

# **INI POS (RESTAURANT)**

# **USER MANUAL**

ver. 14.06.11

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# 1. GETTING STARTED

Welcome to INI's Point of Sale system. This document aims to provide you with simple, easy to understand instructions for using our software, and troubleshooting solutions and tips.

This section will introduce you to the home page, which serves as a gateway into four main branches of the user interface.



*This is the “home page” of INI POS. It is the screen you will see immediately upon first opening up the program.*

## Back Office:



This button leads you to features that adjust your existing menu, add entirely new items, make changes to users, sales reports, and more. An administrator's password is required to enter the back office.

## Start Sale:



This is where non-administrators will spend most of their time. This button leads you to the main POS interface, where you will take orders and process payments.

## Sales Report:



An administrative feature, this button allows you to view, print, or export to MS Excel, the company's sales data. An administrator's password is required to use this feature.

## Clock In/Out:



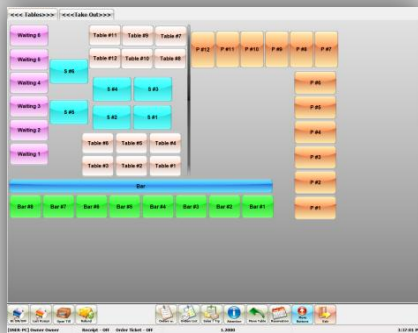
This utility allows your POS station to double as a timestamp for employees. Please refer to section 11.

## 2. HOW TO PLACE AN ORDER

### a. SINGLE ORDER



i) Press Start Sale. You may be prompted for a user password. Enter the password then click or tap the blue arrow key.



ii) This is the main Sales Interface. To place an order, left click or tap the required table.

(The appearance of this screen will vary depending on how your table layout was configured. Please see Section 8.)



iii) Depending on your settings, you may be prompted to identify yourself. Select the appropriate name from the list and press OK.

Refer to Section 10 for more information.



iv) This is the "Order List".

Enter your order by browsing for your item from the right panel. Press the correct category tab, and then press the button with your item's name.

Pressing your item more than once increases the quantity.

### IMPORTANT!

v) ALWAYS PRESS SAVE ORDER (circled in red in the image, left), or the order will not be processed!

**b. SEPARATE ORDERS, SEPARATING EXISTING ORDERS**

You may need to separate orders for a variety of reasons when two or more people are dining at the same table, or even for a single takeout order. Please follow the steps below.

- i) Follow the steps outlined in Section 1a until you've completed the order for the first person.



- ii) Click the "separator" button at the bottom left of your screen.

Server: Owner Order#: 30  
Table: Bar #1 Guests: 1

| #             | Item Name              | Qty | E.Total |
|---------------|------------------------|-----|---------|
| >>>>> 1 >>>>> |                        |     |         |
| 1             | <1>Miso                | 1   | \$1.00  |
| 2             | <2>Rice                | 1   | \$1.00  |
| 3             | <3>Vege Sunomono       | 1   | \$2.75  |
| 4             | <4>Ebi Sunomono        | 1   | \$3.50  |
| 5             | <5>Tako Sunomono       | 1   | \$3.50  |
| 6             | <6>Shrimp Sunomono     | 1   | \$3.50  |
| 7             | <7>Edamame             | 1   | \$3.50  |
| 8             | <8>Agetashi Tofu       | 1   | \$3.75  |
| 9             | <9>Spicy Agedashi T... | 1   | \$3.75  |
| 10            | <10>Gomae              | 1   | \$3.75  |
| >>>>> 2 >>>>> |                        |     |         |

- iii) This creates a separating line that divides the Order List, as shown left:

Server: Owner Order#: 30  
Table: Bar #1 Guests: 1

| #             | Item Name              | Qty | E.Total |
|---------------|------------------------|-----|---------|
| >>>>> 1 >>>>> |                        |     |         |
| 1             | <6>Shrimp Sunomono     | 1   | \$3.50  |
| 2             | <8>Agetashi Tofu       | 1   | \$3.75  |
| 3             | <9>Spicy Agedashi T... | 1   | \$3.75  |
| 4             | <10>Gomae              | 1   | \$3.75  |
| >>>>> 2 >>>>> |                        |     |         |
| 1             | <1>Miso                | 1   | \$1.00  |
| 2             | <2>Rice                | 1   | \$1.00  |
| 3             | <3>Vege Sunomono       | 1   | \$2.75  |
| >>>>> 3 >>>>> |                        |     |         |
| 1             | <5>Tako Sunomono       | 1   | \$3.50  |
| 2             | <4>Ebi Sunomono        | 1   | \$3.50  |
| 3             | <7>Edamame             | 1   | \$3.50  |

- iv) Repeat creating separating lines and entering order items as required. An example is shown left.

**IMPORTANT!**

Remember to click



**b. SEPARATE ORDERS, SEPARATING EXISTING ORDERS (CON'T)**

- v) To separate an existing, single Order List into a divided one, first press the “split to” key.

Server: Owner    Order#: 30  
Table: Bar #1    Guests: 1

| #  | Item Name              | Qty | E.Total |
|----|------------------------|-----|---------|
| 1  | <6>Shrimp Sunomono     | 1   | \$3.50  |
| 2  | <8>Agetashi Tofu       | 1   | \$3.75  |
| 3  | <9>Spicy Agedashi T... | 1   |         |
| 4  | <10>Goma               | 1   |         |
| 5  | <1>Miso                | 1   |         |
| 6  | <2>Rice                | 1   |         |
| 7  | <3>Vege Sunomono       | 1   |         |
| 8  | <7>Edamame             | 1   |         |
| 9  | <4>Ebi Sunomono        | 1   |         |
| 10 | <5>Tako Sunomono       | 1   |         |

**Bill #1 (Master Bill)**

| #  | Item Name              | Qty |
|----|------------------------|-----|
| 1  | <6>Shrimp Sunomono     | 1   |
| 2  | <8>Agetashi Tofu       | 1   |
| 3  | <9>Spicy Agedashi T... | 1   |
| 4  | <10>Goma               | 1   |
| 5  | <1>Miso                | 1   |
| 6  | <2>Rice                | 1   |
| 7  | <3>Vege Sunomono       | 1   |
| 8  | <7>Edamame             | 1   |
| 9  | <4>Ebi Sunomono        | 1   |
| 10 | <5>Tako Sunomono       | 1   |

Total: \$31.50

**Bill #2**

| # | Item Name | Qty |
|---|-----------|-----|
|   |           |     |
|   |           |     |
|   |           |     |
|   |           |     |
|   |           |     |
|   |           |     |
|   |           |     |
|   |           |     |
|   |           |     |
|   |           |     |

Total: \$0.00

S.Ttl: \$30.00  
GST: \$1.50  
PST: \$0.00  
PST2: \$0.00

Total: \$31.50

Close

Go Back   Void   Split To   Split Item   S. Bills   Print Bill   Discount   Order Mem   Table Info.   Schedule Order Print   Print Tip on Bill   Re-Print Whole Ord.

[USER-PC] Owner Owner    Receipt - OFF    Order Ticket - OFF    1.2000    3:21:37 PM

- vi) Eight stacked windows will appear over the sales interface, as shown above.
- vii) Drag your desired items and drop them in the appropriate bill slot, then press close.

viii) **IMPORTANT!**



**C. ITEM PRICE EDITING**

There are three ways to edit an item's price:

- through the Edit Price button, as shown below;
- through the Discount button (see section 3c);
- through accessing the Menu directly from the Back Office (see section 6c).

Of these, only the last option permanently changes an item's price (unless altered again using the same method). The first two options change an item's price on the fly, and for that instance only.

To change an item's price temporarily, follow these steps:

| Server: Owner |                        | Order#: 30 |         |
|---------------|------------------------|------------|---------|
| Table: Bar #1 |                        | Guests: 1  |         |
| #             | Item Name              | Qty        | E.Total |
| >>>>> 1 >>>>> |                        |            |         |
| 1             | <1>Miso                | 1          | \$1.00  |
| 2             | <2>Rice                | 1          | \$1.00  |
| 3             | <3>Vege Sunomono       | 1          | \$2.75  |
| 4             | <4>Ebi Sunomono        | 1          | \$3.50  |
| 5             | <5>Tako Sunomono       | 1          | \$3.50  |
| 6             | <6>Shrimp Sunomono     | 1          | \$3.50  |
| 7             | <7>Edamame             | 1          | \$3.50  |
| 8             | <8>Agetashi Tofu       | 1          | \$3.75  |
| 9             | <9>Spicy Agedashi T... | 1          | \$3.75  |
| 10            | <10>Gomae              | 1          | \$3.75  |
| >>>>> 2 >>>>> |                        |            |         |

- First, ensure you have entered the item into the Order List.
- In the Item Name section displayed to the left, click the name of the item whose price you wish to change.



- Press the Edit Price button, as shown left.
- Change the unit price as desired; press OK.

v) **IMPORTANT!**



**d. DELETE, QTY CHANGE**

Please note that deleting an item from the ordered list completely removes it, regardless of its quantity.

**To DELETE** an entered item from the Ordered List:

- i) Click the desired item in the Ordered List

- ii) Click Delete,  at the bottom of the Ordered List

- iii) Enter the administrator's password if prompted

- iv) **IMPORTANT!**



**To ADJUST THE QUANTITY** of an entered item from the Ordered List:

- i) Click the desired item in the Ordered List

- ii) Click Qty,  at the bottom of the Ordered List

- iii) Enter the administrator's password if prompted

- iv) **IMPORTANT!**

**e. USING ORDER MEMO**

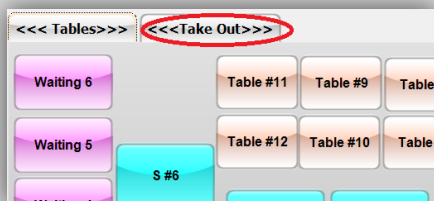
To enter a memo for an Ordered List:

- Press an item in the Ordered List
- Press the "Order Mem" button along the bottom row
- Enter your memo, then press Save Order.

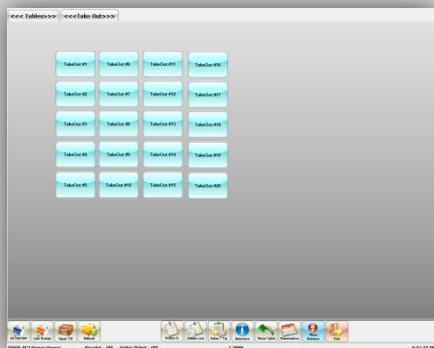




## f. TAKEOUT ORDERS



- i) To fill a takeout order, press the Take Out tab at the top of the Sales Interface screen.



- ii) You should now be viewing the Take Out section of the Sales Interface, as shown in the left.
- iii) Click an empty Take Out cell to begin.

- iv) The Take Out Information window will appear. Enter the information as desired. All entries are optional.
- v) After you've entered the necessary information, press OK.
- vi) Take your order as normal, as with dine-in orders described in Section 2a.

## g. TASTE OPTIONS

Taste Options are modifiers, and appear just like regular items in the Order List screen, likely under the "Other" tab (and elsewhere, depending on how your POS Station was configured).

They are in essence pre-made notes. They enter phrases like "no sauce", "extra mayo", "well-done", etc.

To create your own Taste Option buttons, refer to Sections 6b and 7c.

To use a Taste Option item

- i) Highlight an entered item in the Ordered List by clicking it.
- ii) Enter your desired Taste Option by clicking it like any regular item.

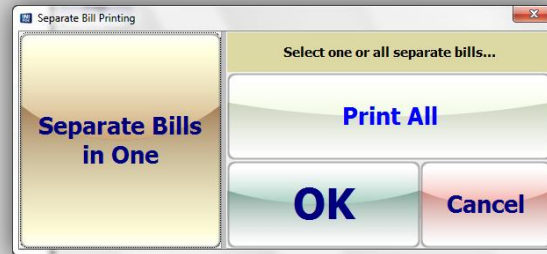
### 3. PRINTING BILLS AND DISCOUNTS

#### a. SINGLE BILL

Press the “Print Bill” button, found near the bottom beneath Payment.

#### b. SEPARATE BILLS, ONE PAGE SEPARATE BILLS

- i) Press the S.Bill button, found to the left of the “Print Bill” button.
- ii) The “Separate Bill Printing” dialogue window will pop up.



- iii) TO PRINT EACH BILL ON SEPARATE PAGES, press “Print All”.
- iv) TO PRINT THE SEPARATE BILLS SEPARATELY BUT ON ONE PAGE, press “Separate Bills in One”.

**Note:** Each separate bill will be numbered for ease of identification.

#### c. APPLYING DISCOUNTS (ONE-TIME)

Applying discounts by using the Discount button in the Order List has a one-time effect. To apply a set discount automatically (i.e. Happy Hour), please see section 6e.



- i) From the bottom-row buttons from the Order List screen, press Discount.
- ii) The Discount window will pop-up, as shown below:



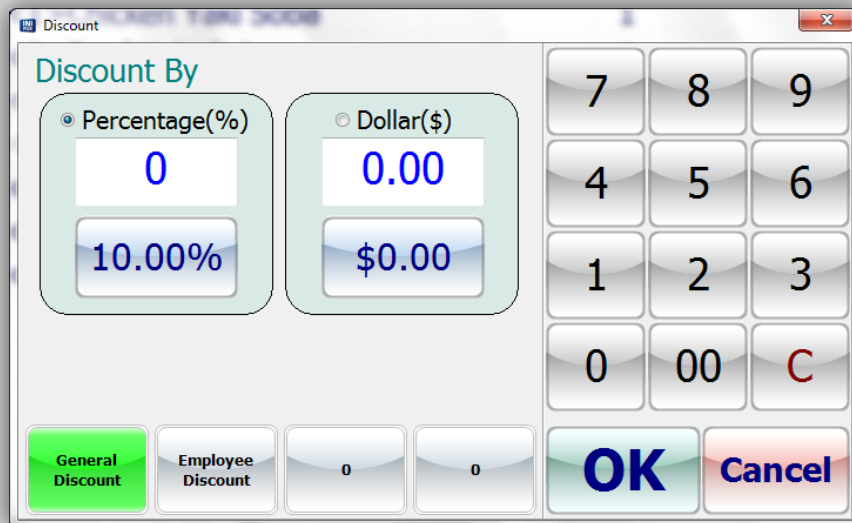
**NOTE:**

If the “x” in the leftmost column does not appear, then that item will NOT be selected for discount.

Click the space in the leftmost column once to toggle the “x” on and off.

**C. APPLYING DISCOUNTS (ONE-TIME, CON'T)**

- iii) Pressing the Discount Pad will bring up the following window where you can manually enter a discount. Press OK after you've finished.



The screenshot shows a 'Discount' window with two main sections: 'Discount By' and a numeric keypad. In the 'Discount By' section, 'Percentage(%)' is selected with a value of '0', and 'Dollar(\$)' is unselected with a value of '0.00'. Below these are buttons for '10.00%' and '\$0.00'. The numeric keypad contains digits 0-9, a '00' button, and a 'C' (clear) button. At the bottom, there are buttons for 'General Discount', 'Employee Discount', two buttons with '0', and 'OK' and 'Cancel' buttons.

- iv) This will return you to the previous window; press close.

| Server: Admin |                      | Order#: 8      |         |
|---------------|----------------------|----------------|---------|
| Table: Bar #3 |                      | Guests: 1      |         |
| #             | Item Name            | Qty            | E.Total |
| 1             | <1>Chicken Yaki Soba | 1              | \$8.95  |
|               | ** Discount(10%) **  |                | -\$0.90 |
| 2             | <2>Beef Yaki Soba    | 1              | \$8.95  |
|               | ** Discount(10%) **  |                | -\$0.90 |
| 3             | <10>Vegetable Roll   | 1              | \$3.25  |
|               | ** Discount(10%) **  |                | -\$0.33 |
| 4             | <9>Negitoro Roll     | 1              | \$3.25  |
|               | ** Discount(10%) **  |                | -\$0.33 |
| 5             | <1>Tuna Cone         | 1              | \$2.95  |
|               | ** Discount(10%) **  |                | -\$0.30 |
| 6             | <1>Yam Tempura       | 1              | \$6.50  |
|               | ** Discount(10%) **  |                | -\$0.65 |
| 7             | <3>Assorted Tempura  | 1              | \$7.95  |
|               | ** Discount(10%) **  |                | -\$0.80 |
|               |                      |                |         |
| S. Ttl:       |                      | \$41.80        |         |
| DSC:          |                      | -\$4.21        |         |
| GST:          |                      | \$1.88         |         |
| PST:          |                      | \$0.00         |         |
| PST2:         |                      | \$0.00         |         |
| <b>Total:</b> |                      | <b>\$39.47</b> |         |

Delete

Separator

Save Order

+

Qty

Edit Price

Payment

- v) The Order List should now show the discount you applied, as illustrated to the left.
- vi) Save order.

## 4. PAYMENT AND ENTERING TIPS

### a. SINGLE PAYMENT

To process a payment (and also to enter the tip – optional):



- i) Press the Payment button. This will bring up the Payment Window, as shown below.

- ii) Select the type of payment by pressing the corresponding button.
- iii) Enter the TOTAL (including the tip!) payment amount. If exact, press the white button with blue text displaying the total amount.
- iv) (Optional) Enter the tip amount in the tip line.
- v) The POS software correctly and automatically calculates the correct change, if applicable.

**Note:** The screenshot above illustrates change given after the elimination of the Canadian penny.

## b. SPLIT PAYMENTS – INDIVIDUAL ORDERS

- i) Ensure that you have printed separate bills. See Section 3b.
- ii) Press “Payment”.
- iii) You will be presented with an individual payment window for each customer, as shown below:



- iv) You can cycle through the customers by pressing the grey number to the right of “Customer # X”.
- v) Process each payment normally, as outlined in the previous section.

## c. SPLIT PAYMENTS – EVENLY DIVIDED

Customers may wish to split the total cost of their purchase evenly, instead of paying for what they individually ordered. You could do this manually with a calculator, but the INI POS software has a built-in feature to handle this situation: split payments.

Split payments are achieved by the “1/n” button beneath the “Due \$” line. Please follow the instructions on the next page:

### C. SPLIT PAYMENTS – EVENLY DIVIDED (CON'T)

Payment window showing the initial state. The total is 43.89. The 'Pay \$' field shows '1/N' circled in red.

- i) In the payment window, press the 1/n button, circled in red on the left.

Payment window showing the '1/N' button pressed. The 'Pay \$' field now shows '1/N' and the 'Due \$' field shows '43.89'.

- ii) The “# to divide by” line will appear. Enter the required number, then press calculate.  
 iii) In the larger screenshot below, the payment has been evenly divided.  
 iv) Process the split payments normally.

Payment window showing the final state. The total is 8.78 (1/5 of 43.89). The 'Pay \$' field shows '1/5' circled in red.

## 5. GIFT CARDS

Gift cards are a great way to promote your business, and INI POS can help manage them. All gift cards can be registered into your database quickly and easily with a unique barcode or number designated by you. This allows you to easily keep track of a Gift Card's remaining balance.

### a. HOW TO LOAD A BALANCE



- i) From the bottom row of icons in the Sales Interface, press More Buttons.



- ii) From the extended menu that appears, press P.Card (Prepaid Card)  
 iii) Enter your user password when prompted.

- iv) Create a unique barcode, and then type in the desired charge amount.



**a. HOW TO LOAD A BALANCE (CON'T)**

- v) Select the payment type used to charge the card; the gift card is now loaded for use.

Prepaid Card

Barcode  
0000000100

Balance  
50.00

Charge Amt.  
+/-

New Card has been added!

Cash Debit Credit

Link To Customer Customer Name

Print Balance Close

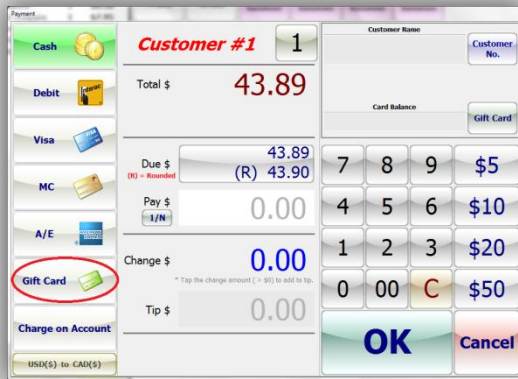
**IMPORTANT!**

Gift Card barcodes are unique. Utilizing a numbering system with many leading zeros is recommended when first creating your barcodes.

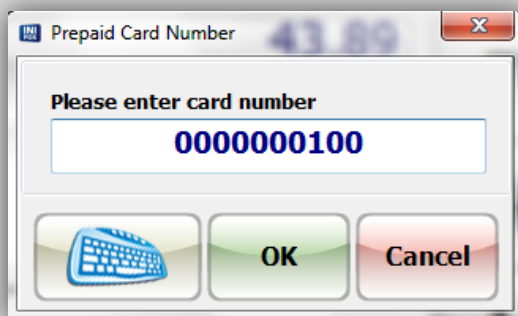


## b. HOW TO ACCEPT GIFT CARD PAYMENTS

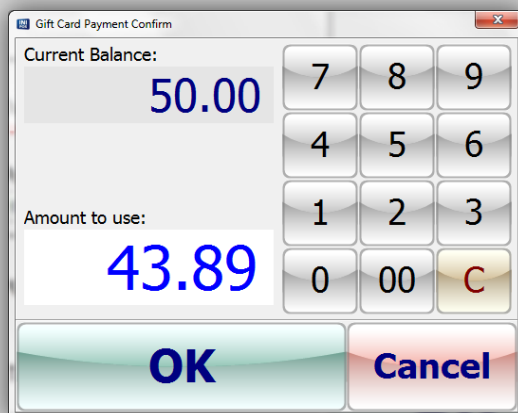
Receiving Gift Card payments is simple; it's nearly identical to selecting a payment type from the Payment Window, then identifying the Gift Card with its barcode.



- i) Select the Gift Card button from the Payment window.



- ii) Enter the Gift Card's barcode, including the leading zeros.



- iii) This window displays the Gift Card's current balance and amount to be used from it. Press OK to confirm.
- iv) Complete the order, adding in extra payment from another source if the Gift Card's balance is insufficient.

### C. CHECK GIFT CARD HISTORY



- i) From the bottom row of the Sales Interface, press More Buttons.
- ii) In the extended menu that appears as shown above, press P.C History (Prepaid Card History).
- iii) In the new window that appears, you may now view the history of all prepaid cards within a time range set at the top, or you may search for a specific gift card by entering its barcode.

Prepaid Card Payment & Charge History

From **20-Jun-2014** To **30-Jun-2014** Filter Card Number

| Payment History        |             | Charge History |              |
|------------------------|-------------|----------------|--------------|
| Charge Date & Time     | Card Number | Amount Charged | Cashier Name |
| 06/30/2014 3:21:00 PM  | 10005       | \$80.00        | Owner Owner  |
| 06/30/2014 3:21:00 PM  | 10006       | \$120.00       | Owner Owner  |
| 06/30/2014 3:21:00 PM  | 10007       | \$35.00        | Owner Owner  |
| 06/30/2014 3:21:00 PM  | 10009       | \$150.00       | Owner Owner  |
| 06/30/2014 3:20:00 PM  | 10001       | \$25.00        | Owner Owner  |
| 06/30/2014 3:20:00 PM  | 10002       | \$75.00        | Owner Owner  |
| 06/30/2014 3:20:00 PM  | 10003       | \$60.00        | Owner Owner  |
| 06/30/2014 3:20:00 PM  | 10004       | \$100.00       | Owner Owner  |
| 06/25/2014 12:00:00 PM | 0000000100  | \$50.00        | Owner Owner  |
| 06/20/2014 4:45:00 PM  | 0000001     | \$50.00        | Owner Owner  |
| 06/20/2014 4:40:00 PM  | 00000001    | \$50.00        | Owner Owner  |

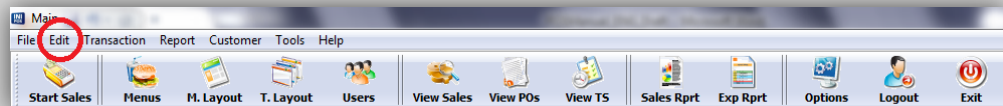
| Card Number | Balance |
|-------------|---------|
|             |         |

**Total Amount Charged: \$815.00** Close

## 6. ADD AND EDIT MENU ITEMS

Note: To add/edit menu items, you must enter the Back Office Interface, and must have the administrator's password. To do so, exit the Sales Interface, and press the Back Office button from the Homepage.

### a. ADDING CATEGORIES



- i) From the top bar within the Back Office, click Edit → Category Detail.
- ii) Click Add New, or select an existing Category and click Edit.
- iii) Name the new Category or make changes to an existing one.
- iv) Click save.

### b. ADDING SIZES/TASTE ITEMS

- i) From the top bar within the Back Office, click Edit → Sizes & Tastes Detail.
- ii) Click Add New, or select an existing Sizes/Taste item and click Edit.
- iii) Name the new Sizes/Taste item, or make your changes to an existing one.
- iv) Click save.

### C. ADDING MENU ITEMS

#### IMPORTANT!

**ALCOHOLIC BEVERAGES NEED TO BE CLASSIFIED AS ALCOHOL, AND PST MUST BE MANUALLY APPLIED!**

**IMPORTANT!**  
**ALCOHOLIC BEVERAGE MUST HAVE**  
**PST, GST AND ALCOHOL BOXES**  
**CHECKED!**

The screenshot shows the 'Item Detail' window with the following details:

- Buttons:** Add New, Edit, **Save** (circled), Cancel, Sub Items, Inventory History, Export...
- Name:** Beer
- Category:** Liquor
- Tax:** ☒ GST (5%), ☒ PST (10%), ☐ PST2 (7%)
- Info.1 - Sizing & Tastes:**

| Size / Taste Name | Price | On Hand | ApplyQty |
|-------------------|-------|---------|----------|
| Chipotle          | 0.00  | 0       |          |
| D                 | 0.00  | 0       |          |
| Double            | 0.00  | 0       |          |
| Glass             | 4.00  | 0       |          |
| Ketchup           | 0.00  | 0       |          |
| Large             | 0.00  | 0       |          |
| Lemon Lime        | 0.00  | 0       |          |
| Mayo              | 0.00  | 0       |          |
| Mustard           | 0.00  | 0       |          |
| Noodle            | 0.00  | 0       |          |
| Pitcher           | 14.00 | 0       |          |
| Rice              | 0.00  | 0       |          |
| Salmon            | 0.00  | 0       |          |
- Info.2 - Item Type:**
  - ☐ Open
  - ☒ Alcohol
  - ☐ Time Chrg.
  - ☐ Taste
  - ☐ Scale
  - ☐ Reward
  - ☐ Menu Group
  - ☐ Online
- Print To:** ☐ Back, ☐ Front, ☒ Bar, ☐ Front2

- From the top bar within the Back Office, click Menus
- In the window that appears, name your item
- Select a category to place your item from the dropdown menu
- Tick the boxes that contain applicable sizes/taste options for your item, then enter the corresponding prices (i.e., Large, 25.00; Small, 18.00).
- Select the printer where an Order Request will be printed (Back = kitchen printer, Front = bar printer) by checking its box.
- Click Save.**
- The "Alternative Name" section is entirely optional, but comes in handy if your servers and staff recognize a certain item by a "friendly name". If you enter an alternative name for a menu item, that will be the name displayed in the Order Screen by default.

**IMPORTANT!****NON-ALCOHOLIC ITEMS MUST HAVE  
GST CHECKED!**

## What are Item Type Boxes?

These boxes serve several purposes, but you will generally only deal with the Open, Taste, and Alcohol boxes. These three boxes (and a few more) and their functions are explained below.

- OPEN:** This box, when checked, creates an item with NO FIXED PRICE. Its price must be manually entered each time it is purchased; useful for items that have significant or frequent price fluctuations.
- ALCOHOL:** The Alcohol box, when checked, allows all liquor sales to show up separately in the Sales Report.
- TASTE:** This box, when ticked, turns an item into a “modifier”.
- SCALE:** This box, when ticked, allows you to charge an item by its weight (\$N / unit of weight)
- TIME CHR.:** This box, when ticked,

#### d. DISCOUNTS (AUTOMATICALLY APPLIED)

This feature is for creating regular, reoccurring discounts for specific items; once these automatic discount times are set and applied, the POS will automatically apply said discounts appropriately until an administrator modifies the settings.

Please note: each item's automatic discounts must be individually configured.

The screenshot below illustrates an item completely configured for a 50% discount on Thursdays, from 11am to noon.

The screenshot shows the 'Item Detail' window for 'Beef Steak Combo'. The 'Tree View' on the left lists various menu items, with 'Beef Steak Combo (House Special Steak)' selected. The main window displays the item's details, including its name, alternative name, category, and tax settings. The 'Info.1' tab shows the 'Sizes & Tastes' table, where the 'Large' size is selected. The 'Info.2' tab shows the 'Discount setting for selected size' section, where the 'Manual Discount' checkbox is unchecked. The 'Happy Hour' section shows a 50% discount rate for Thursday from 11:00 AM to 12:00 PM. Red circles and numbers 1 through 4 highlight the steps: 1. Edit button, 2. Thursday checkbox, 3. Manual Discount checkbox, and 4. Large size.

| Size / Taste Name | Price | On Hand |
|-------------------|-------|---------|
| X Large           | 50.00 | 0       |
| X Regular         | 30.00 | 0       |

| Day  | Price (\$) | Rate (%) | From     | To       | Next Day                 |
|------|------------|----------|----------|----------|--------------------------|
| Mon. | 0.00       | 0.0      | 12:00 AM | 12:00 PM | <input type="checkbox"/> |
| Tue. | 0.00       | 0.0      | 12:00 AM | 12:00 PM | <input type="checkbox"/> |
| Wed. | 5.00       | 0.0      | 06:00 PM | 07:00 PM | <input type="checkbox"/> |
| Thu. | 0.00       | 50.0     | 11:00 AM | 12:00 PM | <input type="checkbox"/> |
| Fri. | 0.00       | 0.0      | 12:00 AM | 12:00 AM | <input type="checkbox"/> |
| Sat. | 0.00       | 0.0      | 12:00 AM | 12:00 AM | <input type="checkbox"/> |
| Sun. | 0.00       | 0.0      | 12:00 AM | 12:00 AM | <input type="checkbox"/> |

- First, select the desired item from the Menus button (found along the top bar of the Back Office).
- If the target item has multiple sizes/taste options, left click the SIZE of the item to which the discount will be applied. Note that in the above scenario, "Large" has been targeted for a discount, as circled in red.
- Click Edit, as circled in red, above.
- Uncheck the "Manual Discount" box. This allows you to create the automatic discount settings.

### d. DISCOUNTS (AUTOMATICALLY APPLIED, CON'T)

**Item Detail**

Tree View | List View | Status: Active

Add New | Edit | Save | Cancel | Sub Items | Inventory History | Export...

Name: Beef Steak Combo | Alternative Name: House Special Steak | Barcode: | ☒ Active

Category: Special Combo | Tax: ☒ GST (5%) | ☐ PST (10%) | ☐ PST2 (7%)

**Info.1**

Sizes & Tastes

| Size / Taste Name | Price | On Hand | Gr |
|-------------------|-------|---------|----|
| X Large           | 50.00 | 0       |    |
| X Regular         | 30.00 | 0       |    |

Discount setting for selected size: **Large**

☐ Manual Discount (Weekday & Happy Hour discount will be ignored)

**Happy Hour**

|  | Price (\$) | Rate (%) | From     | To       | Next Day                 |
|--|------------|----------|----------|----------|--------------------------|
| Mon.                                     | 0.00       | 0.0      | 12:00 AM | 12:00 PM | <input type="checkbox"/> |
| Tue.                                     | 0.00       | 50.0     | 12:00 AM | 12:00 PM | <input type="checkbox"/> |
| Wed.                                     | 0.00       | 0.0      | 06:00 PM | 07:00 PM | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> Thu. | 0.00       | 50.0     | 11:00 AM | 12:00 PM | <input type="checkbox"/> |
| Fri.                                     | 0.00       | 0.0      | 12:00 AM | 12:00 AM | <input type="checkbox"/> |
| Sat.                                     | 0.00       | 0.0      | 12:00 AM | 12:00 AM | <input type="checkbox"/> |
| Sun.                                     | 0.00       | 0.0      | 12:00 AM | 12:00 AM | <input type="checkbox"/> |

**Info.2**

Item Type

☐ Open | ☐ Alcohol | ☐ Time Chrg.

☐ Taste | ☐ Scale | ☐ Reward

☐ Menu Group | ☐ Online

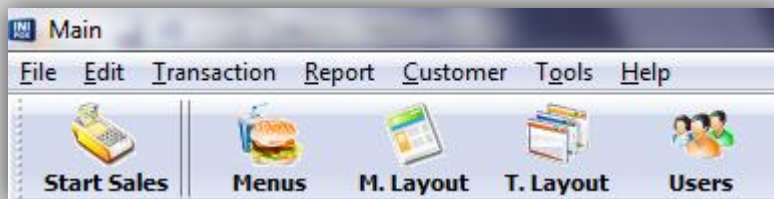
Print To

☒ Back | ☐ Front | ☐ Bar | ☐ Front2

**1.** Edit | Save | Cancel | Copy...

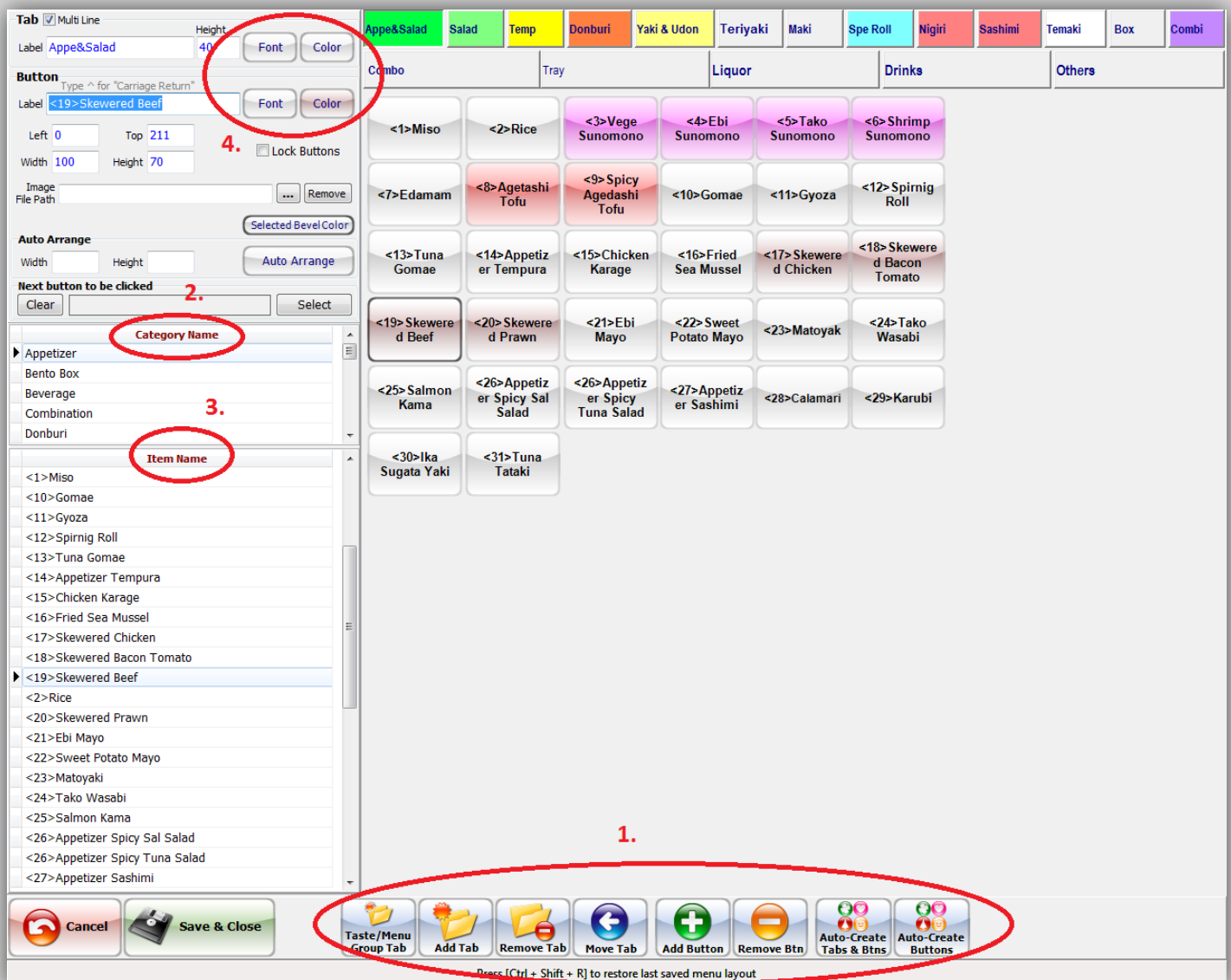
- v) Select the day(s) during which the discount will be in effect.
- vi) Configure the time range. If all day, select the days from the left column.
- vii) Select either Price (\$) or Rate(%) above the appropriate column.
- viii) Enter the discount. Do not enter the characters "\$" or "%".
- ix) **IMPORTANT! CLICK SAVE!**

## 7. MENU LAYOUT



The Menu Layout function adjusts how your menu buttons are organized and appear in the Sales Interface.

To begin, click the M.Layout button along the top bar of the Back Office to bring up the Menu Layout Interface:





## 7. MENU LAYOUT (CON'T)

### a. AUTOMATIC GENERATION

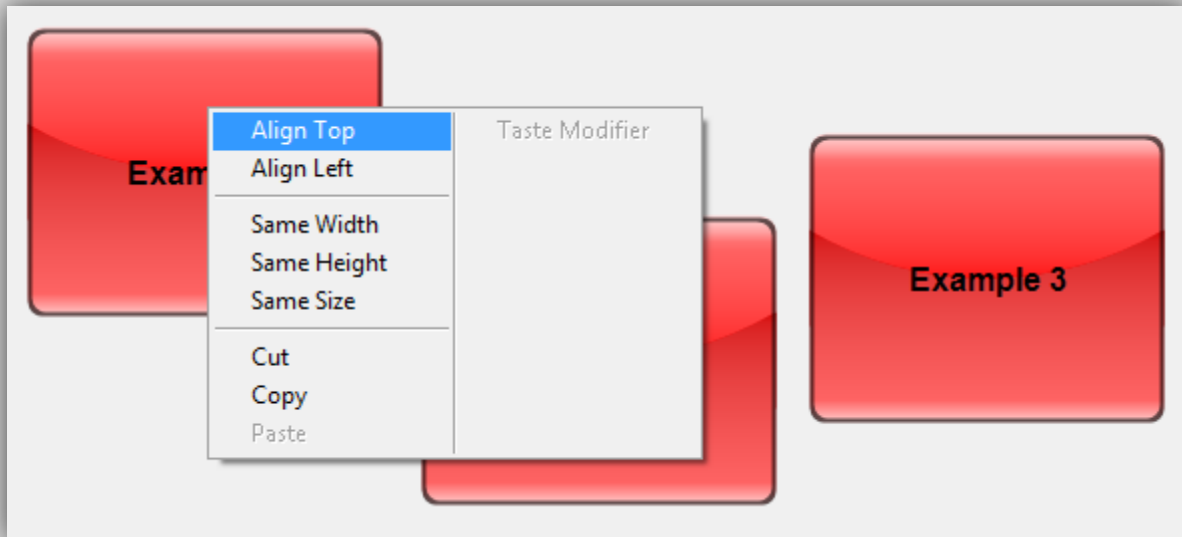
**WARNING:** This feature completely overrides the existing menu layout!

The Auto-Create Tabs & Buttons and the Auto-Create Buttons icons (found along the bottom of the Menu Layout Interface) will, when pressed, completely override your existing menu layout with an auto-generated one.

Your colour scheme, custom sizing and placement will all be overridden with a generic, alphabetically organized format. In general, these two features will only be utilized during first-time setup, when working with a blank slate.

### b. CREATING/DELETING BUTTONS

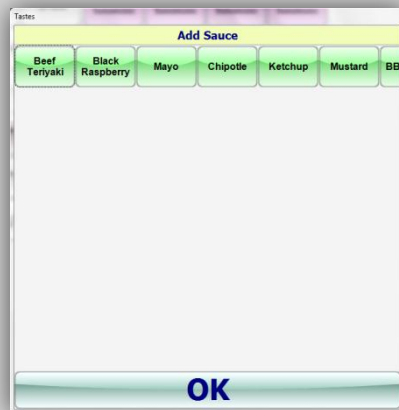
- i. To CREATE a new button, click on a category tab, along the top, where the new item will be placed.
  - ii. Click the Add Button icon along the bottom row of the Menu Layout Interface.
  - iii. Click and drag the generated “New (Not Linked!)” button to a desired location.
  - iv. You must now link the “New (Not Linked!)” button to a menu item.
  - v. Highlight the “New(Not Linked!)” button by left clicking it once.
  - vi. Navigate to a menu item by selecting the Category Name, then the Item Name (circled in red, #2, #3, in the screenshot on the previous page).
  - vii. Your button has now been created.
- 
- i) To DELETE an existing button, highlight it by left clicking it once.
  - ii) Click the “Remove Btn” icon along the bottom row of the Menu Layout Interface.

**C. ALIGNING BUTTONS, CHANGING FONTS, COLOURS, SIZES**

- i. To align two or more buttons along the same height, select the “target” button by left clicking it once. The other buttons to be selected later will align to the target’s current height.
- ii. Holding Shift, left click the other buttons to be aligned.
- iii. Release shift.
- iv. Right click on the target button.
- v. Click Align Top.
- vi. To change the size of a button, click the edge of a button, and drag as desired.
- vii. To change the colour and font of a button, click the button, then use the menu circled in red, #4.

#### d. Taste-button layout

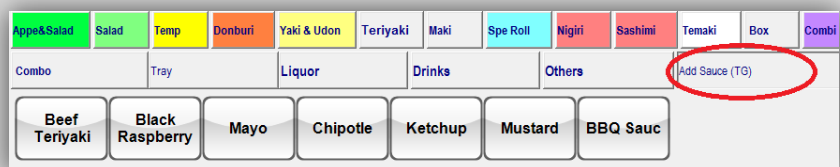
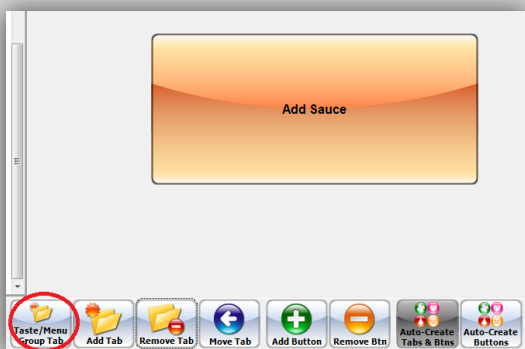
It is possible to create a pop-up menu that contains a multitude of taste-modifiers. For example,



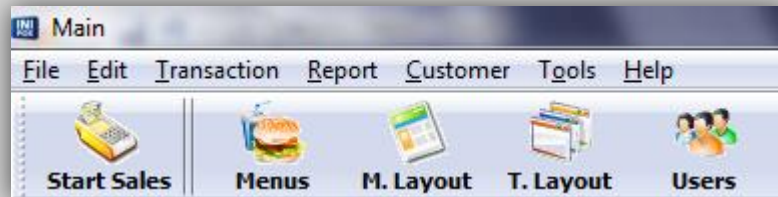
In this example, an “Add Sauce” taste option leads to more detailed choices.

To create this Taste-option menu, follow these steps:

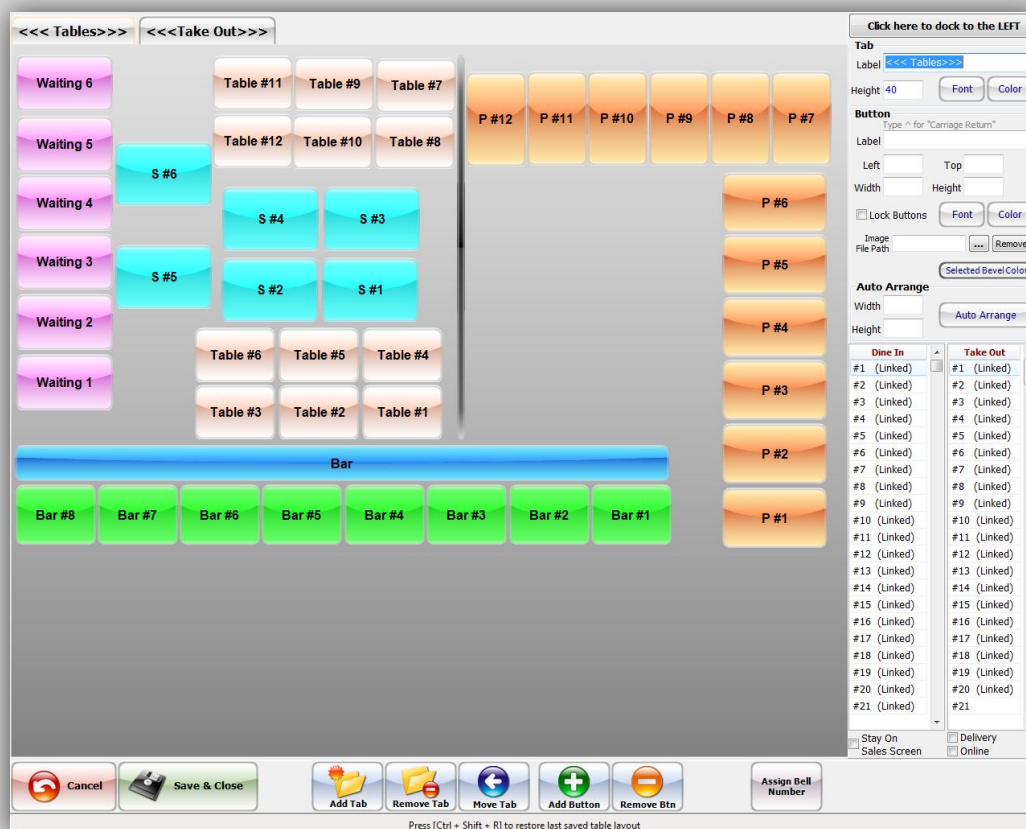
- i) Add a new item into the menu, as detailed in Section 6c.
- ii) Check the “Taste” box during the steps outlined in Section 6c.
- iii) Add the new item into the Menu Layout. See Section 7b.
- iv) Left click the Taste Option button in the Menu Layout.
- v) Click the “Taste/ Menu Group Tab” button along the bottom row.
- vi) This creates a new tab, named after the button. In our example, it would be called “Add Sauce (TG)”. TG stands for “Taste Group”.
- vii) Save and exit the Menu Layout.



## 8. TABLE LAYOUT



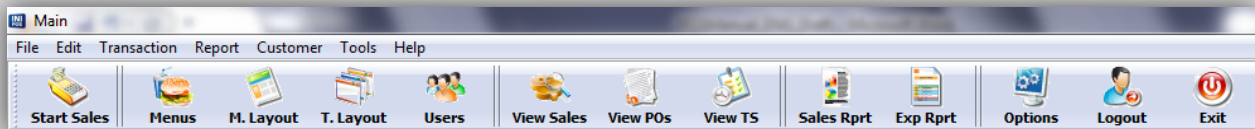
- i) Click the T.Layout button from the Back Office.
- ii) This will bring you to the existing Table Layout screen.



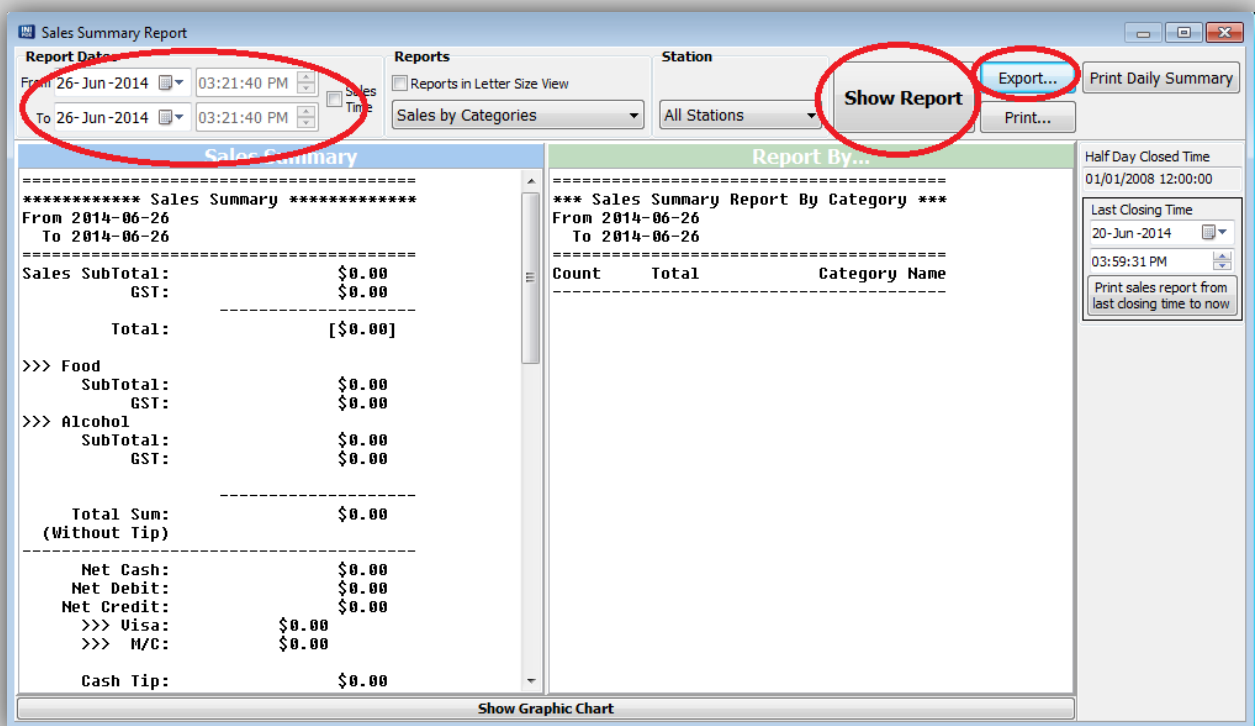
- iii) To add a new table/take out entry button, click the appropriate tab at the top left corner, then click the Add Button icon.
- iv) Drag the new button to the location desired.
- v) Resize, modify colour and change the font size of the new table as desired, using the menu options to the top right corner.
- vi) Highlight the new table by left clicking it once.
- vii) In the Dine in or Take Out lists to the left, scroll to an unlinked entry, then double click.
- viii) The table/take out entry button is now linked and ready for use.

## 9. SALES REPORTS

### a. VIEW SALES REPORTS



- i) From the top bar of the Back Office, Click Sales Rpt.
- ii) This brings up the following menu:

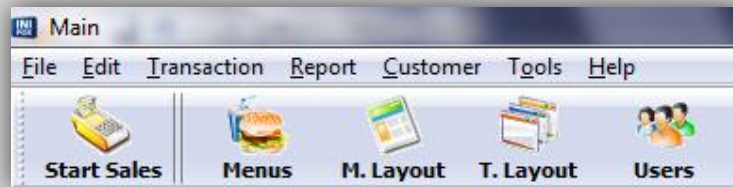


- iii) From here, select the date range, filter the items shown by selecting a category (by default, all items are shown in the sales report), and click Show Report.

### b. EXPORT SALES REPORTS TO EXCEL

To export your Sales Report to Excel, click Export, then choose CSV file.

## 10. USERS – CREATING AND MODIFYING



- i) To modify or create users, click Users along the top bar in the Back Office. This brings up the User Information Window:

| Last Name | First Name |
|-----------|------------|
| Admin     | Admin      |
| Doe       | Jane       |
| Doe       | John       |
| Johnson   | Gary       |
| Owner     | Owner      |
| Smith     | Sally      |

Last Name: Admin  
 First Name: Admin  
 Access Code: \*\*\*\*\*  
 Group: Owner  
 Status: Active  
 Tip Out (%): 0.0  
 Address:   
 Memo: Owner

Add New Edit Delete

| Effective Date | Wage/Hr |
|----------------|---------|
|----------------|---------|

Add New Wage Edit Wage

- ii) Click Add New to create a new user, or click an existing user and click Edit to make modifications, as shown below:
- iii) Save your changes.

Last Name: Thompson  
 First Name: Jennifer  
 Access Code: 001  
 Group: Employee  
 Status: Active  
 Tip Out (%):  
☒ System User

Address: Optional  
 Memo: Optional

Save Cancel

Last Name: Doe  
 First Name: John  
 Access Code: 3  
 Group: Employee  
 Status: Active  
 Tip Out (%): 0.0  
☒ System User

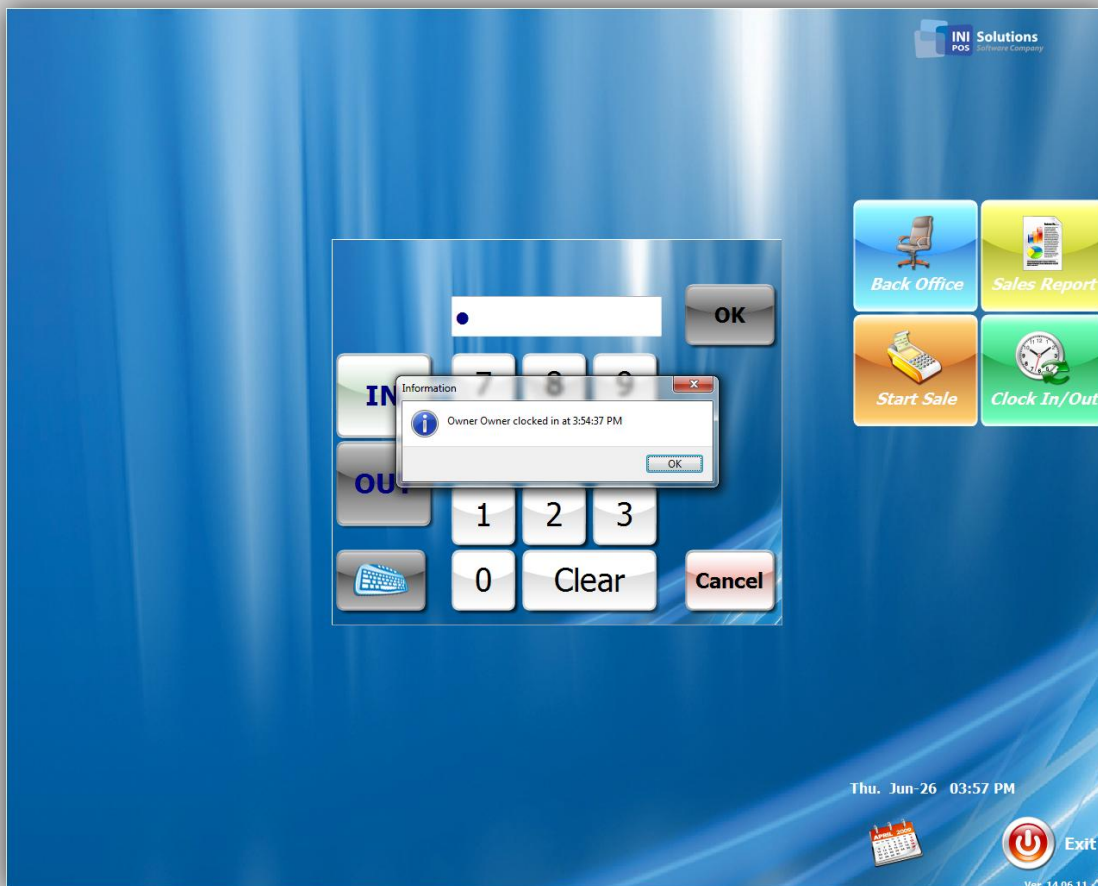
Address: Optional  
 Memo: Optional

Save Cancel

## 11. TIME STAMP UTILITY

Only users registered in the POS Database can utilize this feature. For more information on creating users, please see the previous section.

The Time Stamp Utility is found on the Home Page:



- i) To Clock In or out, press the Clock In/Out button.
- ii) Enter your user password, then press OK.
- iii) The “In” button will flash if you haven’t Clocked In yet; the “Out” button will flash if you have already Clocked In.
- iv) Press the flashing In or Out button.
- v) A confirmation window will pop up; press OK.
- vi) To view the timestamps of users, enter the Back Office.
- vii) Along the top Bar, press View TS.

## 12. CUSTOMER HISTORY

This list of useful information accumulates naturally in the process of take-out orders, as servers take in a customer's names, phone numbers, and even addresses for delivery orders.

This data is useful for planning purposes (alongside the Sales Reports) to determine the direction of your restaurant, and also to help returning customers identify "that delicious dinner I had three days ago".

Customer history can be accessed from both the Sales Interface and the Back Office.

### TO ACCESS FROM THE SALES INTERFACE:

- i) Click More Buttons, then History in the expanded menu:



- ii) If the customer number is known (not often) enter it in the dialogue window that appears; if not, press cancel, and search for their name. Adjust the time range as required.

