

# STATION ACTIVITIES AND MANAGEMENT

All sections of this document will require Manager Tools access

## STATION ACTIVITES

The *Station Activities* menu requires access to the Manager Tools dashboard. From this menu, you will have access to change:

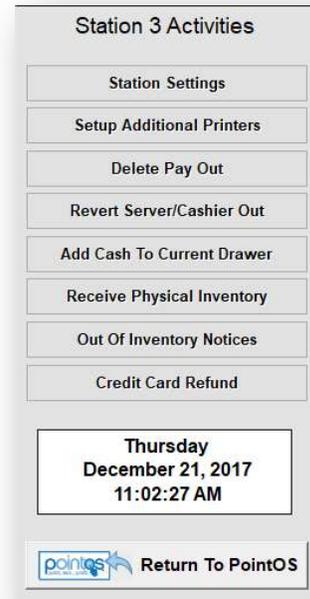
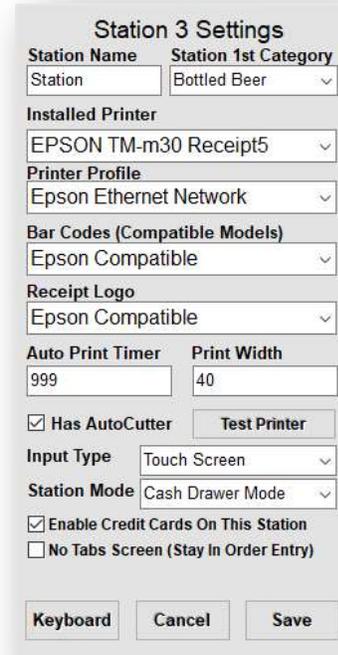
- Station Settings
- Setup Additional Printers
- Delete a Pay Out
- Revert a Server/Cashier Out
- Add Cash to the Current Drawer
- Manage Physical Inventories
- Manage “Out of Inventory” Notices
- Issue a Credit Card Refund

### Station Settings:

Any modifications to the Station Settings are current station specific, which means changing printer settings, enabling Credit Cards, etc. will not change the settings on any other station automatically.

From this panel you are able to modify

- the stations Name,
- the stations first category displayed in the order entry,
- select the station’s receipt printer settings
  - which installed printer to use,
  - the profile,
  - additional receipt settings,
  - the print width,
  - the print timer, and
  - whether the printer uses a cutter
- enable the location to use credit cards,

- change the Station Mode,
- and disabling the Tabs Screen.

### **Installed Printer**

This drop-down will contain a list of all printers currently installed on your station. If your printer is not showing in the list, you will need to add the printer to Windows<sup>®</sup> from the *Add Printer* section of the Control Panel.

### **Printer Profile**

This drop-down list contains a list of the supported printer profiles. If your model is not listed, you can either select the *Generic Printer* profile or select a printer of a similar make and model to the printer you currently are using. Printers by the same manufacturer often have similar settings and profile codes.

The model of the printer is very important when using cash drawers, printing formats, and using the auto-cutter. If you select the incorrect model the cash drawer may not open and the auto-cutter may not operate.

### **Bar Codes**

If you are using Bar Codes, this drop-down list contains the two supported printer modes.

### **Receipt Logo**

If you want to print the company logo on receipts, you will need to select one of the two compatible printer modes from the drop-down list.

You will need to consult your printers reference documentation for more information about uploading logos to your printers.

### **Auto Print Timer**

This value decides how many seconds after a payment transaction occurs before the display automatically closes and prints a receipt. The default is 30 seconds, but you can change the value if necessary.

### **Print Width**

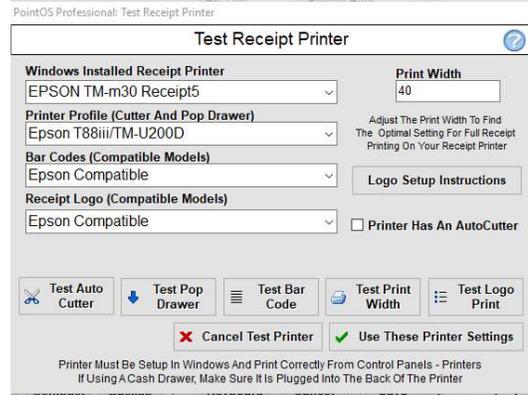
The default *Print Width* is set to 40. If you need to change this value, increase or decrease the value until the printing test <-----> is no longer breaking to a new line.

### Auto Cutter

Enable the Auto-Cutter by checking this box, otherwise the printers auto-cutter will not be activated at the end of the printed ticket.

### Test Printer

This option will allow you to test installed printers with different profile settings, test the Auto-Cutter, Popping the Drawer, Bar Code and Logo printer tests, and print test pages.

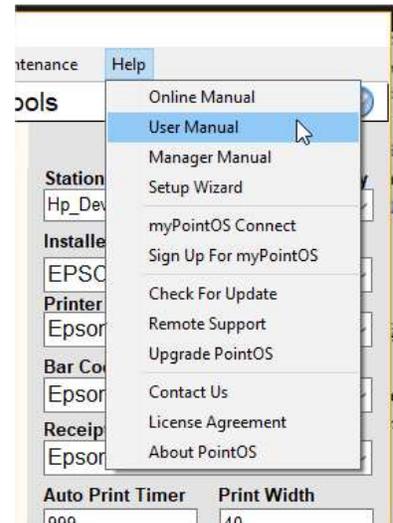


### Input Type

This will determine whether the terminal is utilizing a Touch Screen or Keyboard and Mouse. Select the input desired option from the drop-down list.

### Station Mode

There are three options within the *Station Mode* drop-down; (1) Cash Drawer Mode, (2) Multi Server Mode, and (3) Kitchen Display Mode. See the PointOS User Manual for more detail on each *Station Mode*. You can access the PointOS User Manual from the Manager Tools Help menu.



### Enable Credit Cards on This Station

This check box will allow the users to access credit card sales for this station.

**Note:** Credit Cards must be enabled in two places (the *Payment Setup* screen and each station where credit cards will be accepted).

### No Tabs Screen (Stay in Order Entry)

This option keeps the station in order entry mode. It will NOT show the *Tabs* screen.

## Setup Additional Printers

The *Setup Additional Printers* button allows you to setup other printers. This part is necessary if you want the station to send order tickets to other service printer. There are five additional printer slots:

- Kitchen Printer 1
- Kitchen Printer 2
- Service Station 1
- Service Station 2
- Other

Each additional printer must be installed on the station and defined from each individual station. If the desired printer is not located within the drop-down list, then you will need to install the printer in Windows<sup>®</sup>.

To setup an additional printer, select the installed printer and the compatible mode. You will need to check Enabled to start using the printer.

## Printer Formatting

From here you will be able to manage some printer settings. You will be able to toggle the following settings:

- Enabling centered text
- Do you want to cut the receipt after printing
- Enabling bold printing
- Enabling Large Font Mode for printing
- Print modifiers in red

You will also be able to adjust the Print Width and number of blank lines to print before cutting the receipt.

Before saving the print setting changes, it is always recommended to use the *Test Print* button.

## Manage Printer Holds

This section will allow you to setup whether you want to add a print hold for select printers or all printers. See the PointOS User Manual for more detail on Printer Holds.

## Delete Pay Out

Pay Outs are a way of tracking cash payments made from a cash drawer. The *Delete Pay Out* button allows you to delete a payout made on the current station. The station **MUST** have an open cash drawer to be modified.

**WARNING:** Deleting or modifying any payouts may adversely affect the accuracy of previous reports.

To delete a pay out, select the desired payout from the *Delete Pay Out* screen and click *Delete Pay Out*.

## Revert Cashier Out

Reverting a Cashier Out will allow you to cancel a cash out on the current station, but only for the current day.

This option will only let you revert a cashier out from this station and if it was made within the last 24 hours.

To revert a drawer, select the drawer in question and click the *Revert Cashier Out* button.

## Add Cash to Current Drawer

This will allow you to add cash to the current open drawer on this station.

Enter the value added and the reason for addition (optional), then click *Save Cash to Drawer*. You will be prompted to confirm the addition before the system finishes adding the value to the drawer.

## Receive Physical Inventory

The *Receive Physical Inventory* option allows the user touch screen access to control your inventory. This section is designed to be used from a touch screen and can be used when inventory is delivered without requiring the user to return to the office to enter, or if an item is broken and needs to be removed from inventory.

This screen will list the inventory items set up within your system. You can use the swipe feature or Up/Down buttons to navigate through the items.

To sort or search for a specific item, by using one or more of the following filters:

- Vendor
- Type
- Group
- Locations

Item Name	Group	Type	Vendor
1800 Coconut	Liquor	Liquor	Abc Stores
99 Bananas	Liquor	Liquor	Abc Stores
Absolut Vodka	Liquor	Liquor	Abc Stores
Absolute Vanilla	Liquor	Liquor	Abc Stores
Alize Gold Passioi	Liquor	Liquor	Abc Stores
Alize Red Passion	Liquor	Liquor	Abc Stores
Angry Orchard Cri:	Bottles	Beer	All-State Beve
Angustora Bitters	Liquor	Liquors	Webstaurant
Bacardi 151	Liquor	Liquor	Abc Stores
Bacardi Light Rum	Liquor	Liquor	Abc Stores
Bacardi Oakheart	Liquor	Liquor	Abc Stores
Baileys Original Iri	Liquor	Liquor	Abc Stores
Baker & Chef Hot	Food By Case	Food	Sam's Club
Barton Light Rum	Liquor	Liquor	Abc Stores

You can also search by UPC code using a barcode scanner.

Once you select the inventory item from the list, select one of the following to modify the inventory:

- Subtract One Case
- Subtract One Bottle/Portion
- Add Once Case
- Add One Bottle/Portion

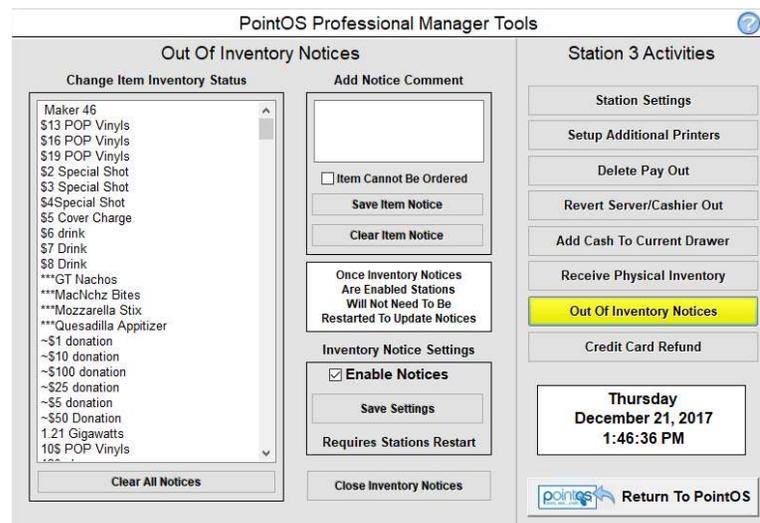
From this screen you can select more than one button to add/subtract multiple amounts. And the square to the right of the buttons will indicate how much you have added/subtracted of the selected item.

Select *Go to Keyboard Entry* to open the Inventory Item Count screen. Refer to the “Inventory Count” section in this Manager Manual for more information.

## Out of Inventory Notices

The *Out of Inventory Notices* section allows you to provide a notice to the other users that an item is out of stock. It can also indicate that the item cannot be ordered to prevent processing orders on items that are unavailable.

Before you can start using Out of Inventory notices for out of stock items, you will need to check the *Enable Notices* and save the setting changes and restart the station to activate the new setting.



### Create an Out of Inventory Item Notice

To create an out of inventory notice, complete the following steps:

1. Select the inventory item from the Change Item Inventory Status list on the left. The items are listed in alphabetical order.
2. Enter the notice that you want to appear when the item is ordered in the Add Notice Comment field.
3. If you want to prevent the item from being ordered, check the Item Cannot be Ordered box.
4. Select Save Item Notice.

### Clear an Out of Inventory Item Notice

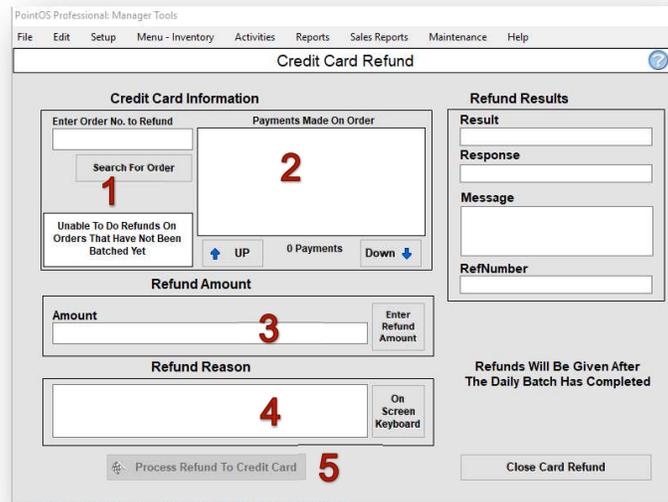
You can clear all notices by selecting *Clear All Notices* at the bottom of the Change Item Inventory Status list. To clear a single inventory item notice:

1. Select the inventory item from the Change Item Inventory Status list on the left. The items are listed in alphabetical order.
2. Select Clear Item Notice.

### Credit Card Refund

To process a credit card refund:

1. Enter the Order Number and click *Search For Order*
2. Select the Credit Payment that matches the Credit Card being refunded.
3. Enter the Amount to Refund
4. Enter the Refund Reason
5. Select *Process Refund to Credit Card*.

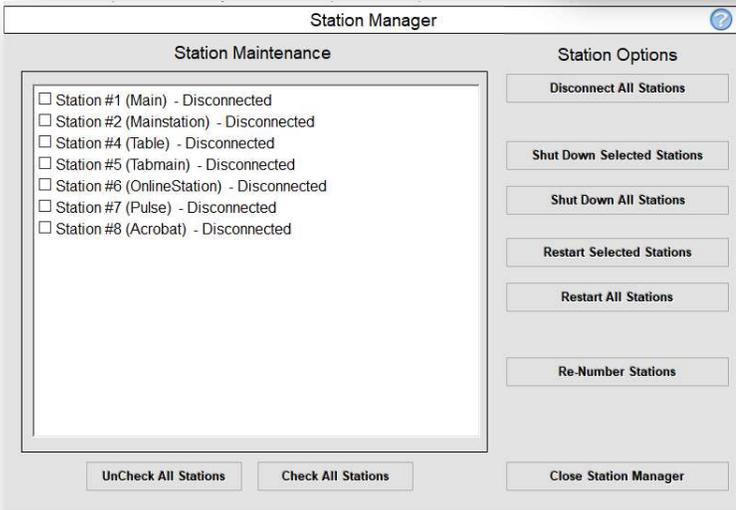
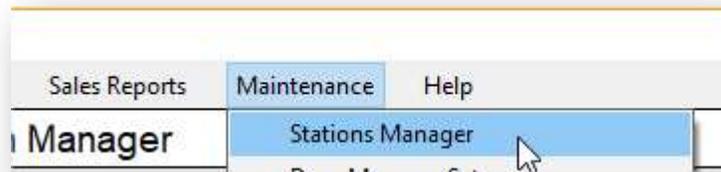


- The **Refund Results** area displays the Result, Response, Message, and Reference Number for the refund.
- The refund will not be available until you batch your credit cards.

### STATIONS MANAGER

The *Stations Manager* screen allows you to shut down or force a restart of selected or all connected stations. This is required for database management or when making system changes.

To access the *Stations Manager*, open the Manager Tools *Maintenance* -> *Stations Manager*.



The *Station Maintenance* area lists the stations that are currently connected to your database. Select a station by checking the box next to the listing. You can select *Uncheck All Stations* or *Check All Stations* to quickly indicate the stations with which you want to work.

To disconnect all stations, select *Disconnect All Stations*.

To shut down the selected stations, select *Shut Down Selected Stations*. To

shut down all stations, select *Shut Down All Stations*.

To restart the selected stations, select *Shut Down Selected Stations*. To restart all stations, select *Shut Down All Stations*.

### Re-number Stations

To re-number stations, all stations must be disconnected, and you cannot have any cash drawers currently cashed in.

**Warning:** Re-numbering stations can adversely affect previous reports.

To re-number the stations, highlight the station you wish to renumber and use the *Move Station Up* and *Move Station Down* arrows to reorder the list of stations.

### Disconnecting Stations

*Disconnect Stations* forces all stations to stop receiving or sending information to or from the database without requiring you to close each station down manually. This is required when performing database maintenance. It may take up to a minute to disconnect all stations.