PointOS®
PROFESSIONAL

User Manual

Table of Contents

Getting Started

This chapter explains how to open and close PointOS. It gives an introduction to the *Main Menu* and explains how to enter your access code.

Open PointOS

If PointOS does not start automatically, select it from the Windows Start menu to open it.

Use the Main Menu

The *Main Menu* provides access to all of the other functions in PointOS.

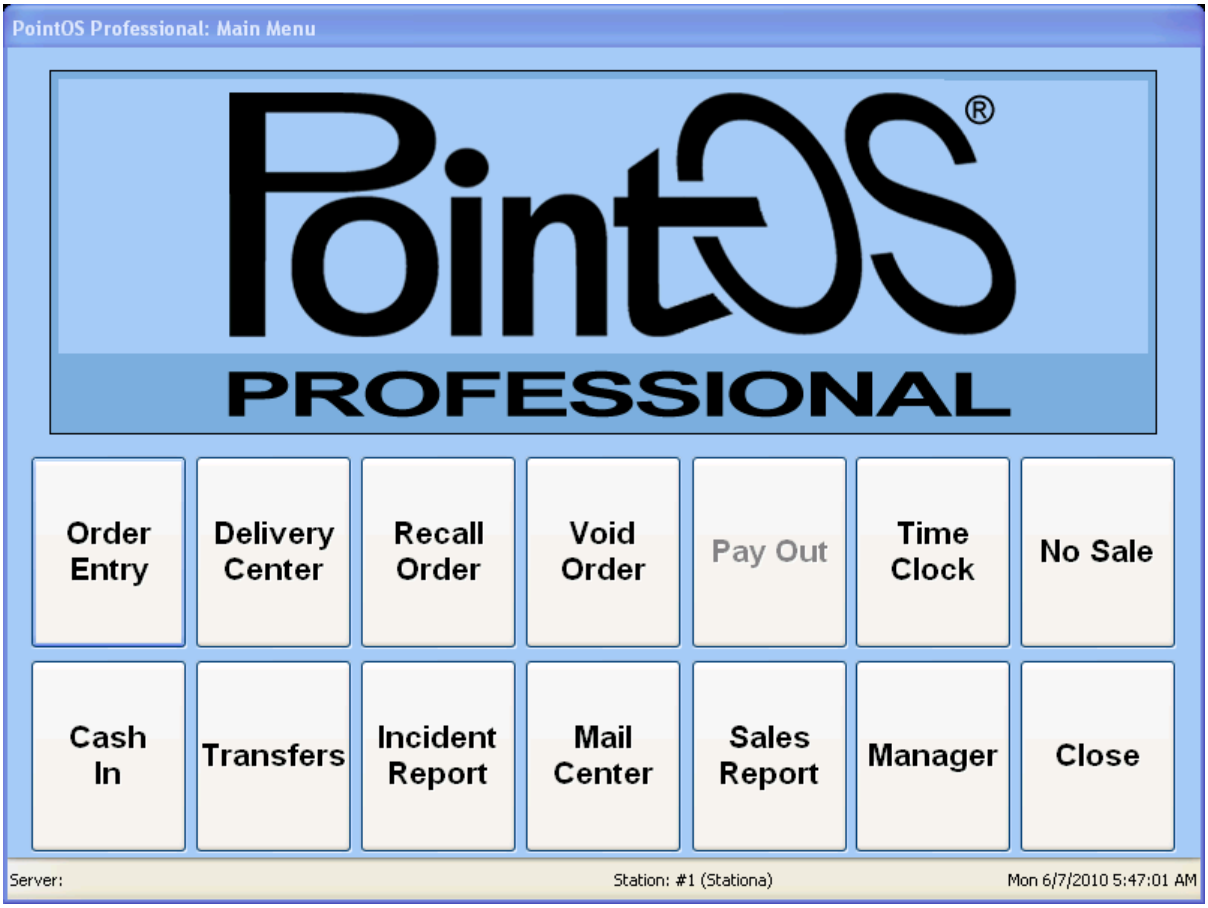

Figure 1: Main Menu

NOTE: If you are in Multi-Server Mode, your *Main Menu* will look different. Refer to the "Using Multi-Server Mode" chapter for more information.

Enter Your Access Code

Many screens require you to enter your access code. When you select an option, the system will display the *Enter Access Code* screen.

Figure 2: Enter Access Code Screen

1. Enter your four-digit access code and press **Enter**. Or swipe your access card in the card reader.
2. If you make a mistake, you can select the **Delete** button to erase the last digit.
3. Select **Cancel** to close the screen without continuing to the selected function.

Close PointOS

When you are ready to close PointOS, complete the following steps:

1. Select **Close** from the *Main Menu*.
2. The system displays an *Exit Program* message to make sure that you want to exit PointOS. Select **Yes** to exit PointOS. Or select **No** to close the dialog box without exiting PointOS.
3. The system displays the *Enter Manager Code* screen. Enter the manager access code.

Using the Time Clock

This chapter explains the time clock. Each employee needs to use the Time Clock:

- To clock in at the beginning of each shift
- To clock out at the end of each shift

The *Time Clock* screen allows you to clock in or out, as well as view the employee history, the employee's schedule for the week, and the entertainment or specials calendar for the week. You can also make a schedule request or print the schedules.

Using the System Prompt for Clocking In or Out

If you have not clocked in or out before attempting to perform some activities, the system will display a prompt to determine if you want to clock in before continuing.

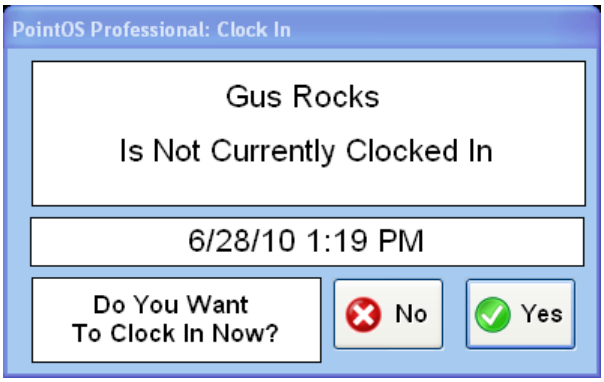

Figure 3: Clock In Prompt

Select **Yes** to clock in (or out) at the current time. The system displays a message indicating that you have been clocked in (or out). Select **OK** to continue.

Select **No** to continue without clocking in (or out).

Open the Time Clock Screen

To open the *Time Clock* screen, complete the following steps:

1. Select **Time Clock** from the *Main Menu*.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

The system displays the *Time Clock* screen.

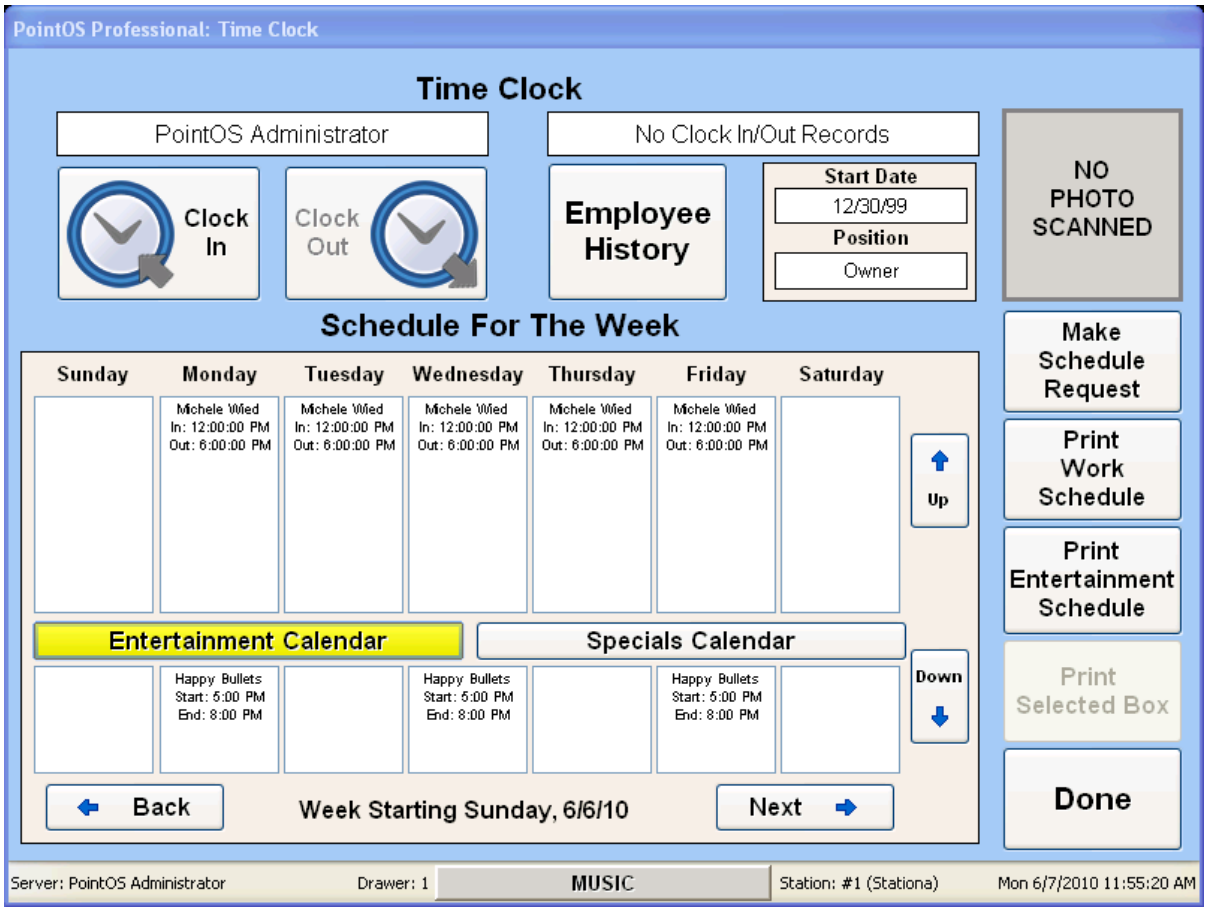

Figure 4: Time Clock

Clock In

To clock in, complete the following steps:

1. Select the **Clock In** button.

The system displays the *Clock In* screen.

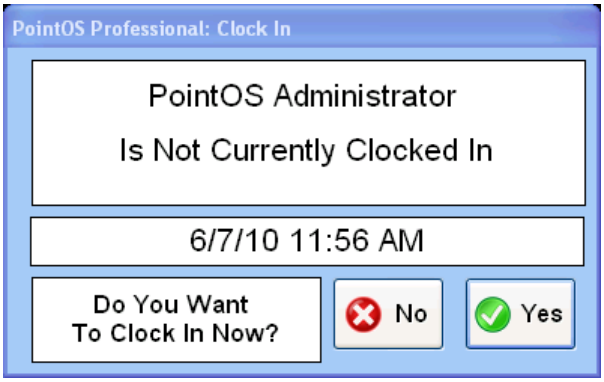

Figure 5: Clock In Screen

2. Select **Yes**. Or select **No** to close the *Clock In* screen without clocking in.

If the Manager has set the system up to prompt for salary level, the system displays the *Choose Job Description* screen.

Figure 6: Choose Job Description Screen

3. Use the **Up** and **Down** arrows to scroll through a long list of job descriptions. Select the appropriate description and select **Choose Description**.
4. The system displays a message indicating that the employee has been clocked in. Select **OK** to close the message.

Clock Out

NOTE: If you forget to clock out within 24 hours, the system will prompt you to do so. The *Clock Out* screen allows you to edit the clock out time.

To clock out, complete the following steps:

1. Select the **Clock Out** button.

The system displays the *Clock Out* screen.

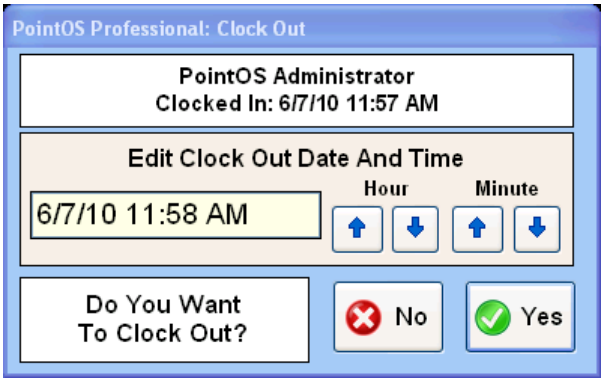

Figure 7: Clock Out Screen

2. If you need to edit the date and time, use the up and down arrows to adjust the time.
3. Select **Yes** to continue. Or select **No** to close the *Clock Out* screen without clocking out.

Depending on your employee settings, the system may display the *Enter Cash Tips* screen.

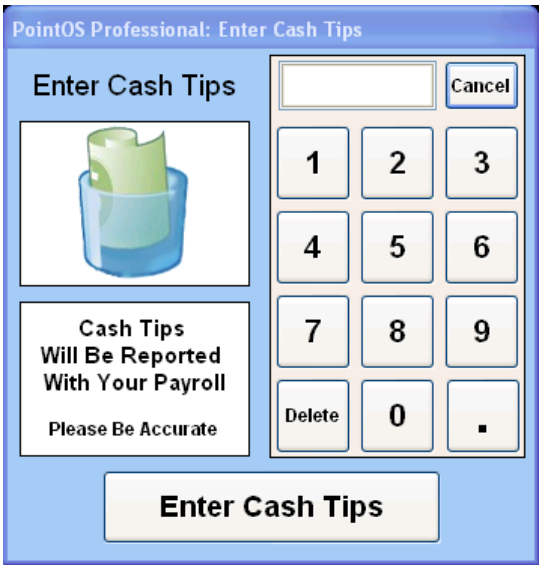

Figure 8: Enter Cash Tips Screen

4. Enter the dollar and cent amount of any cash tips you received during your shift.
5. Select **Enter Cash Tips**. Or select **Cancel** to close the *Enter Cash Tips* screen without declaring any tips.
6. The system displays a message to make sure that you entered the correct amount. Select **Yes** if the amount listed is correct. Select **No** to return to the *Enter Cash Tips* screen.
7. The system displays a message indicating that the employee has been clocked out. Select **OK** to close the message.

View Employee History

The *Employee History* screen displays the total number of hours for the selected employee during the selected month. It also displays the number of cash ins and outs during the same time period. You can use this screen to print a report of the employee history.

To open the *Time Clock* screen, select **Employee History** from the *Time Clock* screen.

The system displays the *Employee History* screen.

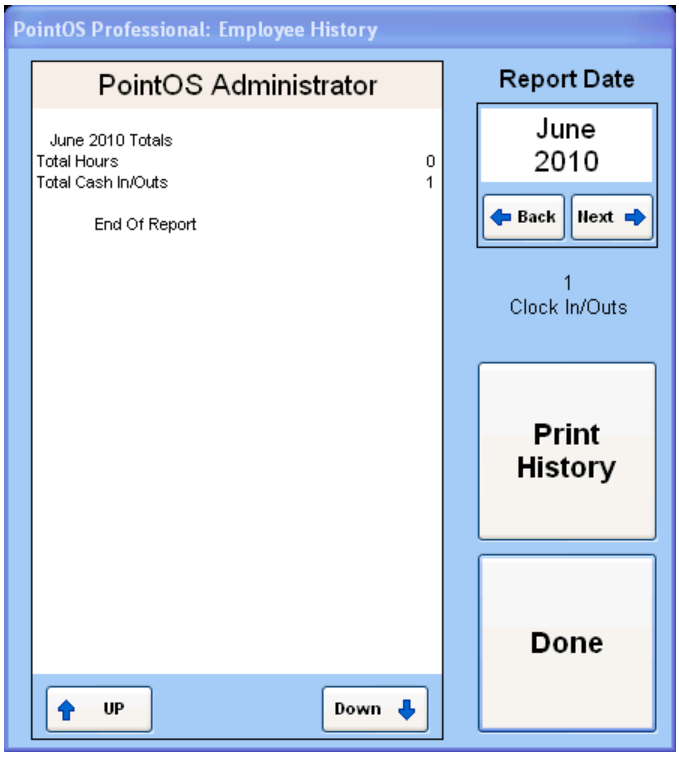

Figure 9: Employee History Screen

To change the date for the employee history report, use the **Back** or **Next** arrows.

To scroll up or down on the report, use the **Up** and **Down** arrows.

To print the employee history report to the report printer, select **Print History**.

When you have finished, select **Done** to close the *Employee History* screen.

Make Schedule Request

The *Schedule Request* screen allows you to send a schedule request to the manager.

To open the *Schedule Request* screen, select **Make Schedule Request** from the *Time Clock* screen.

The system displays the *Schedule Request* screen.

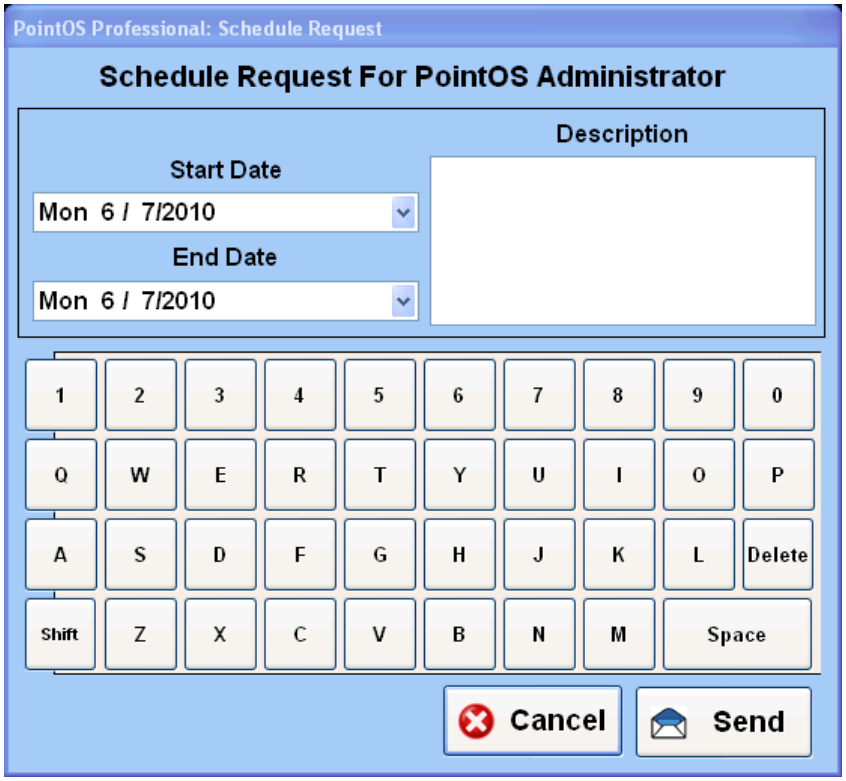

Figure 10: Make Schedule Request Screen

To make a schedule request, complete the following steps:

1. Select the **Start Date**. The current date displays in the **Start Date** field by default. You can change the date, or use the down arrow to select the date from a calendar.
2. Select the **End Date**. The same date as the Start Date field displays by default. You can change the date, or use the down arrow to select the date from a calendar.
3. Enter a message to explain your schedule request in the **Description** field.
4. Select **Send** to send the schedule request message to the manager. Or select **Cancel** to close the Schedule Request screen without sending the message.
5. The system displays a message indicating that the request has been sent. Select **OK** to close the message.

Print Work Schedule

The *Time Clock* screen allows you to print the work schedule for the currently displayed week.

To print the work schedule, complete the following steps:

1. Make sure the correct week's schedule is displayed. You can use the **Next** and **Back** buttons to move forward or backward one week at a time.
2. Select **Print Work Schedule** to print the currently displayed schedule on the report printer.

Print Entertainment or Specials Schedule

The *Time Clock* screen allows you to print the entertainment or special events schedule for the currently displayed week.

To print the entertainment or special events schedule, complete the following steps:

1. Make sure the correct week's schedule is displayed. You can use the **Next** and **Back** buttons to move forward or backward one week at a time.
2. Select either **Entertainment Calendar** or **Specials Calendar**.
3. Select **Print Entertainment Schedule** to print the currently displayed calendar on the report printer.

Print Selected Box

The *Time Clock* screen allows you to print one day's schedule for the employee's work schedule or for the entertainment or specials calendar.

To print the selected box, complete the following steps:

1. Make sure the correct week's schedule is displayed. You can use the **Next** and **Back** buttons to move forward or backward one week at a time.
2. Select either **Entertainment Calendar** or **Specials Calendar**, if applicable.
3. Select the day that you want to print. Note that the **Print Selected Box** option is not available until you select a date.
4. Select **Print Selected Box** to print the currently selected box on the report printer.

Working With Cash Drawers

You'll need to open a cash drawer before you can handle any transactions. Then, when the shift is over, you must close the cash drawer to reconcile the amount of cash against the transactions for that cash drawer. This chapter explains the *Cash In* screen, the *Cash Out* screen, and how to open the cash drawer for a no sale. It also explains how to perform a cash payout, such as for paying entertainment in cash.

Cash In

The *Cash In* screen allows you to record the amount of cash, by denomination, present in the drawer when you open it. It also provides room to report the day's weather, events and other information, which will be correlated to sales for reporting purposes. Finally, the *Cash In* screen can include a link to the *Incident Report* screen. The Manager may choose whether to include this in the Cash In process or not.

To open the *Cash In* screen, complete the following steps:

1. Select **Cash In** from the *Main Menu*.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

The system displays the *Cash In* screen.

Figure 11: Cash In

To cash in, complete the following steps:

1. Select a button to indicate which cash drawer you are opening (i.e., Drawer 1, Drawer 2, Drawer 3, etc.). Use the up and down arrows under **Cash Drawers** to navigate through a long list of cash drawers.
2. Count the money in the cash drawer. Enter the number for each denomination to indicate the number of bills and coins present in the cash drawer. The numbers in the *Cash Total* and *Grand Total* are updated automatically to reflect your entries.
3. If enabled by the Manager, complete the following optional information:
   - Select the temperature (for the day or shift) from the **Temperature** drop down list.
   - Select the weather (for the day or shift) from the **Weather** drop down list and select the **arrow** to enter the selected weather conditions.

- If there are any special events that might affect business for the shift, select the **Today's Events** area. The bottom of the *Cash In* screen changes to a keyboard to help you record the information. Use the up and down arrows to scroll through a long **Today's Events** area. Select the **Clear Today's Events** button if you make a mistake and want to start over. Select the **Hide Keyboard** button to remove the keyboard.

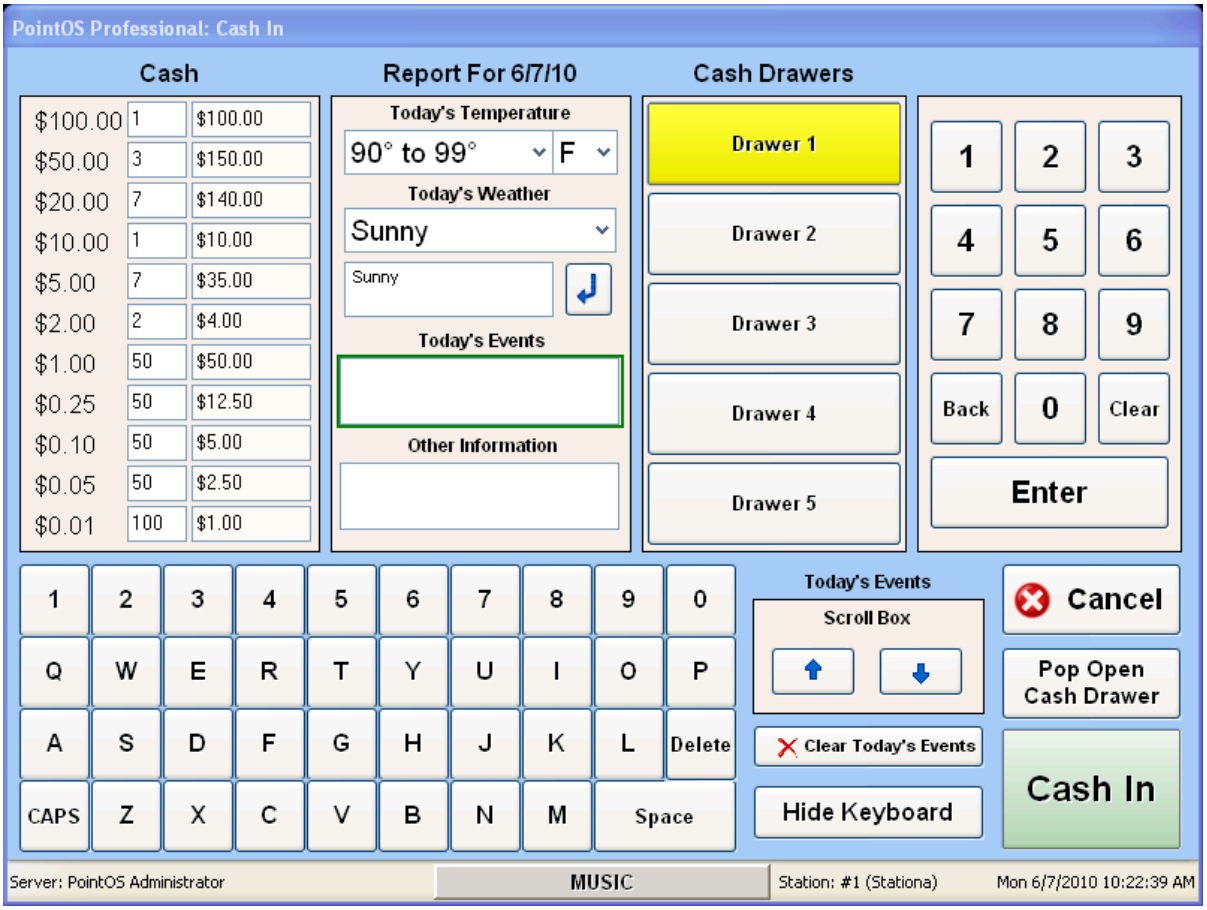

Figure 12: Cash In (Events)

4. If necessary, record any other items in the **Other Information** area.
5. To open the drawer to insert the cash, select **Pop Open Cash Drawer**.
6. Select **Cash In**.
7. The system displays a message indicating that the employee has cashed in the selected cash drawer. Select **OK** to continue.
8. The system displays a message asking whether you want to print the casher in receipt. The receipt will automatically print in 1 minute. To print immediately, select **Print**. To close the message without printing, select **Done**.

Pay Out Cash

The Pay Out function allows you to make cash pay outs from the drawer, such as for a band. This adjusts the cash drawer accordingly to make sure the cash out process will go smoothly at the end of the shift.

NOTE: The system will not allow you to do a payout for more money than you have in the drawer.

The *Cash Pay Out* screen allows you to pay out cash.

To open the *Cash Pay Out* screen, complete the following steps:

1. Select **Pay Out** from the *Main Menu*.
2. The system displays the *Enter Access Code* screen Enter your Access Code.

The system displays the *Cash Pay Out* screen.

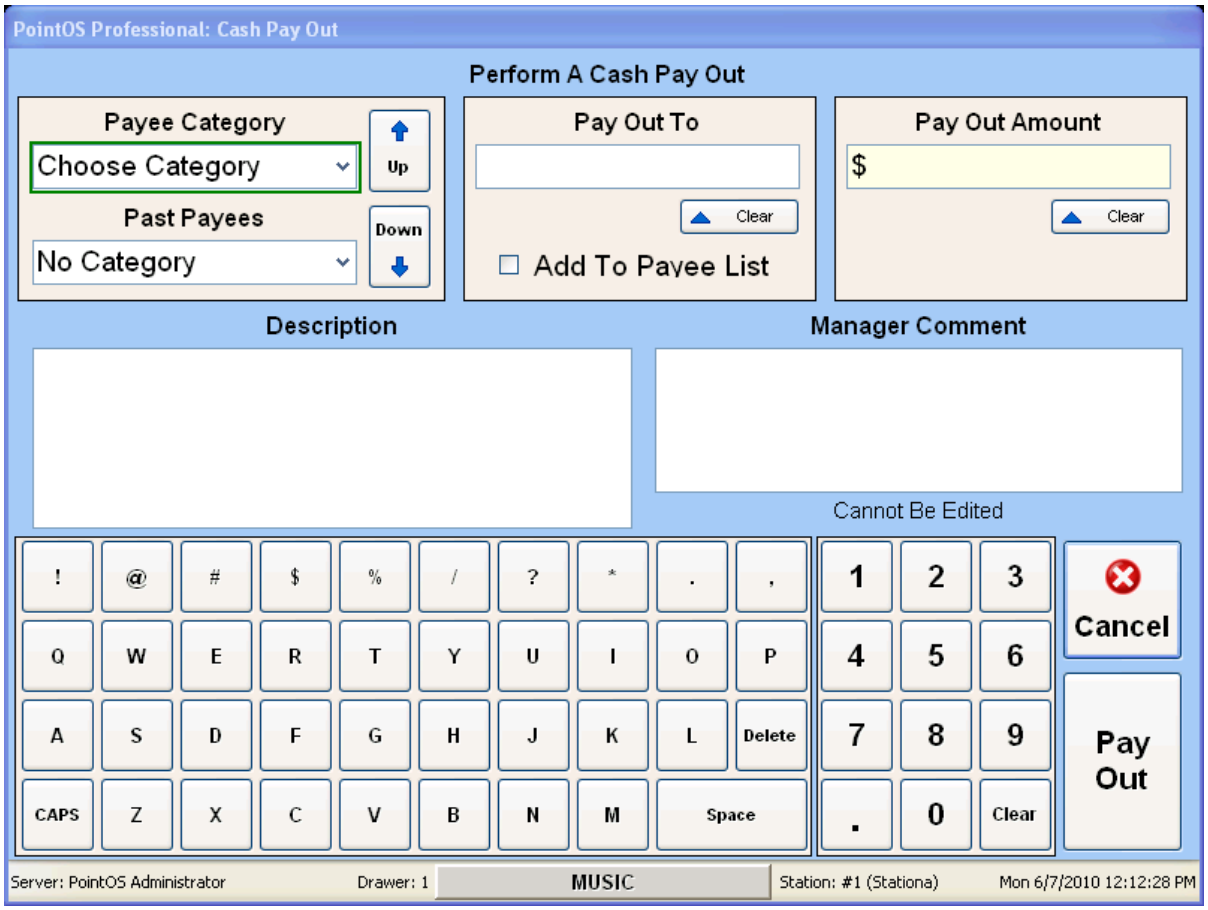

Figure 13: Cash Pay Out

To pay out cash, complete the following steps:

1. Select a Payee Category from the **Choose Category** drop down list.

2. Select a Payee from the **Choose Payee** drop down list if you have previously made a pay out to this payee. If not, enter the payee name in the **Pay Out To** field. Check the **Add To Payee List** box to include the Payee on the Past Payees list next time. If you make a mistake, select the **Clear** button to start over.
3. Enter the **Pay Out Amount**. If you make a mistake, select the **Clear** button to start over.
4. Enter a **Description** of the reason you are making the payout.

The **Manager Comment** displays any comments the manager has made for the selected payee. You cannot edit the manager comment.

5. Select the **Pay Out** button. Or select **Cancel** to close the *Cash Pay Out* screen without making a payout.
6. The system displays a message indicating that the payout has been made. Select **OK** to close the message.
7. The system displays a message asking if you want to print a payout receipt. Select **Print** to print the receipt immediately. Otherwise, the receipt will print automatically in 1 minute. Or you can select **Done** to close the message without printing the receipt.

Open the Cash Out Screen

At the end of the day, the cash drawers will need to be cashed out to reconcile the amount of money in the drawers to the transactions recorded for that drawer.

To open the *Cash Out* screen, complete the following steps:

1. Select **Cash Out** from the *Main Menu*.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

Adjust Gratuity

If there are non-cash sales that have not yet batched for your cash drawer, the system displays the *Adjust Gratuity* screen when you select the **Cash Out** option from the *Main Menu*. If there are not non-cash sales for your cash drawer, skip to the *Cash Out* screen section.

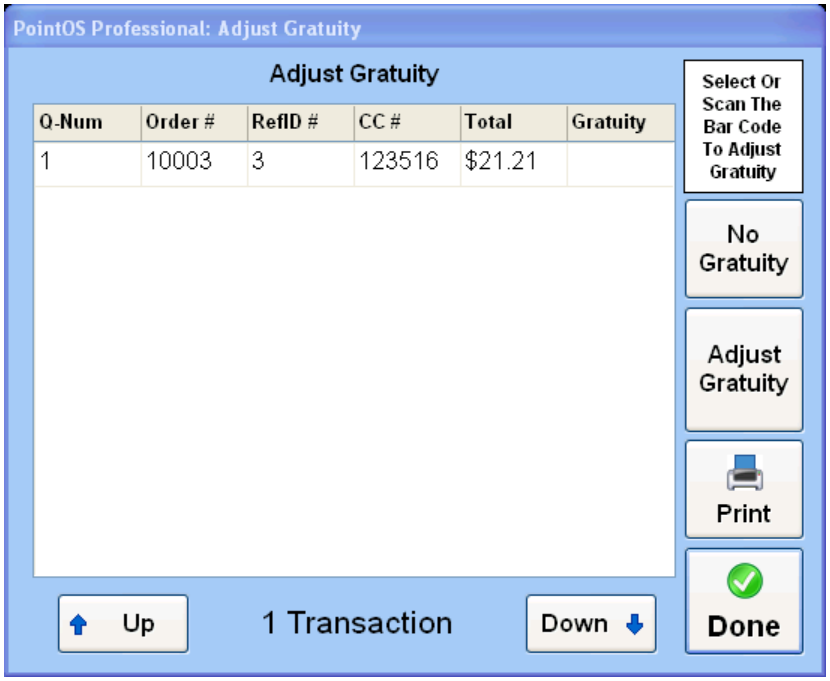

Figure 14: Adjust Gratuity

To indicate the gratuity added to non-cash sales, complete the following steps:

1. Select a transaction, either by choosing it from the list or by scanning the receipt bar code. Use the **Up** and **Down** arrows to scroll through a long list of transactions.
2. Indicate the gratuity according to the following chart.

If the customer …	THEN …
Did NOT add gratuity to the credit card sale…	Select **No Gratuity.** The system records the gratuity for the transaction as $0.00.

If the customer …	THEN …
Did add gratuity to the credit card sale…	Select **Adjust Gratuity**. The system opens the *Enter Gratuity* screen. Enter the dollar and cent amount of the credit card transaction gratuity and select **Enter**.  **Figure 15: Enter Gratuity Screen** The system displays a message to indicate that the Gratuity Adjustment was successful. You can print the message by selecting **Print**. Select **OK** to close the message.  **Figure 16: Adjust Gratuity Message**

3. To print the transaction list in the *Adjust Gratuity* screen, such as for Manager review, select **Print**.
4. When you have finished with all of the transactions, select **Done**.
5. The system displays the *Total Credit Card Gratuity* screen to indicate the total gratuity for the employee. This amount should be removed from the cash drawer. Select **OK** to close the message.

Cash Out

The *Cash Out* screen allows you to record the amount of cash, by denomination, present in the drawer when you close it. The amount can be adjusted for gratuities. It also shows the amounts for transactions paid in credit card, gift card, or check. Finally, the *Cash Out* screen also links to the *Incident Report* and the *Closing Report* screens.

When you select **Cash Out** from the *Main Menu* and complete the *Adjust Gratuity* screen (if applicable), the system displays the *Cash Out* screen. The system automatically selects the current cash drawer and displays it in the **Cash Drawers** area.

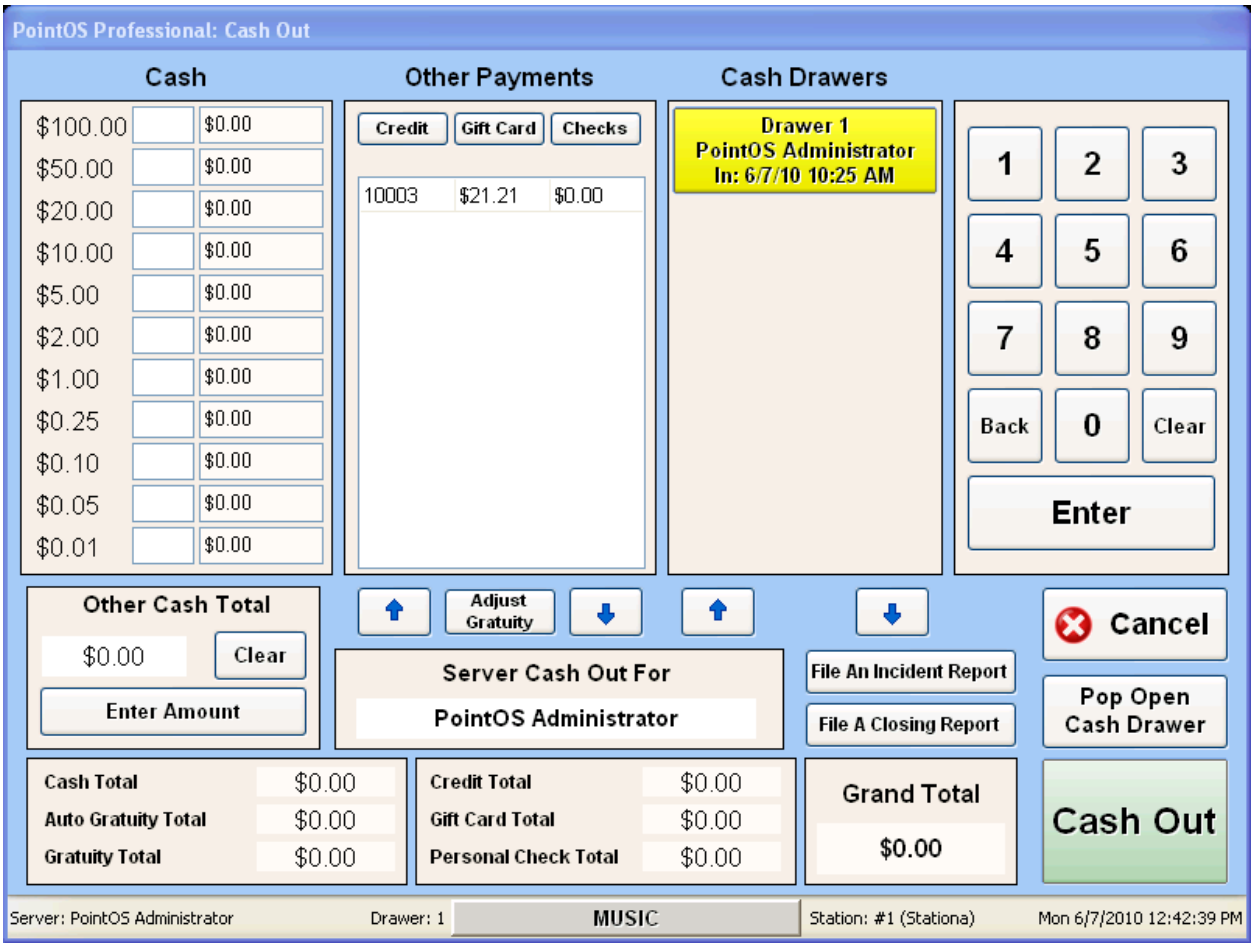

Figure 17: Cash Out Screen

To cash out, complete the following steps:

1. Count the money in the cash drawer. Enter the number for each denomination to indicate the number of bills and coins present in the cash drawer. To indicate other cash, select the **Enter Amount** button under **Other Cash Total**. Enter the amount and select **Enter**. The numbers in the **Cash Total** and **Grand Total** are updated automatically to reflect your entries of cash and other cash.
2. The **Other Payments** area lists the non-cash transactions. Select **Credit Card**, **Gift Card**, or **Check** to see the transactions of that type. Use the **Up** and **Down** arrows to scroll through a long list of transactions. Select the **Adjust Gratuity** button to open the *Adjust Gratuity* screen.
3. To open the *Incident Report* screen, select the **File An Incident Report** button.
4. To open the *Closing Report* screen, select the **File A Closing Report** button.
5. To open the drawer, select **Pop Open Cash Drawer**.
6. Select **Cash Out**.
7. The system displays a message indicating that the employee has cashed out the selected cash drawer. The message indicates if the drawer is exactly right or the amount the drawer is over or under the expected amount. Select **OK** to continue.
8. If the drawer is over or under, the system displays the *Drawer Over* or *Drawer Under Reason* screen. Enter a reason for the overage or shortage for reporting purposes and select **Done**.
9. The system displays a message asking whether you want to print the cash out receipt. The receipt will automatically print in 1 minute. To print immediately, select **Print**. To close the message without printing, select **Done**.

Open Cash Drawer

You can open the cash drawer at any time. If the printer and cash drawer are connected, the *No Sale* screen records the drawer opening.

To open the cash drawer, select **No Sale** from the *Main Menu* or **Pop Open Cash Drawer** from the *Cash In* or *Cash Out* screen.

Figure 18: No Sale/Cash Drawer Pop

Select **OK** to close the *No Sale* message.

Entering Orders

Once you cash in, the system opens the *Tab Select* screen to allow you to enter orders. Since this is the main function of PointOS, it includes navigation to related areas, such as entering customer information.

The basic process for orders is:

1. Choose **Fast Cash** to access the order screen without connecting the order to a customer, tab or table. Or use the *Tab Select* screen to indicate the customer, tab or table for the order. If you are using credit card pre-authorizations, the tab name is automated, based on the name on the credit card used for pre-authorization.
2. Enter the items for the customer's order. For each item, you can enter modifiers as needed. Depending on your settings, these items may generate a printed receipt in the kitchen or bar.
3. Make a payment for the customer's order.

You can also reorder, void, or discount items in an order as needed. There are also several additional order activities, which are discussed in later chapters.

Select Tab

Each tab must have a name associated with it. The name can be a tab name, the customer name, or the table where the customer is sitting.

The Tab Select by Open Orders Screen

The *Tab Select* screen allows you to manage the current **Open Orders**. The *Tab Select* screen opens automatically after you have cashed in.

To open the *Tab Select* screen if it is not already open, complete the following steps:

1. Select **Order Entry** from the *Main Menu*.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

The system displays the *Tab Select* by Open Orders screen.

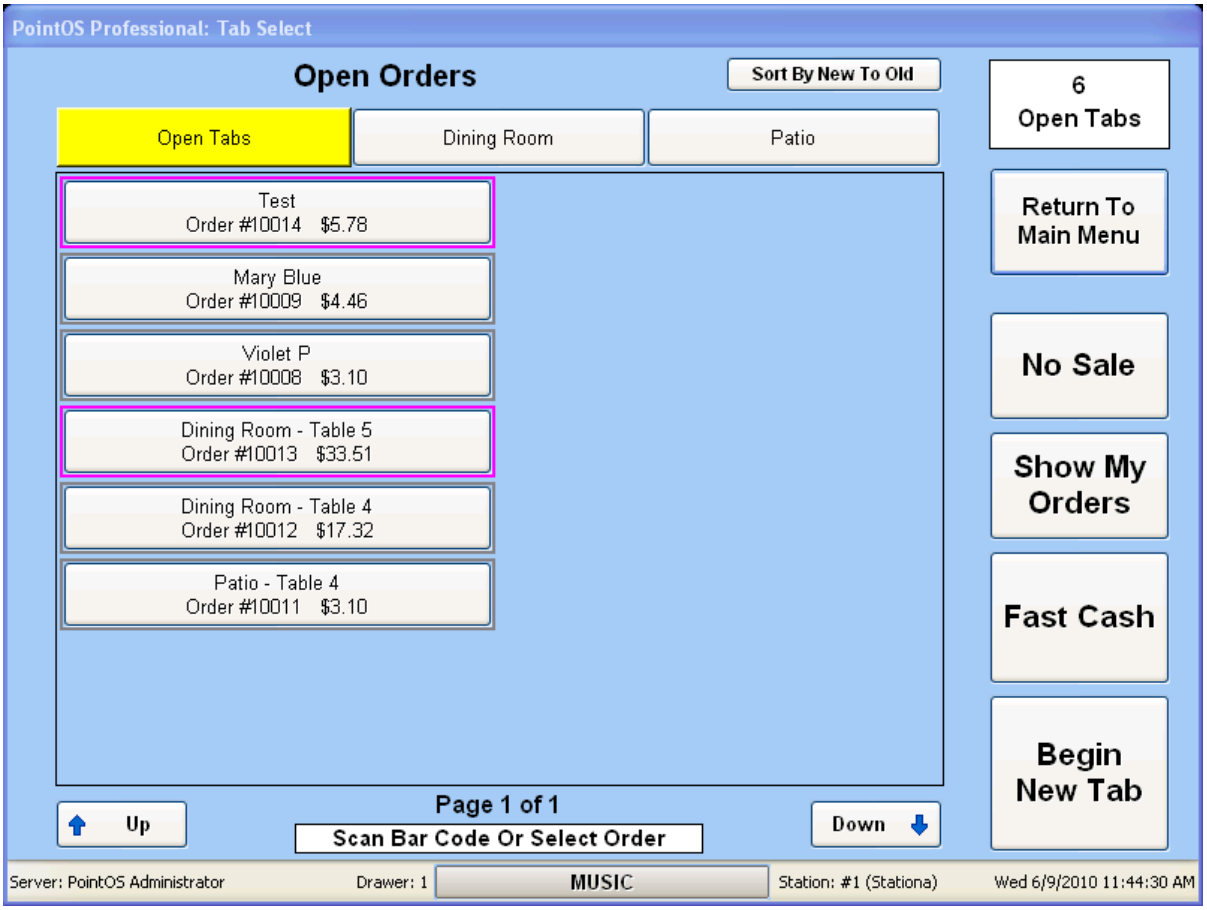

Figure 19: Tab Select by Open Orders Screen

The *Tab Select by Open Orders* screen displays the current open orders by name. The top right displays the number of open tabs. The orders for the current employee access code are highlighted in the list in the employee color set on the Manager *Employee Setup* screen. Use the **Up** and **Down** arrows to scroll through a long list of orders. You can change the view using one of the following options:

- The buttons at the top allow you to see all open tabs, or only the tabs for the selected room. Select the room name to open the *Tab Select* by Room screen or select **Open Tabs** to see all open orders.
- The button above the Open Tabs and room names toggles between three sorting options: **Sort Old to New**, **Sort New to Old**, or **Sort by Tab Name**. Select the button to change the sort order for the displayed tabs.
- Select **Show My Orders** to filter the list to only your orders.

Select an order to open the *Order Entry* screen for that order.

Select **Begin New Tab** to open the *Name Tab* screen.

Select **No Sale** to open the cash drawer.

Select **Fast Cash** to open the *Order Entry* screen without naming a tab. You will have a chance to name the tab later, or you can simply process the order and payment without naming the tab. Note that you will not be able to go to another screen of PointOS until the order has been completed or named.

The Tab Select by Room Screen

The *Tab Select* by Room screen displays the open orders by table.

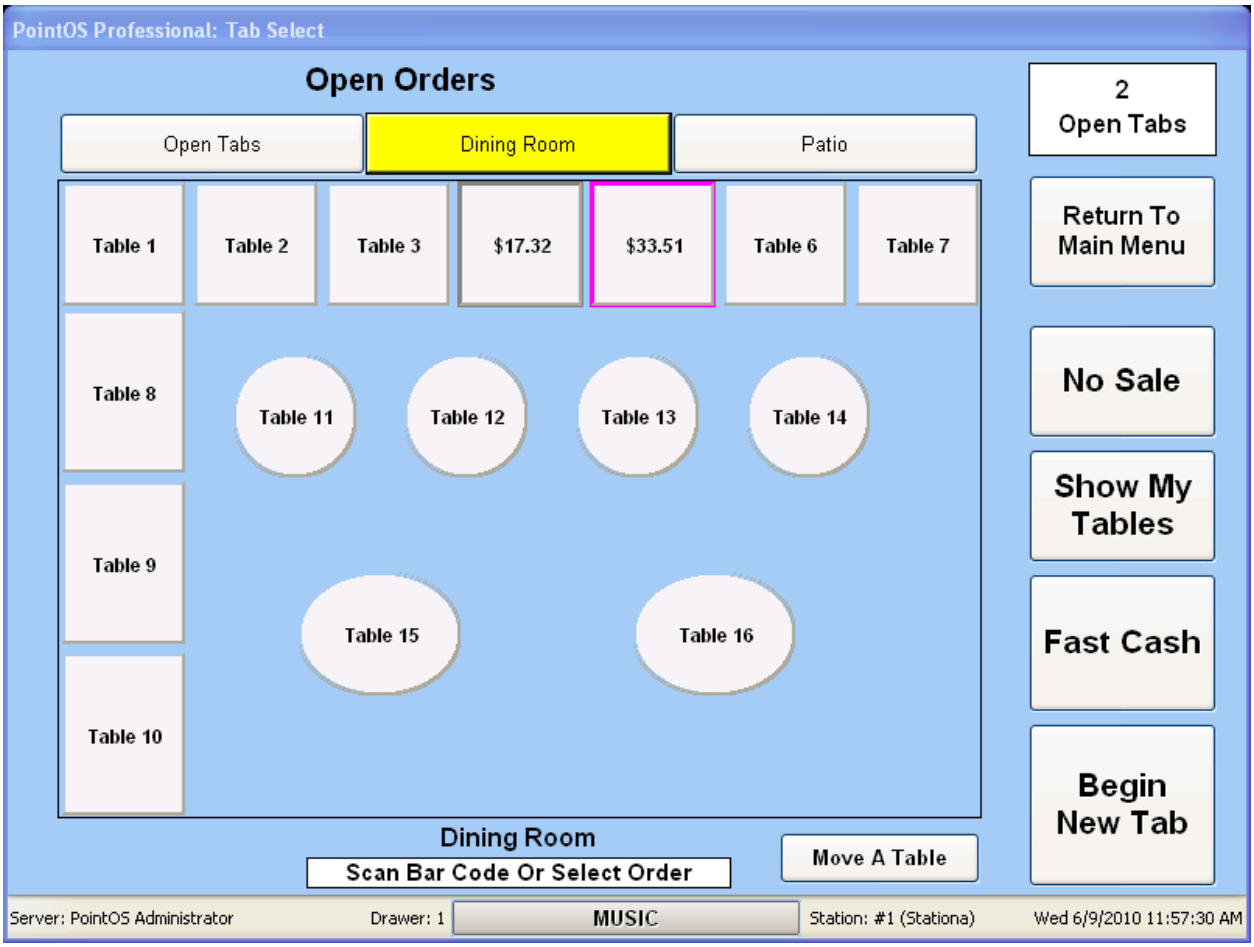

Figure 20: Tab Select by Room Screen

The *Tab Select by Room* screen displays a view of the room as set up in the Manger screens. Open orders show as an amount at the selected table. The top right displays the number of open tabs. The orders for the current employee access code are highlighted in the employee color set on the Manager *Employee Setup* screen. You can change the view using one of the following options:

- The buttons at the top allow you to see all open tabs, or only the tabs for the selected room. Select the room name to open the *Tab Select* by Room screen or select **Open Tabs** to see all open orders.
- Select **Show My Tables** to filter the list to only your tables.

Select a table with a total to open the *Order Entry* screen for that order.

Select a table without an order to open the *Order Entry* screen for a new order. Note that you don't need to name a tab when the order is connected to a table.

Select **Begin New Tab** to open the *Name Tab* screen.

Select **No Sale** to open the cash drawer.

Select **Fast Cash** to open the *Order Entry* screen without naming a tab. You will have a chance to name the tab later, or you can simply process the order and payment without naming the tab. Note that you will not be able to go to another screen of PointOS until the order has been completed or named.

Select **Move Table** to open the *Move Table* screen. Select the table with an open order that you want to move. Then select an open table to indicate where the order is going.

Fast Cash

Fast Cash allows you to enter orders without assigning the order to a tab.

When you select **Fast Cash** from the *Tab Select* screen, the system displays the *Select Order Type* screen. The order type can help you identify a Fast Cash Order later if you need to recall the order.

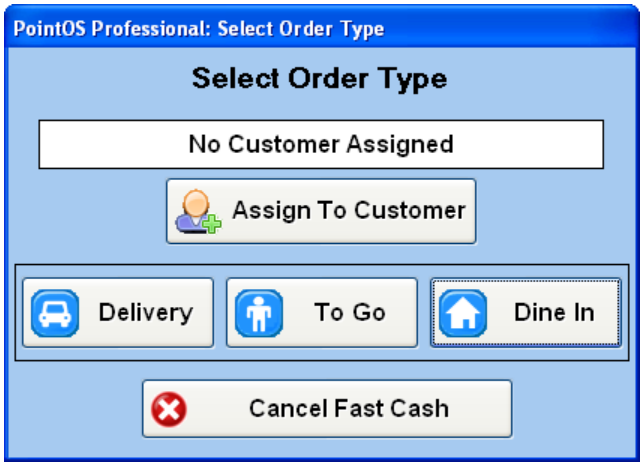

Figure 21: Select Order Type Screen

Select one of the following options to indicate the type of order:

- **Assign to Customer** (opens the Choose Customer screen)
- **Delivery**
- **To Go**
- **Dine In**

Select **Cancel Fast Cash** to close the *Select Order Type* screen without selecting an order type. The system returns to the *Tab Select* screen.

Begin New Tab

You can give tabs a meaningful name, or you can select a customer from the customer list (or create a new customer) to name the tab.

The Name Tab Screen

The *Name Tab* screen allows you to find a customer, open the *Add New Customer* screen, or name the tab.

To open the *Name Tab* screen, select **Begin New Tab** from the *Tab Select* screen.

The system displays the *Name Tab* screen.

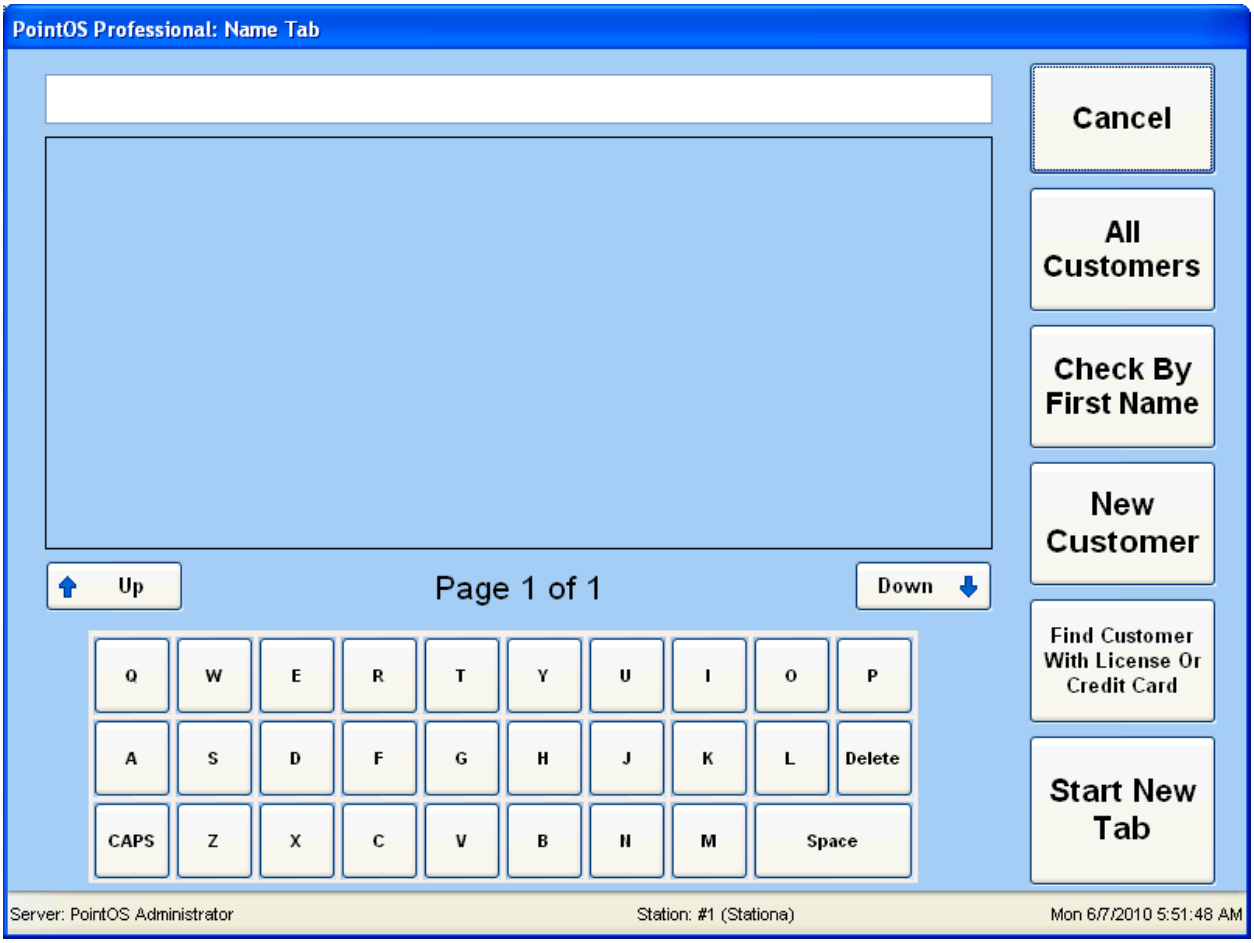

Figure 22: Name Tab

To enter a name for this tab to be used only for this order, complete the following steps:

1. Enter the name in the top field.
2. Select **Start New Tab**.

The system opens the *Order Entry* screen.

To select a customer for this order by name, complete the following steps:

1. Enter one or more letters of the customer's first or last name in the top field.
2. As you type, the system displays any matching customers. Select **Check by First Name** or **Check by Last Name** to switch the search, depending on what you entered in step 1. Select **Recent Customers** or **All Customers** to narrow or widen the search.

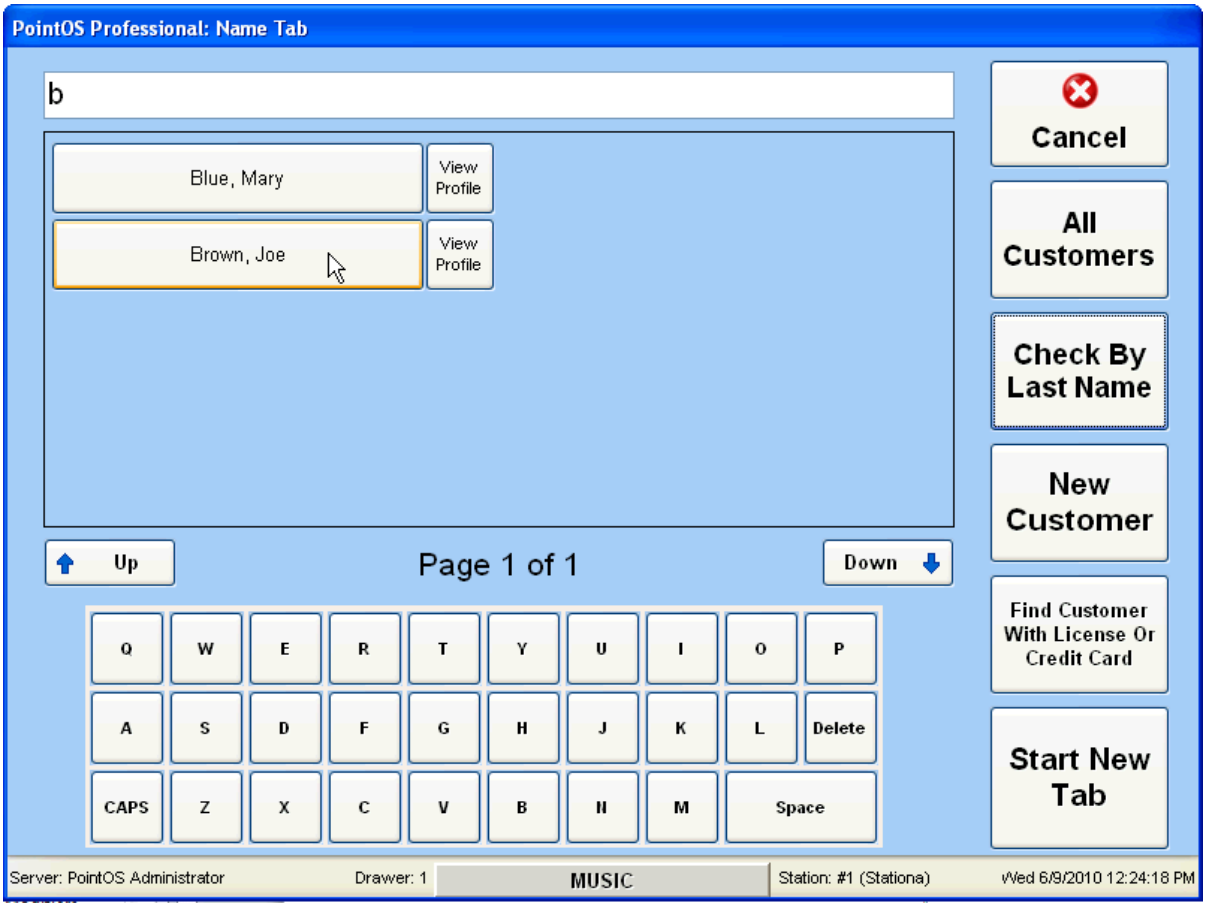

Figure 23: Name Tab Screen - Example of Customer Search

3. Select the customer to open the *Order Entry* screen. Select **View Profile** to open the *Customer Profile* screen.

To select a customer for this order by driver's license or credit card, complete the following steps:

1. Select the **Find Customer With License or Credit Card** button.
2. Swipe the card.
3. Select the matching customer to open the *Order Entry* screen.

Select the **New Customer** button to open the *Add New Customer* screen.

Pre-Authorize Credit Card

NOTE: The pre-authorization only authorizes up to a $250 charge. If you have a charge that is more than that, it may hold up your next credit card batch.

If you have credit cards enabled on the station, the *Credit Card Sale* screen appears when you open a new tab. This allows you to pre-authorize the credit card, if necessary.

NOTE: The pre-authorization is only held until the next credit card batch.

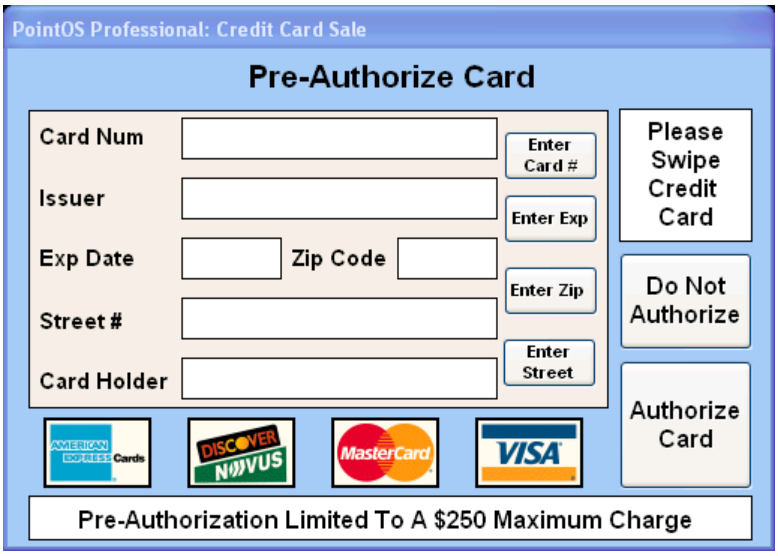

Figure 24: Pre-Authorize Credit Card Sale

To begin the Credit Card Sale pre-authorization, complete the following steps:

1. Swipe the credit card, or enter the **Card Number**, the **Expiration Date**, the **Zip Code**, the **Street Number**, and the **Card Holder** name.
2. Select **Authorize Card**. Or select **Do Not Authorize** to close the *Credit Card Sale* screen without pre-authorizing a credit card.

The system authorizes the credit card by posting a $.01 charge. The pre-authorizations are voided when the credit cards are batched.

3. When the system approves the card, it displays an **Authorization Reference ID**. Select **OK** to close the screen.

Enter Order

Once you have named your tab (if necessary) and pre-authorized the credit card (if necessary), you are ready to enter the customer's order.

The Order Entry Screen

The *Order Entry* screen allows you to order items from the menu, and modify them as needed.

NOTE: Remember that you need to name the tab, select a customer or a table, or use **Fast Cash** to open the *Order Entry* screen. If you use **Fast Cash**, you will need to complete the transaction, including making payments, before you can close the current *Order Entry* screen. You can name the tab if you need to close the screen before closing the transaction.

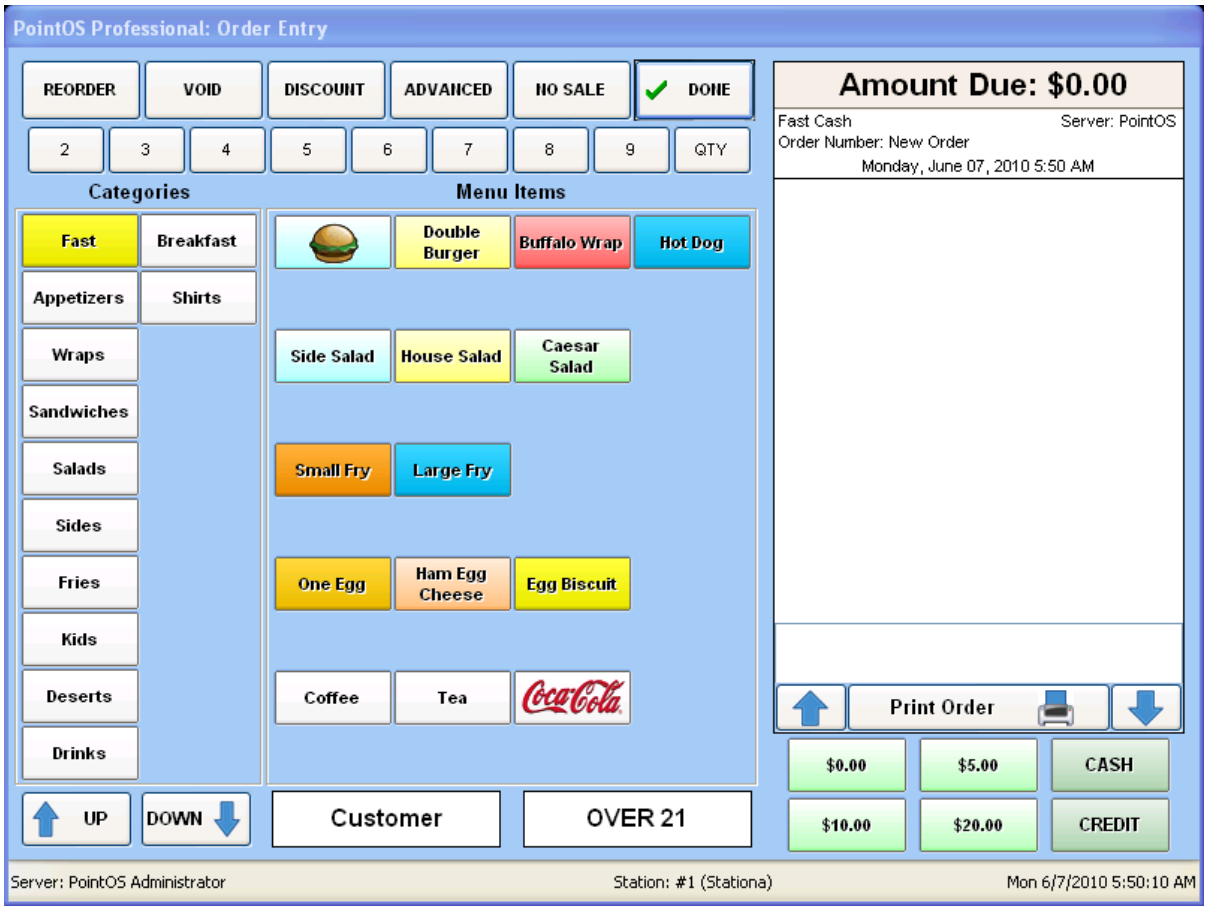

Figure 25: Order Entry Screen

To order menu items, complete the following steps:

1. Select the **Category** from the list on the left. Use the **Up** and **Down** arrows to scroll through a long list of categories.
2. For multiple quantities of an item, select the number to order before selecting the item.
3. Select the **Menu Item** from the list in the center.
4. The system displays the modifiers for the selected menu item on the right. Select a modifier button to include it on the printed receipt for the order. Select the **Custom** item modifier to open the *Custom Modifier* screen.

The **Amount Due** area on the right displays the items you have entered. Use the **Up** and **Down** arrows to scroll through a long list of items.

NOTE: You can view price or recipe information for a menu item by holding down the desired item. You can also use this feature to mark an item out of inventory.

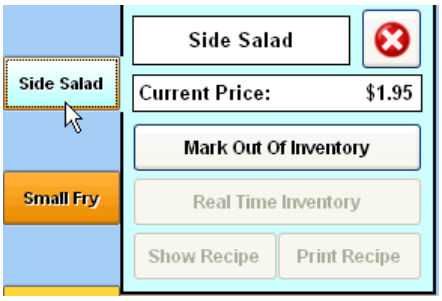

Figure 26: Menu Item Options

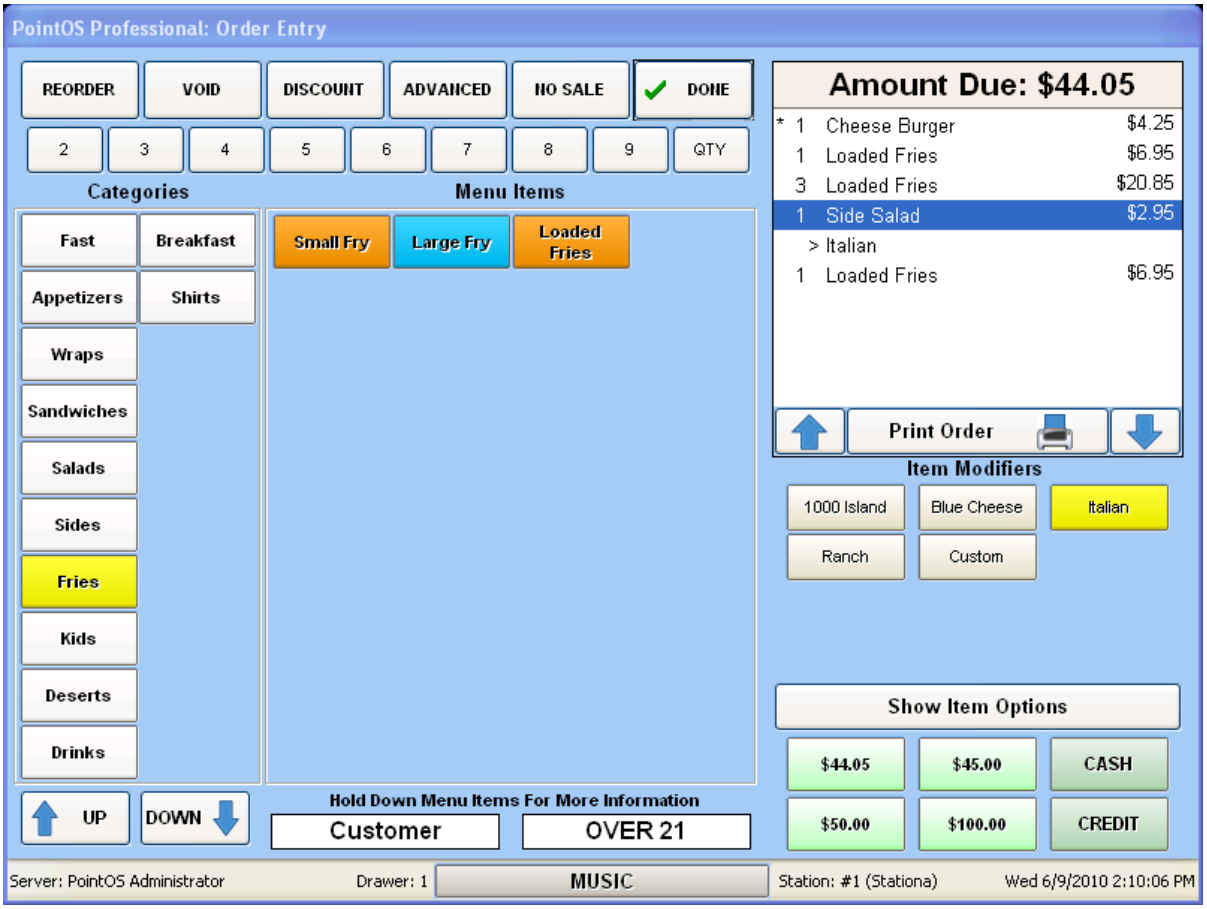

Figure 27: Order Entry Screen Illustrating Modifiers and Amount Due

5. Select **Print Order** to print the order receipt on the designated printer.

There are several other options available on this screen, which will be discussed in the sections that follow.

6. Select **Done** to close the *Order Entry* screen. If you opened the *Order Entry* screen using **Fast Cash**, the system displays a message that will allow you to return to the *Name Tab* screen.
7. The system displays the *Printer Holds* screen to allow you to hold some items from printing at this time.

The Custom Modifier Screen

The *Customer Modifier* screen allows you to enter a text description and a price, if applicable, to modify a menu item.

To open the *Custom Modifier* screen, select the appropriate menu item from the **Amount Due** list on the *Order Entry* screen. Then select the **Custom** button in the **Item Modifiers** list.

The system displays the *Custom Modifier* screen.

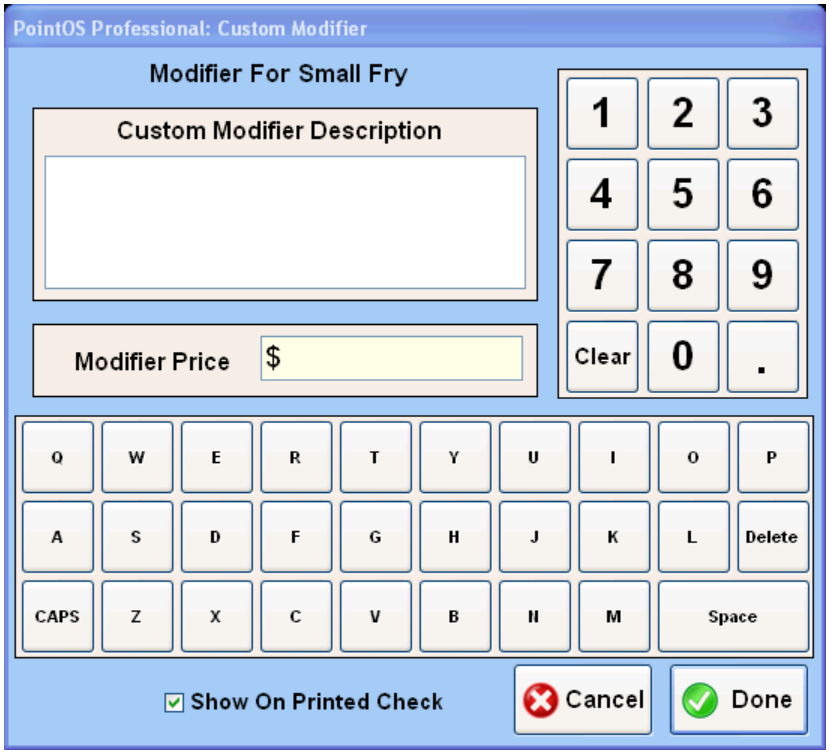

Figure 28: Custom Item Modifier

To enter a custom modifier, complete the following steps:

1. Enter a description of how to modify the menu item in the **Custom Modifier Descriptio**n field.
2. Enter any additional amount for the modification in the **Modifier Price** field.
3. Check the **Show On Printed Check** box to include the modifier on the customer's printed check.

NOTE: The Modifier will always show on the check if it affects the price.

4. Select **Done**. Or select **Cancel** to close the *Custom Modifier* screen without saving a custom modifier.

Printer Holds

When you close the *Order Entry* screen for an order, the *Printer Holds* screen displays to allow you to select items to print or hold.

Figure 29: Printer Holds Screen

Use the **Up** and **Down** arrows to scroll through a long list of items.

 - Indicates that the item will be held and not printed at this time.

 - Indicates that the item will be printed at this time.

To hold an item, select the printer icon. It changes to the stop icon.

You can select the item (not the icon next to it) to open the *Item Detail* screen to view any modifiers.

The **Select All** button selects all of the items for printing. The **UnSelect All** holds all of the items.

Make your selections and holds and select **Print Selected**. Or select **Print All** or **Print None**.

Item Detail

The *Item Detail* screen allows you to view the detail for an item.

To open the *Item Detail* screen for an item, select the item (not the icon next to it) from the *Printer Holds* screen.

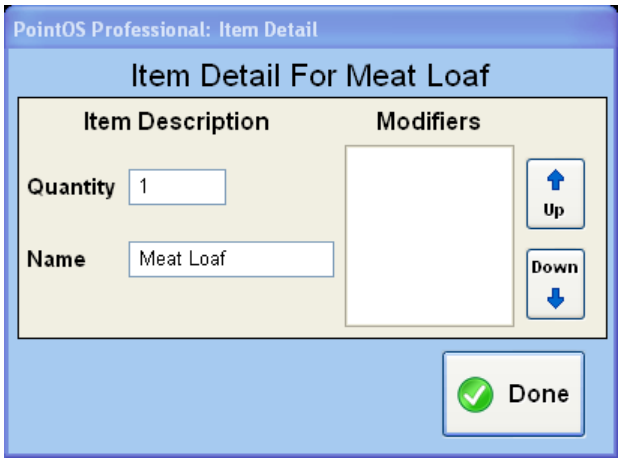

Figure 30: Item Detail

You can view the quantity, name of the item, and any modifiers on the *Item Detail* screen. Use the **Up** and **Down** arrows to scroll through a long list of modifiers.

Reorder Items

The Reorder Items feature allows you to quickly enter another item exactly like another item on the order, including any modifiers.

There are two ways to reorder an item from the *Order Entry* screen. The first method allows you to reorder multiple quantities for items from the order using the same modifiers. It also allows you to reorder a voided item. Complete the following steps:

1. From the *Order Entry* screen, select **Reorder** from the top left corner.

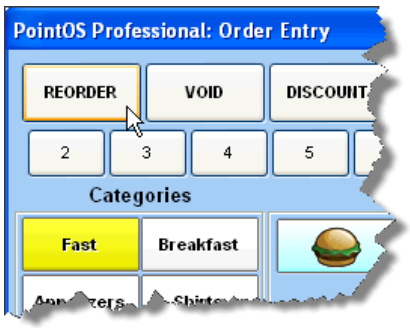

Figure 31: Order Entry Screen Showing Reorder Button

The system displays the *Reorder Items* screen.

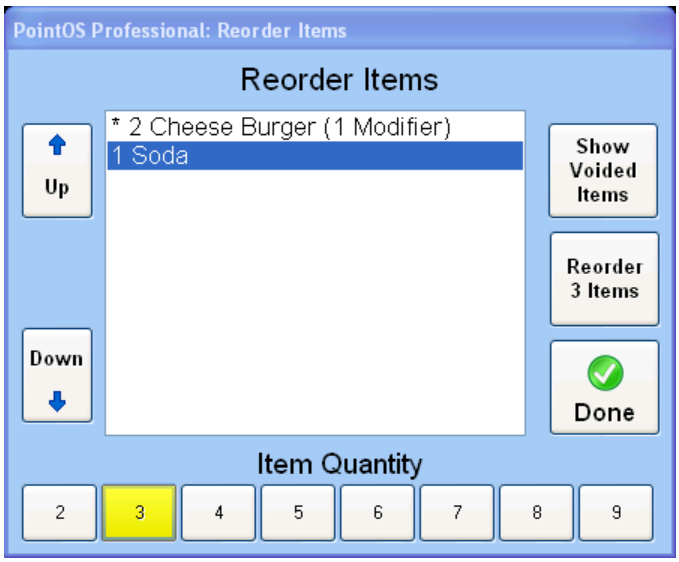

Figure 32: Reorder Items

2. Select the Item from the **Reorder Items** list. Use the **Up** and **Down** arrows to scroll through a long list of items. Select **Show Voided Items** to show any items from the order that have been voided.
3. To add more than one of the item to the order, select the **Item Quantity**.
4. Select **Reorder Item**. If there are multiple quantities selected, the button will show how many to reorder.
5. Select **Done**.

The second method of reordering allows you to quickly reorder one item and select different modifiers. Complete the following steps:

1. From the **Amount Due** area on the *Order Entry* screen, select the item in the order that you want to reorder.
2. Select the **Show Item Options** button below the **Amount Due** area.

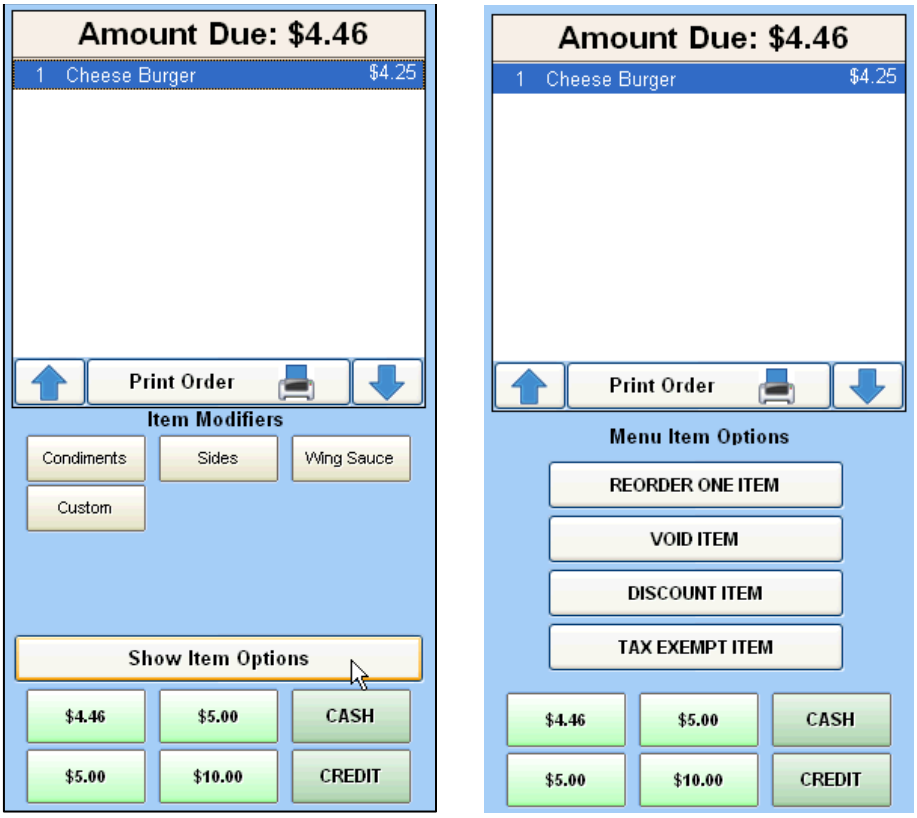

Figure 33: Order Entry Screen Showing Amount Due and Show Item Options

3. Select the **Reorder One Item** button.
4. Select the **Item Modifiers** for the item, if desired.

Void Items

The **Void Items** feature allows you to quickly remove an item from the order. The void items feature distinguishes between items that are removed from inventory, and items that were not removed from inventory. This helps with inventory control.

NOTE: A Manager access code is required to void an item from an order.

There are two methods for voiding an item from an order. For the first method, complete the following steps.

1. From the *Order Entry* screen, select **Void** from the top left corner.

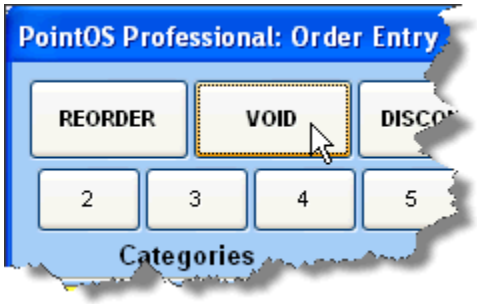

Figure 34: Order Entry Screen Showing Void Button

The system displays the *Item Void* screen.

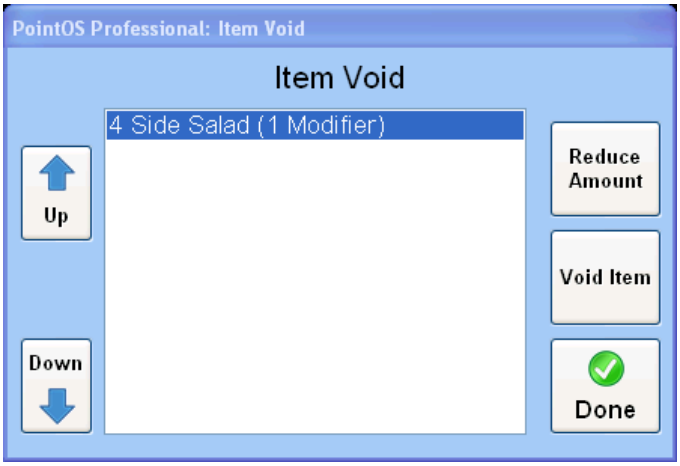

Figure 35: Item Void Screen

2. Select the Item from the **Item Void** list. Use the **Up** and **Down** arrows to scroll through a long list of items.
3. Select **Reduce Amount** or **Void Item**.

The system displays the *Enter Manager Code* screen.

4. Enter the Manager Access Code.

The system displays the *Void Item Reason* screen.

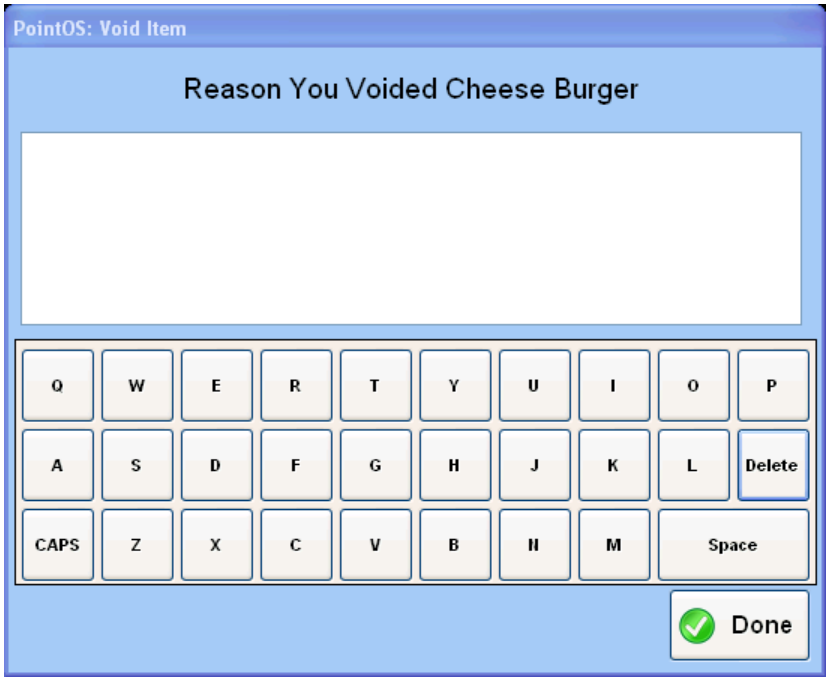

Figure 36: Void Item Reason Screen

5. Enter a reason for why you are voiding the item for the Manager report.

The system displays the *Item Inventory Screen* to determine whether the item was removed from inventory.

Figure 37: Void Item Message

6. Select **Yes** or **No**.
7. Select **Done**.

To void an item using the second method, complete the following steps:

1. From the **Amount Due** area on the *Order Entry* screen, select the item in the order that you want to void.
2. Select the **Show Item Options** button below the **Amount Due** area.

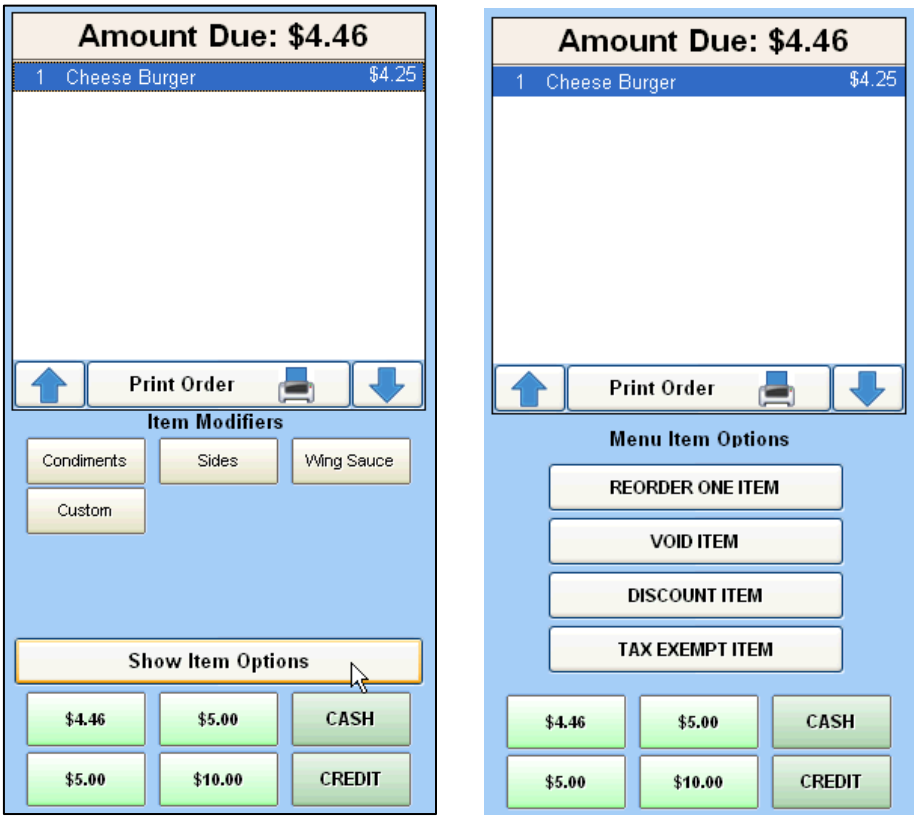

Figure 38: Order Entry Screen Showing Amount Due and Show Item Options

3. Select the **Void Item** button.
4. Select the **Item Modifiers** for the item, if desired.
5. The system displays the *Enter Manager Code* screen. Enter the Manager Access Code.
6. The system displays the *Void Item Reason* screen. Enter a reason for why you are voiding the item for the Manager report.
7. The system displays the *Item Inventory Screen* to determine whether the item was removed from inventory. Select **Yes** or **No**.
8. Select **Done**.

Working with Discounts

This chapter explains discounts. You can discount a single item in an order, or you can discount the entire order for a customer. You can also mark an item or entire order as tax exempt. This feature also allows you to set special pricing for the customer on all future visits.

NOTE: A Manager access code is required to apply discounts, to set tax exempt status for an item or order, or to set special customer pricing.

Discount an Order

To discount an entire order, complete the following steps:

1. From the *Order Entry* screen, select **Discount** from the top left corner.

Figure 39: Order Entry Screen Showing Discount Button

2. The system displays the *Enter Manager Code* screen. Enter the Manager Access Code.

The system displays the *Discounts* screen.

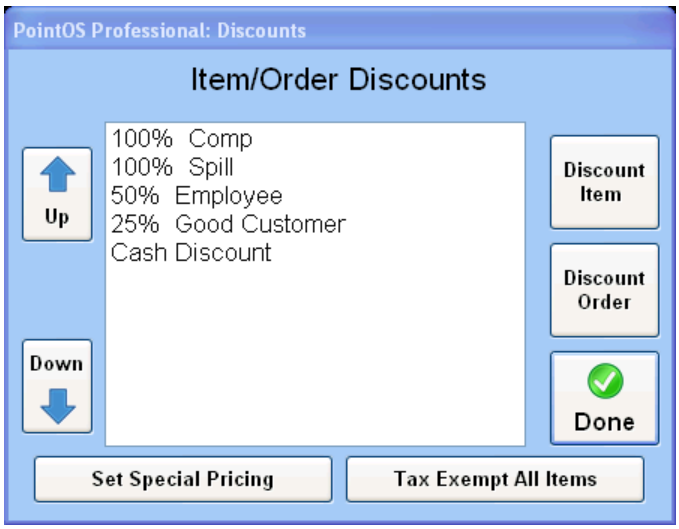

Figure 40: Discounts Screen

3. Select the type of discount from the **Item/Order Discounts** list. Use the **Up** and **Down** arrows to scroll through a long list of items.
4. Select **Discount Order**.

The system displays the *Discount Order Reason* screen.

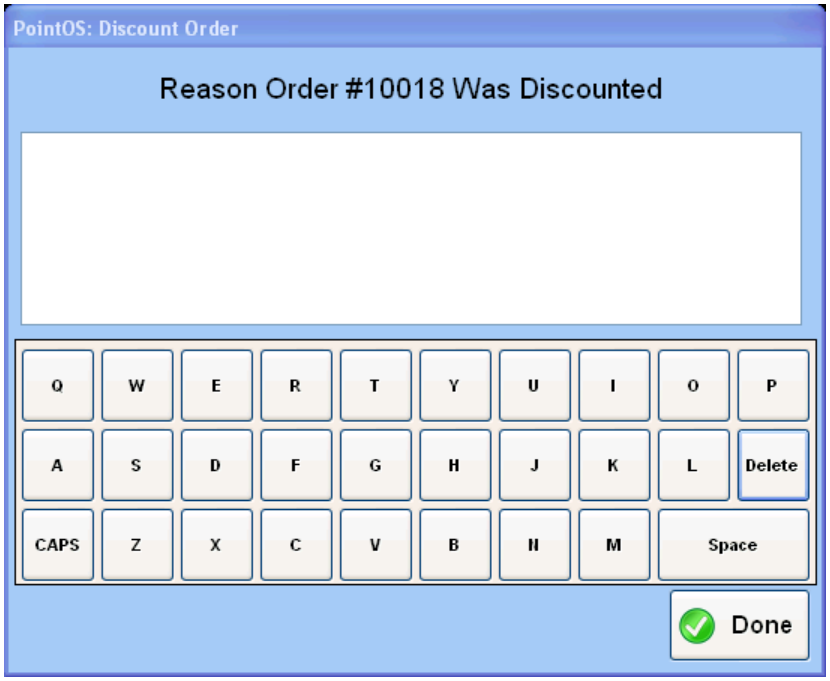

Figure 41: Discount Order Reason Screen

5. Enter a reason for why you are discounting the order for the Manager report.

6. Select **Done**.

Discount an Item (Method One)

There are two ways to discount a single item from an order. The first method is similar to the Discount Order procedure above. Complete the following steps:

1. From the *Order Entry* screen, select **Discount** from the top left corner.
2. The system displays the *Enter Manager Code* screen. Enter the Manager Access Code.
3. The system displays a screen to help you select the type of discount. Select the type of discount from the **Item/Order Discounts** list. Use the **Up** and **Down** arrows to scroll through a long list of items.
4. Select **Discount Item**.

The system displays the *Discounts* screen.

Figure 42: Item/Order Discounts Screen

5. Select the Item you want to discount. Use the **Up** and **Down** arrows to scroll through a long list of items.
6. Select **Discount Item**. The button displays the amount for the type of discount you selected on the previous screen. Or select **Remove Discount** to remove a previously applied discount.
7. The system displays the *Discount Order Reason* screen. Enter a reason for why you are discounting the order for the Manager report.
8. Select **Done**.

Discount an Item (Method Two)

To select the item from the **Amount Due** area before applying the discount, complete the following steps:

1. From the **Amount Due** area on the *Order Entry* screen, select the item in the order that you want to discount.
2. Select the **Show Item Options** button below the **Amount Due** area.

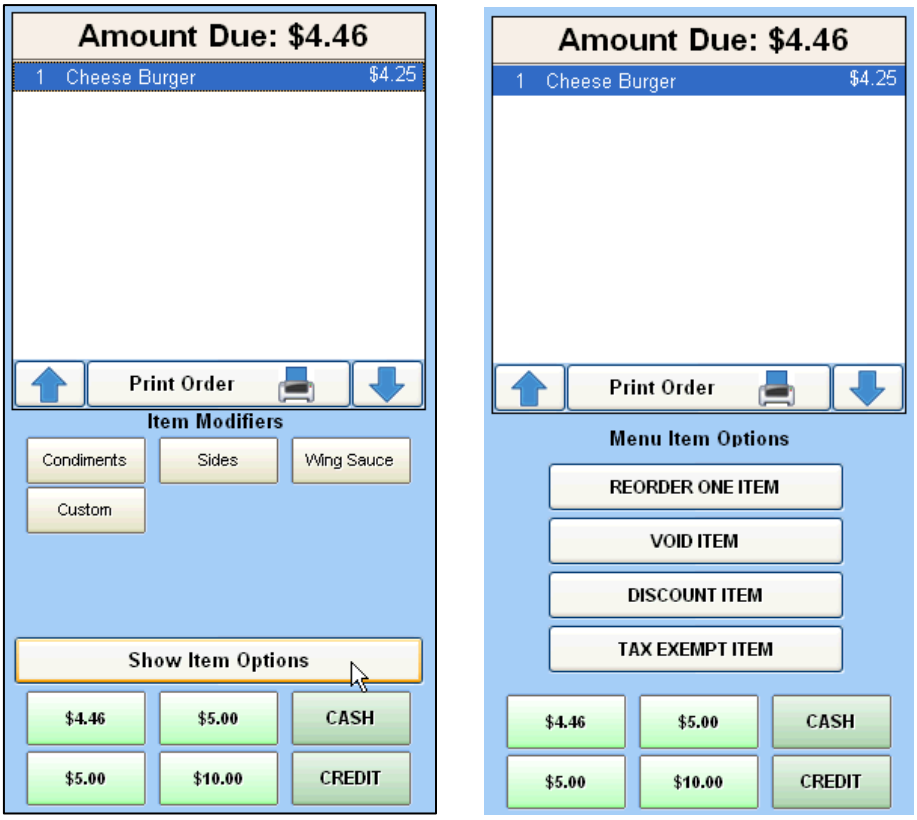

Figure 43: Order Entry Screen Showing Amount Due and Show Item Options

3. Select the **Discount Item** button.
4. The system displays the *Enter Manager Code* screen. Enter the Manager Access Code.
5. The system displays the *Discounts* screen.
6. Select the type of discount from the **Item/Order Discounts** list. Use the **Up** and **Down** arrows to scroll through a long list of items.
7. Select **Discount Item**.
8. The system displays the *Discount Item Reason* screen. Enter a reason for why you are discounting the item for the Manager report and select **Done**.
9. Select **Done** on the *Discounts* screen.

Set Special Pricing for a Customer

To set special pricing for a customer, complete the following steps:

1. From the *Order Entry* screen, select **Discount** from the top left corner.
2. The system displays the *Enter Manager Code* screen. Enter the Manager Access Code.

The system displays the *Discounts* screen.

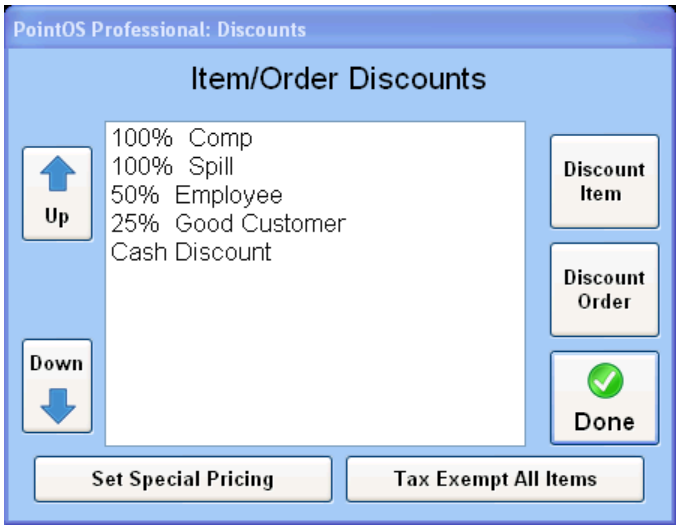

Figure 44: Discounts Screen

3. Select **Set Special Pricing**.

The system displays the *Set Customer Price Level* screen.

Figure 45: Set Customer Price Level Screen

4. Select the **Customer Price Level** from the options.
5. The system displays the *Discount Order Reason* screen. Enter a reason for why you are providing special pricing for this customer for the Manager report and select **Done**.
6. Select **Done** on the *Set Customer Price Level* screen.

7. Select **Done** on the *Discounts* screen.

Tax Exempt an Order

To set an entire order as tax exempt, complete the following steps:

1. From the *Order Entry* screen, select **Discount** from the top left corner.

Figure 46: Order Entry Screen Showing Discount Button

2. The system displays the *Enter Manager Code* screen. Enter the Manager Access Code.

The system displays the *Discounts* screen.

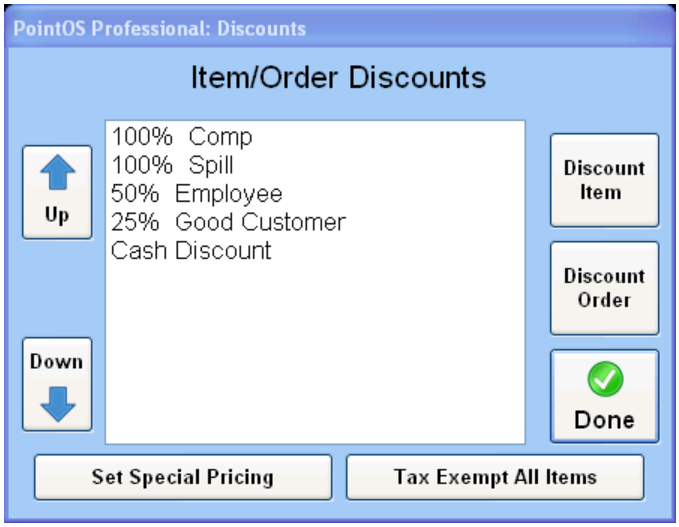

Figure 47: Discounts Screen

3. Select **Tax Exempt All Items**.
4. The system displays the *Enter Manager Code* screen. Enter the Manager Access Code.
5. The system displays a message indicating that all ordered items are tax exempt. Select **OK** to close the message.
6. Select **Done** on the *Discounts* screen.

Tax Exempt an Item

To tax exempt a single item from an order, complete the following steps:

1. From the **Amount Due** area on the *Order Entry* screen, select the item in the order that you want to discount.
2. Select the **Show Item Options** button below the **Amount Due** area.

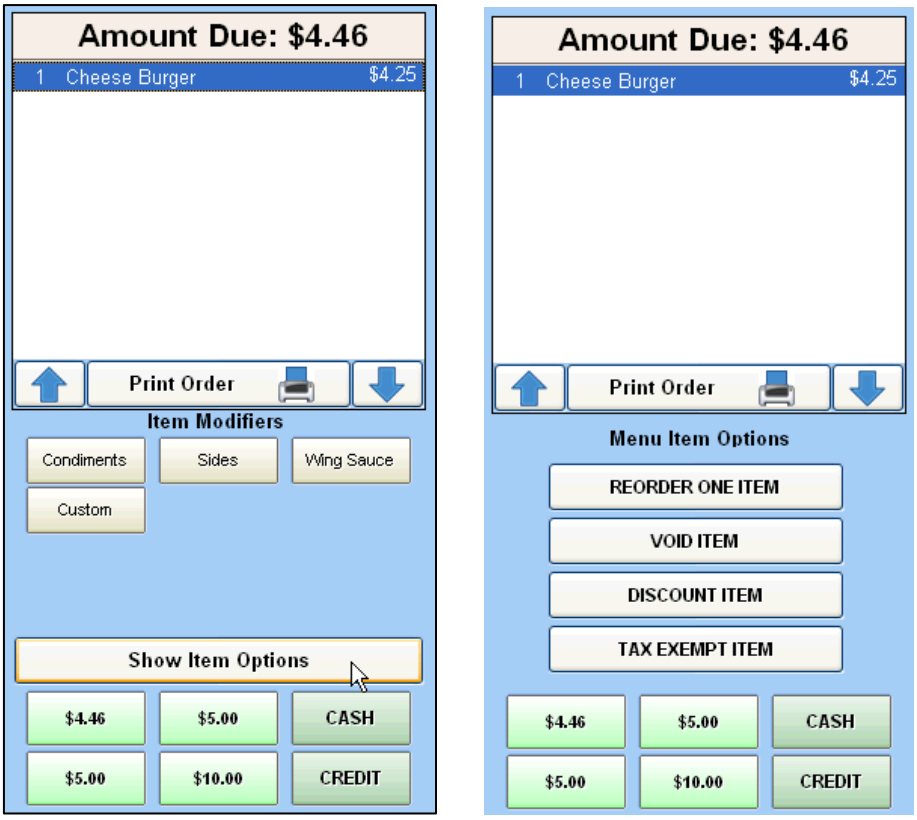

Figure 48: Order Entry Screen Showing Amount Due and Show Item Options

3. Select the **Tax Exempt Item** button.
4. The system displays the *Enter Manager Code* screen. Enter the Manager Access Code.

Working with Payments

The system accepts cash, credit, and other payments for orders. This chapter explains how to enter payment information.

Make Cash Payments

When the customer pays for the order in cash, you can quickly enter the amount paid, and the system displays the change due. You enter payments on the *Order Entry* screen.

The *Order Entry* screen displays some cash options below the **Amount Due** area, based on the amount due for the order.

If one of the options matches the amount the customer paid, select it.

If none of the cash options below the **Amount Due** list matches the amount the customer paid, complete the following steps:

1. Select the **Cash** button.
2. The system displays the *Enter Cash Amount* screen. Enter the amount of cash the customer paid. You can use the number keypad, and/or use the denomination buttons on the right.

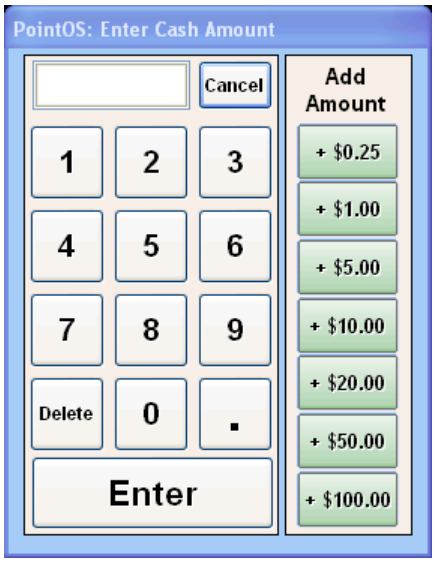

Figure 49: Enter Cash Amount Screen

2. When you have entered the correct amount, select **Enter**.

After you have entered the cash payment, the system displays the **Change Due**. The receipt will automatically print in 1 minute. Select **Print** to print it immediately, or select **Done** to close the **Change Due** information without printing the receipt.

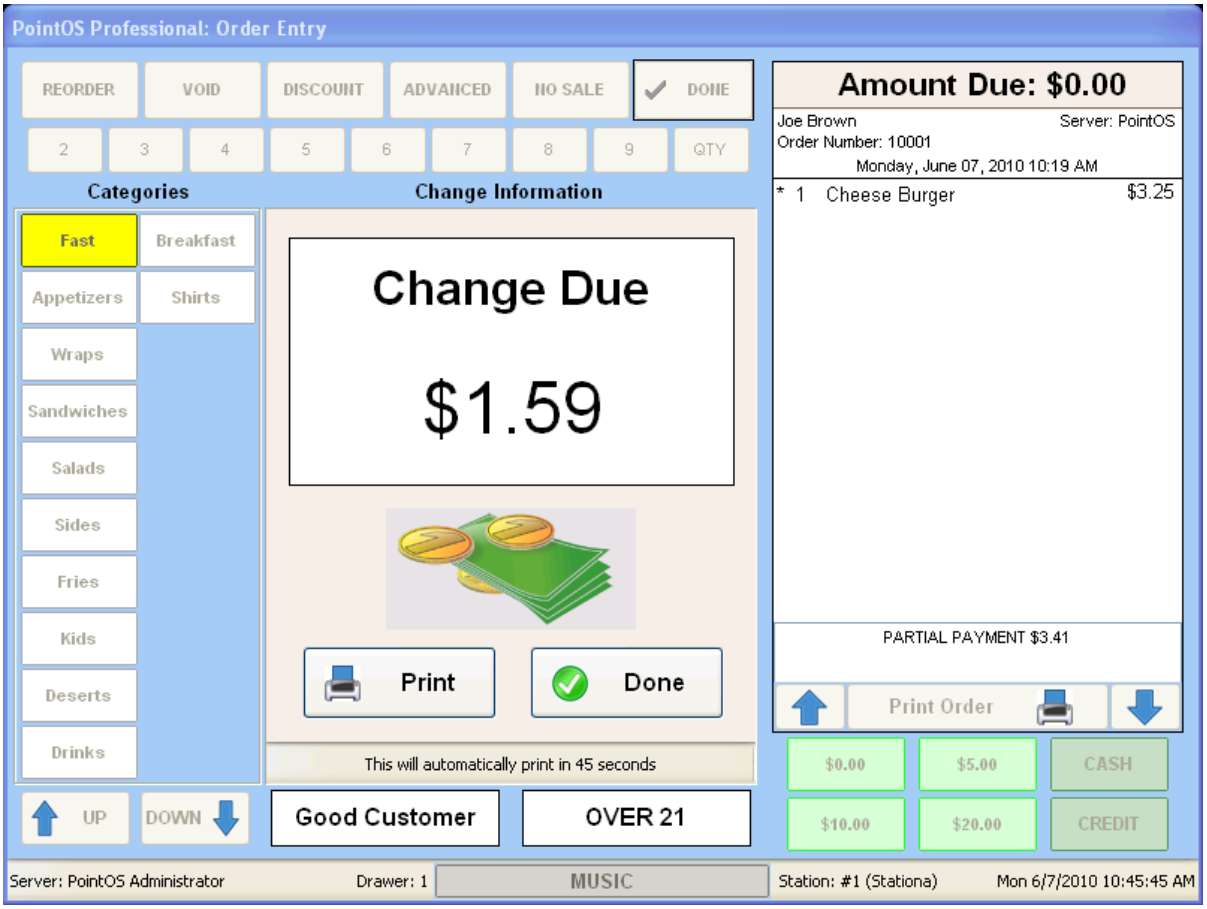

Figure 50: Order Entry (Change Due)

The system returns to the *Select Tab* screen showing all the open orders.

Make Credit Card Payment

The screen you use for credit card transactions depends on the way credit cards are set up on your system.

To make a credit card payment, select **Credit** under the **Amount Due** area of the *Order Entry* screen.

Credit Card Sale Screen

If you have a credit card terminal connected to the system, the system displays the *Credit Card Sale* screen when you select **Credit** from the *Order Entry* screen.

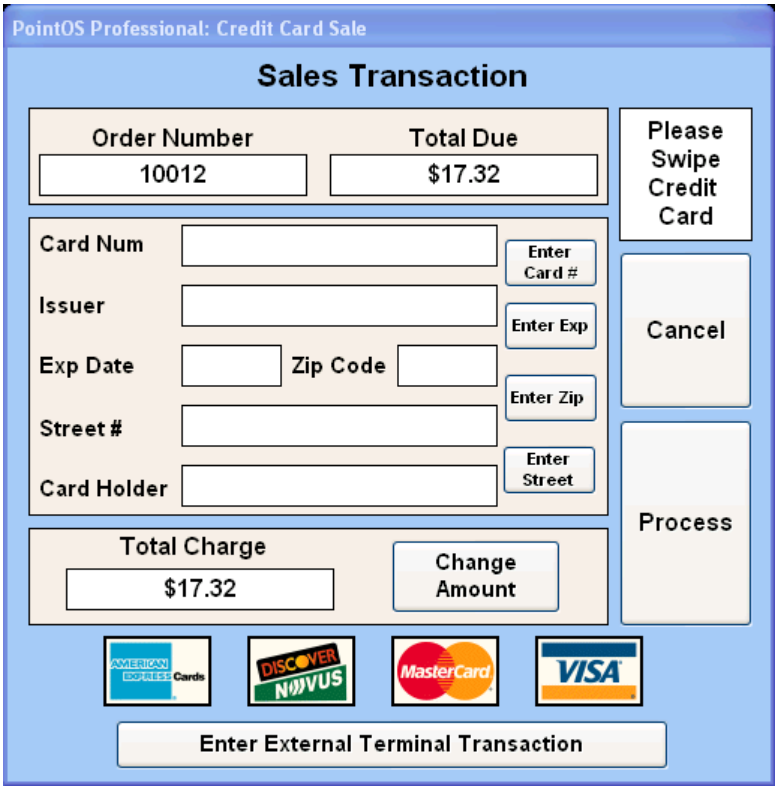

Figure 51: Credit Card Sale Screen

If you have pre-authorized a credit card for this order, the system displays the following additional option on the *Credit Card Sale* screen.

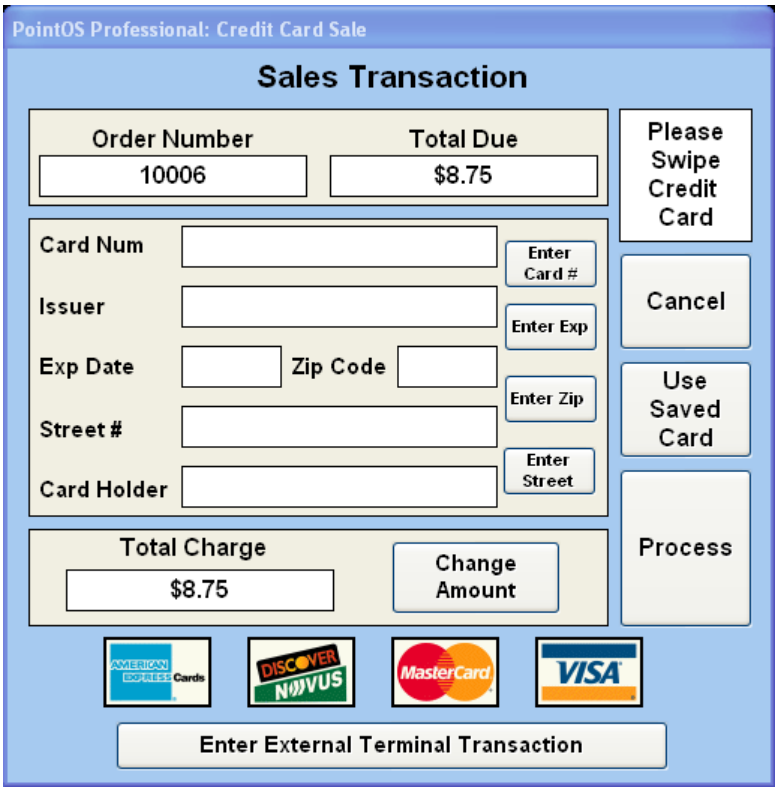

Figure 52: Credit Card Sale with Pre-Authorization

If you have pre-authorized the credit card, select **Use Saved Card** to enter the credit card information. Then select **Process**.

If you have not pre-authorized the credit card, swipe the credit card, or enter the **Card Number**, the **Expiration Date**, the cardholder's **Zip Code**, and the cardholder's **Street number**. Select **Change Amount** to change the amount of the transaction, such as when the customer is using multiple payment options. Select **Process** to process the transaction.

External Terminal Credit Card Sale Screen

If your credit card terminal is not connected to the system or you have difficulty processing the transaction, use the *External Terminal Credit Card Sale* screen.

To open the *External Terminal Credit Card Sale* screen, select **Credit** from the *Order Entry* screen or **Enter External Terminal Transaction** from the *Credit Card Sale* screen.

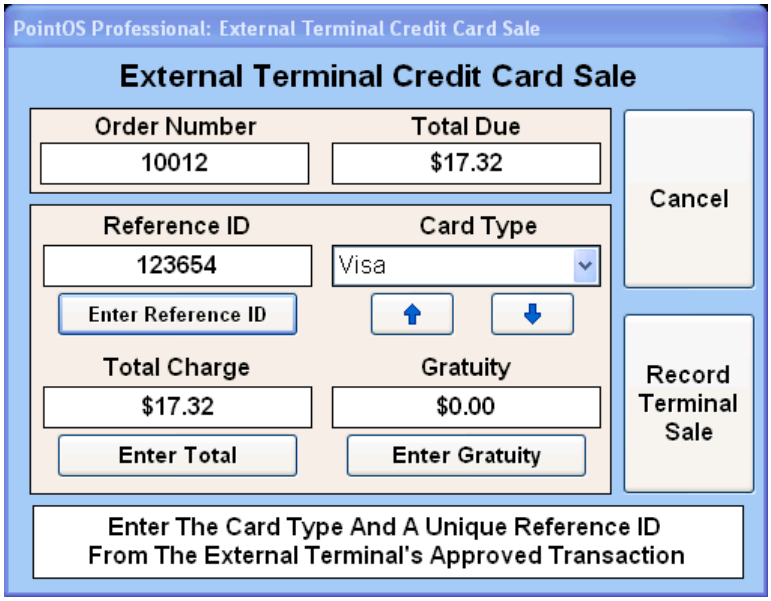

Figure 53: External Terminal Credit Card Sale

To record a credit card transaction using an external terminal, complete the following steps:

1. Enter the **Reference ID** from the credit card processing at the external terminal.

WARNING: **DO NOT use the Credit Card number as the Reference ID.** Credit Card Numbers should NEVER be stored by the system. The Reference ID is the credit card transaction approval code.

2. Select the **Card Type** from the drop down list. Or use the **Up** and **Down** arrows to scroll through the list of options.
3. To adjust the total, such as when the customer is using multiple payment options, select **Enter Total** and enter the amount to charge.
4. To enter a charged gratuity, select **Enter Gratuity** and enter the amount.
5. Select **Record Terminal Sale**.

The system displays a message.

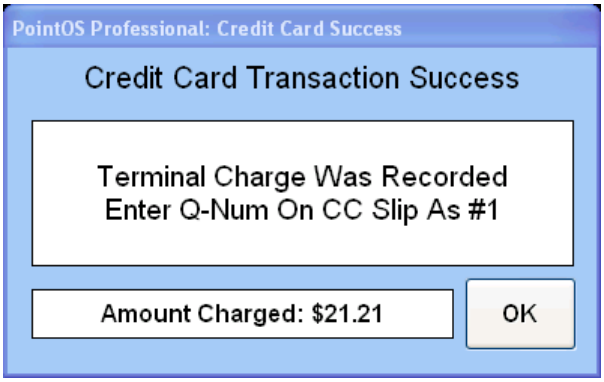

Figure 54: Credit Card Success Message

6. Select **OK** to close the message.

The system returns to the *Select Tab* screen showing all the open orders.

Make Other Payment

The system can accept other types of payments, including gift cards and personal checks, depending on your system settings.

To make another type of payment, complete the following steps:

1. Select the **Advanced** button at the top of the *Order Entry* screen.

The system displays the Advanced options below the **Amount Due** area.

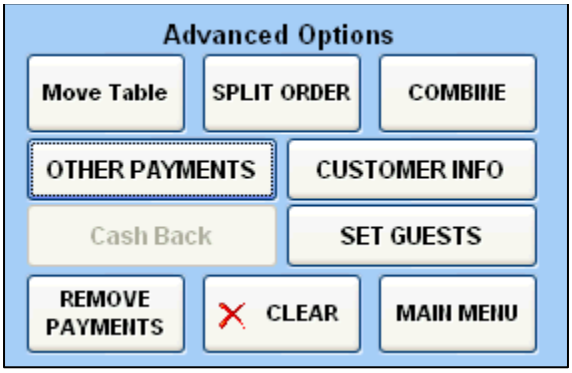

Figure 55: Order Entry Screen Advanced Options

2. Select **Other Payments**.

The system displays the *Select Payment Type* screen.

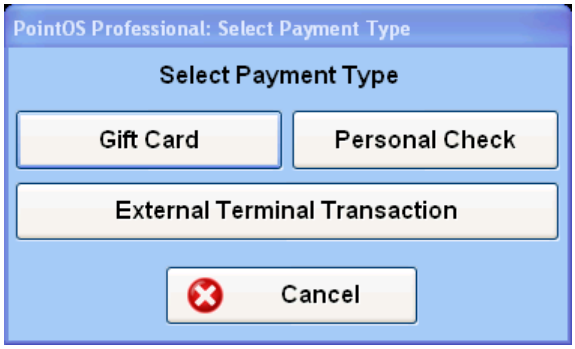

Figure 56: Select Payment Type

3. Select the Payment Type. The **Gift Card** option opens the *Gift Card Transaction* screen. The **Personal Check** option opens the *Check Payment* screen. The **External Terminal Transaction** opens the *External Terminal Credit Card Sale* screen. Or select **Cancel** to close the *Select Payment Type* screen to return to the *Order Entry* screen.

Gift Card Transaction Screen

The *Gift Card Transaction* screen allows you to redeem a gift card for payment. If you are using Merchant Warehouse, it will make a connection with them. If you are not using Merchant Warehouse, the gift card information is stored locally.

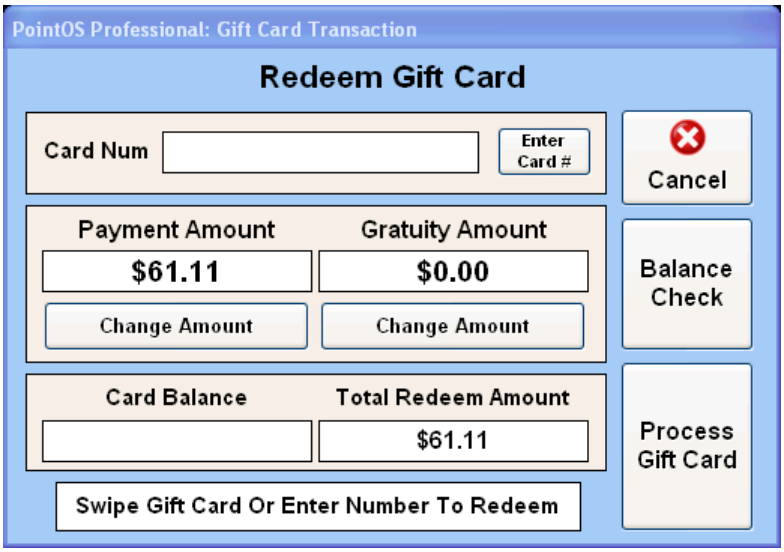

Figure 57: Gift Card Transaction Screen

Swipe the gift card or enter the card number. Select **Balance Check** to determine the card balance. The **Card Balance** area should display the current balance on the card.

To make a partial payment with the gift card, select **Change Amount** under **Payment Amount** and enter the partial amount to pay with the gift card.

To include the gratuity on the gift card, select **Change Amount** under **Gratuity** and enter the gratuity to include in the gift card payment.

To process the payment, select **Process Gift Card**. Or select **Cancel** to close the *Gift Card Transaction* screen without processing a payment.

Check Payment Screen

The *Check Payment* screen allows you to enter a personal check as payment.

NOTE: Checks are recorded, but the system does not verify the funds.

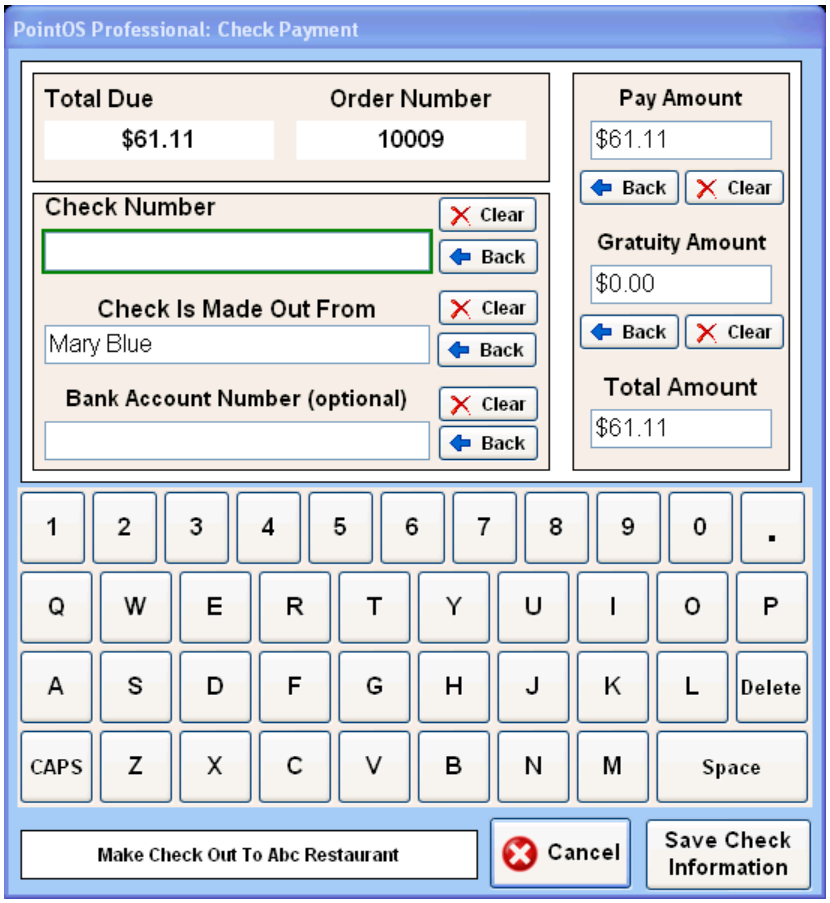

Figure 58: Check Payment Screen

Each field that allows data entry includes a **Clear** button and a **Back** button to help correct any mistakes.

- The **Clear** button removes any data you have entered so that you can start over.
- The **Back** button deletes the previous character you entered.

To enter a check payment, complete the following steps:

1. Enter the **Check Number**.
2. The Customer's Name is listed in the **Check Is Made Out From** field. If the tab is not connected to a customer, or the another guest with the customer wrote the check, enter the name on the check.
3. If desired, enter the **Bank Account Number**.
4. Enter the **Pay Amount**. This amount can be less than the order total, if the customer wants to make a partial payment, but it cannot be more than the order total.
5. If the customer included gratuity on the check, enter the **Gratuity Amount**. The total amount is displayed. Make sure the amount displayed matches the amount on the check.
6. Select **Save Check Information**. Or select **Cancel** to close the *Check Payment* screen without entering the check payment.
7. The system displays the **Change Due (0.00)** message. The receipt will automatically print in 1 minute. Select **Print** to print it immediately, or select **Done** to close the **Change Due** information without printing the receipt.

Recalling, Voiding, or Transferring Orders

This chapter explains the following additional activities you can perform with orders:

- You can recall an order to review it, reprint the credit card receipt, or to add to the order.
- You can void an entire order and indicate whether the items were taken out of inventory.
- You can transfer an order to another server or employee.

Recall Order

You can recall an order to view or print the tab, reprint a credit card receipt, or to return to the *Order Entry* screen for that order, where you can make any necessary adjustments to the order or payments.

The *Recall Order* screen displays both open and closed orders.

To recall an order, complete the following steps:

1. Select **Recall Order** from the *Main Menu*.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

The system displays the *Recall Order* screen.

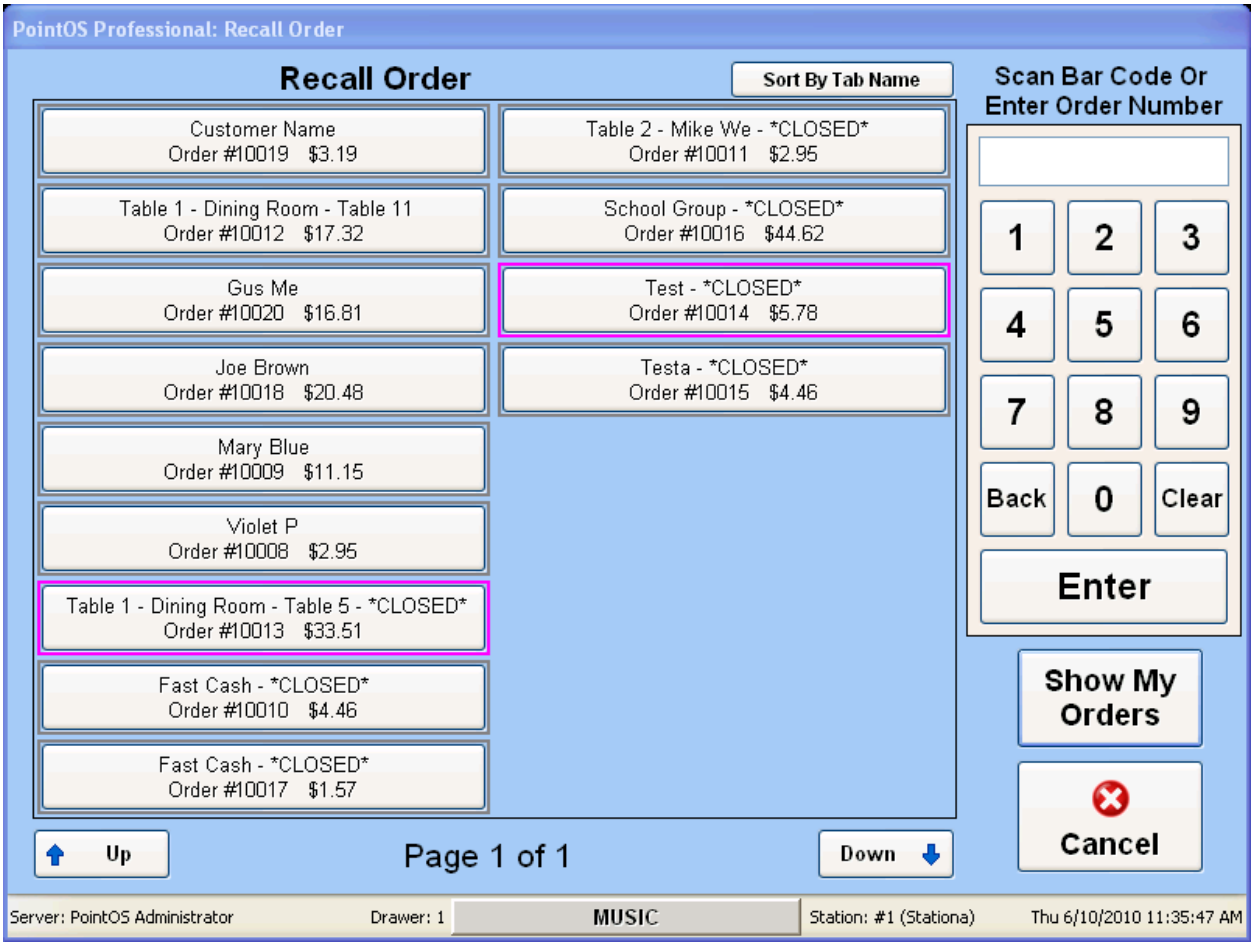

Figure 59: Recall Order

The *Recall Order* screen displays the open and closed orders by name. The orders for the current employee access code are highlighted in the list in the employee color set on the Manager *Employee Setup* screen. Use the **Up** and **Down** arrows to scroll through a long list of orders. You can change the view using one of the following options:

- The button at the top right toggles between three sorting options: **Sort Old to New**, **Sort New to Old**, or **Sort by Tab Name**. Select the button to change the sort order for the displayed tabs.
- Select **Show My Orders** to filter the list to only your orders.

Select an order to open the *Recall Tab* screen for that order.

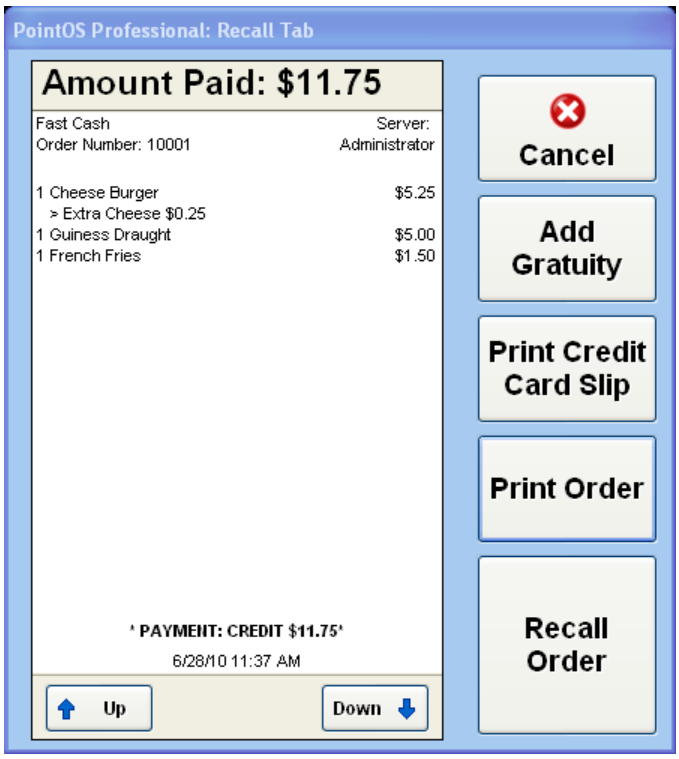

Figure 60: Recall Tab

If the order was paid by credit card, you can select **Add Gratuity** to add the gratuity to the charge. The system opens the **Enter Gratuity** screen. Enter the amount and select **Enter**.

If the order was paid by credit card, you can select **Print Credit Card Slip** to reprint the credit card slip. The system displays a message to make sure you want to reprint the credit card slip. Select **Yes** to continue.

Select **Print Order** to print a receipt for the order. The system displays a *Print Receipt* message to make sure you want to print the order. Select **Yes** to continue or **No** to close the message without printing the order.

Select **Recall Order** to open the *Order Entry* screen for the selected order. If the order is closed, the system displays an *Open Order* message make sure you want to reopen a closed order. Select **Yes** to continue or **No** to close the message without opening the order.

Void Order

NOTE: You cannot void orders with payments. Instead, recall the order, remove the payments, and then void the order. Refer to the "Frequently Asked Questions" chapter of this User Guide for more information.

The *Void Order* screen allows you to void open orders.

To void an order, complete the following steps:

1. Select **Void Order** from the *Main Menu*.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

The system displays the *Void Order* screen.

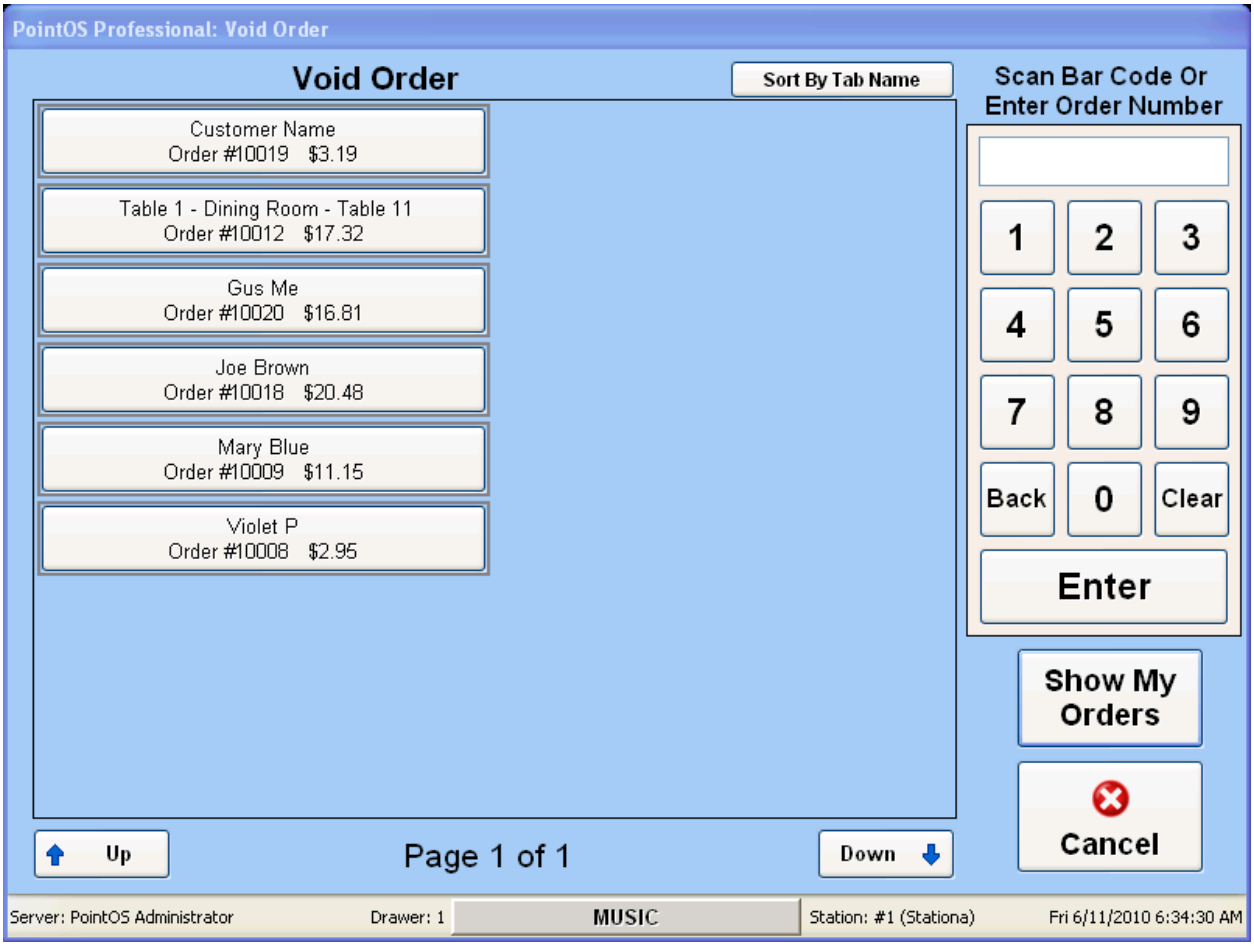

Figure 61: Void Order

The *Void Order* screen displays the open orders by name. The orders for the current employee access code are highlighted in the list. Use the **Up** and **Down** arrows to scroll through a long list of orders. You can change the view using one of the following options:

- The button at the top right names toggles between three sorting options: **Sort Old to New**, **Sort New to Old**, or **Sort by Tab Name**. Select the button to change the sort order for the displayed tabs.
- Select **Show My Orders** to filter the list to only your orders.

3. Select an order to open the *Recall Tab* screen for that order.

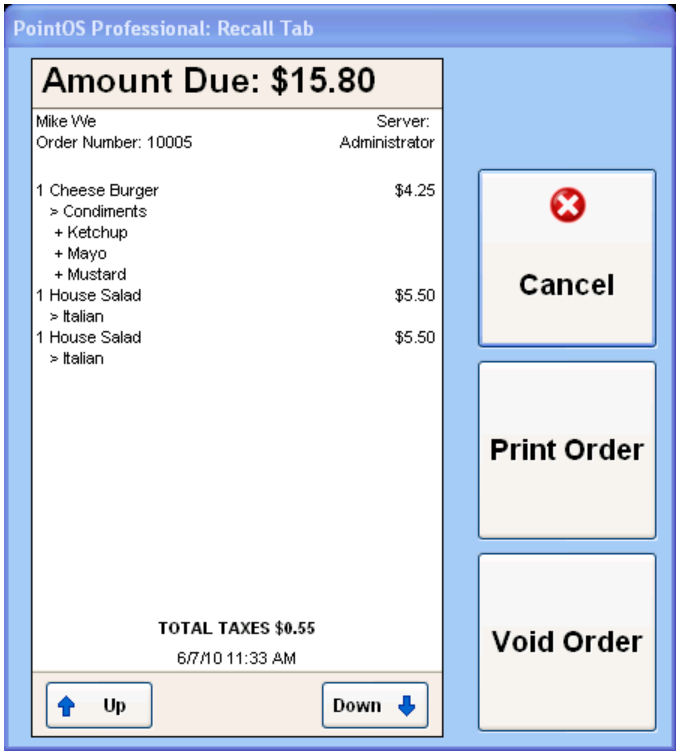

Figure 62: Recall Tab/Void Order

4. To print a receipt for the order, select **Print Order**. The system displays a *Print Receipt* message to make sure you want to print the order. Select **Yes** to continue or **No** to close the message without printing the order.
5. Select **Void Order** to void the selected order. The system displays a message to make sure you want to void the order. Select **Yes** to continue or **No** to close the message without voiding the order.
6. The system displays the *Discount Order Reason* screen. Enter a reason for why you are voiding the order for the Manager report and select **Done**.
7. The system displays the *Item Inventory Screen* to determine whether the item was removed from inventory. Select **Yes** or **No**.
8. The system displays a message indicating that the void was successful. Select **OK**.

Transfer Order

The *Transfer* screen allows you to transfer an order or all a server's orders to another server at any time.

To transfer an order, complete the following steps:

1. Select **Transfers** from the *Main Menu*.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

The system displays the *Transfer* screen to determine whether you want to transfer orders or an open cash drawer to another station.

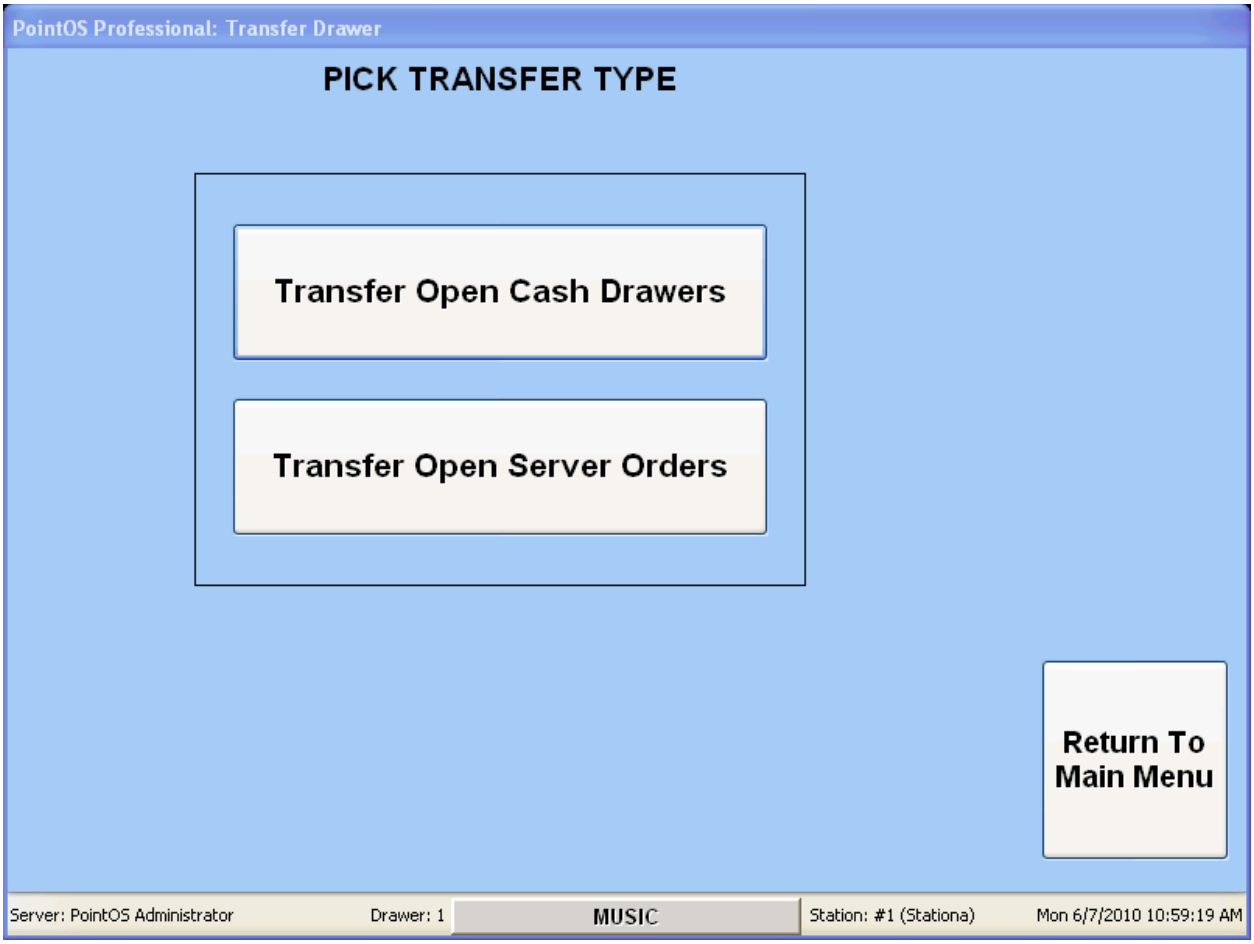

Figure 63: Transfer Drawer

3. Select **Transfer Open Server Orders**. Or select **Return to Main Menu** to close the *Transfer* screen without transferring an order.

The system displays the *Transfer Drawer* screen to determine which server or station needs to transfer one or more orders.

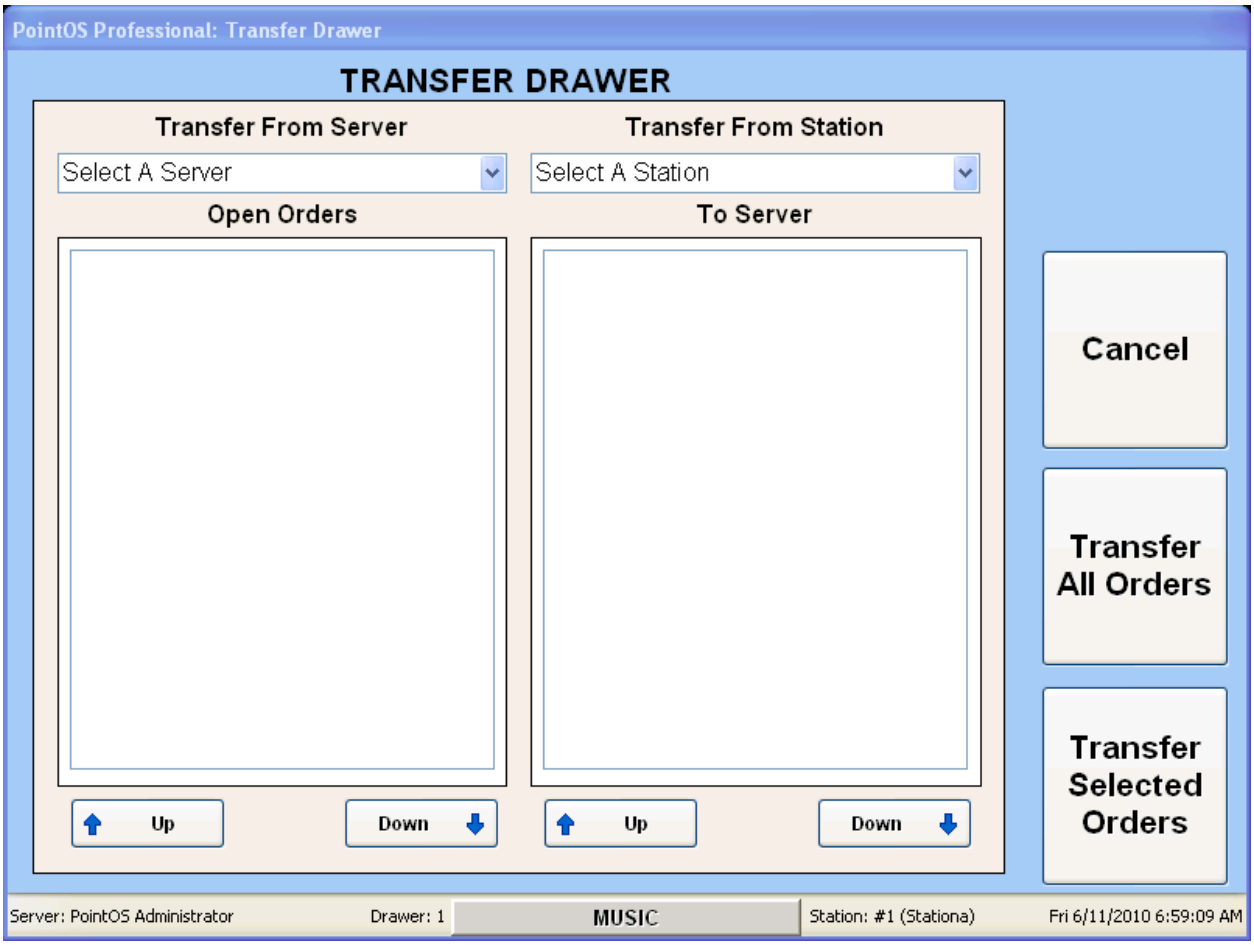

Figure 64: Transfer Orders

4. Select an option from either the **Transfer From Server** or the **Transfer From Station** drop down list.

The system displays the open orders for the selected server in the **Open Orders** list. The system displays the other servers who are cashed in in the **To Server** list.

5. To transfer only some of the orders, select the Order from the **Open Orders** list. You can use the **Shift** key or the **Control** key while you highlight the orders to select multiple orders.
6. Select the new server from the **To Server** list.
7. To transfer the selected order(s), select **Transfer Selected Orders**. To transfer all orders, select **Transfer All Orders**.

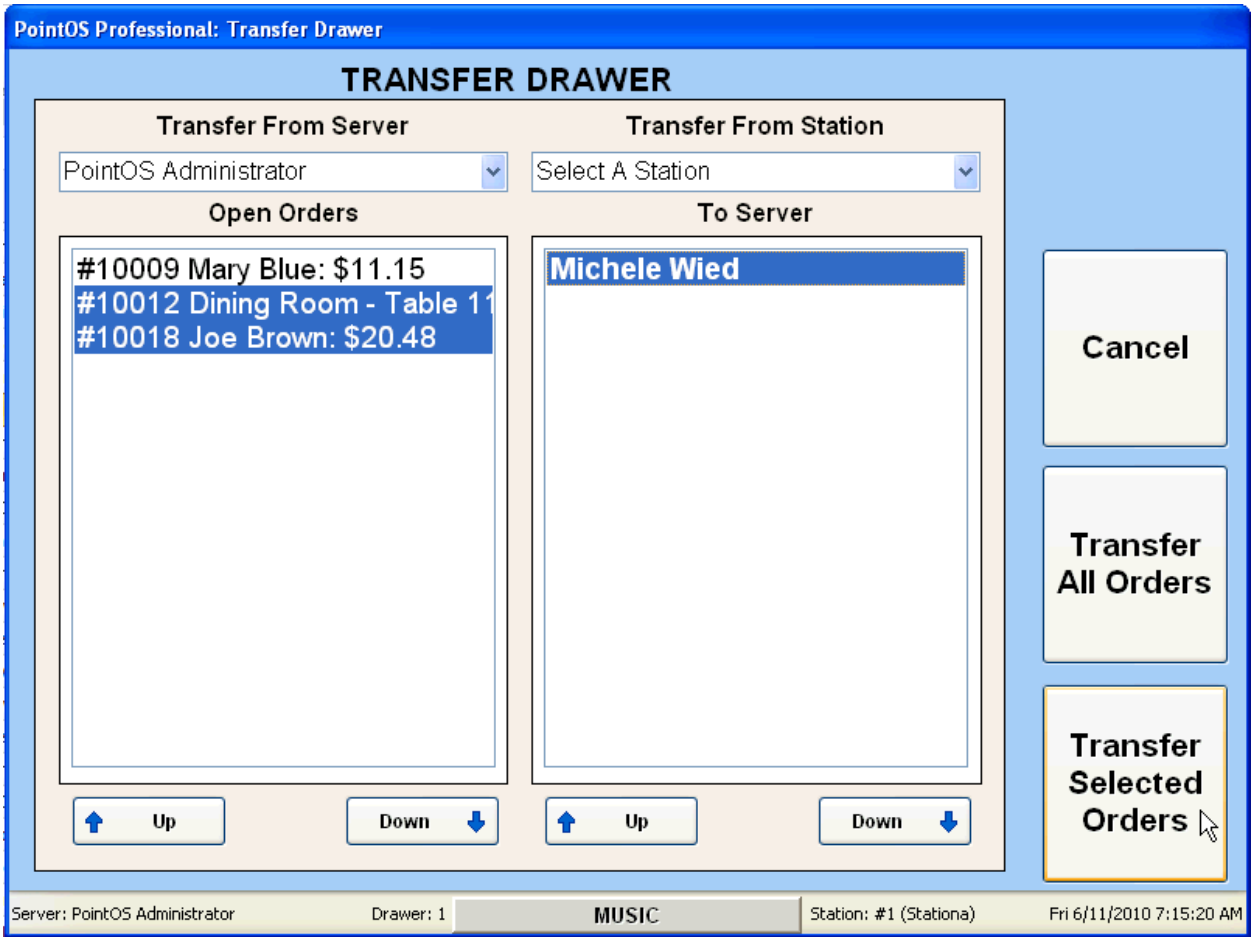

Figure 65: Transfer Orders Example

8. The system displays a message to make sure that you want to transfer to the selected server. Select **Yes** to continue. Or select **No** to close the *Transfer Order* message without transferring the order(s).
9. The system displays a message to indicate that the transfer was successful. Select **OK** to close the message.

The system returns to the *Transfer* screen. Select **Return to Main Menu** to close it.

Working With Advanced Order Options

The Advanced Options for an order allow you to do the following actions:

- Move the order to a table.
- Split an order.
- Combine an order.
- Make payments other than cash or credit card (discussed in the Working With Payments chapter).
- Select a customer for the tab or view the customer profile (discussed in the Working With Customers chapter).
- Allow the customer to request additional cash back.
- Set the number of guests.
- Remove Payments.

Open the Advanced Options

To view the Advanced options, complete the following steps:

1. Select the **Advanced** button at the top of the *Order Entry* screen.

The system displays the **Advanced Options** below the **Amount Due** area.

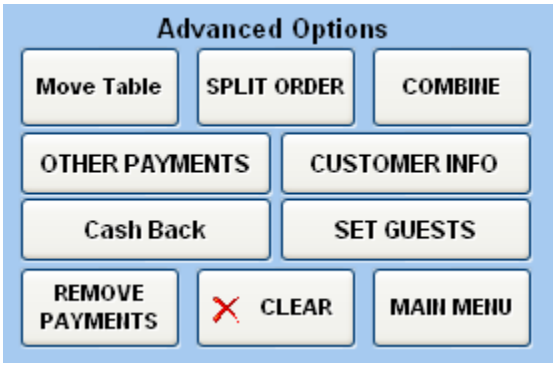

Figure 66: Order Entry Screen Advanced Options

Move Table

The Move Table option allows you to move the selected order to a table in one of your rooms.

To move the selected order to a table, complete the following steps:

1. Select the **Move Table** button from the **Advanced Options** on the *Order Entry* screen.

The system displays the *Move Table* screen.

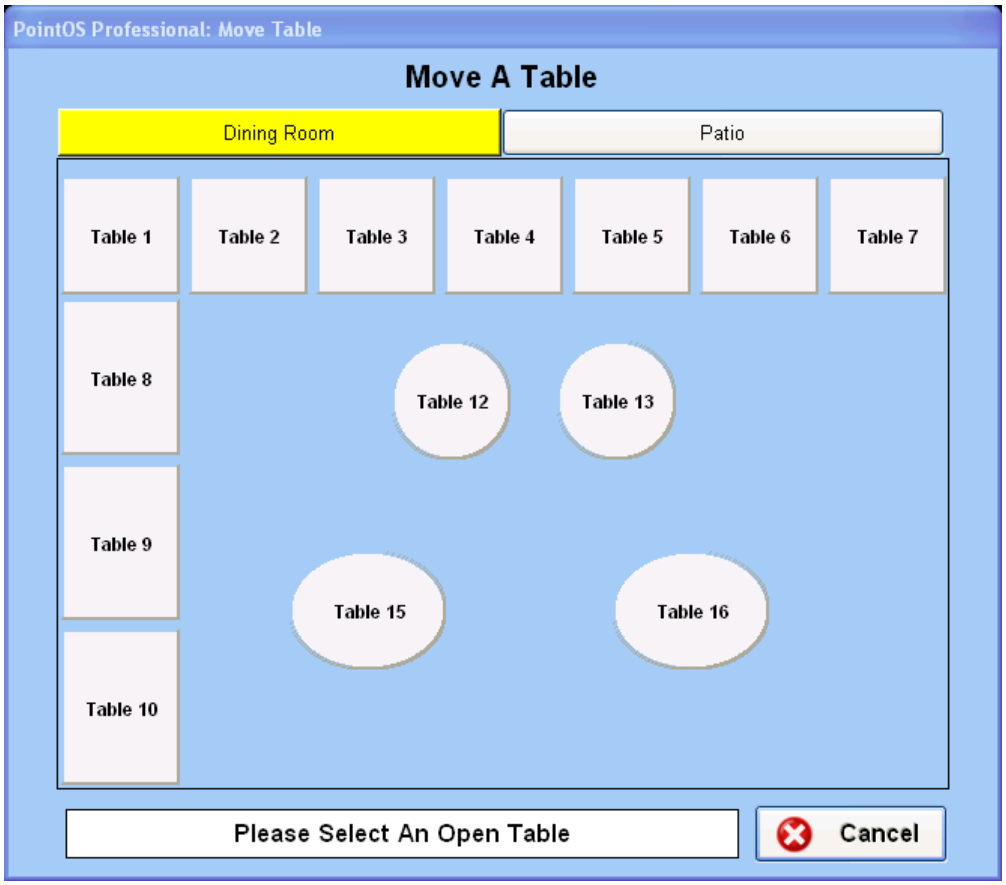

Figure 67: Move Table Screen

2. Select the table where you want to move the selected order. Or select **Cancel** to close the Move Table screen without moving the order.

The system returns to the *Order Entry* screen.

Split Order

The **Split Order** option allows you to split the order items for one order into separate tabs. At the time of splitting, you can print all the split checks at once. However, once you have split the order, each tab is handled separately on the *Order Entry* screen.

To split the selected order, complete the following steps:

1. Select the **Split Order** button from the **Advanced Options** on the *Order Entry* screen.

The system displays the *Split Order* message.

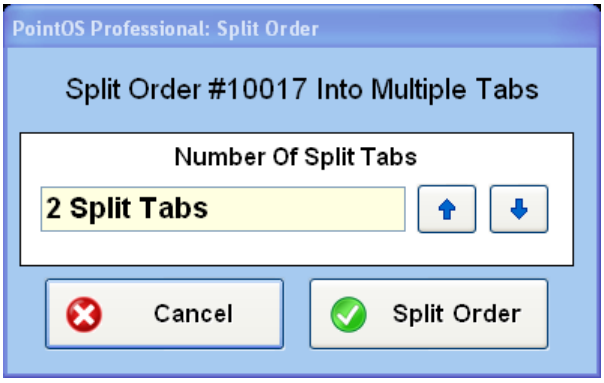

Figure 68: Split Order

2. Use the **Up** and **Down** arrows to select the number of tabs.
3. When you have indicated the correct number of tabs, select the **Split Order** button. Or select **Cancel** to close the *Split Order* screen without splitting the order.

The system displays the *Split Order* screen, listing the **Menu Items** from the selected order.

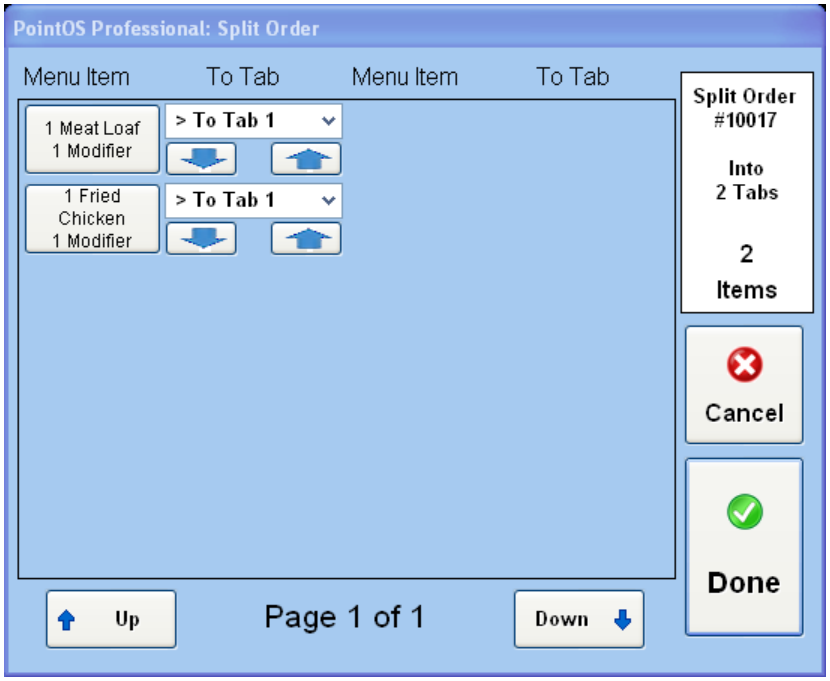

Figure 69: Split Order Example

4. For each menu item listed, use the **Up** and **Down** arrows or the drop down list to select the tab.
5. When you have finished choosing a tab for each menu item, select **Done**. Or select **Cancel** to close the *Split Order* screen without splitting the order.
6. The system displays a message to make sure that you want to split the order. Select **Yes** to continue. Or select **No** to close the message without splitting the order.
7. The system displays a message to ask if you want to print all split checks. Select **Yes** to print the checks now. Select **No** to close the message without printing the checks at this time.

The system returns to the *Tab Select* screen. The split orders have the same name with a number added at the end to distinguish the split orders. When you open one of the split orders, it only includes the menu items on that tab.

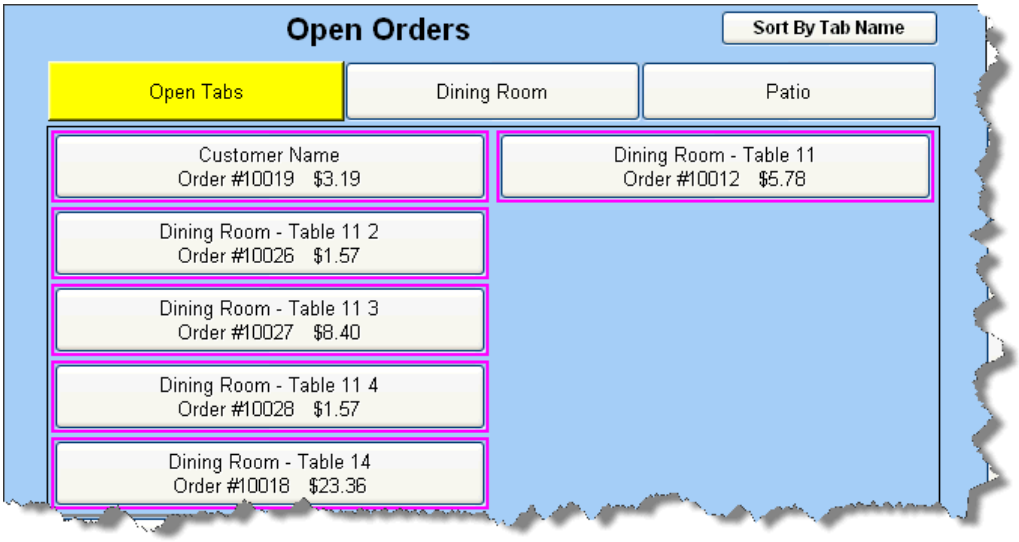

Figure 70: Tab Select Screen Showing Split Orders

Combine Order

The Combine Order option allows you to combine multiple tabs into one tab. This feature can be used to combine orders that have been previously split, or to combine orders from multiple tables.

To combine the selected order, complete the following steps:

1. Select the **Combine** button from the **Advanced Options** on the *Order Entry* screen.
2. The system displays a message to make sure you want to combine orders. Select **Yes** to continue. Or select **No** to close the message without combining the order.

The system displays the *Combine Orders* screen.

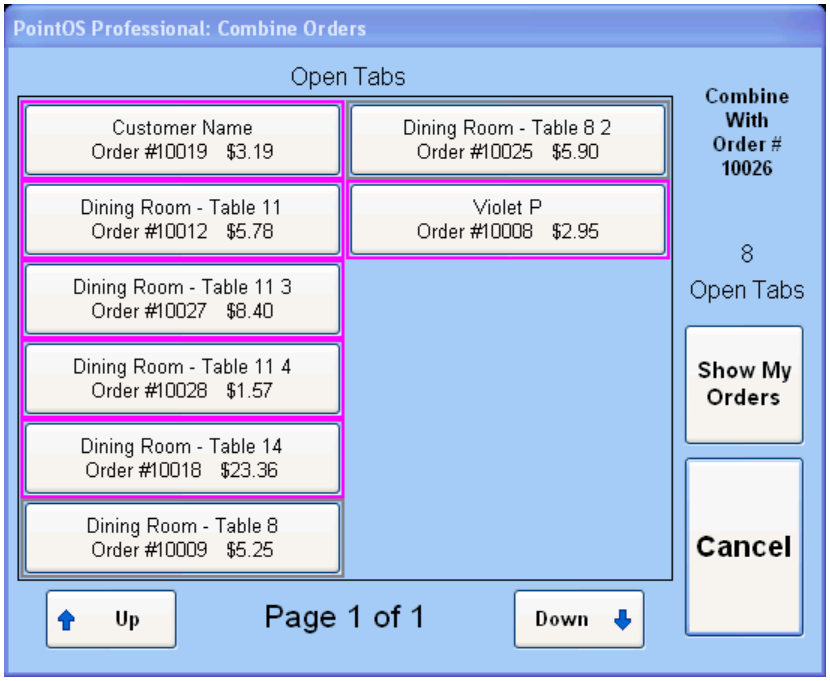

Figure 71: Combine Orders Screen

3. Use the **Up** and **Down** arrows to scroll through a long list. Select the **Show My Orders** button to filter the list to show only the orders for the selected employee access code.
4. Select the order from the **Open Tabs** list. Or select **Cancel** to close the *Combine Orders* screen without combining the order.
5. The system displays a message to make sure that you want to combine the selected orders. Select **Yes** to continue. Or select **No** to close the message without combining the orders.

The system returns to the *Order Entry* screen for the original order. The menu items for the second order have now been added to this order. The second tab is no longer available on the *Tab Select* screen.

Enter Cash Back Amount

NOTE: There is a maximum of $100 cash back allowed.

If the Manager has enabled this feature, customers can request cash back, adding the additional amount to their order totals to be paid by credit card or check.

To add cash back to a customer's order, complete the following steps:

1. Select the **Cash Back** button from the **Advanced Options** on the *Order Entry* screen.

The system displays the *Enter Cash Back Amount* screen.

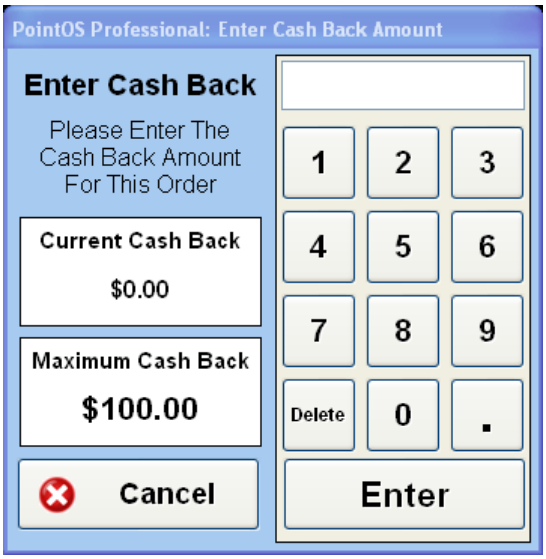

Figure 72: Enter Cash Back Amount Screen

2. Enter the amount and select **Enter**.

The system adds an item to the order for the amount of cash back.

Figure 73: Cash Back Added to Amount Due

Enter Number of Guests

The **Number of Guests** feature allows you to set the number of guests for an order, to be used in reporting and the amount of auto-gratuity for the order if auto-gratuity is enabled.

To set the number of guests, complete the following steps:

1. Select the **Set Guests** button from the **Advanced Options** on the *Order Entry* screen.

The system displays the *Enter Number of Guests* screen.

Figure 74: Enter Number Of Guests

2. Enter the number of guests in the party and select **Enter**.

The number of guests is now displayed at the top of the **Amount Due** area of the *Order Entry* screen.

Remove Payments

The **Remove Payments** feature allows you to remove any payments you have entered for the order. This applies to open or recalled orders.

To remove payments from an order, complete the following steps:

1. Select the **Remove Payments** button from the **Advanced Options** on the *Order Entry* screen.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

The system displays the *Remove Payments* screen.

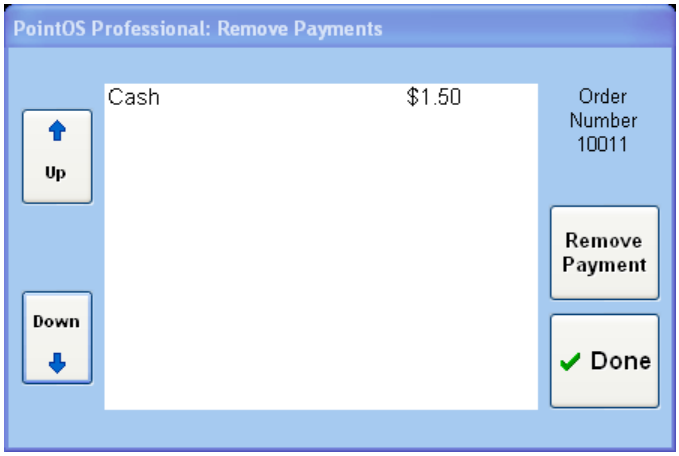

Figure 75: Remove Payments Screen

3. Use the **Up** and **Down** arrows to scroll through a long list of multiple payments, if necessary.
4. Highlight the payment you want to remove and select **Remove Payment**.
5. The system displays a message to verify that you want to remove the payment. Select **Yes** to continue.
6. The system displays a message based on the type of payment you removed. Follow the instructions about returning any cash tendered or voiding a credit card sale, and select **OK** to close the message.
7. Repeat steps 1-6 if there are multiple payments and you want to remove more than one payment.
8. Select **Done** to close the screen without removing payments.

Working With Customers

This chapter explains the PointOS tools for working with customers. Once you have added a customer to the PointOS system, you can view the customer profile, set special pricing, ban the customer, and view the customer's order history. You can even link songs to the customer to add to the playlist when the customer arrives. The manager will also be able to send newsletters and special customer messages (such as for the customer's birthday).

Add New Customer

You will need to add new customers to the system before you can use the other customer tools. You can add the customer by using a connected scanner to scan an ID. Or you can enter the customer information manually.

Scan Customer ID

To scan the information for a new customer, complete the following steps:

1. If PointOS is showing the *Main Menu*, select **Order Entry**.
2. Select **Begin New Tab** from the *Tab Select* screen.
3. Select **New Customer**.

The system displays the *Customer Permission* screen.

Figure 76: Customer Permission Screen

4. Select **Yes** to continue or **No** to close the screen without scanning the customer ID. Or select **Only Photo, Name, and Birthday** to only capture that information.
5. If you have the customer's permission, place the customer ID face down in the ID scanner.

The customer displays the *Scan New Customer* screen.

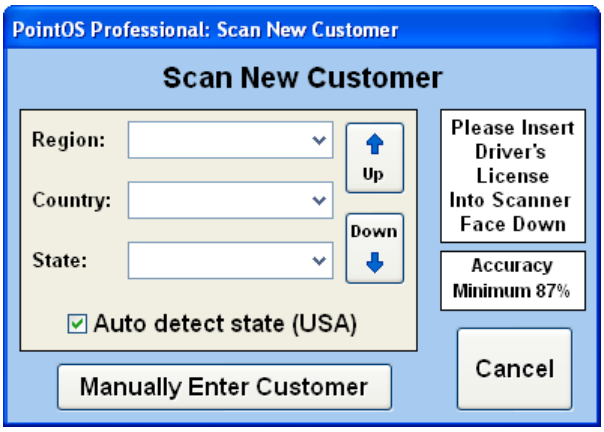

Figure 77: Scan New Customer Screen

6. The scanner detects the information. If the customer's ID will not scan, select **Manually Enter Customer** to open the *Add New Customer* screen.

Add Customer Manually

The *Add New Customer* screen allows you to enter the customer information manually.

To open the *Add New Customer* screen, complete the following steps:

1. If PointOS is showing the *Main Menu*, select **Order Entry**.
2. Select **Begin New Tab** from the *Tab Select* screen.
3. Select **New Customer**.

The system displays the *Add New Customer* screen.

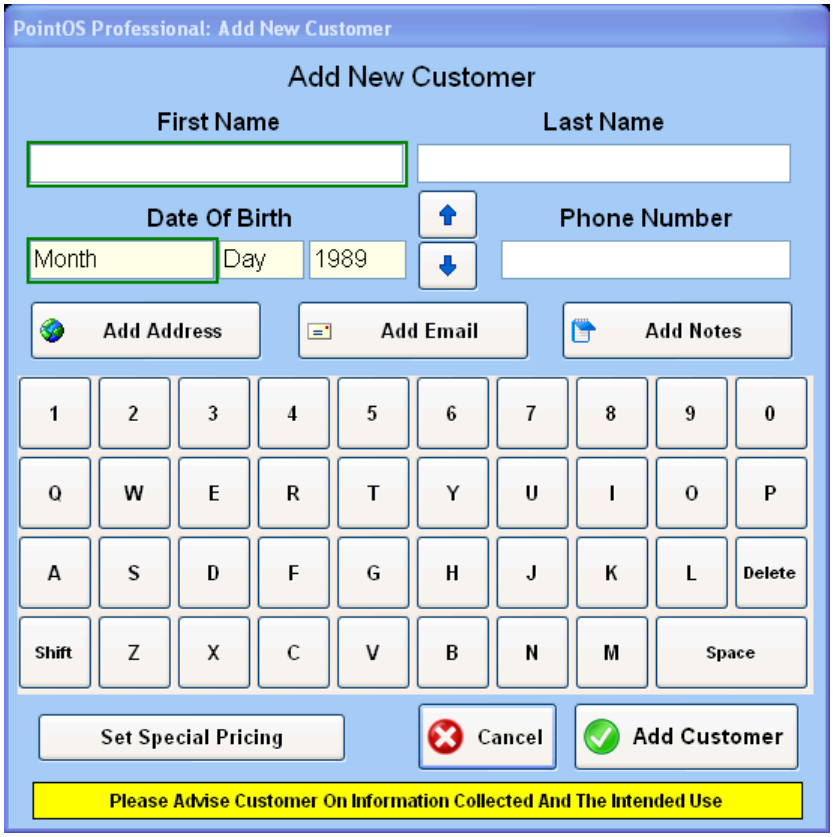

Figure 78: Add New Customer

To complete the *Add New Customer* screen, complete the following steps:

1. Enter the customer's **First Name**.
2. Enter the customer's **Last Name**.
3. Select the **Month** field. Use the **Up** and **Down** arrows to move to the month of the customer's birth date.
4. Select the **Day** field. Use the **Up** and **Down** arrows to move to the date of the customer's birth date.
5. Select the **Year** field. Use the **Up** and **Down** arrows to move to the year of the customer's birth date.
6. Enter the customer's **Phone Number**.
7. To enter the customer's mailing address, select the **Add Address** button. Then enter the **Street Address**, **Apartment #** (if applicable), **City** and **Postal Code**. Use the **Up** and **Down** arrows to select the **State**.

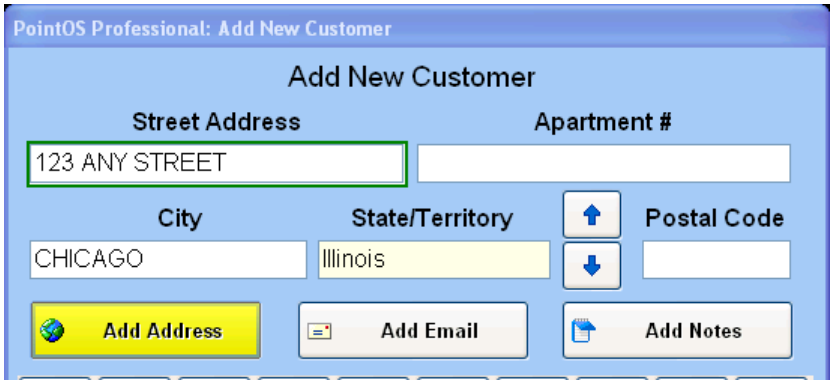

Figure 79: Add New Customer (Address)

8. To add the customer Email address, select the **Add Email** button. Then enter the customer's **Email** address.

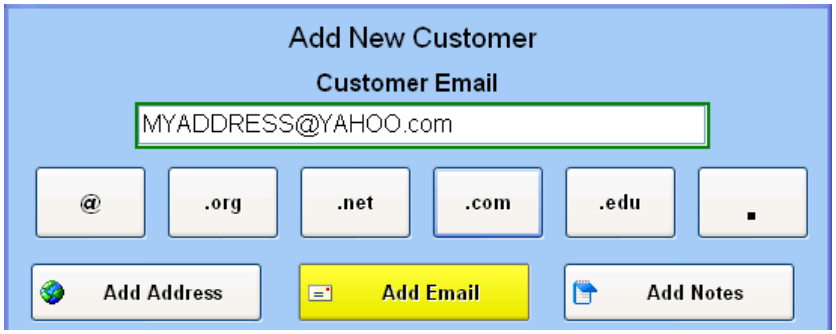

Figure 80: Add New Customer (Email)

9. To add any notes about the customer, select the **Add Notes** button. Then enter your notes.

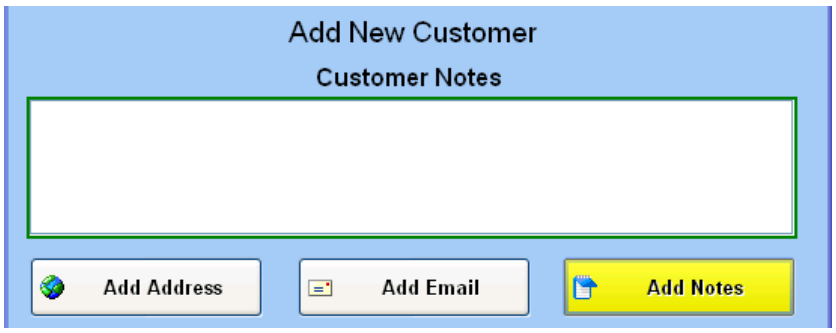

Figure 81: Add New Customer (Notes)

10. To add the customer, select the *Add Customer* button. Or select **Cancel** to close the *Add New Customer* screen without saving the customer information.

View Customer Profile

The *Customer Profile* screen displays information about the customer.

You can open the *Customer Profile* screen, from the *Name Tab* screen or the **Advanced Options** on the *Order Entry* screen if the customer has been selected for the order.

To open the *Customer Profile* screen from the *Order Entry* screen, select the **Advanced Options** button. Then select the **Select Customer** button.

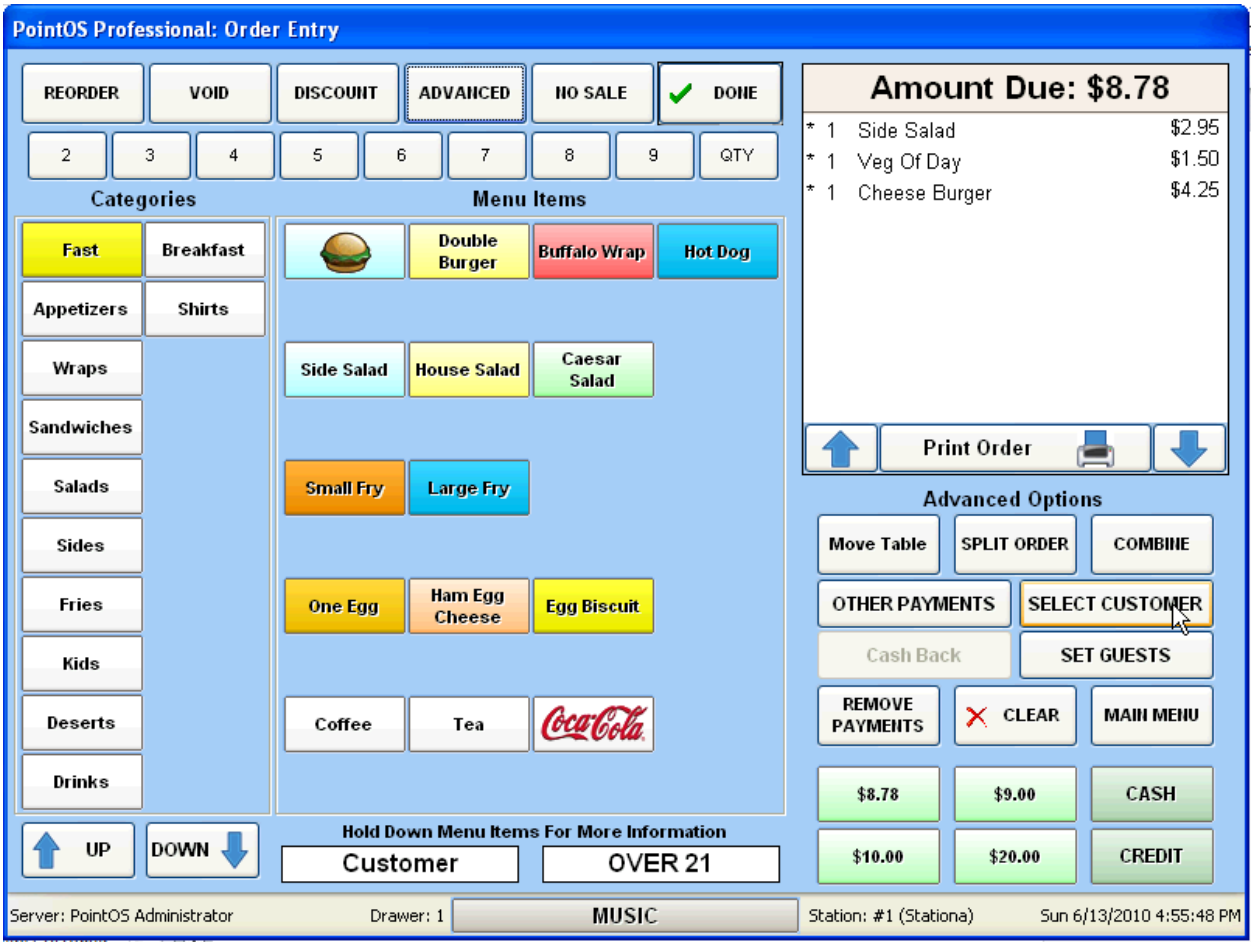

Figure 82: Select Customer Button on the Order Entry Screen

To open the *Customer Profile* screen from the *Tab Select* screen, find the customer by entering one or more letters of the customer's first or last name. As you type, the system displays any matching customers. Select **Check by First Name** or **Check by Last Name** to switch the search. Select **Recent Customers** or **All Customers** to narrow or widen the search. When you have located the customer, select **View Profile**.

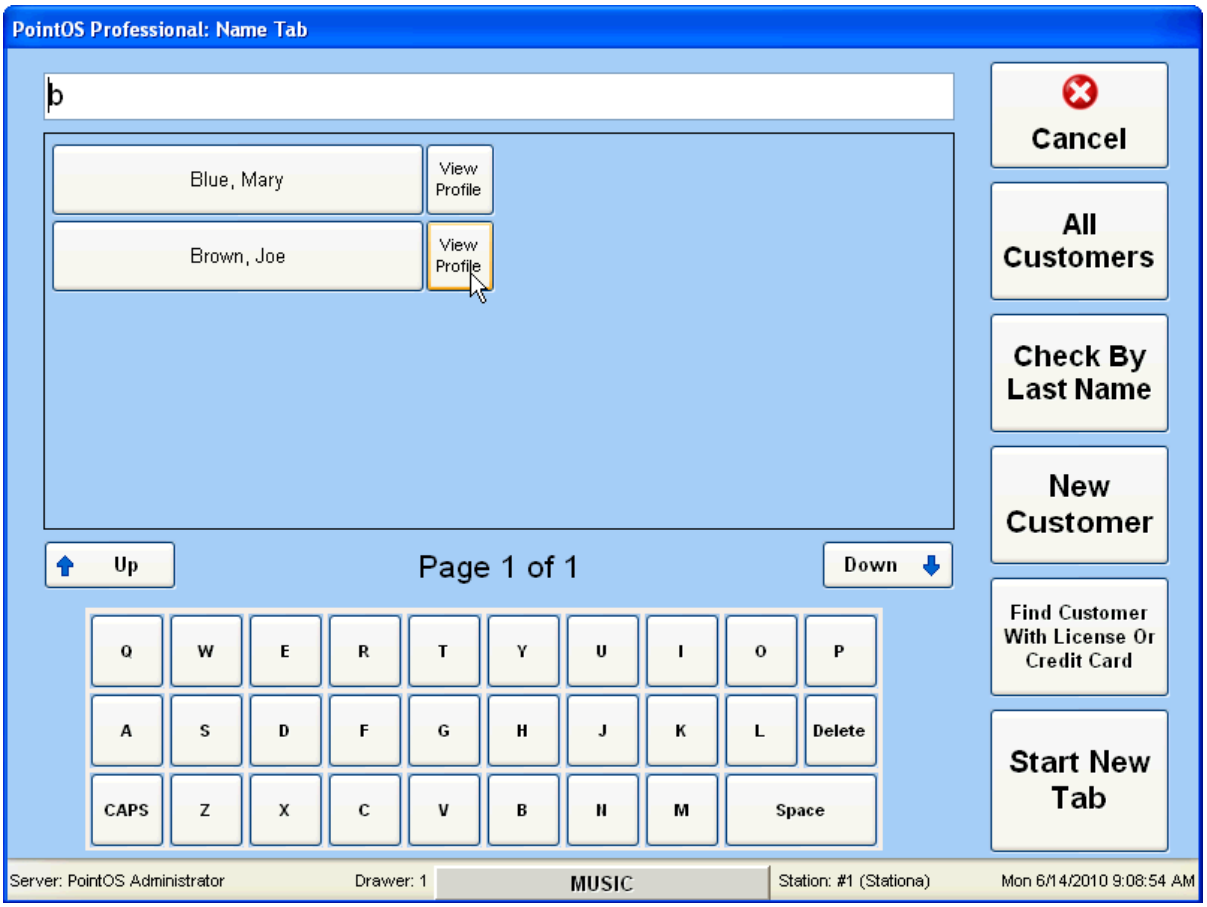

Figure 83: View Profile Button on the Name Tab Screen

The system displays the *Customer Profile* screen.

Figure 84: Customer Profile

The *Customer Profile* screen displays the following information:

- Customer name
- Birthday
- Pricing level
- Number of visits
- Amount spent since the customer was added to the system

You can view or enter additional notes about the customer on this screen. To enter a note, place the cursor in the large note field and simply enter the note.

This screen allows you to open the screens to edit the customer's email, ban the customer, set special pricing, select the customer's favorite music and view the customer's order history.

When you have finished viewing the information or entering notes, select **Done** to close the screen.

Add or Edit Customer Email Address

The *Customer Email Address* screen allows you to edit the customer's email address.

To open the *Customer Email Address* screen, select **Edit Email** from the *Customer Profile* screen.

The system displays the *Customer Email Address* screen.

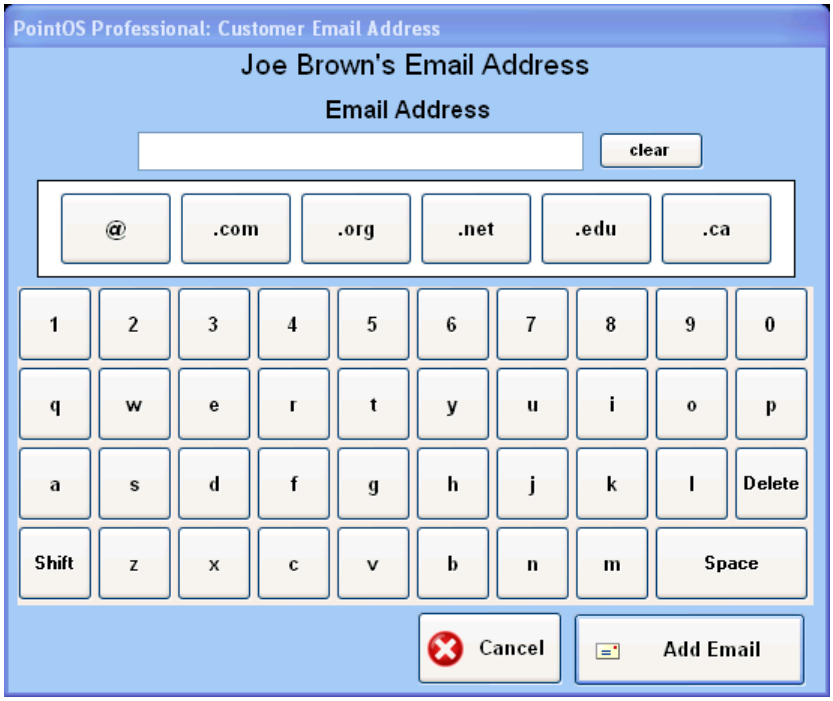

Figure 85: Customer Email Address

To add or edit the customer's email address, complete the following steps:

1. If the customer's address has changed, select the **Clear** button to delete the old address.
2. Enter the customer's email address.
3. Select **Add Email**. Or select **Cancel** to close the *Customer Email Address* screen without changing the customer's email address.

Ban Customer

The Ban Customer feature posts a red banner on the customer profile.

To ban a customer, complete the following steps:

1. Open the *Profile* screen for the selected customer.
2. Select the **Ban Customer** button.
3. The system displays a message to make sure that you want to ban the customer. Select **Yes** to continue. Or select **No** to close the message without banning the customer.
4. The system displays the *Enter Access Code* screen. Enter your Access Code.
5. The system displays the *Ban Customer Reason* screen. Enter the reason for banning the customer and select **Done**.

The system returns to the *Customer Profile* screen.

When you have banned a customer, the *Customer Profile* screen shows a red “Banned” banner showing that the customer is banned.

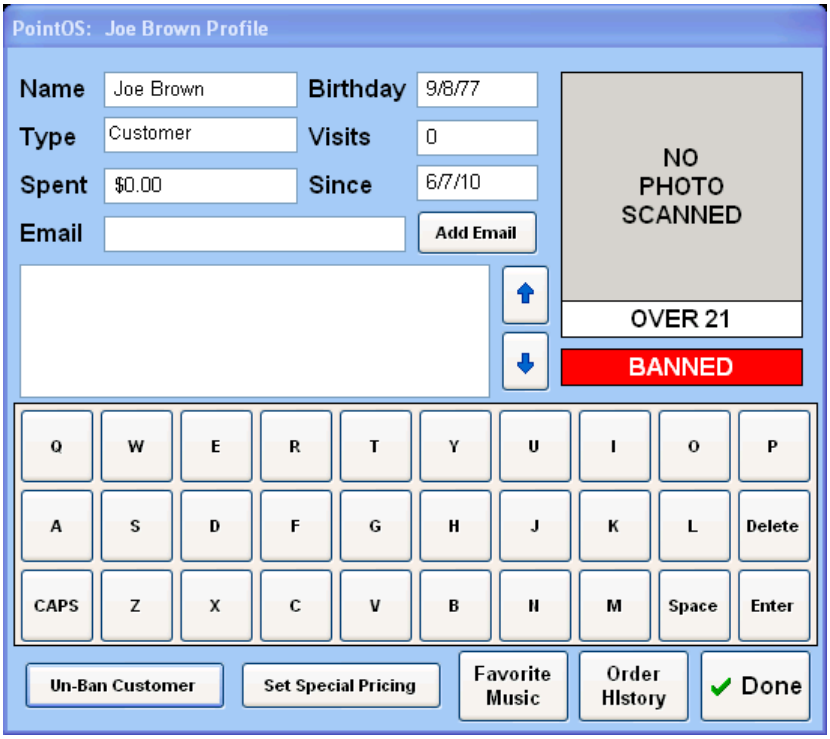

Figure 86: Banned Customer

Un-Ban Customer

The Un-Ban Customer feature removes the Banned banner from the customer profile.

To un-ban a customer, complete the following steps:

1. Open the *Profile* screen for the selected customer.
2. Select the **Un-Ban Customer** button.
3. The system displays a message to make sure that you want to un-ban the customer. Select **Yes** to continue. Or select **No** to close the message without un-banning the customer.
4. The system displays the *Enter Access Code* screen. Enter your Access Code.

The system returns to the *Customer Profile* screen.

Set Special Pricing

The manager can set up different pricing levels to provide discounts to certain customers. The **Set Special Pricing** feature allows you to assign one of those special pricing levels to a selected customer.

To set special pricing for a customer, complete the following steps:

1. Open the *Profile* screen for the selected customer.
2. Select the **Set Special Pricing** button.

The system displays the *Set Customer Price Level* screen. The options available depend on what your manager has set up for this feature.

Figure 87: Set Customer Price Level

3. Select the button for the selected price level for this customer.
4. The system displays the *Enter Access Code* screen. Enter your Access Code.
5. The system displays the *Change Customer Level Reason* screen. Enter the reason for providing a discount to the customer and select **Done**.
6. Select **Done** on the *Set Customer Price Level* screen.

The system returns to the *Customer Profile* screen.

Maintain Customer Song List

You can assign songs from your music library to a customer to set up a customer personal songlist. You can also use this feature to request one of these songs to be played.

To open the *Customer Songlist* screen, complete the following steps:

1. Open the *Profile* screen for the selected customer.
2. Select the **Favorite Music** button.

The system displays the *Customer Songlist* screen.

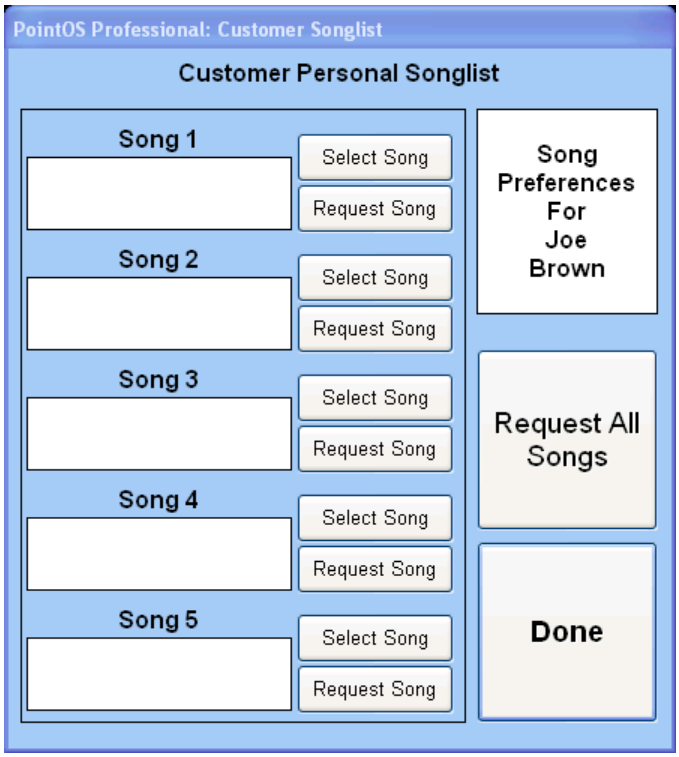

Figure 88: Customer Songlist

This screen allows you to add songs to the customer songlist, remove songs from the personal songlist, request a single song, and request all songs on the list. When you have finished, select **Done** to close the screen.

Add Songs to Customer Songlist

To add a song to the customer songlist, complete the following steps:

1. Open the *Songlist* screen for the selected customer.
2. Select the **Select Song** button.

The system opens the **Search by**… screen.

Figure 89: Song Records

3. Enter one or more letters of the song or artist name in the top field.
4. As you type, the system displays any matching songs. Select **By Title** or **By Artist** to switch the search, depending on what you entered. Use the **Up** and **Down** arrows to scroll through a long list of songs or artists.
5. Select the song. The song is added to the customer's personal songlist.

Remove Songs from Customer Songlist

To remove a song to the customer songlist, complete the following steps:

1. Open the *Songlist* screen for the selected customer.
2. Select the **Remove Song** button next to the song on the customer's personal songlist that you want to remove.

The song is immediately removed from the customer's personal songlist.

Request One Song or All Songs from the Customer Personal Songlist

To request songs for the customer, first open the *Customer Songlist* screen for the selected customer.

To request a single song from the customer's personal songlist, select the **Add to Playlist** button next to the song you want to request.

To request all songs on the customer's personal songlist, select the **Request All Songs** button.

View Order History

The **View Order History** feature allows you to view past orders, the order status, and to open the Recall Tab screen for the selected customer's previous orders. You can also see all the items the customer has ordered for open or closed tabs.

To open the *Customer History* screen, complete the following steps:

1. Open the *Profile* screen for the selected customer.
2. Select the Order History button.

The system displays the *Customer History* screen.

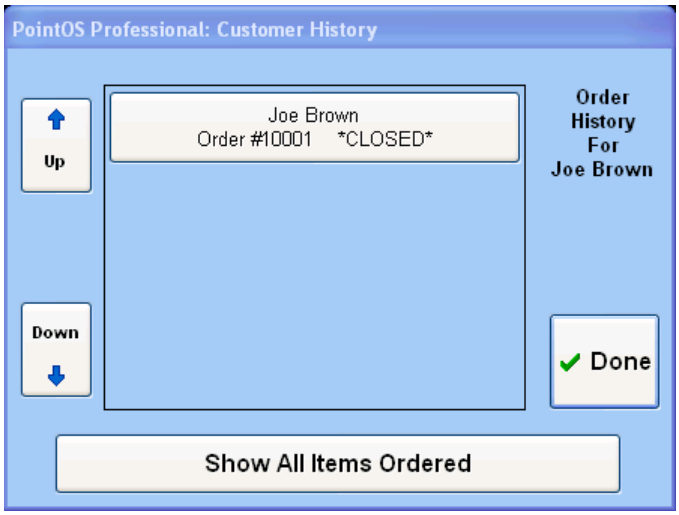

Figure 90: Customer History

Use the **Up** and **Down** arrows to scroll through a long list of orders.

Select an order to open the *Recall Tab* screen.

On the *Recall Tab* screen, select **Print Order** to print a receipt for the order. The system displays a *Print Receipt* message to make sure you want to print the order. Select **Yes** to continue or **No** to close the message without printing the order.

To open the *Show All Items Ordered* screen, select the **Show All Items Ordered** button.

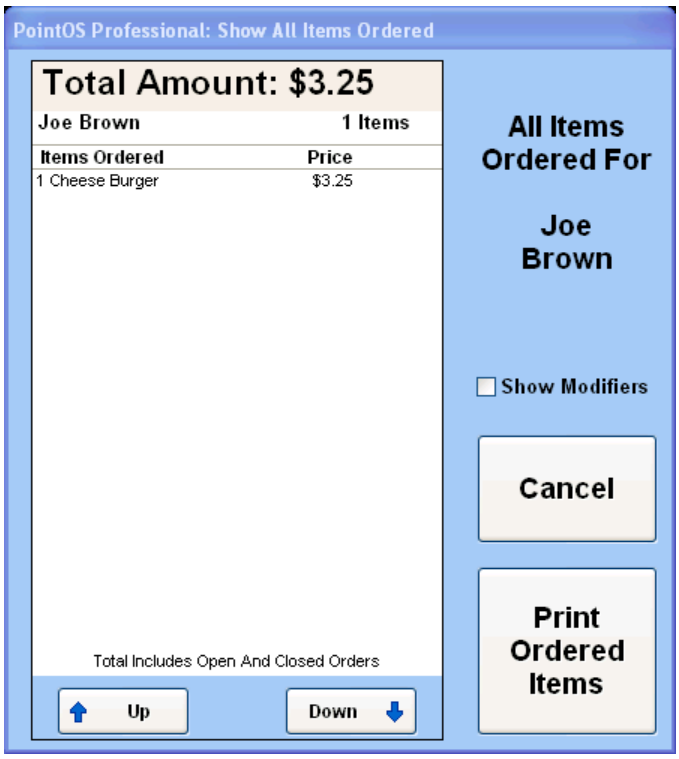

Figure 91: Show All Items Ordered

On the *Show All Items Ordered* screen, select **Print Ordered Items** to print all the ordered items. The system displays a *Print All Items* message to make sure you want to print all the ordered items. Select **Yes** to continue or **No** to close the message without printing the items. Or select **Cancel** to close the *Show All Items Ordered* screen.

Select **Done** when you have finished using the *Customer History* screen.

Working With Deliveries

This chapter explains the Deliveries feature.

The basic process for deliveries is:

1. Indicate the customer for the order. You can select an existing customer or manually add a new customer.
2. The Delivery center allows you to update the customer record or view the customer profile. You can map the address or get driving directions from the address listed in PointOS for your bar or restaurant.
3. Once you have started the delivery order, you can use the *Order Entry* screen like any other order. The order is available from the *Tab Select* screen, shown with a car icon to distinguish it from the other orders.

You can also recall, void, or transfer an order as needed, just as with a non-delivery order.

Open the Delivery Center Screen

The *Delivery Center* screen helps you select the appropriate customer for a delivery order.

To open the *Delivery Center* screen, select **Delivery Center** from the *Main Menu.*

The system displays the *Delivery Center* screen.

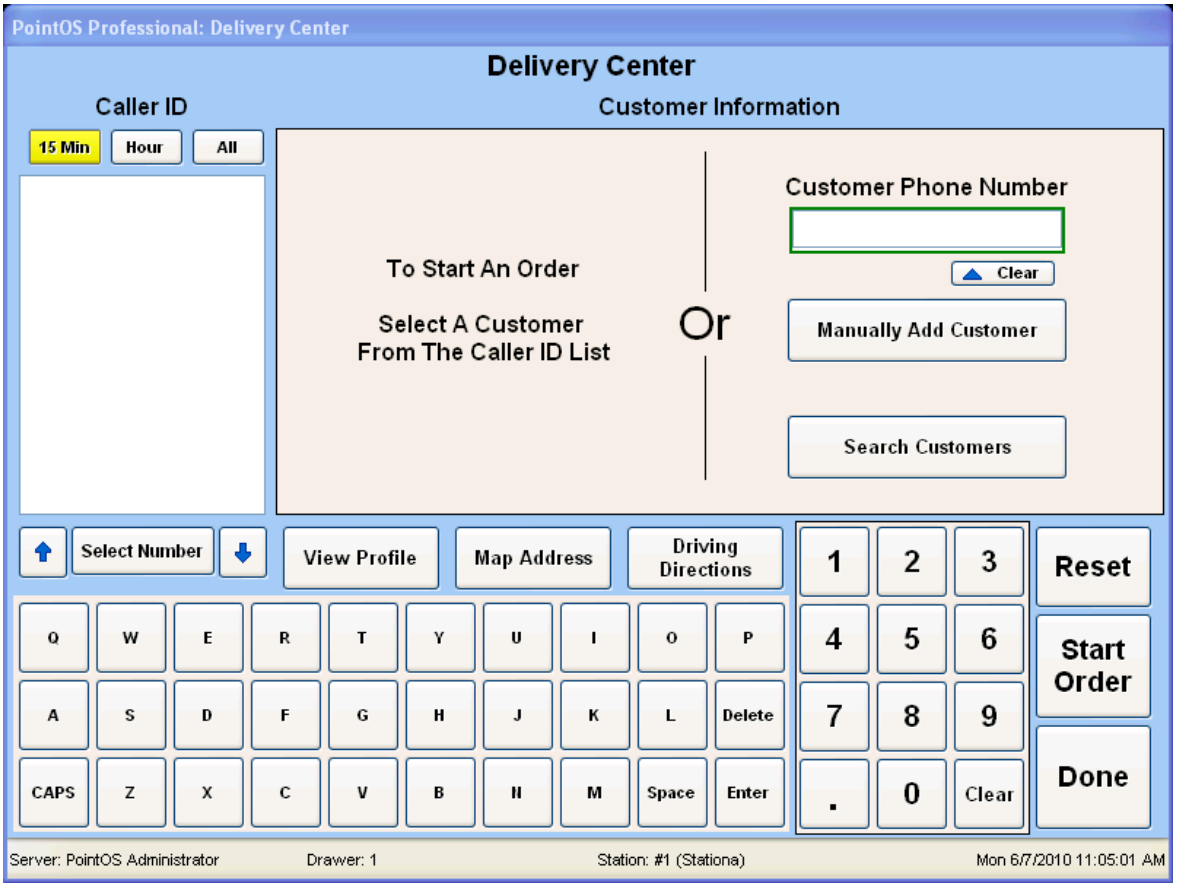

Figure 92: Delivery Center

You can indicate the delivery customer using one of the following methods:

- Use the customer's Caller ID
- Manually Add the Customer
- Search the Customers already added to PointOS

Once you have selected or entered the customer, select **Start Order** to open the *Order Entry* screen for the selected customer.

From the Delivery Center screen, you can also:

- Print the customer information.
- Open the *Customer Profile* screen.
- Open a new screen with a map to the customer's address.
- Open a new screen with driving directions to the customer's address.

Select **Done** when you have finished using the *Delivery Center* screen.

Select Customer from Caller ID

If the station is connected to Caller ID, the **Caller ID** list on the left of the *Delivery Center* screen displays the Caller ID for calls received in the last 15 minutes, hour or all calls. Select the button at the top to change the range for which calls are displayed.

NOTE: The Manager can delete the Caller ID log from the Delivery Setup screen.

To use caller ID to select the customer, select the phone number from the list. Then select the **Select Number** button. If the phone number matches a customer in the system, the system displays the *Customer Information* for that customer. If the phone number does not match a customer in the system, you can add the information for the new customer.

Add Delivery Customer

To add a customer through the *Delivery Center* screen, complete the following steps:

1. Open the *Delivery Center* screen.
2. Enter the new customer's phone number in the **Customer Phone Number** field. Or select the number from the **Caller ID** list.
3. The system displays a message to make sure that you want to manually add the customer for delivery. Select **Yes** to continue. Or select **No** to close the message without adding a customer.

The system displays the **Customer Information** area of the *Delivery Center* screen.

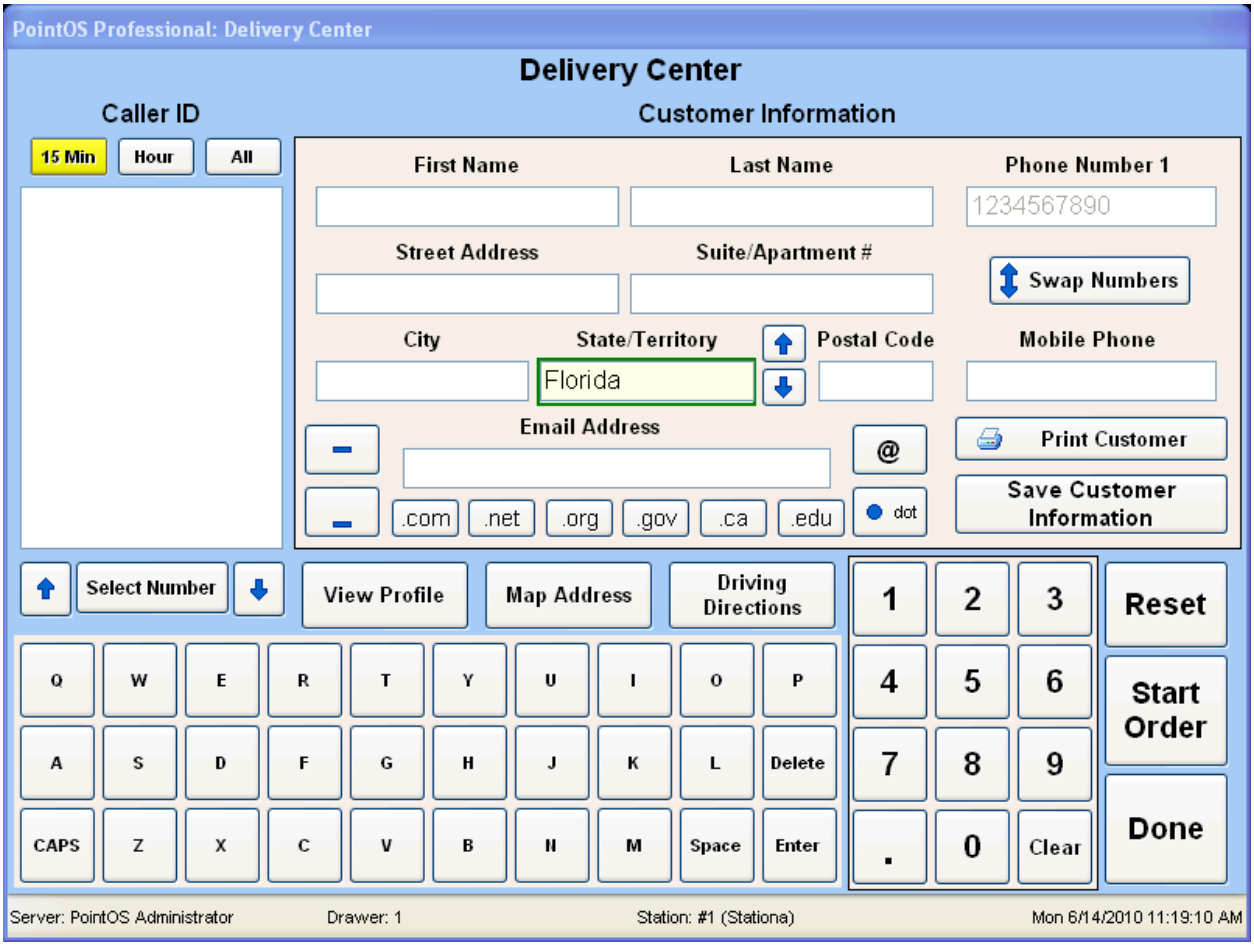

Figure 93: Delivery Center with Blank Customer Information

4. Enter the following information for the customer:
    - First Name
    - Last Name
    - Street Address
    - Suite/Apartment #
    - City
    - State (Use the **Up** and **Down** arrows to select.)
    - Postal Code
    - Mobile Phone
    - Email Address
5. Select the **Save Customer Information** button.
6. The system displays a message asking if you want to save the customer. Select **Yes** to continue. Or select **No** to close the message and return to the Customer Information.
7. The system displays a message indicating that the customer has been added. Select **OK** to close the message.

Select Delivery Customer From Existing Customers

To select a delivery customer from the customers in the PointOS system, complete the following steps:

1. Open the *Delivery Center* screen.
2. Select the **Search Customers** button.
3. Enter one or more letters of the customer's first or last name in the top field.
4. As you type, the system displays any matching customers. Select B**y First Name** or B**y Last Name** to switch the search, depending on what you entered. Or you can select the **Swipe ID** button to swipe the customer's ID instead.

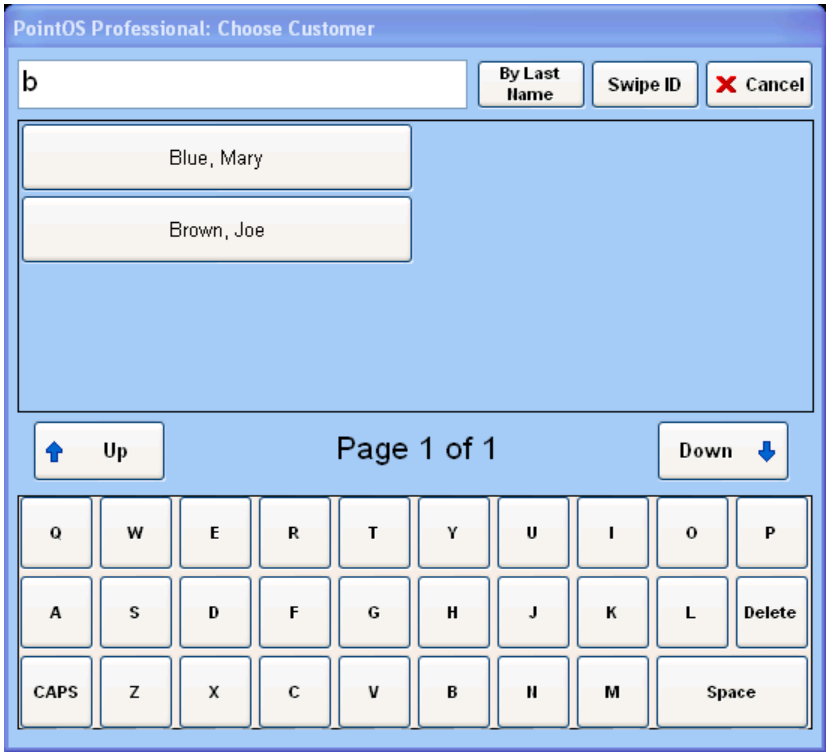

Figure 94: Choose Customer

5. Use the **Up** and **Down** arrows to scroll through a long list of customers. When you find the customer, select the button with the customer's name.

The system displays the Customer Information.

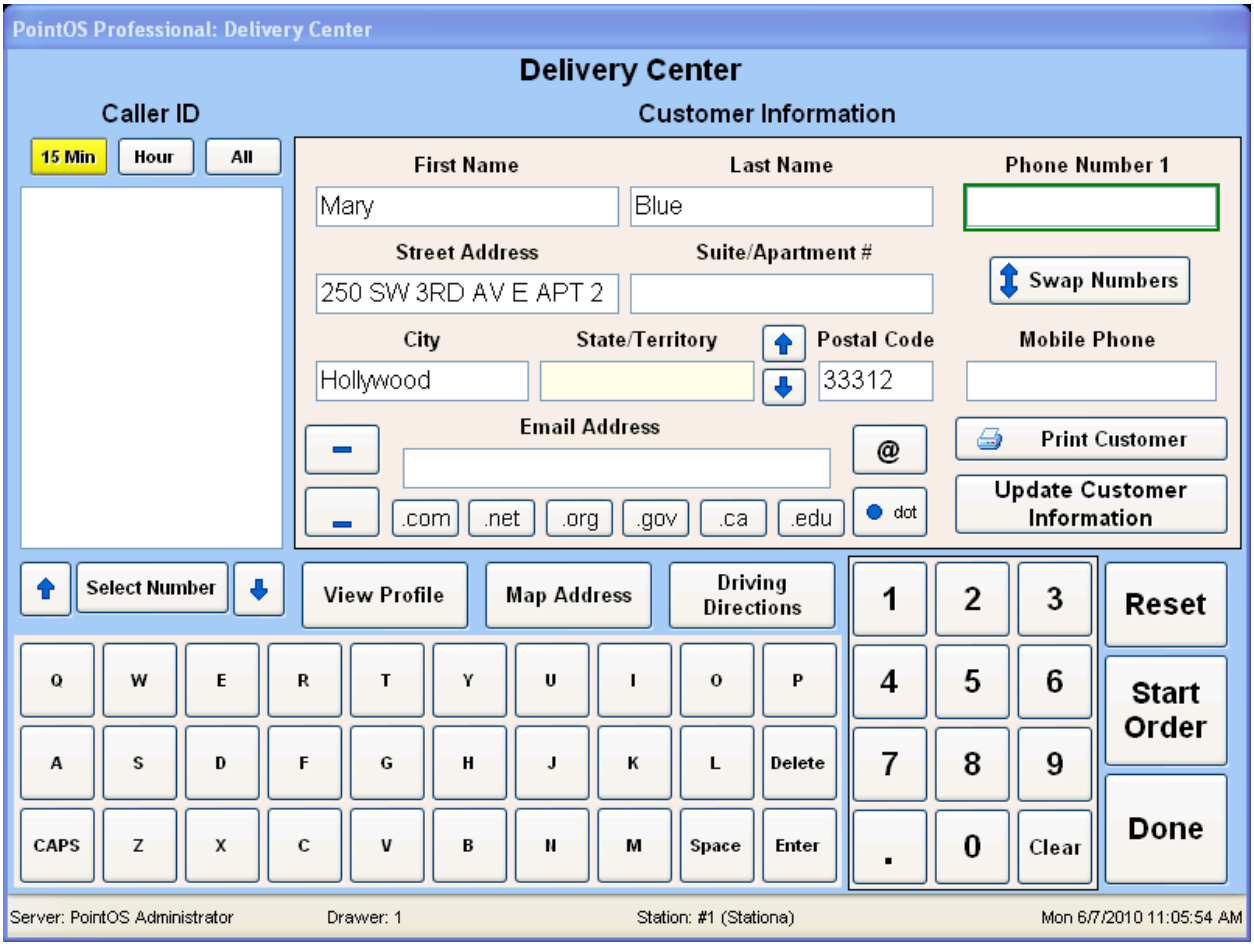

Figure 95: Delivery Center (Customer Information)

Select the **Reset** button to start the customer search over.

Update Delivery Customer Information

To update the customer information for a delivery customer, use the following procedure:

1. Select the customer on the *Delivery Center* screen.
2. Edit the following information for the customer as needed:
    - First Name
    - Last Name
    - Street Address
    - Suite/Apartment #
    - City
    - State (Use the **Up** and **Down** arrows to select.)
    - Postal Code
    - Mobile Phone
    - Email Address
3. To swap the number in the **Mobile Phone** field with **Phone Number 1**, select the **Swap Numbers** button.
4. To print the customer information, select the **Print Customer** button.
5. To save the new information for the selected customer, select the **Update Customer Information** button.
6. The system displays a message to indicate that the customer has been updated. Select **OK** to close the message.

Map Customer's Address

The **Map Address** features works with Google Maps to provide a map to the customer's address. The map opens in a separate screen from the *Delivery Center* screen.

To open the map, select the **Map Address** button from the *Delivery Center* screen for the selected customer.

Figure 96: Map Address

Select the **Map Address** button to remap the address for the selected customer.

Select the **Driving Directions** button to show the driving directions stored for your business to the selected customer's address.

Select the **Show In Browser** button to open the map in your default web browser window.

Select the **Print** button to print the map.

Select **Close Map** to close the screen.

Get Driving Directions to Customer's Address

The **Driving Directions** features works with Google Maps to provide directions from the address stored for your business to the customer's address. The map and directions open in a separate screen from the *Delivery Center* screen.

To open the map, select the **Driving Directions** button from the *Delivery Center* screen for the selected customer.

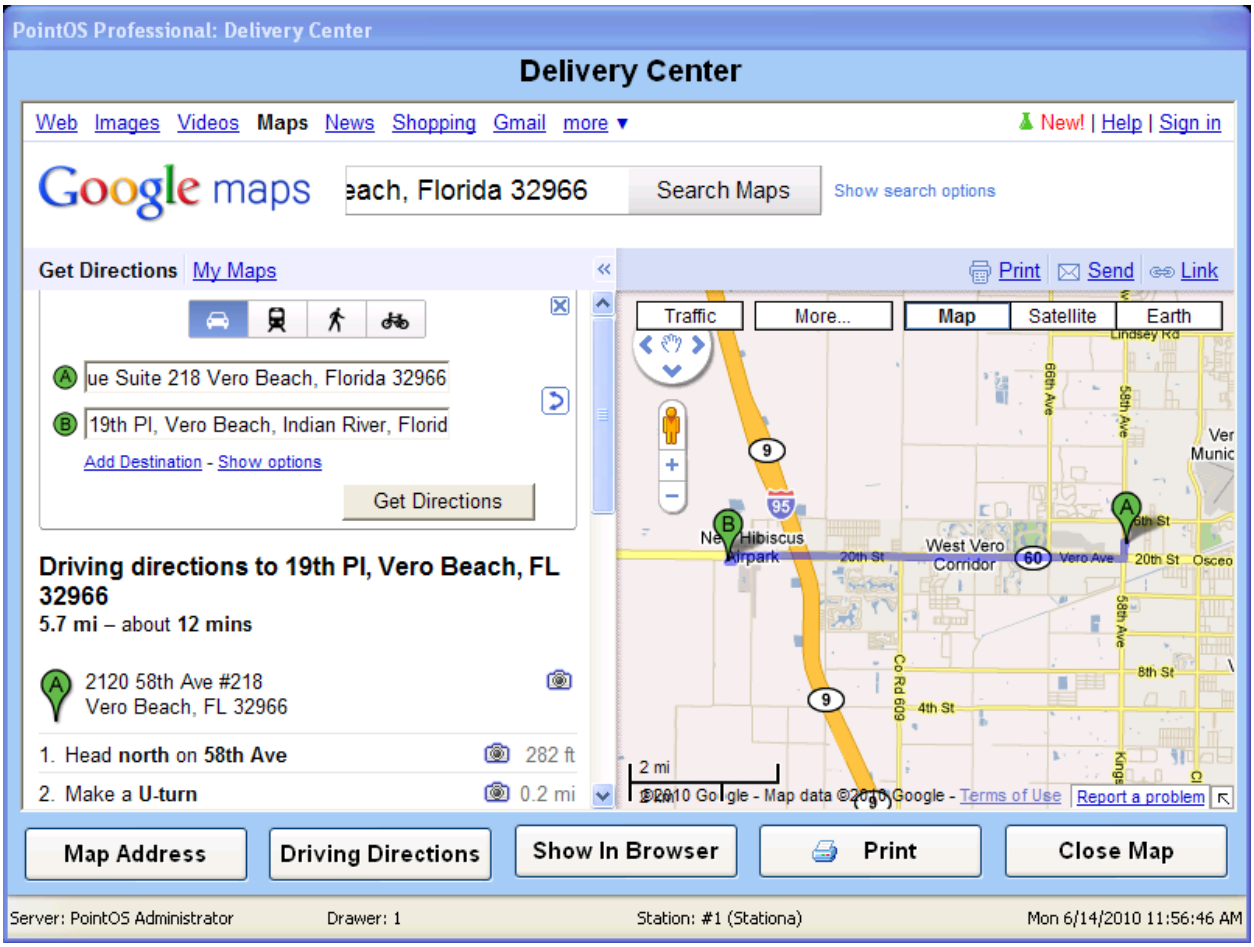

Figure 97: Driving Directions

Select the **Map Address** button to remap the address for the selected customer.

Select the **Driving Directions** button to show the driving directions stored for your business to the selected customer's address.

Select the **Show In Browser** button to open the driving directions in your default web browser window.

Select the **Print** button to print the map and directions.

Select **Close Map** to close the screen.

Working With Music

PointOS can manage all of the recorded music that plays in your business.

Open The Music Player Screen

The *Music Player* screen allows you to manage your recorded music.

To open the *Music Player* screen, select the **Music** button from the bottom of almost any PointOS screen.

Figure 98: Music Player Screen

The left side of the screen includes the following information for the currently playing song:

- Song Title
- Artist
- Status/Position (current time of total time)

Control the Current Song or Volume

The following controls are available for the current song on the left side of the *Music Player* screen:

- A slider to rewind or fast forward the song – Simply drag the slider to start playing the song in a different position.
- **Pause** – Select the Pause button to pause the song until you press Play.
- **Play** – Select the Play button to play a song that has been stopped or paused.
- **Stop** – Select the Stop button to stop playing music.
- **Last Song** – Select the Last Song button to return to the previous song in the playlist.
- **Rewind** – Select the Rewind button to back up in the current song a few seconds at a time.
- **Forward** – Select the Forward button to move forward in the current song a few seconds at a time.
- **Next Song** – Select the Next Song button to skip to the next song in the playlist.
- **Turn Volume Down** – Select the Down button to turn the volume down.
- **Mute Volume** – Select the Mute button to mute the music.
- **Turn Volume Up** – Select the Up button to turn the volume up.
- **A Volume Slider** – Simply drag the slider up or down to change the volume.

The following controls are available for the current song on the right side of the *Music Player* screen:

- **Won't Play** – Select this option to report problems with the current song and remove it from the playlist.
- **Assign to Customer** – Select this option to open the *Choose Customer* screen to assign the current song to a customer.

Use Playlists and Control Songs

The right side of the *Music Player* screen displays the playlist. Use the drop down list or the **Up** or **Down** arrows next to the playlist name to select a new playlist.

The **Song Cue** list includes any songs that have been added to the selected playlist. Use the **Up** and **Down** arrows to scroll through a long list of songs.

Select a song to see additional options for the song.

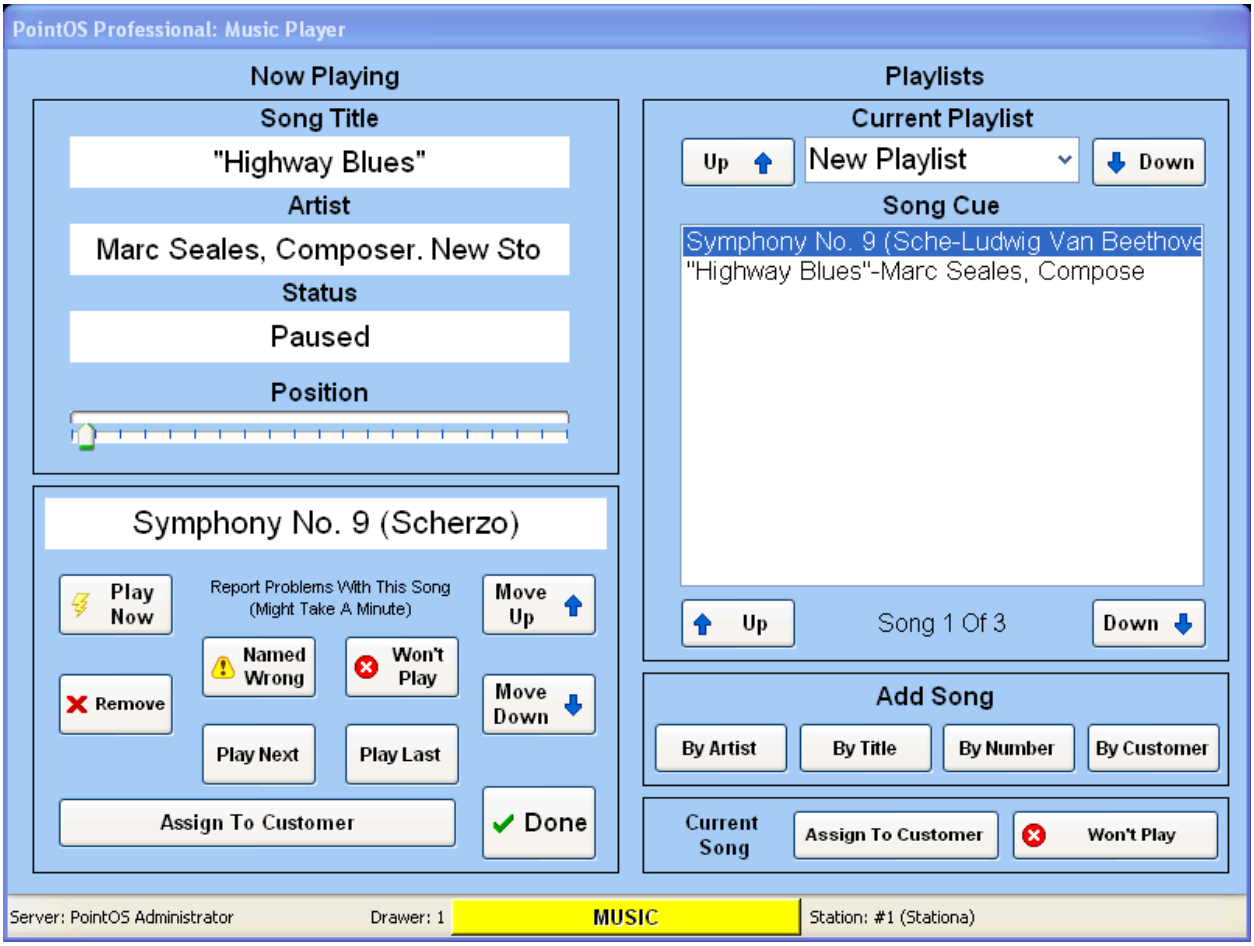

Figure 99: Music Player – Additional Song Options

The following controls are available for the selected song:

- **Play Now** – Select this option to immediately begin playing the song.
- **Remove** – Select this option to remove the song from the current playlist.
- **Named Wrong** – Select this option to open the *Rename Song* screen.
- **Won't Play** – Select this option to report problems with the song and remove it from the playlist.
- **Move Up** – Select this option to move the song up in the playlist.
- **Move Down** – Select this option to move the song down in the playlist.
- **Play Next** – Select this option to play the song next in the playlist.
- **Play Last** – Select this option to play the song last in the playlist.
- **Assign to Customer** – Select this option to open the Choose Customer screen to assign the song to a customer.
- **Done** – Select this option to close the additional controls for the song.

Add Songs

You can add songs by artist, title, or number in the currently selected playlist. You can also add songs by customer.

To add a song to the currently selected playlist by artist or title, complete the following steps:

1. Select the **By Artist** button or the **By Title** button.

The system displays the *Search by Artist* or *Search by Title* screen.

Figure 100: Search by Artist Screen

2. Enter one or more letters of the artist or title name in the top field.
3. As you type, the system displays any matching songs. Select B**y Artist** or B**y Title** to switch the search, depending on what you entered.
4. Use the **Up** and **Down** arrows to scroll through a long list of songs. Select the song to add it to the playlist. Or select **Cancel** to close the search screen without adding a song.

To add a song by number, complete the following steps:

1. Select the **By Artist** button or the **By Title** button.

The system displays the *Song by Number* screen.

Figure 101: Song By Number Screen

2. Enter the number of the song in the selected playlist and select **Enter**.
3. The system displays a message asking if you want to add the song to the playlist. Select **Yes** to add it to the playlist. Or select **No** to close the message without adding it to the playlist.

To add a song by customer, complete the following steps:

1. Select the **By Customer** button.

The system displays the *Choose Customer* screen.

Figure 102: Choose Customer Screen

2. Enter one or more letters of the customer's first or last name in the top field.
3. As you type, the system displays any matching customers. Select B**y First Name** or B**y Last Name** to switch the search, depending on what you entered.
4. Select the customer to open the *Customer Personal Songlist* screen.
5. To request a single song from the customer's personal songlist, select the **Add to Playlist** button next to the song you want to request. Or to request all songs on the customer's personal songlist, select the **Request All Songs** button.

Rename Song

If a song's information is incorrect, you can rename it on the *Rename Song* screen.

To rename a song title or artist, complete the following steps:

1. Select the song on the current playlist and select the **Named Wrong** button on the Music Player screen.

The system opens the *Rename Song* screen.

Figure 103: Rename Song Screen

2. Select the **Clear Title** button to clear the Song title field. Enter the new song title.
3. Select the **Clear Artist** button to clear the Artist field. Enter the new song artist.
4. Select **Done**. Or select **Cancel** to close the *Rename Song* screen without changing the song title and artist information.

Working With the Message Center

PointOS includes a Message Center to send message to other employees. If you use “local mail,” the next time that employee enters his or her access code, the system displays the message. If you have email set up, the messages can be sent via email.

Send a Message

The *Message Center* screen allows you to send an employee a message.

To open the *Message Center* screen, select **Mail Center** from the *Main Menu*.

The system displays the *Message Center* screen.

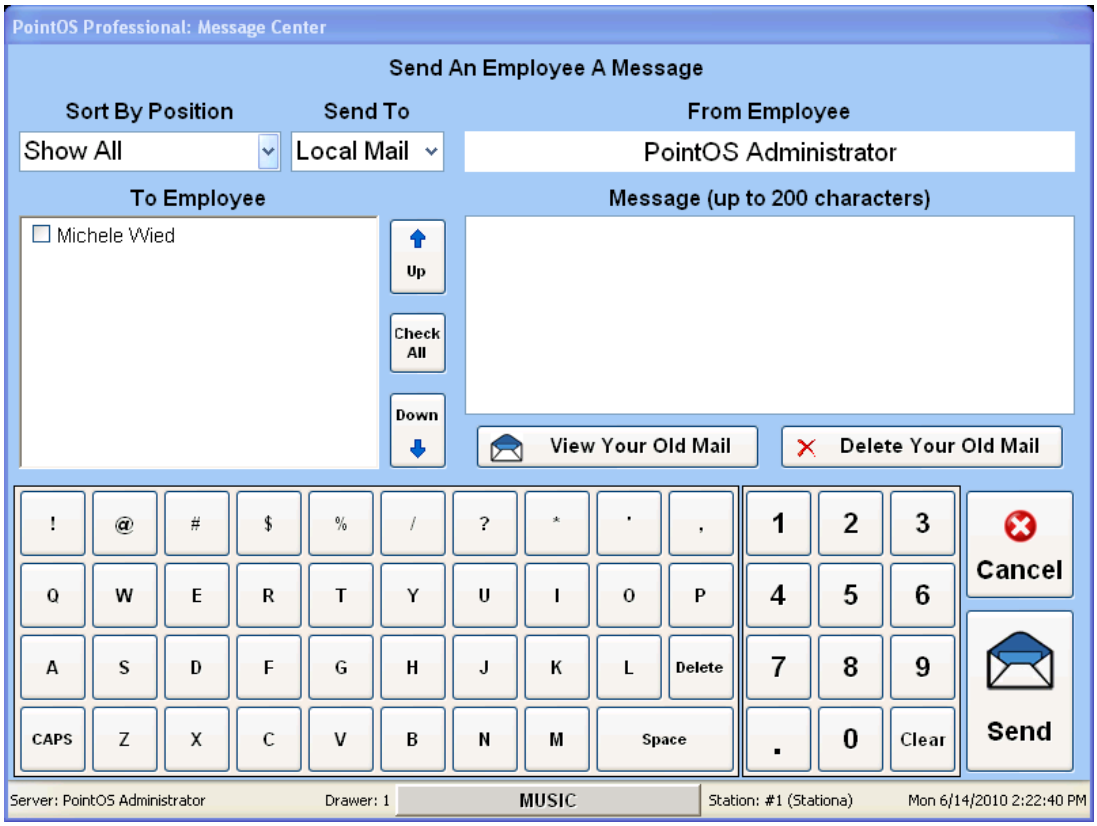

Figure 104: Message Center

To send a message, complete the following steps:

1. Select a position from the **Sort By Position** drop down list to limit the list of **Employees**.
2. Select whether to send the message through PointOS (**Local Mail**) or via **Email**.
3. Select the employee to receive the message by checking the box next to the name. You can check more than one name. Or select the **Check All** button. Use the **Up** and **Down** buttons to scroll through a long list of names.
4. Enter your **Message**.
5. Select **Send** to send the message. Or select **Cancel** to close the *Message Center* screen without sending a message.
6. The system displays a message indicating that your message has been sent. Select **OK** to close the message.

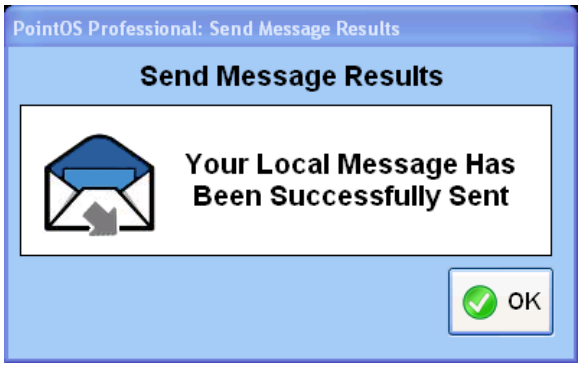

Figure 105: Send Message Results

Read Message

When another employee has sent a message, the *Read Message* screen displays when you next enter your employee access code.

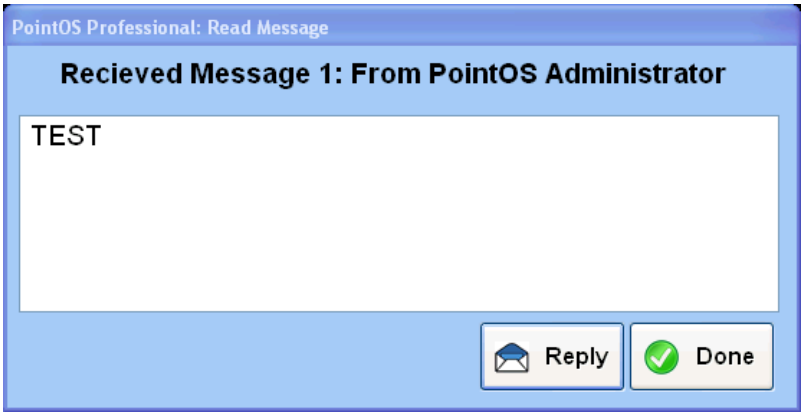

Figure 106: Read Message

Select the **Reply** button to reply to the message. Or select **Done** to close the message without replying.

Reply to Message

When you reply to another message, PointOS displays the *Send Message* screen.

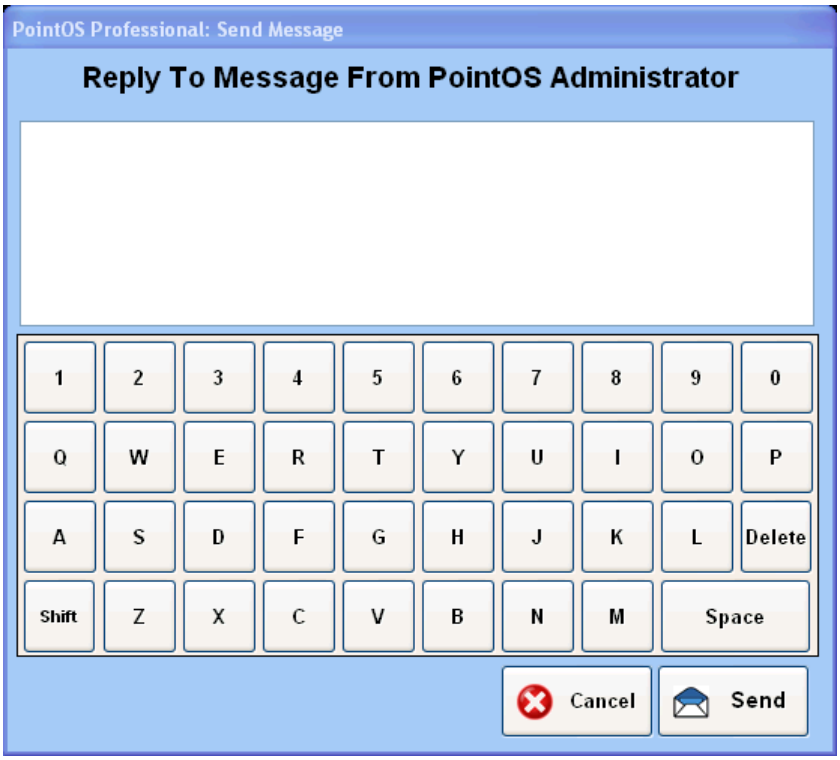

Figure 107: Reply to Message

To reply to the message, enter the **Message**. Then select the **Send** button to send the message. Or select **Cancel** to close the *Send Message* screen without sending a reply.

View Old Mail

The *Message Center* also allows you to view your old messages. This screen may be helpful if you are unable to respond to a message when it is displayed.

To open the *Old Mail* screen, select the **View Your Old Mail** button from the *Message Center* screen.

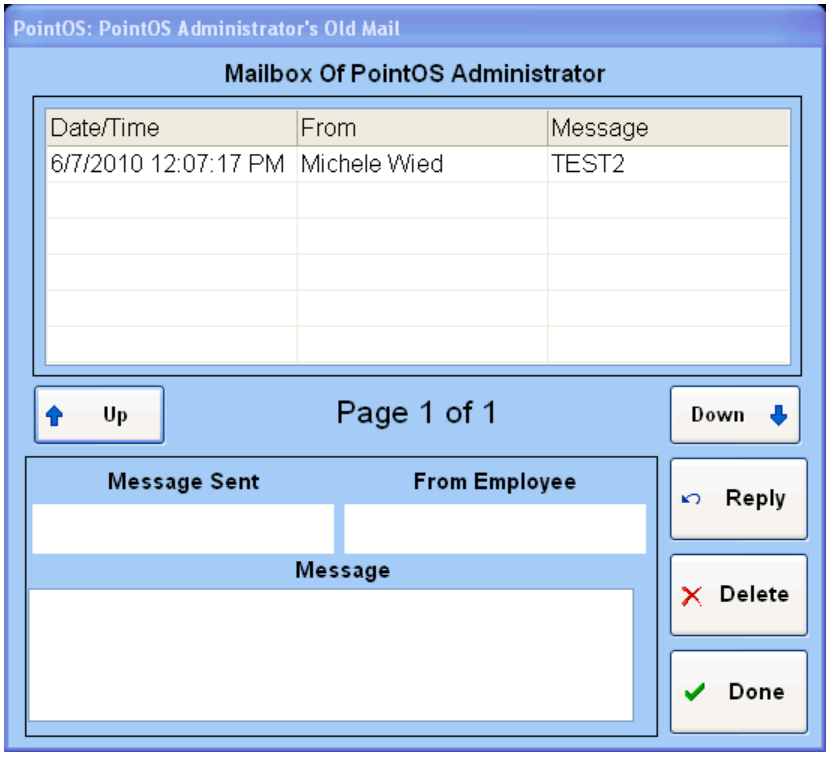

Figure 108: Old Mail

Use the **Up** and **Down** arrows to scroll through a long list of messages.

Select a message in the **Mailbox** list to see when the message was sent, who it was from, and the message text. Select the **Reply** button to reply to the message. Select the **Delete** button to delete the message.

Select the **Done** button to close the *Old Mail* screen.

Delete Old Mail

The **Delete Old Mail** option deletes all of the messages stored in your mailbox.

To delete all of your old mail, complete the following steps:

1. Select the **Delete Old Mail** button from the *Message Center* screen.
2. The system displays a message to make sure you want to delete all of the messages. Select **Yes** to continue. Select **No** to close the message without deleting any old mail.
3. The system displays a message indicating that the messages have been deleted. Select **OK** to close the message.

Working with Reports

While you are cashing out, you can complete a closing report or an incident report. You can also report an incident at any time during the shift.

To see how your business is performing over a selected time period, you can view a complete or quick sales report.

Complete Closing Report

The *Closing Report* screen allows you to report any damage issues or indicate menu items that need to be reordered. It also allows you to report any other information to the manager.

To open the *Closing Report* screen, complete the following steps:

1. Select **File a Closing Report** from the *Cash Out* screen.

The system displays the *Closing Report* screen.

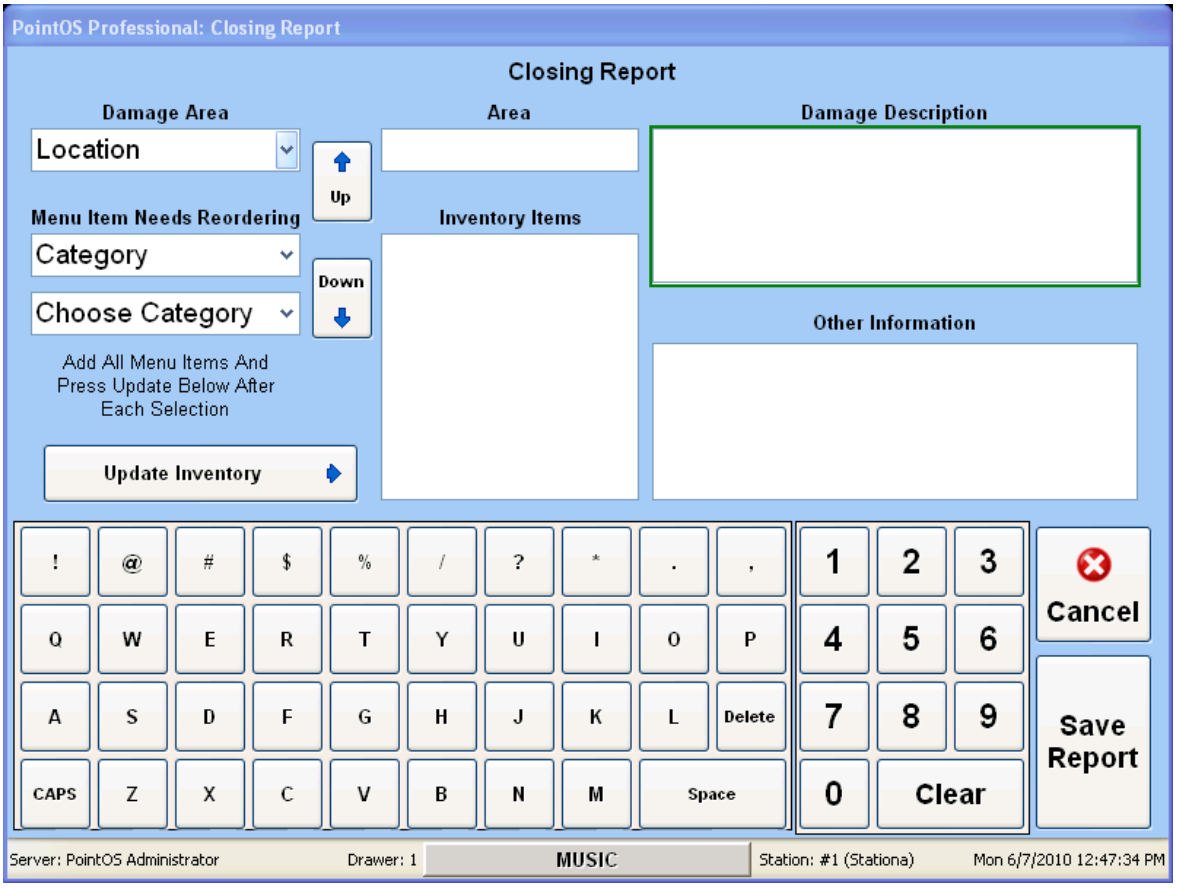

Figure 109: Closing Report

To file a closing report, complete the following steps:

1. To report damage, select the area of the damage from the **Location** drop down list. Enter a description of the damage in the **Damage Description** field.
2. To indicate menu items that need to be reordered, first select the item category from the **Category** drop down list. Second, select the item from the **Choose Item** drop down list. This list is not available until you select a category. Third, select the **Update Inventory** button. Repeat for each item that needs to be reordered.
3. To inform the manager of any other information, enter a description in the **Other Information** field.
4. Select **Save Report**. Or select **Cancel** to close the *Closing Report* screen without saving it.

Report Incident

The *Incident Report* screen allows you to document in the system any unusual incidents for the Manager to review and store for future reference, if necessary. You can report an incident at any time, or when you are cashing in for the day.

To open the *Incident Report* screen, select the **Incident Report** button on the *Main Menu*. Or select the **File an Incident Report** button from the *Cash Out* screen.

The system displays the *Incident Report* screen.

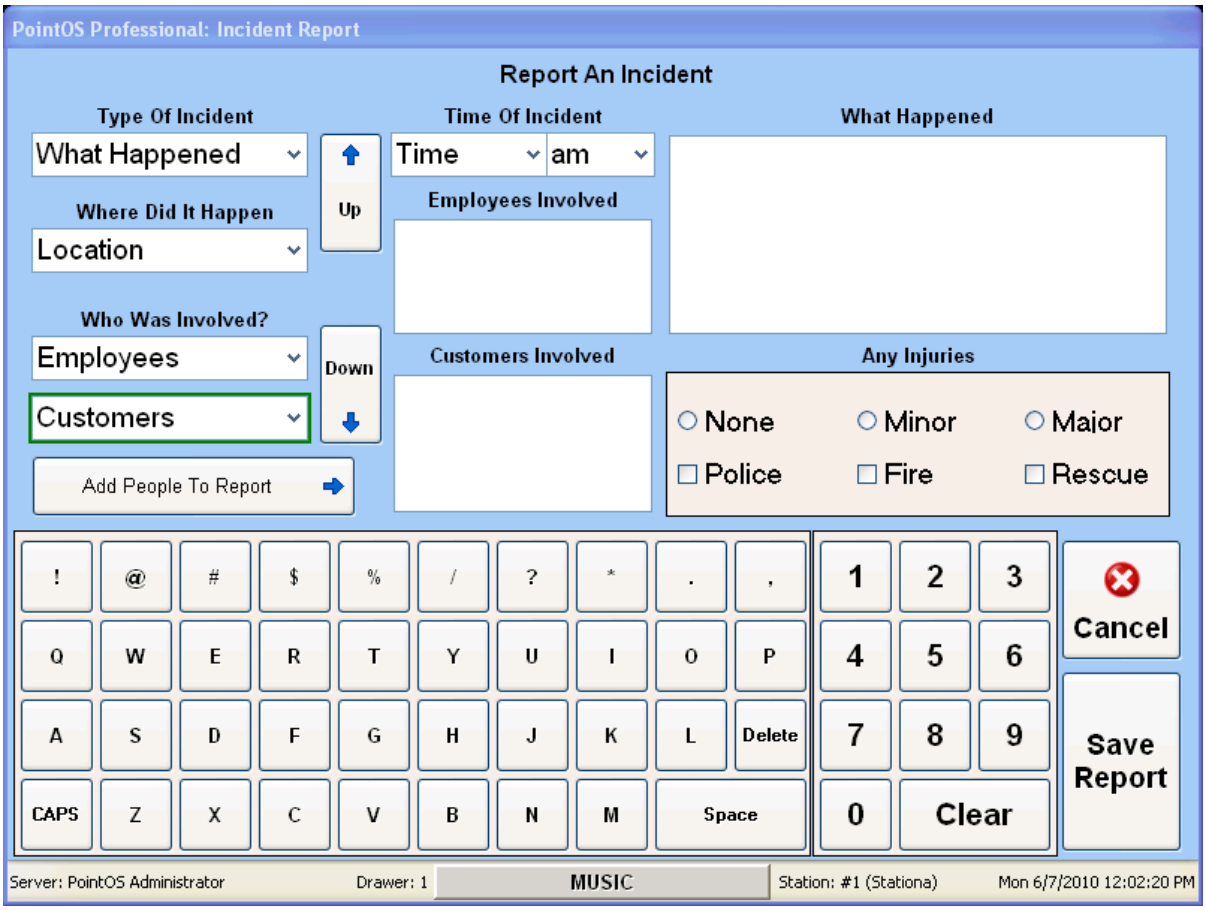

Figure 110: Incident Report

To file an incident report, complete the following steps:

1. Select the type of incident from the **What Happened** drop down list.
2. Select the location of the incident from the **Location** drop down list.
3. Select the **Time of Incident** from the **Time** and **am** drop down lists.
4. Select any employees who were involved from the **Employees** drop down list.
5. Select any customers who were involved from the **Customers** drop down list.

6. Select the **Add People To Report** button.
7. If more than one employee and/or customer was involved, repeat steps 4, 5, and 6.
8. Enter a description of the incident in the large **What Happened** field.
9. Select **None**, **Minor**, or **Major** to report any injuries.
10. Check the appropriate boxes to indicate if the **Police**, **Fire**, or **Rescue** team were involved.
11. Select the **Save Report** button. Or select **Cancel** to close the *Incident Report* screen without making a report.
12. The system displays a message indicating that the Incident Report was saved. Select **OK** to close the message.

View Sales Report

The *Sales Report* screen allows you to view or print the quick or full sales report.

To run sales report on the *Sales Report* screen, complete the following steps:

1. Select **Sales Report** from the *Main Menu*.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.
3. Select the **Start Date**. Select the **Today** button to choose the current date. Or use the **Up** and **Down** arrows for each field to select a new **Month**, **Day**, **Year**, and **Time**.
4. Select the **End Date**. Select the **Today** button to choose the current date. Or use the **Up** and **Down** arrows for each field to select a new **Month**, **Day**, **Year**, and **Time.**
5. Select either the **Get Full Report** button or the **Get Quick Report** button.

The system displays a message while it retrieves the selected report.

Figure 111: Retrieving Report Message

The system displays the Report.

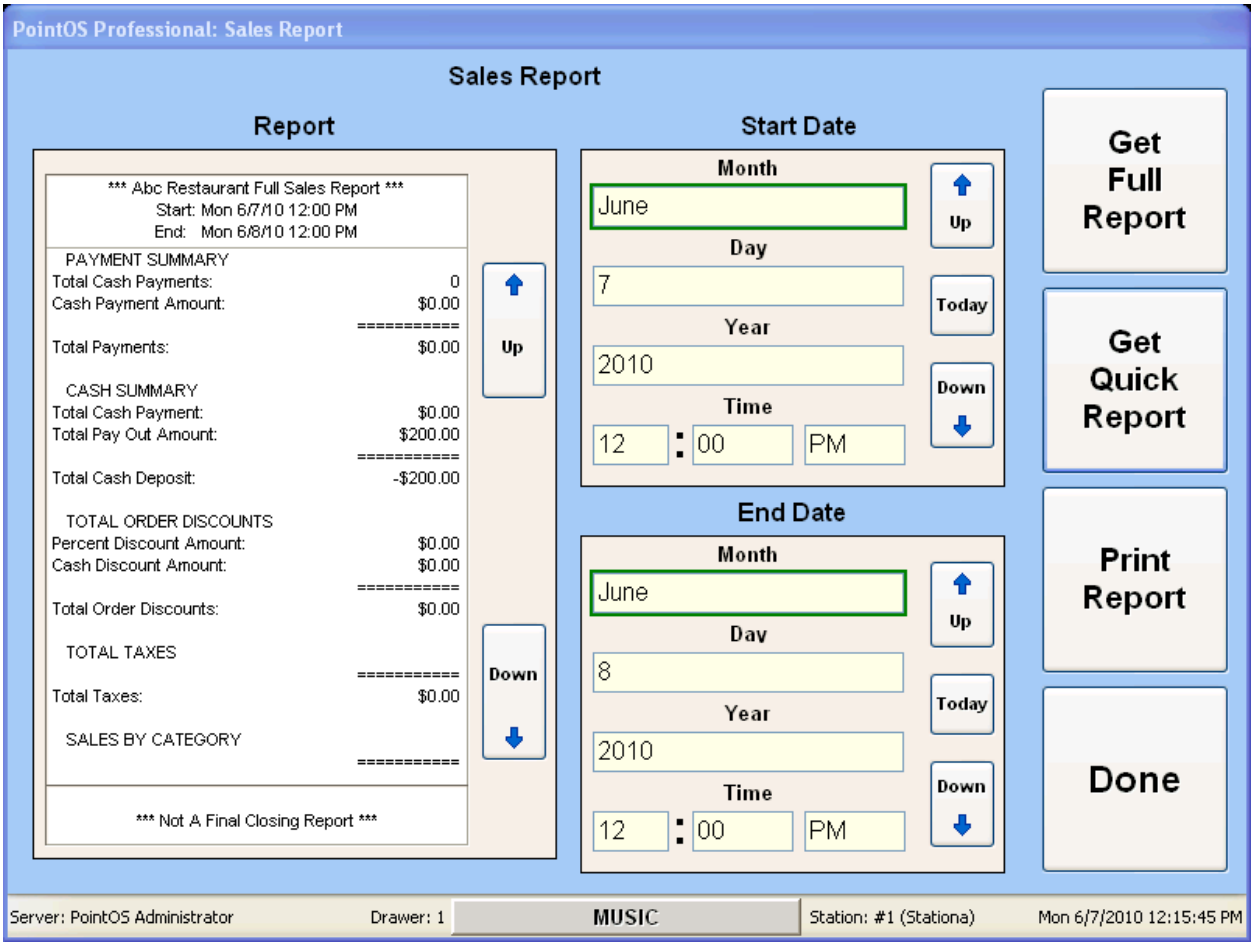

Figure 112: Sales Report

The report is displayed on the left side of the screen. Use the **Up** and **Down** arrows to scroll through a long report.

Select the **Print Report** button to print the report.

Select the **Done** button to close the *Sales Report* screen.

Using Multi-Server Mode

If your PointOS system is set up with stations in Multi-Server mode, some of the options are different. A multi-server mode station is not attached to a cash drawer.

Main Menu

The multi-server mode *Main Menu* is illustrated below.

The Order Entry, Recall Order, Void Order, Time Clock, Incident Report, Message, Sales Report options, and Close functions are mainly the same as those accessed from the regular *Main Menu*.

The Order Entry, Recall Order, and Void Order screens are limited to only those tabs entered using the same access code. If the manager access code is used to access these functions, the system displays the *Select Cashier* screen.

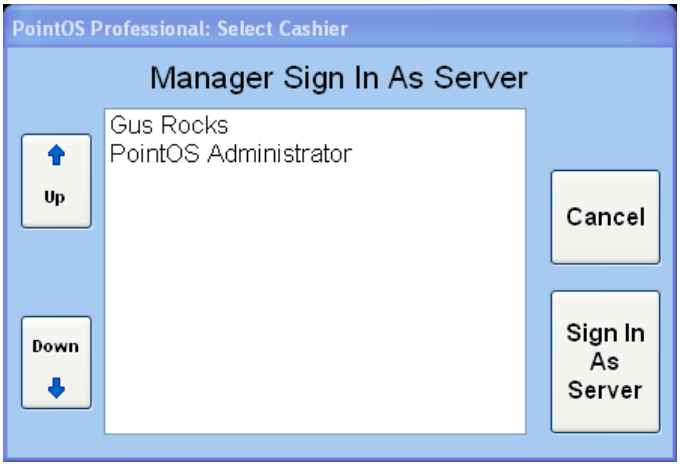

Figure 113: Select Cashier Screen

The *Select Cashier* screen lists the names of the servers who have logged in. Use the **Up** and **Down** arrows to scroll through a long list of servers.

Select the name for the server tabs you want to access and select **Sign In As Server**.

Server In

The **Server In** option allows a server to begin the shift. It is similar to the **Cash In** option. However, there is no cash drawer to count.

NOTE: You will not be able to enter orders until you have performed the **Server In** function.

To perform the **Server In** option, complete the following steps:

1. Select the **Server In** option from the *Main* Menu.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

If you have not clocked in yet, the system will prompt you to clock in.

The system displays a message indicating that the server has been logged in.

Select **OK** to close the message.

Server Out

The **Server Out** option ends the shift for a server. It is similar to the Cash Out option and displays the amount that the server owes for his or her sales, less any reported tips.

NOTE: You cannot perform the **Server Out** option if you have open tabs.

To perform the **Server Out** option, complete the following steps:

1. Select the **Server Out** option from the *Main* Menu.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.
3. The system displays a message asking if you want to cash the server out. Select **Yes** to continue or **No** to close the message without continuing the **Server Out** function.

If you have had credit card sales, the system displays the *Adjust Gratuity* screen. Refer to the "Adjust Gratuity" section of this User Guide for more information.

The system displays the *Cash Out Server* screen.

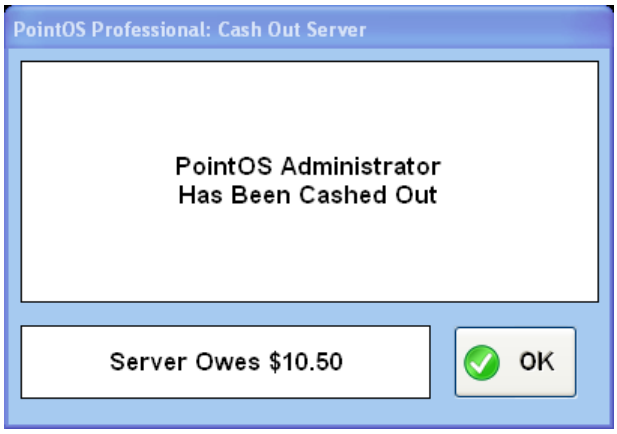

Figure 114: Cash Out Server

The bottom of the *Cash Out Server* screen indicates the amount of cash you owe for your customer tabs from the shift.

4. Select **OK** to close the screen.

The system prompts you to clock out.

Custom Modifiers

The *Customer Modifier* screen is slightly different when using multi-server mode. The Custom Modifier screen allows you to assign seat numbers for the order to facilitate order delivery.

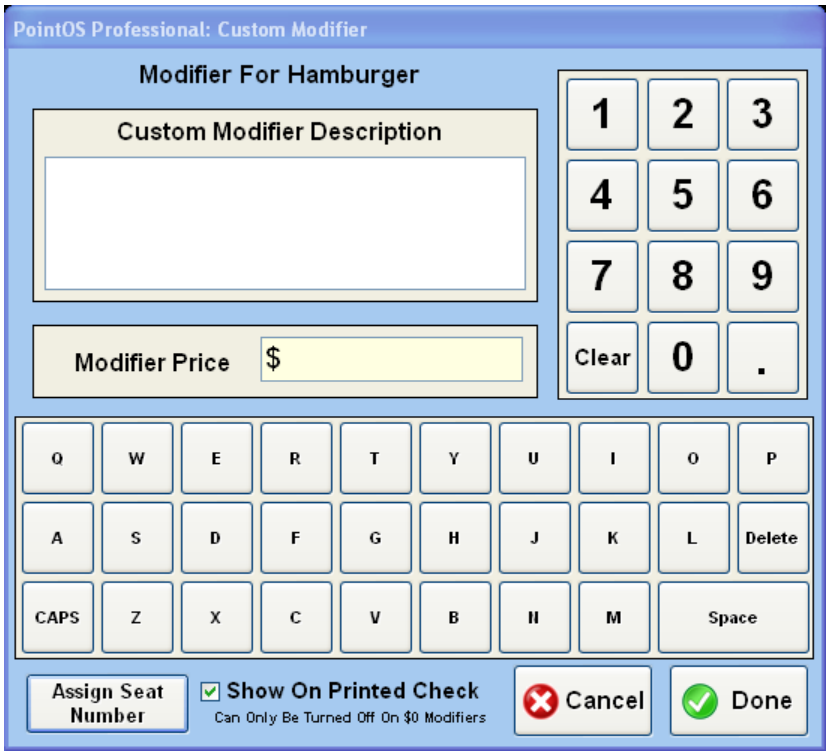

Figure 115: Custom Modifier Screen for Multi-Server Mode

To assign seat numbers, complete the following steps:

1. Select **Custom** on a menu item's *Item Modifier* screen to open the *Custom Modifier* screen.
2. Select **Assign Seat Numbers**.
3. The system displays the *Enter Seat Number* screen. Enter the seat number on the table and select **Enter**. The system displays the seat number in the *Custom Modifier Description* area. You can then enter additional custom modifier information as needed.

Lock Station

The **Lock Station** option causes the system to immediately display the screen saver for the station.

Select **Lock Station** at the bottom of the *Main* screen or the *Order Entry* screen to close the screen you are on and go to the station screen saver.

Using PointOS DoorMan

If you are using PointOS DoorMan, the Door Manager screen provides limited access to some PointOS functions to be used at the door of your business.

Main Menu

One station can be setup as the Door Manager. It will display the Door Manager version of the *Main Menu*.

Figure 116: Door Manager Main Menu

The Time Clock, Cash In/Cash Out, Incident Report, Sales Report, No Sale, Manager, and Exit functions are the same as those accessed from the regular *Main Menu*.

The Door Manager option opens a slightly modified *Name Tab* screen.

Name Tab

The Door Manager *Name Tab* screen allows you to easily find or add customers, and either add them to a tab or have them pay now (such as for a cover charge).

To add customers to a tab on the *Name Tab* screen, complete the following steps:

1. Select **Door Manager** from the *Door Manager Main Menu*.
2. The system displays the *Enter Access Code* screen. Enter your Access Code.

The system displays the *Name Tab* screen.

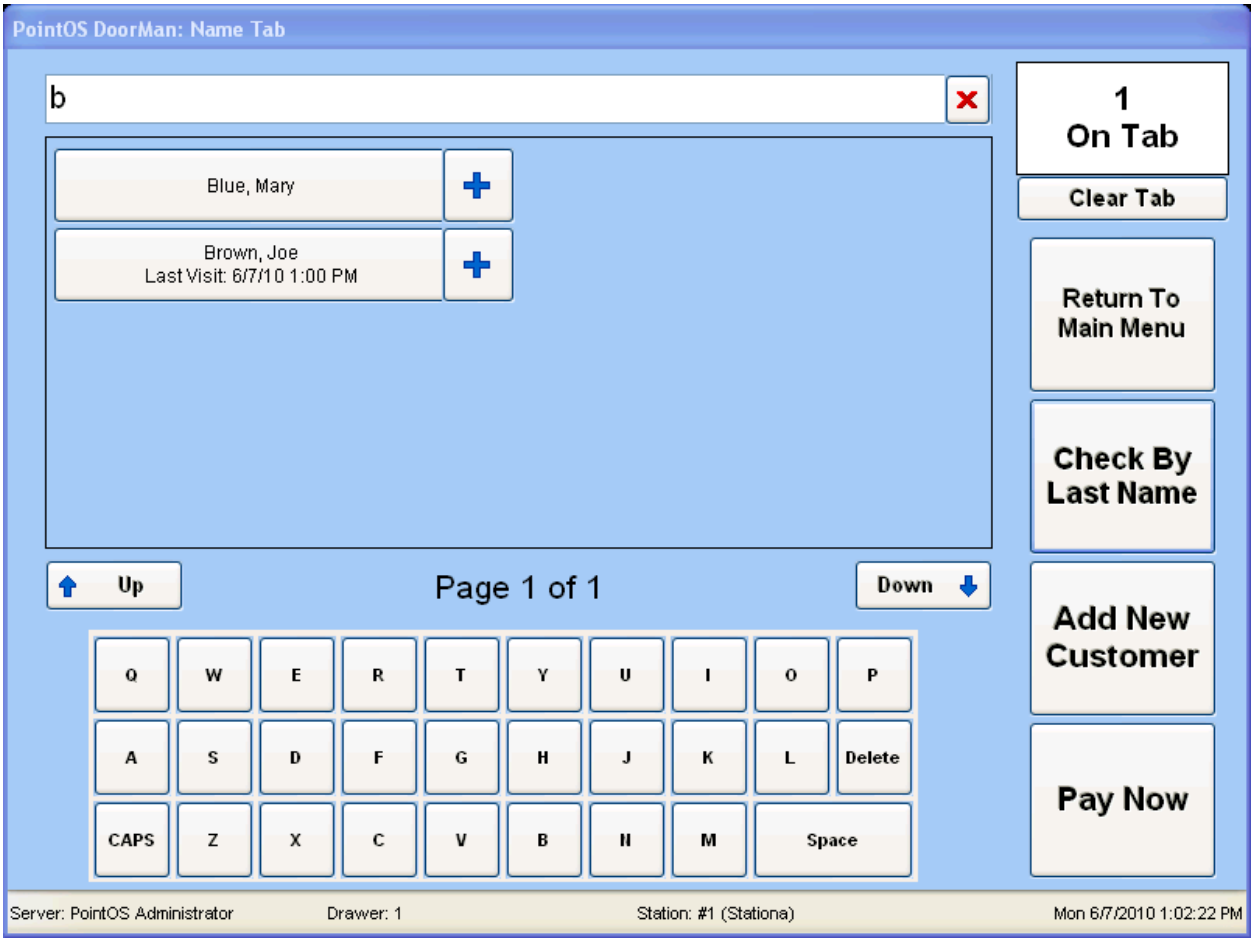

Figure 117: DoorMan Name Tab

3. Enter one or more letters of the customer's first or last name in the top field.

4. As you type, the system displays any matching customers. Select **Check by First Name** or **Check by Last Name** to switch the search, depending on what you entered.
5. Add customers to the tab, using one of the following methods. As you add customers to the tab, the number on the tab is displayed in the top right hand corner. You can select **Clear Tab** to start the tab over.
    - Select the **Plus** sign next to the customer name to add the customer to the tab.
    - Select **Add New Customer** to open the *Customer Information* screen to enter a new customer's information.
6. The system displays the *Customer Alert* screen to indicate the customer who has been added to the current tab. Select **Done** to close the message.
7. Select **Pay Now** to open the Door Manager version of the *Order Entry* screen.

Add New Customer

The *Customer Information* screen allows you to enter a new customer. It is similar to the *Customer Profile* screen.

To open the *Customer Information* screen for a new customer, select the **Add New Customer** button from the *Name Tab* screen.

The system displays the *Customer Information* screen.

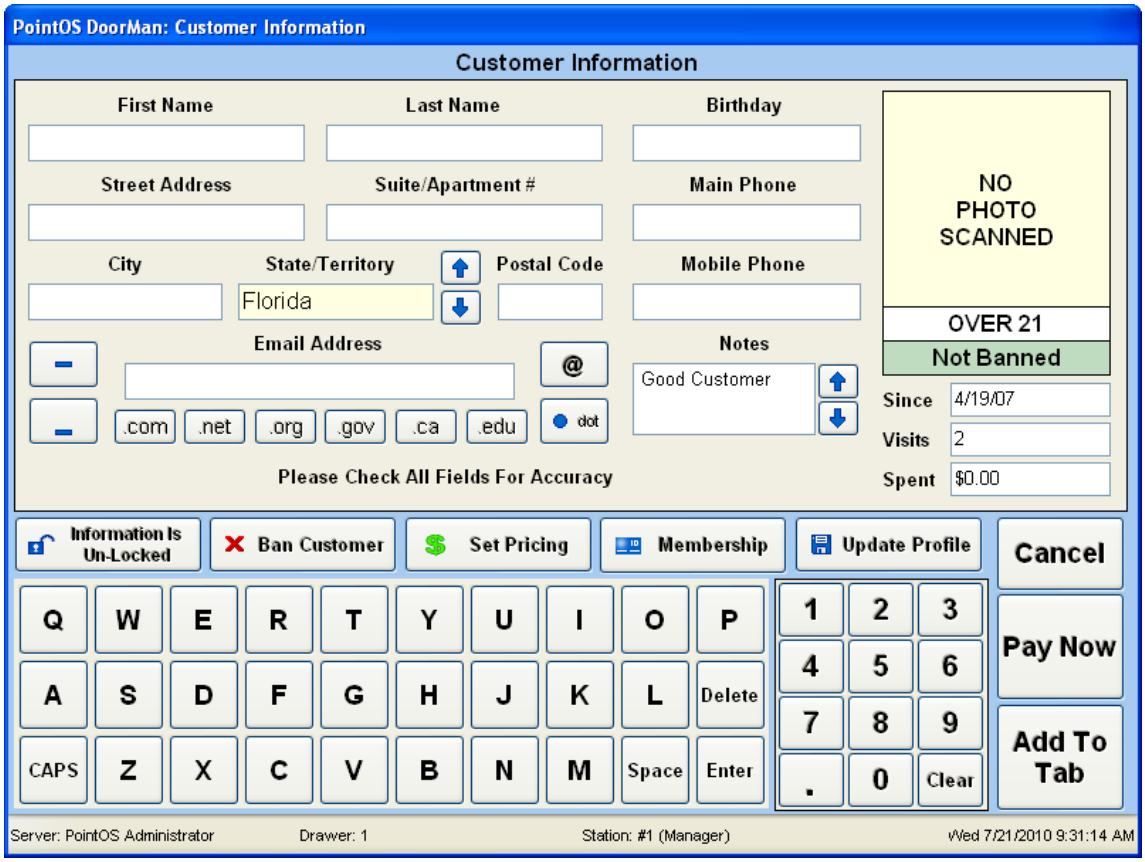

Figure 118: DoorMan Customer Information

To enter the new customer, complete the following steps:

1. Enter the following information for the customer:
   - First and Last Name
   - Street Address
   - Suite/Apartment #
   - City
   - State (Use the **Up** and **Down** arrows to select.)
   - Postal Code
   - Main Phone
   - Mobile Phone
   - Email Address
   - Notes

2. Select the **Birthday** field. PointOS displays the following additional tools.

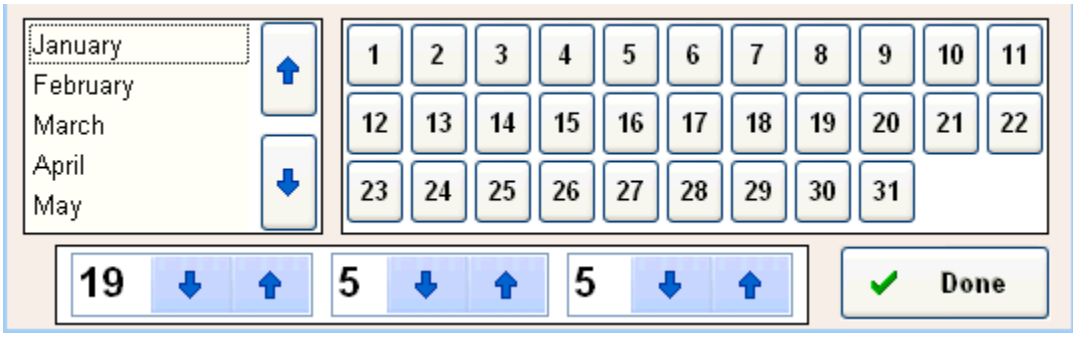

Figure 119: Birthday Tools

3. Use the **Up** and **Down** arrows to scroll through the list of months. Select the month of the customer's birthday.
4. Select the date of the customer's birthday.
5. Use the up and down arrows to select the **century**, **decade** and **year** of the customer's birthday.
6. Select **Done** to close the birthday tools.
7. Select the **Save Profile** button to save the customer information. The system displays a message asking if you want to save the customer. Select **Yes** to continue. Or select **No** to close the message and return to the *Customer Information* screen.
8. Select the **Information is Un-locked** button to lock the customer's information for privacy.

You can Ban or Set Special pricing for the customer as from the *Customer Profile* screen.

Select **Membership** to open the *Membership Information* screen. Refer to the "Membership Information" section in this User Guide for more information.

Select **Add to Tab** to add the customer to the current tab. Then you can add the other customers to the tab. The system displays a message indicating that the customer has been added to the order. Select **Done** to close the message.

Select **Pay Now** to accept the customer's payment.

Membership Information

The **Membership** option allows you to add memberships to a selected customer, and start a tab.

To open the *Membership Information* screen, select **Membership** from the *Customer Information* screen.

The system displays the *Membership Information* screen.

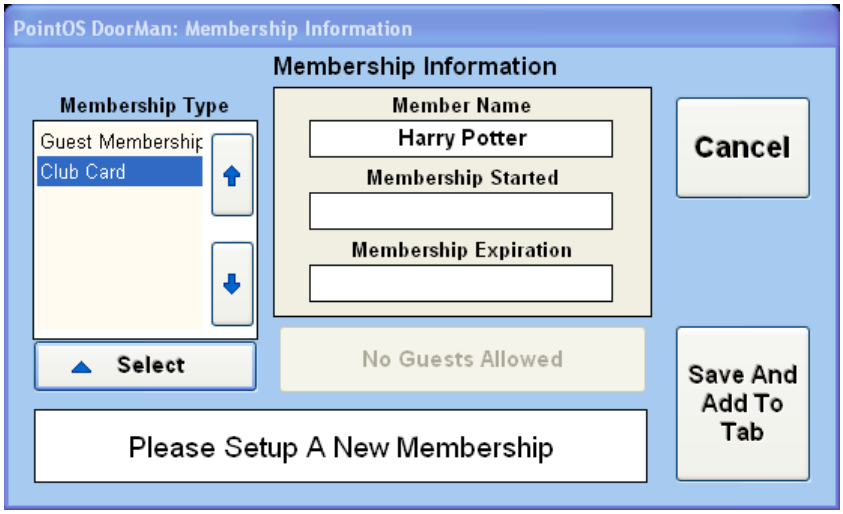

Figure 120: Membership Information Screen

To add a membership for a customer, complete the following steps:

1. Highlight the appropriate membership from the **Membership Type** list. Use the **Up** and **Down** arrows to scroll through a long list of memberships.
2. Choose the **Select** button.
3. The system displays the *Enter Access Code* screen. Enter your **Access Code**.

The *Membership Information* screen displays the **Membership Started** date and the **Membership Expiration** date.

4. Select the **Set Guests Allowed** button, if applicable.
5. The system displays the *Enter Manager Code* screen. Enter your **Access Code**.

The system displays the *Enter Number of Guests* screen.

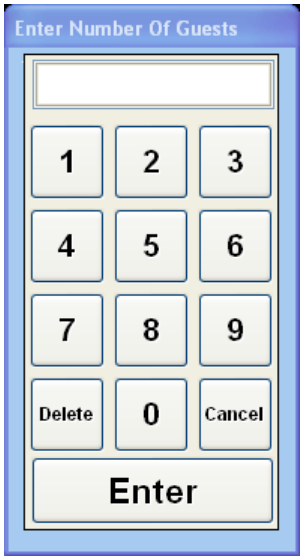

Figure 121: Enter Number of Guests

6. Enter the number of guests the customer may include on the membership and select **Enter**. The *Membership Information* screen displays the new guest information.
7. For a customer who already has a membership, you can select **Add to Tab Reprint Card Only** to reprint the membership card.
8. Select **Save and Add to Tab**.
9. The system displays a message asking if you want to set up a membership card (if applicable). Select **Yes** to continue or **No** to print the card at another time.

The membership ID card prints to your card printer.

Pay Now

The Pay Now feature allows you to open the DoorMan version of the *Order Entry* screen. This screen works the same as the PointOS *Order Entry* screen, but it has a separate set of menu items, such as to collect a cover charge.

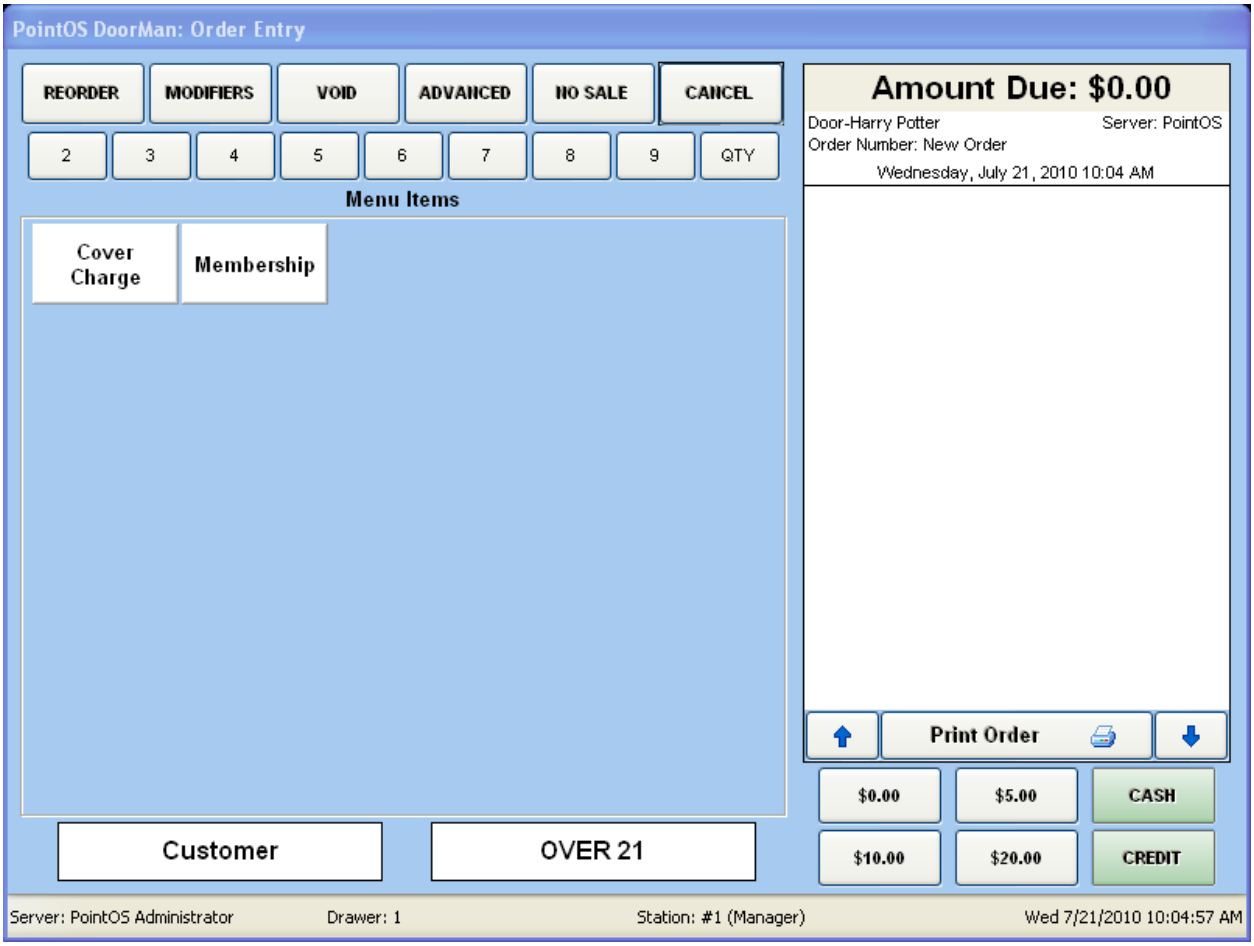

Figure 122: DoorMan Pay Now

Best Practices for Using PointOS

This chapter describes a typical day at a bar, club, or restaurant and the best practices for using PointOS.

If you are a cashier, use the following process:

1. Use the *Time Clock* screen to clock in.
2. When you receive your cash drawer, count the amount of each denomination in the drawer. Use the *Cash In* screen to cash in.
3. Record your orders and sales throughout the day using the *Order Entry* screen and associated other screens.
4. At the end of the shift, use the *Cash Out* screen to cash out. This process includes declaring your tips. If you organize your credit card slips in order by the Q# at the bottom of the receipts, you can quickly use the *Adjust Gratuity* screen to declare your credit card tips. Make sure to print from the *Adjust Gratuity* screen so the manager can review the gratuities.
5. Remove the total gratuity amount from the drawer.
6. Count the amount of each denomination of coins and bills in the drawer. Record the amounts on the *Cash Out* screen.
7. Use the *Time Clock* screen to clock out.

If using multi-server mode and you are a server, use the following process.

1. Use the *Time Clock* screen to clock in.
2. Use the **Server In** function on the *Main* menu to sign in.
3. Record your orders and sales throughout the day using the *Order Entry* screen and associated other screens.
4. At the end of the shift, use the *Server Out* function to cash out. This process includes declaring your tips. If you organize your credit card slips in order by the Q# at the bottom of the receipts, you can quickly use the *Adjust Gratuity* screen to declare your credit card tips. Make sure to print from the *Adjust Gratuity* screen so the manager can review the gratuities.
5. Pay the indicated amount for your sales.
6. Use the *Time Clock* screen to clock out.

Frequently Asked Questions

How Do I Void a Paid Order?

Complete the following process to void a paid order:

1. Recall the order using the *Recall Order* screen. Refer to the " Order" section in this User Guide for more information.
2. Remove the payments from the order. Refer to the Payments" section in this User Guide for more information.
3. Once the payments have been removed, you can void the order. Refer to the " Order" section in this User Guide for more information.

How do I Reprint a Credit Card Receipt?

Complete the following process to reprint a credit card receipt:

1. Recall the order using the *Recall Order* screen. Refer to the " Order" section in this User Guide for more information.
2. Select **Print Credit Card Slip** from the *Recall Tab* screen. The **Print Credit Card Slip** button only appears if the order includes a credit card payment.
3. The system displays a message asking if you want to reprint the credit card receipt. Select **Yes** to continue.

Troubleshooting

The following table outlines some common problems with PointOS and some possible solutions.

Problem	Possible Solution
The cash drawer won't pop.	First, check your cables and then make sure your printer is turned on, has paper, and a ribbon or ink. If the cash drawer still doesn't pop, the printer may not be setup with the correct model. Refer to the "Station Settings" section in the Manager Manual for more information on setting up the printer.

List of Figures