal Period represents for the day.
-

## 5.6 Quarter Hour Productivity Report

System	Revenue Center	Terminal	Employee
✓			

The Half Hourly Productivity Report provides a sales breakdown by times of day. Subtotals are provided by Meal Period.

```

-----
1/25/07 11:54am                                001
      QTR HOUR PROD
From 1/25/07 9:00 To 1/25/07 11:54
      Greenville SC - Restaurant
-----

```

①	②	③	④
09-10	3	18.66	29.27 %
:15	0	0.00	0.00 %
:30	0	0.00	0.00 %
:45	2	9.28	49.73 %
:60	1	9.38	50.27 %
10-11	2	34.52	54.14 %
:15	0	0.00	0.00 %
:30	0	0.00	0.00 %
:45	0	0.00	0.00 %
:60	2	34.52	100.00 %
Breakfast	5	53.18	83.41 %
Total	6	63.76	

- ① **Time Periods** –determined by OPEN and CLOSE options in System Setup table. If any sales are outside those business hours, the report hours are adjusted to include all sales.
- ② **Number of Guests** – The guest count included in all checks for the interval.
- ③ **Gross Revenue** – Sales for each period = Menu Item sales adjusted for discounts.
- ④ **Percent of Sales** - Shows percentages that each interval and Meal Period represents for the day.

## 5.7 Sales Mix Report

System	Revenue Center	Terminal	Employee
✓	✓	✓	✓

The Sales Mix Report gives a breakdown of Menu Items sold for the period.

- Menu Items are the first level of the Menu file. The Menu is structured so Menu Items are grouped into Departments, and Departments are grouped into Major Groups.
- Only items with the Track System Sales option set in the Menu Setup table will be detailed.
- Net Sales and Total # Sold on the Employee Report only include items with the Track Employee flag set. Net Sales on the System, Terminal and Revenue Centers include all items regardless of the System Tracking options.

```

-----
1/22/07 11:12pm                                001
      SYS SALES MIX
From 1/22/07 0:35 To 1/22/07 23:12
Greenville SC - Restaurant
-----
①  1 - salisbury steak                          5.29
      The price shown is the Total revenue divided by the # sold.
②  #SOLD                                       3      6.12 %
③  Gross Rev                                  5.29   5.53 %
④  Item Disc                                  0.00   0.00 %
⑤  Net Sales                                  15.87
      2 - Chick&Broc w/Rice                      5.29
      #SOLD                                       1      2.04 %
      Gross Rev                                  5.29   5.53 %
      Item Disc                                  0.00   0.00 %
      Net Sales                                  5.29
-----

```

~~~~~

---

Total

|   |           |       |                                                                       |
|---|-----------|-------|-----------------------------------------------------------------------|
|   | #SOLD     | 49    | Total # Sold includes all items regardless of System Tracking option. |
|   | Gross Rev | 95.67 |                                                                       |
|   | Item Disc | 2.00- |                                                                       |
|   |           |       | Item Discounts = Applied to a specific menu item.                     |
|   |           |       | Discounts = Applied to the subtotal of a check.                       |
| ⑥ | Discounts | 7.53- |                                                                       |
|   | Net Sales | 86.14 |                                                                       |

### **Sales Mix Report Items**

- ① **Item** - This line contains the record number of the Menu Item and the item's name. The Menu Item report includes the average selling price of the total number of items sold.
- ② **# Sold** - The number of the Menu Item sold, and the number sold as a percent of total items sold for the period.
- ③ **Gross Revenue** - The amount of revenue generated by selling the Menu Item, and the revenue for the Menu Item as a percent of total.
- ④ **Item Discounts** – The dollar amount that was discounted from specific items and the percentage of the total revenue from this Menu Item that was discounted.
- ⑤ **Net Sales** – Total of the selling prices of this menu item, adjusted for Item discounts.
- ⑥ **Discounts** – This total is only on the report summary. The total dollar amount of discounts that were applied to check subtotals.

## 5.8 Department Sales

The Department report summarizes all Menu Item sales by Departments. All menu items sold for the period are included in the Department report.

- The Total # Sold includes non-priced items only if the Track System Sales option is set in the Department Setup table.
- Departments are the second level of the Menu file. The Menu is structured so Menu Items are grouped into Departments, and Departments are grouped into Major Groups.

| -----                      |                     |       |               |
|----------------------------|---------------------|-------|---------------|
| 1/22/07 11:12pm            |                     | 001   |               |
| SYS DEPT                   |                     |       |               |
| From                       | 1/22/07 0:35        | To    | 1/22/07 23:12 |
| Greenville SC - Restaurant |                     |       |               |
| -----                      |                     |       |               |
| ①                          | 1 - Daily Specials  |       | 5.29          |
| ②                          | #SOLD               | 9     | 18.37 %       |
| ③                          | Gross Rev           | 47.61 | 49.76 %       |
| ④                          | Item Disc           | 0.00  | 0.00 %        |
| ⑤                          | Net Sales           | 47.61 |               |
|                            |                     |       |               |
|                            | 2 - Lunch Favorites |       | 4.33          |
|                            | #SOLD               | 5     | 10.20 %       |
|                            | Gross Rev           | 21.65 | 22.63 %       |
|                            | Item Disc           | 0.00  | 0.00 %        |
|                            | Net Sales           | 21.65 |               |
|                            |                     |       |               |
|                            | 4 - Cold sub Sandw  |       | 3.29          |
|                            | #SOLD               | 1     | 2.04 %        |
|                            | Gross Rev           | 3.29  | 3.44 %        |
|                            | Item Disc           | 0.00  | 0.00 %        |
|                            | Net Sales           | 3.29  |               |
|                            |                     |       |               |
| ~~~~~                      |                     |       |               |
| Total                      |                     |       |               |
|                            | #SOLD               | 49    |               |
|                            | Gross Rev           | 95.67 |               |
|                            | Item Disc           | 2.00- |               |
| ⑥                          | Discounts           | 7.53- |               |
|                            | Net Sales           | 86.14 |               |

### Department Report Items

- ① **Departments** - This line contains the record number of the Department and its name. The price is the average selling price of each Menu Item sold of that Department.

- 
- ② **# Sold** - The number of Menu Items sold in the Department, and the number sold as a percent of total items sold for the period.
  - ③ **Gross Revenue** - The amount of revenue generated by each Department, and the revenue for the Department as a percent of total.
  - ④ **Item Discounts** – The dollar amounts of this Department's sales that were discounted from specific Menu Items and the percentage of the total revenue from this Department that was discounted.
  - ⑤ **Net Sales** – Total of the selling prices of this Department's Menu Items, adjusted for Item discounts
  - ⑥ **Discounts** – This total is only on the report summary. The total dollar amount of discounts that were applied to check subtotals.

## 5.9 Major Groups – Menu Item Sales

The Department report summarizes all Menu Items sales by Major Groups. All menu items sold for the period are included in the Major Group report.

- The Total # Sold includes non-priced items only if the Track System Sales option is set in the Major Group's Department Setup table.
- Major Groups are the highest level of the Menu file. The Menu is structured so Menu Items are grouped into Departments, and Departments are grouped into Major Groups.

```

-----
1/22/07 11:11pm                                001
          SYS MAJOR GROUP
From 1/22/07 0:35 To 1/22/07 23:11
Greenville SC - Restaurant
-----
① 1 - Food                                     4.31
②   #SOLD                                     22      44.90 %
③   Gross Rev                               94.88    99.17 %
④   Item Disc                               2.00-    2.11 %
⑤   Net Sales                               92.88

      2 - Beverages                             0.79
        #SOLD                                  1      2.04 %
        Gross Rev                             0.79    0.83 %
        Item Disc                             0.00    0.00 %
        Net Sales                             0.79

      3 - Modifiers                             0.00
        #SOLD                                  26     53.06 %
        Gross Rev                             0.00    0.00 %
        Item Disc                             0.00    0.00 %
        Net Sales                             0.00

Total

        #SOLD                                  49
        Gross Rev                             95.67
⑥   Discounts                               7.53-
        Net Sales                             86.14

```

---

---

### ***Major Group Report Items***

- ① **Major Groups** - This line contains the record number of the Major Group and its name. The price is the average selling price of each Menu Item sold of that Major Group.
- ② **# Sold** - The number of Menu Items sold of the Major Group, and the number sold as a percent of total items sold for the period.
- ③ **Gross Revenue** - The amount of revenue generated by each Major Group, and the revenue for the Major Group as a percent of total.
- ④ **Item Discounts** – The dollar amounts of this Major Group’s sales that were discounted from specific items and the percentage of the total revenue from this Major Group that was discounted.
- ⑤ **Net Sales** – Total of the selling prices of this Major Group’s Menu Items, adjusted for Item discounts.
- ⑥ **Discounts** – This total is only on the report summary. The total dollar amount of discounts that were applied to check subtotals.

## 5.10 System Voids Report

| System | Revenue Center | Terminal | Employee |
|--------|----------------|----------|----------|
| ✓      |                |          |          |

The System Voids Report is a log of all voids that occurred during the business day. Voids are created any time an item is removed from an unpaid check that was entered in a previous service round. The report lists voids plus a total by approving manager.

```

-----
1/22/07 11:10pm                                001
      SYS VOIDS
From 1/22/07 0:35 To 1/22/07 23:10
      Greenville SC - Restaurant
-----
Manager #1
                                     The approving Manager's name.
  ①      ②      ③                                     ④
3:19 10005 Green Beans                                0.00
3:19 10005 Baked Beans                                0.00
3:19 10005 Meatloaf                                  5.29
      Total                                           5.29
Total                                           5.29
  
```

- ① **TIME** - The time that the void occurred.
  - ② **CHK** - This is the check number that contained the voided item.
  - ③ **DESCRIPTION** – The name of the menu item that was voided.
  - ④ **PRICE** - This is the price of the voided item that was removed from the check.
-

## 5.11 Refund Report

| System | Revenue Center | Terminal | Employee |
|--------|----------------|----------|----------|
| ✓      |                |          | ✓        |

The Refund Report is a log of all refunds that occurred during the business day. Refunds are created when a check is started with [REFUND], creating a check with negative values. The report lists refunds by approving manager and gives totals for each manager as well as a total of all Refunds.

```

-----
1/22/07 11:10pm                                001
      SYS VOIDS
From 1/22/07 0:35 To 1/22/07 23:10
      Greenville SC - Restaurant
-----
Manager # 1
                                     The approving Manager's Name.
  ①      ②      ③                                     ④
3:19 10005 Green Beans                                0.00
3:19 10005 Baked Beans                                0.00
3:19 10005 Meatloaf                                  5.29
      Total                                           5.29
Total                                           5.29
  
```

- ① **TIME** - The time that the Refund check was entered.
- ② **CHK** - The check number of the check.
- ③ **DESCRIPTION** - The Menu Item names entered on the Refund check.
- ④ **PRICE** - The price of the item.

## 5.12 Financial Report

| System | Revenue Center | Terminal | Employee |
|--------|----------------|----------|----------|
| ✓      | ✓              | ✓        | ✓        |

-----  
 1/22/07 11:20pm 001  
 SYS FINANCIAL  
 From 1/22/07 0:35 To 1/22/07 23:20  
 Greenville SC - Restaurant  
 -----

**Readings** - Non-resettable totals maintained by each POS Terminal. This section prints if the USE NRGT option in System Setup is set. These fields do not appear on the Employee Financial Report.

### Readings

|         |                                                                      |
|---------|----------------------------------------------------------------------|
| Opening | 0.00                                                                 |
| Closing | 100.82                                                               |
|         | Menu Item Sales before Voids, Refunds or Discounts<br>+ Tax and Tips |

|             |                                                             |
|-------------|-------------------------------------------------------------|
| Trn Opening | 0.00                                                        |
| Trn Closing | 0.00                                                        |
|             | Readings for Training Totals if selected in Training Setup. |

**Sales** - Sales totals by Tax Table sales tax collected, and sales totals and statistics by order type.

### Sales

|             |                                                           |
|-------------|-----------------------------------------------------------|
| Tax 1       | 44.03                                                     |
| Sales Tax   | 2.63                                                      |
|             | -----                                                     |
| Gross Sales | 46.66                                                     |
| Sales Tax   | 2.63-                                                     |
|             | -----                                                     |
| Net Sales   | 44.03                                                     |
|             | Net Sales = Menu Item Sales – Voids/Refunds +/- Discounts |

Statistics for each Order Type.

|              |   |       |
|--------------|---|-------|
| Eat-In       |   | 44.03 |
| Tcks/Avg Tck | 7 | 6.29  |
| Gsts/Avg Chk | 7 | 6.29  |
| Avg Trn Time |   | 0.41  |

Check/Guest averages are Net Sales ÷ # of Checks.  
 Average Transaction Times are minutes  
 all checks are opened ÷ # of Checks

|              |   |       |
|--------------|---|-------|
| Total        |   | 44.03 |
| Tcks/Avg Tck | 7 | 6.29  |
| Gsts/Avg Chk | 7 | 6.29  |
| Avg Trn Time |   | 0.41  |

**Balance** - This section contains a method of balancing the readings adjustment to the system's reported Gross Sales. It does not print if the NRGT is not being used in the READINGS section.

**Balance**

|                 |        |   |
|-----------------|--------|---|
| Closing         | 100.82 | + |
| Opening         | 0.00   | - |
| Readings Change | 100.82 | = |
|                 |        |   |
| Open Checks     | 44.63  | - |
| Voids           | 5.29   | - |
| Refunds         | 5.29   | - |
| Discounts       | 9.53   | - |
|                 | -----  |   |
| Gross Sales     | 46.66  |   |

**Server Sales** - Summary of sales by server.

**Server Sales**

|         |       |
|---------|-------|
| Server1 | 15.58 |
| Server3 | 25.48 |
| Cashier | 5.60  |
|         | ----- |
| Total   | 46.66 |

Server Name  
 Gross Sales for each Employee

**Media** - This section of the Financial Report contains media balancing totals to be reconciled with deposits and cash drawers.

**Media**

|       | ① | ②     | ③       |
|-------|---|-------|---------|
| Cash  | 7 | 55.25 | 72.50 % |
| Check | 3 | 20.96 | 27.50 % |
|       |   | ----- |         |
| Total |   | 76.21 |         |

① The number of times this media was used.

② The Total amount collected of this media.

③ Each media's percentage of Total Media collected.

|               |      |
|---------------|------|
| Cash Tips     | 0.00 |
| Charge Tips   | 0.00 |
| Declared Tips | .00  |

Tips included in checks with [\[Cash Tips\]](#).

Tips included in checks with [\[Charge Tips\]](#).

Declared Tips = Cash Tips + Charge Tips

Prints if MIN TIP % is set in System Setup

**Deposit** – This section is created from entries made in the Deposit function. Media types that display are those with the option set for IN DEPOSIT LST.

**Deposit**

|       |       |
|-------|-------|
| Cash  | 30.00 |
| Check | 15.58 |
| Total | 45.58 |
| Diff  | 1.08- |

DIFF is the total reported thru the system minus the entries made in the Deposit Entry report selection.

**Cash Balance** – Calculates cash amount for reconciling with the cash drawer(s). Cash media type is defined by the System Setup option CASH MEDIA ID. It is recommended that CASH be always set as Media #1.

**Cash Balance**

|             |        |      |
|-------------|--------|------|
| Gross Sales | 46.66  |      |
|             | -----  |      |
| Total Due   | 46.66  | <--- |
| Check       | 20.96- |      |
|             | -----  |      |
| Cash Due    | 25.70  | <--- |

**Discounts** - Summary of the discounts applied for the period.

## Discounts

|              | ① | ②     | ③       |
|--------------|---|-------|---------|
| 50% Ticket   | 1 | 6.53- | 68.52 % |
| \$ Ticket Di | 1 | 1.00- | 10.49 % |
| \$ Item Disc | 2 | 2.00- | 20.99 % |
|              |   | ----- |         |
| Total        |   | 9.53- |         |

① Number of each discount used on checks.

② Total amount subtracted from checks for each discount.

③ Each discount's percentage of the Total Discount \$ amount.

**Sales Mix** – Major Groups and Department summaries of Menu Item sales. Each Major Group flagged to track sales (Track System Sales for the System, Revenue Center, and Terminal reports and Track Employee Sales for the Employee report) will appear on this report.

## Major Groups

# Items sold, Gross Revenue and % of Total for each Major Group.

|             |    |        |         |
|-------------|----|--------|---------|
| Food        | 22 | 92.88  | 99.17 % |
| Beverages   | 1  | 0.79   | 0.83 %  |
| Modifiers   | 26 | 0.00   | 0.00 %  |
| Open Checks |    | 42.11- |         |
| Discounts   |    | 7.53-  |         |
|             |    | -----  |         |
| Total       |    | 46.03  |         |

## Departments

# Items sold, Gross Revenue and % of Total for each Menu Department.

|             |      |        |         |
|-------------|------|--------|---------|
| Daily Speci | 9    | 47.61  | 49.76 % |
| Lunch Favor | 5    | 21.65  | 22.63 % |
| Cold Sub Sa | 1    | 3.29   | 3.44 %  |
| Hot Sandwic | 3    | 8.57   | 8.96 %  |
| Hamburgers  | 1    | 3.59   | 3.75 %  |
| Pita Wraps  | 197- | 10.17  | 10.63 % |
| w/ Sub Item | 1    | 0.00   | 0.00 %  |
| Beverages   | 1    | 0.79   | 0.83 %  |
| Temp's      | 1    | 0.00   | 0.00 %  |
| Veggies     | 24   | 0.00   | 0.00 %  |
| Open Checks |      | 42.11- |         |
| Discounts   |      | 7.53-  |         |
|             |      | -----  |         |
| Total       |      | 46.03  |         |

**Functions** – Summarizes the use of functions that are flagged to track usage (Track System for the System, Revenue Center, and Terminal reports and Track Employee for the Employee report) defined in the Function Setup table.

### Functions

|              |   |      |
|--------------|---|------|
| Program Mode | 2 |      |
| Void         | 3 | 5.29 |

The number of times each Function is used and \$ amounts where appropriate.



### 5.13 Customer Summary Report

| System | Revenue Center | Terminal | Employee |
|--------|----------------|----------|----------|
| ✓      |                |          |          |

The Customer Summary Report lists Net Sales and check averages by Meal Period.

```

-----
1/22/07 11:10pm                                001
          CUST SUMMARY
From 1/22/07 0:35 To 1/22/07 23:10
          Greenville SC - Restaurant
-----
Breakfast                                65.40
Tcks/Avg Tck                               8  8.18
Gsts/Avg Chk                               8  8.18

Lunch                                     20.74
Tcks/Avg Tck                               4  5.19
Gsts/Avg Chk                               4  5.19

Total                                     86.14
Tcks/Avg Tck                               12  7.18
Gsts/Avg Chk                               12  7.18

```

**Sales** – Net Sales for the Meal Period. Menu Item totals adjusted for discounts.

**Tckts/Avg Tckt** - The number of checks and the average net sales per check for the Meal Period.

**Guests/Avg Chk** - The number of guests and the average net sales per guest for the Meal Period.

## 5.14 Media Report

| System | Revenue Center | Terminal | Employee |
|--------|----------------|----------|----------|
| ✓      | ✓              | ✓        | ✓        |

This report details the totals for each different media type by Server. Totals for CASH include any loans and pick-ups that were recorded by the system.

```

-----
1/22/07 11:13pm                                001
      SYS MEDIA
From 1/22/07 0:35 To 1/22/07 23:13
      Greenville SC - Restaurant
-----
  
```

Server1 - Shift 1

```

-----
Cash           1          4.00-
Check          2          15.58
Total          3          11.58

Pickup         1           4.00
Gross Sales                    15.58
  
```

Server Name, Employee ID and the shift # for the report.

~~~~~

```

=====
Cash           7          55.25
Check          3          20.96
Total         10          76.21
  
```

Number of transactions and total for each Media type.  
Total Amounts of all Media types.

```

Amount of Loans and Pickups (is included in CASH total).
Loan           3          35.55-
Pickup         2           6.00
Gross Sales                    46.66
  
```

## 5.15 Loan/Pickup Report

System	Revenue Center	Terminal	Employee
✓			✓

This report is a log of the bank loans and pick-ups that occurred on the system. The Net amount of this report is included in the CASH amount on the Financial and Media Reports.

```

-----
1/22/07 11:21pm                                001
      SYS LOAN/PICKUP
From 1/22/07 0:35 To 1/22/07 23:21
      Greenville SC - Restaurant
-----

```

①			②	③
1/22/07	4:43	Loan	1	5.00
1/22/07	4:45	Loan	1	25.00
1/22/07	4:47	Loan	1	5.55
		Loan Total		35.55
1/22/07	4:43	Pickup	1	2.00
1/22/07	4:45	Pickup	1	4.00
		Pickup Total		6.00
		Total		29.55

The net amount of all Loans (+) and Pickups (-)

- ① The date and time of the loan or pick-up.
- ② The Terminal ID where the loan or pick-up occurred.
- ③ The amount of the loan or pick-up.

## 5.16 Sales Tax Report

System	Revenue Center	Terminal	Employee
✓	✓	✓	✓

The Sales Tax Report summarizes the sales and sales tax collected for each tax table. Sales tax for inclusive tax tables is computed as a percent of sales posted to the tax table.

```
-----  
1/22/07 11:13pm                                001  
          SYS SALES TAX  
From 1/22/07 0:35 To 1/22/07 23:13  
      Greenville SC - Restaurant  
-----  
Tax 1  
Taxable                                44.03  
Non-Taxable                            0.00  
Sales Tax                               2.63  
  
Total  
Taxable                                44.03  
Non-Taxable                            0.00  
Sales Tax                               2.63
```

**Taxable Sales** - This is the amount of taxable sales posted to the tax table.

**Non-Taxable Sales** - This is the amount of non-taxable sales posted to the tax table.

**Sales Tax** - This is the amount of sales tax posted to the tax table, or for inclusive tax tables, the amount of computed tax from the taxable sales posted to the tax table.

## 5.17 Charge Account Balance Report

System	Revenue Center	Terminal	Employee
✓			

The Charge Account Balance Report is used to report house account charges. This report is updated when a check is tendered with a media that is set with the CHARGE ACCT option in Media Setup\Options. Accounts are created in the Charge Account Setup table.

```

-----
1/23/07 12:26am                                001
      CHRG ACCT BALANCE
From 1/23/07 0:35 To 1/23/07 0:26
      Greenville SC - Restaurant
-----
  
```

111	Account #
John Doe	Name
123 Main St	Address 1
Suite 567	Address 2
Atlanta	City
GA 30360	State Zip
770-449-3040	Phone #
Declining: No	Y/N
Credit Limit: 500.00	Limit on the account
Balance: 7.50	The current balance

## 5.18 Discount Recipient Report

System	Revenue Center	Terminal	Employee
✓			

The Discount Recipient Report details the use of discounts given to employees, managers, and corporate personnel. Discounts programmed with the RECIPIENT option set will be included on this report, sorted by the person receiving the discount.

```

-----
1/24/07  4:48pm                                004
          DISCOUNT RECIPIENT
From 1/23/07  0:33 TO  1/23/07 16:23
          Greenville SC - Restaurant
-----
   ①      ②          ③          ④
   10  Emp Disc      1          1.00
    6  Emp Disc      1          2.39
    4  Emp Disc      1          3.62

Total                                     7.01

```

- ① The ID number of the employee receiving the discount. The server is prompted for the ID number when applying the discount to a check.
  - ② This is the description of the discount used.
  - ③ The number of discounts received by the employee.
  - ④ The total amount of the discounts received.
-

---

## 5.19 X Report

System	Revenue Center	Terminal	Employee
✓	✓	✓	✓

The X Report allows a pre-defined sequence of reports to be printed with a single command, without clearing any totals.

- The reports that are included with a X Report for each Report Class are set in Report Setup\X Report.

## 5.20 Z Report

System	Revenue Center	Terminal	Employee
✓	✓	✓	✓

The Z Report allows a employee to print a pre-defined sequence of reports with a single command. In addition, Z Reports clear all totals for the report type, regardless if they are set to print or not.

- The reports that are included with a Z Report for each Report Class are set in the Report Setup\Z Report.
  - A Terminal Z also closes a shift for the Terminal.
  - An Employee Z also closes a shift for the employee.

### 5.20.1 Programming Options for Z Reports

The following table lists programming options that affect Z Reports. Refer to the Programming Manual for more explanations.

Table	TAB	Option Description
Report Setup	Z Report	Reports to include in each Z.
System Setup	Exports	Create Export
	Exports	Append Export Files
	Exports	Fixed Position Export
	Exports	Export Line Header
	Location	Sales Week Ending
	Location	24 Hour
	Options 1	Create Backup Files
	Options 1	Month Backup File
	Options 1	Disable Z2 Totals
	Options 1	Disable Z3 Totals
	Reports	Z With Open Checks
	Reports	Z Terminal
	Reports	Report Terminal Offline

---