

EverServ® PixelPoint®

BackOffice Version 12

User's Guide

Publication Details

Copyright

Copyright © ParTech, Inc. 2013. All Rights Reserved. This product and related documentation are protected by copyright and are distributed under licenses restricting their use, copying, distribution, and decompilation. No part of this product or related documentation may be reproduced in any form by any means without prior written authorization of PAR and any requisite licensors.

Trademarks

PixelPoint, ParTech, and their respective logos are all trademarks of PAR Technology Corporation.

PAR may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document.

Except as expressly provided in any written license agreement from PAR, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

Microsoft® and Windows® are registered trademarks of Microsoft Corporation in the United States and/or other countries. Other product names may be trademarks or registered trademarks of their respective companies and are hereby acknowledged.

Disclaimer

PAR has thoroughly reviewed this document and believes it to be reliable. However, this document is provided for informational purposes only and PAR makes no warranties, either expressed or implied, in this document. Information in this document is subject to change without notice. Risk of use and responsibility for the results of use of this document lie with the user.

Patents

The following patents apply to some areas of functionality within the PixelPoint software suite: Pat. 6,384,850; 6,871,325; 6,982,733; 8,146,077; 8,287,340

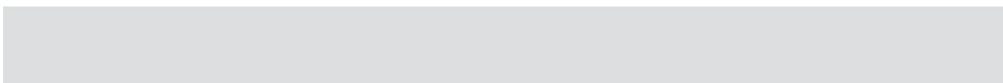
Table of Contents

PixelPoint BackOffice Version 12

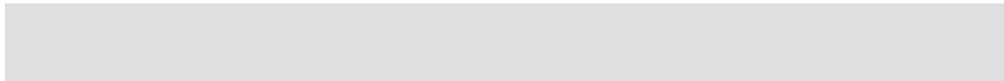
Welcome.....	7
About ParTech.....	8
Legal Information.....	9
Running PixelPoint Software.....	17
System Concepts.....	18
BackOffice Overview.....	19
Programming Changes.....	21
Order Of Programming.....	22
Navigation Bar.....	24
Active And Inactive Records.....	25
System Configurations.....	26
Printing Concepts.....	28
Naming Printers.....	29
What Is A Printer Channel.....	30
Determining Printer Channels.....	31
Print Consolidation.....	32
BackOffice Menus.....	33
Products.....	33
Product Concepts.....	34
Product Types.....	35
Combos.....	37
Product Setup.....	39
Order Page Setup.....	62
Report Category Setup.....	64
Summary Group Setup.....	66
Sales Summary Report.....	67
Forced Questions.....	72
Multi Menu Setup.....	75
Menu Setup.....	76
Configuration Setup.....	79
Refund Reasons.....	82
Exit Setup.....	83
Mail.....	84
Send Mail.....	85
Response Mail.....	87
Inventory.....	88

Inventory Without StockBoy.....	89
Stocked Items.....	91
Supplier Setup.....	100
Warehouse Setup.....	102
Inventory Manager.....	104
Inventory Order of Programming.....	118
Employees.....	120
Employee Concepts.....	121
Employee Setup.....	122
Department Setup.....	132
Employee Performance Points.....	133
Job Position Setup.....	134
Security Level Setup.....	138
Time-Clock Manager.....	144
Schedule.....	146
Shift Rules.....	164
Collaboration.....	168
Cash Management.....	169
Contests.....	173
Members/VIP.....	176
Member Concepts.....	177
Member Group Setup.....	178
Company Setup.....	180
Member Setup.....	181
Delivery Zone Setup.....	191
Member Browser.....	192
General Setup.....	194
Coupon Setup.....	195
Coupon Groups.....	202
Receipt Setup.....	207
Mealtime Setup.....	211
Pay In/Out Reasons.....	212
Billboard Message Setup.....	213
Banner Message.....	214
Weather Conditions.....	215
System Log.....	216
Backup Now!.....	217
Alert Manager.....	219
Table Setup.....	221
Table Section Setup.....	222

Table Settings.....	223
Table Layout Setup.....	224
Table Drawing.....	230
Reservations.....	231
Administrator.....	234
System Setup.....	235
Station Setup.....	257
Revenue Center Setup.....	272
Sales Type Setup.....	273
POS Functions.....	275
Payment Method Setup.....	277
Printer Channel Setup.....	284
Printer Code Setup.....	285
Network Printer Setup.....	287
Policy Setup.....	295
Form Designer.....	296
Window.....	365
Help.....	366
Advanced Programming.....	367
Overview.....	367
Deposits.....	368
Size Up and Size Down.....	371
Shift Products.....	372
Hold and Fire.....	375
Inventory.....	376
Kiosks.....	378
Overview.....	378
Programming a Kiosk.....	381
Welcome Form.....	382
Menu Form.....	383
Cancel Form.....	384
Product Form.....	385
Modify Item Form.....	387
Finish Form.....	389
Modify Select Item Form.....	391
Authorizing Payment Form.....	393
Confirmation Form.....	394
Declined Payment.....	395
Out of Service Form.....	396
Exiting and Restarting a Kiosk.....	398



Glossary..... 399





Thank you for using PixelPoint POS.

This guide contains information about back office operations; specifically, it is about how to program a point-of-sale (POS) system using PixelPoint's BackOffice program.

Each BackOffice pull-down menu is presented as a separate chapter, and each item on these pull-down menus is presented in its own section. For example, the menu options in the *Administrator* menu are in a chapter with that name, and are presented in the order they appear on that pull-down menu.

The table of contents and the index will be of great help to you in locating the information you may need. You are advised to make extensive use of both of them. In addition, this printed document includes an extensive glossary in the back matter which will aid you if any concept is unclear.

This guide is intended for anybody with authorization to use BackOffice (but especially for those programming the POS system). This document is written with the assumption that the PixelPoint POS software has already been installed and that the reader is aware of basic POS concepts.

For information about front-end operations, see the PixelPoint POS User's Guide. For information about installing the software, see the PixelPoint POS Installation Guide.

About ParTech

PAR Technology Corporation is an industry leader in systems and service solutions for the hospitality industry. For more than 30 years, PAR has developed technology solutions for hospitality companies: restaurant, hotel, spa, retail, entertainment venues and cruise ships. We are committed to delivering innovative solutions that optimize the guest experience.

With point-of-sale systems in more than 50,000 restaurants and more than 110 countries, PAR is redefining the point of sale to bring technological innovation to all corners of the enterprise. Our software is complemented by reliable hardware and is backed by PAR's international services infrastructure.

We are also a leading global provider of hospitality management solutions for enterprises such as city-center hotels, destination spa and golf properties, cruise ships, and casino resorts. Our pioneering SMS|Host[®] Hospitality Management System set the standard in guest-centric property management systems. We are now revolutionizing the industry with the ATRIO[™] hospitality technology platform. ATRIO is moving hospitality to "The Cloud", a new user experience and to a new business paradigm. We also offer SpaSoft[®], a dynamic activities management/scheduling software solution, specifically designed to meet the unique needs of resorts, day spas, medi-spas and health clubs.

In addition to PAR's hospitality solutions, PAR is a leading provider of technical solutions to the government sector. PAR's Government business is a wholly owned subsidiary of PAR Technology Corporation and is comprised of PAR Government Systems Corporation and Rome Research Corporation., PAR's Government business delivers innovative information management solutions through advanced technology and professional services to Federal, State, and local Government agencies as well as private industry customers throughout the world.

Par Technology Corporation stock is traded on the New York Stock Exchange under the symbol PAR.

History

PAR's origins date back to 1968 when PAR Technology Corporation was founded as a high tech, government contracting firm. PAR is an acronym for "Pattern Analysis and Recognition". PAR's founder, John W. Sammon, was determined to utilize "technology transfer" as an engine of new opportunity as he and his colleagues developed and transferred government funded research and development initiatives to the commercial sector as viable products with real business applications. PAR then successfully embarked upon a mission to use this transferred technology to develop the industry's first stand alone POS terminal for McDonald's Corporation in 1978.

Legal Information

PAR EverServ® POS PixelPoint®

End-User License Agreement

BY CLICKING ACCEPT BELOW, YOU ACKNOWLEDGE THAT YOU HAVE READ, UNDERSTOOD, AND AGREED TO BE BOUND BY THE PROVISIONS OF THIS AGREEMENT. IF YOU DO NOT AGREE WITH THE TERMS AND CONDITIONS OF THIS AGREEMENT, PLEASE CLICK THE DO NOT AGREE BELOW AND EXIT FROM THIS APPLICATION.

The following patents apply to some areas of functionality within the PAR EverServ PixelPoint software : Pat. 6,384,850; 6,871,325; 6,982,733; 8,146,077.

This PAR EverServ® POS PixelPoint® End-User License Agreement (“Agreement”) sets forth the terms and conditions under which you are granted a limited license to use: (a) the PAR EverServ POS PixelPoint software and any third party software, each as provided in digital form with which this Agreement is provided (the “Software”); (b) any explanatory written materials, videos, technical reference documents, and Internet and other web delivered content provided or made available to you by PAR or its distributors (“Documentation”); and (c) modified versions, releases, upgrades, updates, additions, and copies of the Software, if any, licensed to you by PAR (collectively, “Updates”). Collectively the Software, Documentation and Updates are referred to as the “Licensed Materials”.

PAR grants to you a nonexclusive, non-transferable license to use the Licensed Materials upon the following terms and conditions:

1. Use of the Licensed Materials

- 1.1 Single Terminal Installs:** You may install and use the Software: (a) on that number of single terminal computers, and/or (b) for use by that number of end users; each as permitted by the hardware licensing devices approved by, and delivered by, PAR on with the Software (the “Permitted Number of Computers and Users”).
- 1.2 Multi-terminal Installs:** You may install one copy of the Software on a single file server for the purpose of downloading, installing and using the Software on a hard disk or other storage device of up to the Permitted Number of Computers that are on the same internal network as the file server. Any use of the Software on any other network is not permitted.
- 1.3 Maximum Usage:** In no event shall the Software be installed or used on any number of computers or made available to any number of users in excess of the Permitted Number of Computers and Users.
- 1.4 No Modification or Viewing:** You may not modify, alter, enhance, reverse-engineer, disassemble, decompile, make any attempt to view or use the source code of the Software, or create any derivative works from the Software. Any activity to obtain the underlying information or code that is not visible to the user in connection with the normal use of the Software is prohibited. Any attempt relating to any of the foregoing will be a material violation of this Agreement.
- 1.5 No Distribution for Profit:** The Software may not be used, disclosed, made accessible or distributed for profit.
- 1.6 Copyright Notices:** All copyright and other proprietary rights notices and legends shall be maintained unaltered on the Software.
- 1.7 No Sale.** The Licensed Materials are licensed, not sold.
- 1.8 Read/Write Access.** With PAR’s prior written consent, you may use or allow a third party on

your behalf to use: (a) the username and password (“Authorizations”) to access the Software databases and (b) the technical reference document explaining the read/write access for the Software databases for the sole purpose of importing data into the Software databases residing on the terminals located in your restaurants. Contact PAR or your reseller for more information. A separate license agreement may be required.

2. **Proprietary Rights.** All title, ownership and copyrights to the Licensed Materials and any copies that you are permitted to make, and all intellectual and industrial rights therein (including without limitation, copyrights, trademarks, patents, industrial designs, trade names and trade secrets), are owned by PAR and its licensors, and the structure, organization, and code of the Software and any Updates thereto are the valuable trade secrets of PAR and its licensors. The Licensed Materials are also protected by the copyright laws of various countries, international copyright treaties as well as other intellectual property laws and treaties. You may not copy the Licensed Materials, except as set forth in the ‘Use of the Licensed Materials’ section above. Trademarks can only be used to identify printed output produced by the Software and such use does not give you any rights of ownership in that trademark. Except as stated above, this Agreement does not grant you any intellectual or industrial property rights in the Licensed Materials.
3. **Transfer.** You may not rent, lease, sublease, lend, disclose, host or otherwise share the Licensed Materials in any manner whatsoever. You may not assign or transfer this Agreement or the Licensed Materials to any third party without PAR’s prior written consent.
4. **Software Updates.** If the Software is an Update to a previous version of the Software, you must possess a valid license to such previous version to use the Update, and you may use the previous version for ninety (90) days after you receive the Update to assist you in the transition to the Update. After such time you no longer have a license to use the previous version, except for the sole purpose of enabling you to install the Update. At all times the use of any Update shall be governed by the provisions of this Agreement.
5. **Software Maintenance. (Software Maintenance must be purchased separately if you are not purchasing the Software under a Subscription Model).** PAR will provide the following Software Maintenance Services for the Software:
 - 5.1 **Service Packs.** PAR shall provide Service Packs to you on a periodic basis as such corrections and bug fixes are developed and bundled. Service Packs mean bug fixes and corrections for the PAR EverServ® PixelPoint® Software.
 - 5.2 **Revisions.** PAR shall provide Revisions to you on a periodic basis. Revisions mean new releases of the PAR EverServ® PixelPoint® Software which may include corrections, modifications and enhancements. The PAR EverServ® PixelPoint® Software is identified by a number, in the form of X.Y, Z where X is the version number, Y is the release number and Z is the build number. An increment in Y or Z is a Revision.
 - 5.3 **Upgrades.** PAR shall provide Upgrades to you on an annual basis. Upgrades mean a new version of the PAR EverServ® PixelPoint® Software which may include significant changes from the previous version. The PAR EverServ® PixelPoint® Software is identified by a number, in the form of X.Y, Z where X is the version number and Y is the release number. An increment in X or Y is an Upgrade.
 - 5.4 **Exclusions.** Software Maintenance does not include any of the following (i) telephone or email reporting of defects, responding to your inquiries or other support services; (ii) customized modifications or enhancements to the PAR EverServ® PixelPoint® Software other than Service Packs, Revisions and Upgrades, (iii) user education and training, (iv) implementation or installation assistance, (v) consultation for new programs or equipment, (vi) correction of problems and assistance regarding problems caused by operator errors (such as entering of incorrect data, not following recommended procedures and keeping inadequate backup copies),

(vii) hardware problems including any malfunction of hardware, (viii) correction of errors attributable to software other than the Software, (ix) maintenance services for any third party products used in connection with the Software notwithstanding that we may have recommended or supplied such third party products, and (x) problems arising due to external causes such as accident, disaster, electrostatic discharge, fire, flood, lightning, wind or water damage.

5.5 Annual Software Maintenance Fees. Annual Software Maintenance Fees (except if you are purchasing under a Subscription Model) shall be due and payable within thirty (30) days of the date of PARs invoice thereof , prior to the commencement of each said twelve (12) month period and shall be billed at PARs then current rates.

6. NO WARRANTY. PAR DOES NOT WARRANT THE SOFTWARE ITSELF. THE SOFTWARE IS PROVIDED “AS IS” WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED INCLUDING BUT NOT LIMITED TO WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

No distributor, dealer or any other entity or person is authorized to expand or alter this warranty or any other provisions of this Agreement. PAR does not warrant that the functions contained in the Software will meet your requirements or that the operation of the Software will be uninterrupted or error-free or free from malicious code.

THE FOREGOING STATES THE SOLE AND EXCLUSIVE REMEDIES FOR PAR'S OR ITS SUPPLIERS' BREACH OF WARRANTY.

7. DISCLAIMER OF WARRANTIES. EXCEPT FOR THE LIMITED WARRANTY EXPRESSLY SET FORTH IN SECTION 5 ABOVE, PAR, AND ITS SUPPLIERS, LICENSORS AND DISTRIBUTORS MAKE NO REPRESENTATIONS, WARRANTIES OR CONDITIONS, EXPRESS, IMPLIED, OR STATUTORY, AND EXPRESSLY DISCLAIM TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAW ALL OTHER REPRESENTATIONS, WARRANTIES AND CONDITIONS, EITHER EXPRESS OR IMPLIED, AS TO ANY AND ALL OTHER MATTERS, INCLUDING BUT NOT LIMITED TO NON-INFRINGEMENT OF THIRD-PARTY RIGHTS, MERCHANTABILITY, MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE AND PAR, AND ITS SUPPLIERS DO NOT AND CANNOT WARRANT THE PERFORMANCE OR RESULTS YOU MAY OBTAIN BY USING THE LICENSED MATERIALS. You assume full responsibility for the selection of the Licensed Materials to achieve your intended results, for the selection and purchase of any equipment necessary to use the Licensed Materials and for the installation, use and results obtained from the Licensed Materials. You are responsible for taking precautionary measures to prevent the loss or destruction of your data and databases such as, for example, making regular backups and verifying the results obtained from using the Licensed Materials, and PAR, and its suppliers, shall have no liability whatsoever for any such loss or destruction. Some states or jurisdictions do not allow the exclusion of implied warranties or limitations on how long an implied warranty may last, so the above limitations may not apply to you. To the fullest extent permissible, any implied warranties determined to exist are limited to thirty (30) days.

8. Limitation of Liability.

(a) FOR ANY BREACH OR DEFAULT BY PAR OF ANY OF THE PROVISIONS OF THIS AGREEMENT, OR WITH RESPECT TO ANY CLAIM ARISING FROM OR RELATED TO THIS AGREEMENT OR THE LICENSED MATERIALS, PIXELPOINT'S ENTIRE LIABILITY FOR CUSTOMER'S DIRECT, PROVABLE DAMAGES SHALL IN NO EVENT EXCEED THE AMOUNT PAID FOR THE LICENSED MATERIALS THAT ARE THE SUBJECT OF THE CLAIM, AND IN THE AGGREGATE WITH RESPECT TO ALL CLAIMS UNDER OR RELATED TO THIS AGREEMENT, THE AMOUNT PAID FOR THE LICENSED MATERIALS.

(b) TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT WILL PAR OR ITS SUPPLIERS, LICENSORS AND DISTRIBUTORS BE LIABLE FOR ANY CONSEQUENTIAL, INDIRECT, INCIDENTAL, PUNITIVE, OR SPECIAL DAMAGES

WHATSOEVER, INCLUDING WITHOUT LIMITATION, ANY LOST PROFITS, LOST SAVINGS, LOST BUSINESS, LOST DATA OR ANY OTHER LOSS SUFFERED OR INCURRED BY YOU OR ANY THIRD PARTY ARISING FROM OR IN CONNECTION WITH THE LICENSED MATERIALS OR PAR'S TERMINATION OF THIS AGREEMENT IN ACCORDANCE WITH THE TERMS HEREOF, EVEN IF A REPRESENTATIVE OF PAR, OR ANY OF ITS SUPPLIERS, LICENSORS OR DISTRIBUTORS HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES, OR FOR ANY CLAIM BY ANY THIRD PARTY. PAR OR ITS SUPPLIERS WILL NOT HAVE ANY LIABILITY FOR ANY UNTRUE STATEMENT OR REPRESENTATION MADE BY THEIR AGENTS OR ANYONE ELSE (WHETHER INNOCENTLY OR NEGLIGENTLY) UPON WHICH YOU RELIED UPON IN ENTERING INTO THIS AGREEMENT.

(c) THE LIMITATIONS, EXCLUSIONS AND DISCLAIMERS IN THIS AGREEMENT SHALL APPLY IRRESPECTIVE OF THE NATURE OF THE CAUSE OF ACTION, DEMAND OR CLAIM, INCLUDING BUT NOT LIMITED TO BREACH OF CONTRACT, NEGLIGENCE, TORT, STRICT LIABILITY OR ANY OTHER LEGAL THEORY AND SHALL SURVIVE A FUNDAMENTAL BREACH OR BREACHES OR THE FAILURE OF THE ESSENTIAL PURPOSE OF THIS AGREEMENT OR ANY REMEDY HEREIN.

(d) The aforesaid limitation liability shall not be construed as limited to defects in the Licensed Materials, but shall also apply to all defects/mistakes in: (1) preset data programmed by PAR; and (2) defects in Documentation. Under no circumstances shall PAR be liable for any damages resulting from failure of the Software to comply with specifications of any local governmental authority. You shall be responsible for determining the applicability of any local laws or regulations in any specific country with respect to use of the Software and shall also inform PAR prior to your acceptance of this Agreement of any such laws or regulations. Any additional costs associated with compliance with such laws or regulations shall be borne by you.

9. **Termination.** Without limiting any rights or remedies available to it at law or in equity, upon providing you with written notice PAR may terminate this Agreement in the event of your breach of this Agreement, including, but not limited to, your failure to pay Annual Software Maintenance Fees, and in such instances when, in PAR's sole judgment, a cure can be effected, your failure to cure such breach within ten (10) days of written notice thereof. Upon termination you shall cease all use of the Licensed Materials, and return or permanently destroy all copies of the Licensed Materials. Upon PAR's request, you shall certify in writing that the Licensed Materials and all copies thereof have been returned or permanently destroyed.
10. **Governing Law.** This Agreement shall be construed and interpreted in accordance with the laws of the State of New York. You hereby agree to submit to the exclusive jurisdiction and venue of the United States District Court for the Northern District of New York and the Supreme Court of the State of New York for the purposes of adjudicating any dispute or action arising out of or in connection with this Agreement. This Agreement will not be governed by the United Nations Convention on Contracts for the International Sale of Goods, the application of which is expressly excluded.
11. **U.S. Government Restricted Rights.** If the Software is acquired by or on behalf of a unit or agency of the United States Government, the Software and has been developed entirely at private expense and is delivered and licensed as "Commercial Items", as that term is defined at 48 C.F.R. §2.101, consisting of "Commercial Computer Licensed Software" and "Commercial Computer Licensed Software Documentation", as such terms are used in 48 C.F.R. §12.212 or 48 C.F.R. §227.7202, as applicable. Consistent with 48 C.F.R. §12.212 or 48 C.F.R. §227.7202-1 through 227.7202-4, as applicable, the Commercial Computer Licensed Software and Commercial Computer Licensed Software Documentation are being licensed to U.S. Government end users (a) only as Commercial Items and (b) with only those rights as are granted to all other end users pursuant to the terms and conditions herein. Unpublished-rights reserved under the copyright laws of the United States.
12. **Export Restrictions.** You agree that you will not export or re-export the Software except as authorized by United States law and the laws of the jurisdiction in which the Software was obtained. In particular, but without limitation, the Software may not be exported or re-exported (a) into any U.S. embargoed

countries or (b) to anyone on the U.S. Treasury Department's list of Specially Designated Nationals or the U.S. Department of Commerce Denied Person's List or Entity List. By using the Software, you represent and warrant that you are not located in any such country or on any such list. You also agree that you will not use these products for any purposes prohibited by United States law, including, without limitation, the development, design, manufacture or production of nuclear, missiles, or chemical or biological weapons.

13. **Compliance with Licenses.** You agree that upon request of PAR or PAR's representative, you will within thirty (30) days fully document and provide an officer's certificate that your use of any and all Licensed Materials at the time of the request is in conformity with your valid licenses from PAR.
14. **Applicability of License.** The terms and conditions of this Agreement shall apply to all Licensed Materials ordered by and delivered to you or your representatives as well as all Updates or subsequent license purchases unless superseded by a license agreement bearing a later date. If you are purchasing licenses for multiple site locations, the terms and conditions of this Agreement shall apply to the installation locations identified in your sales agreement.
15. **Consumer Mobile/On-line Ordering.** (Applicable to use within the U.S. only). PAR currently has a License Agreement with Ameranth, Inc. Your sale or use of the Software to process mobile/on-line ordering for food/beverage orders, payment processing, restaurant reservations and the processing of such transactions on a wireless handheld computing device and on internet web pages is not covered by PAR's License Agreement with Ameranth, absent a separate license Agreement (or other authorization) from Ameranth to you or a third party that you license from to process such transactions.
16. **Installation by Agent or other Third Party.** If you are downloading or installing the Software on behalf of another person or entity, you hereby represent and warrant that you have the authority to bind the party or entity for which you are performing the download or installation to the terms and conditions of this Agreement. If you do not have such authority, you may not download or install the Software.
17. **SAP Crystal Reports Runtime Product.** SAP Crystal Reports runtime product ("Runtime Product") is provided with the Software. You agree not to:
 - modify, disassemble, decompile, translate, adapt or reverse-engineer the Runtime Product or the report file (.RPT) format;
 - distribute the Runtime Product to any third party or use the Runtime Product on a rental or timesharing basis or to operate a service bureau facility for the benefit of third-parties;
 - use the Runtime Product to create for distribution a product that is generally competitive with SAP's product offerings;
 - use the Runtime Product to create for distribution a product that converts the report file (.RPT) format to an alternative report file format used by any general-purpose report writing, data analysis or report delivery product that is not the property of SAP.
18. **SAP Sybase SQL iAnywhere (Prepay) and SAP ASP.**
 - 18.1 Definitions Applicable to this Section 18.
 - "Limited Use" or "ADL" means use of the Programs, as incorporated within the Software, is only for purposes of running the Software (and is not for running other applications), and that access to the Programs, by you or by another application, is solely through the Software interface.

- “Programs” means SQL Anywhere client/server RDBMS.
- "PSLTs" means the additional or supplemental Free Download Components terms and conditions specific to a particular Program ("Product Specific License Terms"), which are posted on www.sybase.com/pslt as of the date of the order for such Programs; wherein, the reference to "the iAnywhere Agreement accompanying this Program" shall mean the Agreement. By installing or using the Program in any way, Partner acknowledges and agrees that it has read, understands and agrees to the applicable Product Specific License Terms.
- "Seat" means a specific identifiable unique access or of information, such as (but not limited to) a terminal, personal computer, single user workstation, personal digital assistant (PDA), or wireless or real time device.
- "Server" means a computer containing software that permits it to await and fulfill services to other computers.

18.2 PAR sublicenses to you the SAP Sybase SQL Anywhere (Prepay) software in accordance with the following terms and conditions:

- You are only granted a non-exclusive, non-transferable right to use the Program(s) for your own internal business purposes.
- You may only use the Program(s) with and as part of the Software, and you are prohibited from using the Program(s) for application development purposes or on a standalone basis.
- Your use of the Program(s), as incorporated into the Software, shall be restricted to the number of Seats and/or Servers (as applicable) equal to the respective number of Seat and Server Licenses purchased by you.
- You shall be prohibited from (a) sublicensing, timesharing, rental, facility management, or service bureau use of the Program(s); and (b) permitting third parties to remotely access and use the Program, as incorporated within the Software, over the internet, unless PAR has paid iAnywhere the applicable fees for any such usage of the Programs. "Service bureau" shall mean an arrangement pursuant to which (i) third parties are permitted to access and use the Programs, as incorporated within the Software, directly or indirectly by any means to process their own data; or (ii) you use the Programs, as incorporated within the Software, to process the data of any third party.
- iAnywhere retains title to the Program(s), and all copies thereof, and associated intellectual property rights therein. You may not copy the Program(s), except for inactive backup and archival purposes, and must include on any copy of a Program(s) all copyright, government restricted rights and other proprietary notices or legends included on the Program(s) when it was provided to you.
- iAnywhere, as licensor of software included in the Software, is an intended third party beneficiaries of this sublicense agreement and may enforce it directly against you.
- iAnywhere and its licensors shall not be responsible for any direct, indirect, incidental, special and consequential damages.
- Only object code versions of the Program(s) are licensed to you, and reverse engineering, disassembly or decompilation to derive source code shall be prohibited (except to the extent

expressly allowed under applicable law without possibility of waiver).

- You agree to comply with all export and re-export restrictions and regulations ("Export Restrictions") imposed by the governments of the United States and the United Kingdom.
- If you are the U.S. government, use, duplication or disclosure of the Program(s) and documentation by you shall be subject to terms and conditions consistent with any applicable FAR provisions, for example, FAR 52.227-19.
- Although copyrighted, the Program(s) is unpublished and contain proprietary and confidential information of iAnywhere. You will agree to maintain the Program(s) in confidence and shall use a reasonable degree of care to protect the confidentiality of the Program(s).
- Upon termination of this Agreement, you shall destroy or return all copies of the Program (s).
- PAR shall have the right to conduct and/or direct an independent accounting firm to conduct, during normal business hours, an audit of your appropriate records to verify compliance with the terms of the sublicense agreement.
- You shall be restricted to Limited Use of the Program(s).
- Any provision associated with the Free Download Components identified in the PSLT that is required to be passed on to an End User licensee, as indicated in the PSLT.

19. Provisions Applicable Only to Subscription Model.

- 19.1 TERM** – The Initial Term of the Subscription Model shall commence on the date you purchase the subscription, and shall continue for one (1) year thereafter. Upon the expiration of the Initial Term, your subscription shall automatically renew for successive one (1) year terms (“Renewal Terms”), unless you provide PAR with written notice of non-renewal at least (60) days prior to the end of the Initial Term or any Renewal Term. The Initial Term or the Renewal Term shall be referred to collectively herein as the “Term.”
- 19.2 SUBSCRIPTION FEES** - To subscribe, you, or a reseller of the subscription, shall pay the subscription fees per license as ordered. The Subscription Fees shall be non-refundable, except as otherwise provided herein. PAR will provide you with thirty (30) days notice of any change in the Subscription Fees prior to any Renewal Term. Subscription Fees include Software Maintenance as set forth in Section 5.
- 19.3 PAYMENT** –You consent to PAR, or a reseller of the subscription, charging your credit card in advance for the amount of the Subscription Fees in accordance with the payment terms selected by you when you subscribed. You agree to notify PAR, or a reseller of the subscription, at least thirty (30) days prior to the date your credit card will expire. If you fail to provide PAR, or a reseller of the subscription, with such notification, your subscription will be automatically cancelled without notice to you and you will be unable to use the Software.
- 19.4 TERMINATION.**
- (a) PAR, or a reseller of the subscription, shall have the right to terminate this Agreement and your subscription should you, or a reseller of the subscription, on your behalf, fails to make any payment within ten (10) days of its due date.

- (b) PAR, or a reseller of a subscription, shall also have the right to immediately terminate this Agreement, including all license rights granted to you, without refund of any Subscription Fees paid, by written notice to you (i) if you become insolvent or become a party to any bankruptcy or receivership proceeding prior to full payment of all amounts payable hereunder, (ii) if you sell or assign your rights, duties, or obligations under this Agreement to any person or entity, in whole or in part, whether by assignment, merger, transfer of assets, operation of law, or otherwise, without obtaining our prior written consent, or (iii) upon your breach of this Agreement, or (iv) upon a violation of our proprietary rights under this Agreement. Your obligation to pay all charges which have accrued will survive any termination of this Agreement. PAR's termination of this Agreement will be in addition to any other remedies PAR may have at law or in equity.

- 20. General Provisions.** This Agreement shall automatically terminate, without prejudice to any of PAR's rights hereunder, upon failure by you to comply with its terms, in which event you must destroy all copies of the Licensed Materials. This Agreement may only be modified by way of a written document duly signed by an authorized officer of PAR. If any provision of this Agreement is deemed invalid or unenforceable by any court having competent jurisdiction, that particular provision will be deemed modified to the extent necessary to make the provision valid and enforceable, and the remaining provisions will remain in full force and effect. This Agreement shall be binding upon, and shall enure to the benefit of, the parties hereto and their agents, successors and permitted assigns.

Running PixelPoint Software

There are two PixelPoint agents that must be running in order for the POS and BackOffice to function. They are PixelSQLBase - the PixelPoint SQL Engine, and PixelPoint License Manager.

Since these agents must both be running before other PixelPoint software will be able to, it is best to create shortcuts to these two agents so that after a system reboot, it will be easy to start up the PixelSQLBase engine and License Manager to connect to the DB through it. PixelPoint software will then be ready to run.

System Concepts

This chapter discusses some of the more basic concepts behind BackOffice, such as how to get into the program and how to move around within it.

It also discusses some basic programming and system configuration topics, such as the order in which you should program system components and how printers should be set up.

The contents of this chapter are:

- BackOffice Overview
- Programming Changes
- Order of Programming
- Navigation Bar
- Active And Inactive Records
- System Configurations
- Printing Concepts

BackOffice Overview

You can access BackOffice in two ways:

1. From the POS front-end.
 - Select [Manager] from the Table Layout screen. Then select [BackOffice].
2. From the Windows desktop.
 - Select Start > Programs > PixelPoint POS > POS BackOffice.

You can also create a Windows desktop shortcut for it, or simply navigate to: "`\\posserver\pixelpos\systemset.exe`".

Main BackOffice Screen

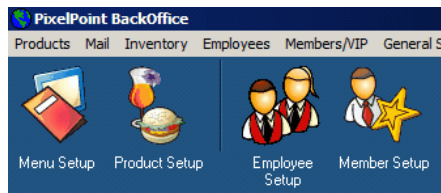
The screen has three sections (shown below):

- **Pull-down menus:** Listed across the top in a gray bar are pull-down menus which grant access to all programming sections within BackOffice.

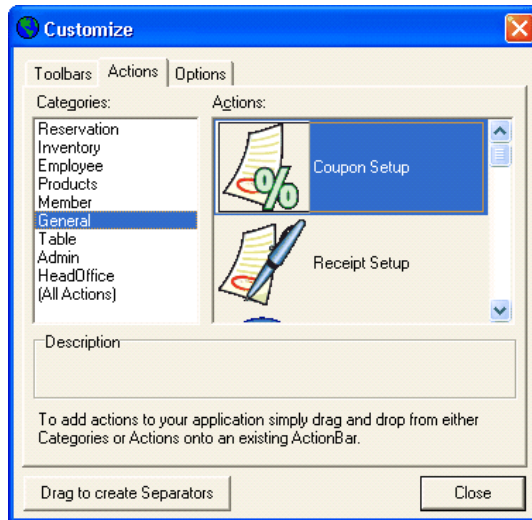
Products Mail Inventory Employees Members/VIP General Setup Table Setup Administrator Window Help

When you click on a menu, the applicable pull-down menu appears.

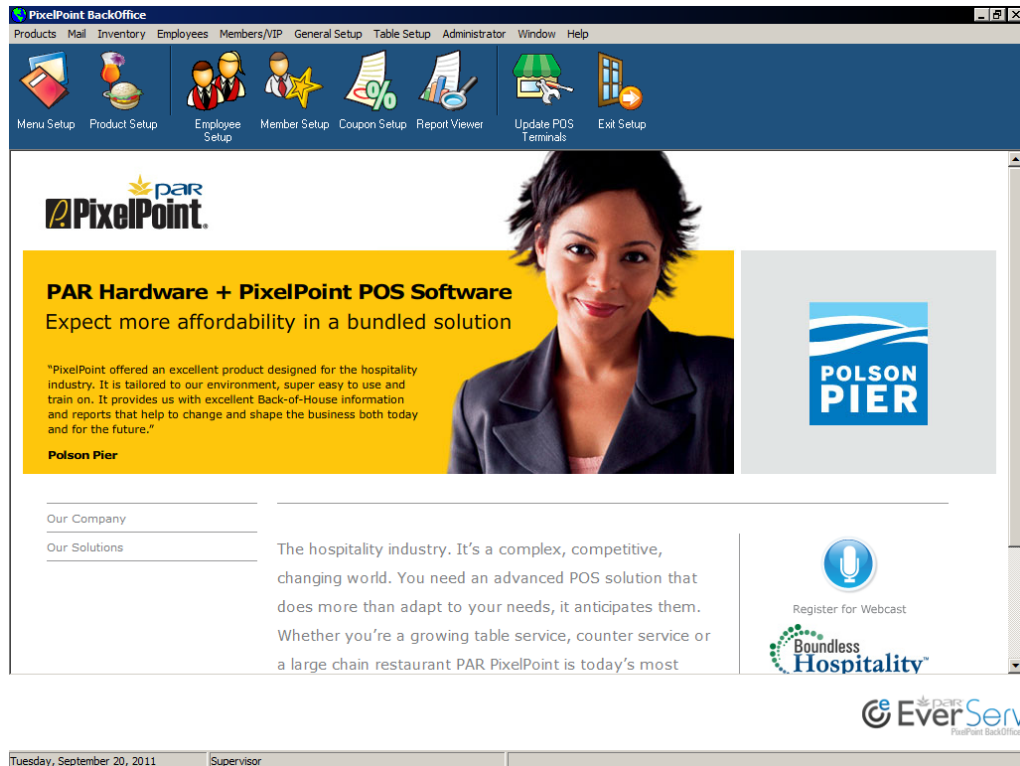
- **Toolbar:** The blue toolbar contains shortcut icons to various programming functions contained in the pull-down menus. You can customize this toolbar by right-clicking on the blue area and selecting Customize from the right-click menu; although the default selections are perhaps the most frequently used, you can change what is on the toolbar if there is something else you use more often.



When you right-click on the blue toolbar to customize it, a window appears. To remove an icon from the toolbar, click on it and drag it to this window. To add an icon, select it from the 'Actions' window and click and drag it to the toolbar. You can also rearrange the toolbar icons by clicking on them and dragging them to a new location.



- **Display Area:** The empty white area below can be filled by a website, and can also display the BackOffice programming screens as they are selected.



Online Help

The contents of each PixelPoint manual are available by selecting the [Help] button where provided. You can also access help by pressing the [F1] function key or from the BackOffice screen by selecting the [Help] pull-down menu. See "Help" for more information regarding the Help function.

Programming Changes

Most updates and changes to system programming take effect at the front-end, when you log out of the system. However, you may need to restart the PixelPoint POS system before changes involving some of the higher-level settings for system configuration can take place. Generally speaking, you need to restart the POS in order for changes made under the Administrator menu to take effect.

For example, if you add a new coupon you only need to log out for it to take effect. Upon logging back in, you will see the coupon in the system. But if you add a station or change a printer's configuration, you have to restart the system in order for those changes to take effect.

Order of Programming

When programming a PixelPoint POS system from scratch, you may find it difficult to know where to start and what is the best sequence to follow. Below is the recommended path of programming for a basic system.

1. Initial Setup

1. Shift Rules (under **Employees**)
2. System Setup (under **Administrator**)
3. Printer Channel Setup (under **Administrator**)
4. Network Printer Setup (under **Administrator**)
5. Sales Type Setup (under **Administrator**)
6. Form Designer (under **Administrator**)
7. Revenue Center Setup (under **Administrator**)
8. Multi Menu Setup (under **Products**)
9. Table Section Setup (under **Table Setup**)
10. Table Settings (under **Table Setup**)
11. Table Layout Setup (under **Table Setup**)
12. Station Setup (under **Administrator**)

2. Employee Setup

1. Department Setup (under **Employees**)
2. Job Position Setup (under **Employees**)
3. Security Level Setup (under **Employees**)
4. Employee Setup (under **Employees**)
5. Employee Performance Points (under **Employees**)

3. General Setup

1. Payment Method Setup (under **Administrator**)
2. Pay In/Out Reasons (under **General Setup**)
3. Refund Reasons (under **Products**)
4. Receipt Setup (under **General Setup**)
5. Mealtime Setup (under **General Setup**)
6. Banner Message (under **General Setup**)
7. Billboard Message Setup (under **General Setup**)

4. Product and Menu Setup

1. Summary Group Setup (under **Products**)
2. Report Category Setup (under **Products**)
3. Order Page Setup (under **Products**)
4. Forced Questions (under **Products**)
5. Product Setup (under **Products**)
6. Menu Setup (under **Products**)
7. Coupon Setup (under **General Setup**)
8. Form Designer* (under **Administrator**)

*Form Designer appears for a second time in the recommended order of programming since product grid and button appearance settings (which you can design in Form Designer) ought to be programmed once you have created products, designed order pages, and completed other menu-related programming.













Note: The recommended order of programming for a Quick Service establishment is the same as that presented above, except that the three steps under Table Setup (#9-11) in the "Initial Setup" section are not necessary.

You may find that some of these steps do not need to be programmed for your particular system. If you do, simply continue on to the next step. There are also many optional features and functions within BackOffice that are not included in this list (such as members and inventory). They are not critical components to the operation of the POS system and can be programmed any time after completing the main system setup.

Navigation Bar



This navigation bar is very common throughout BackOffice. It will help guide you to whichever database record you are looking for, and also enables you to add and edit records. The function of each button is as follows:

-  Moves to the first record.
-  Moves to the previous record.
-  Moves to the next record.
-  Moves to the last record.
-  Searches all records; presents them in a database table format.
-  Refreshes the display.
-  Adds a new record.
-  Edits the current record.
-  Copies the record and puts its information into a new record, thus saving you from having to enter all of the information again. This is very useful, for example, if you have similar products with a lot of the same features or characteristics.
-  Leaves the function.
-  Saves the change (in edit mode).
-  Cancels the change (in edit mode).

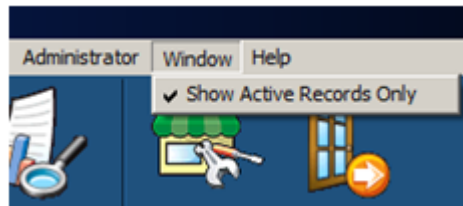
Active And Inactive Records

You do not delete database records from the PixelPoint database; instead, you set them as inactive.

Is Active?

In many of the setup screens, you will see this checkbox located in the upper right corner. If you wish to remove a record (be it for an employee, product or something else), simply open the record and then uncheck this box; the record will no longer display.

If you want to see the record again, go into BackOffice and select the Window menu.



Un-check *Show Active Records Only*. You will now be able to view and edit inactive records. Open the record again and check the 'Is Active?' box to re-activate the record.

System Configurations

There are three basic types of PixelPoint POS configurations. Your system will be configured in one of these ways. Each of them is explained and illustrated below. This section also discusses the way printers and cash drawers fit into the system.

Dedicated Server Configuration

In this configuration, a back office PC, referred to as POSSERVER, resides out of the way of the restaurant operation in an isolated area. The PixelPoint POS software resides on this PC. The POS stations used by the employees are located elsewhere throughout the establishment. Each station is numbered. This configuration is used in establishments that make intensive use of the system (such as larger establishments with many stations or those with high customer traffic).



Non-Dedicated Server Configuration

Here, POSSERVER is also a station—POSSERVER and Station 1 are the same unit. The PixelPoint POS software resides on this unit, but it is placed somewhere in the establishment where it is used by employees for normal operations. This configuration is used in establishments that need to make moderate use of the system (such as establishments needing two to four stations, or ones with low to moderate customer traffic).



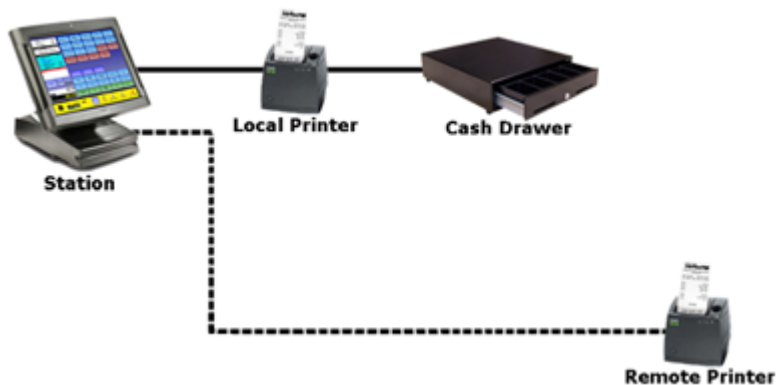
Standalone Server Configuration

In this configuration, POSSERVER and Station 1 are the same unit, as in non-dedicated server configurations. However, here there are no other stations; there is only this one unit. This configuration is used in small establishments that need only one station.



Printers and Cash Drawers

System printers fall into two general categories: local printers and remote printers. A local printer is one right next to the station you are at. A remote printer is one that is elsewhere in the establishment (the kitchen or the bar, for example). Local printers are connected to a station. In turn, cash drawers are connected to a local printer. PixelPoint sends special print jobs to get the drawer to open.



Printing Concepts

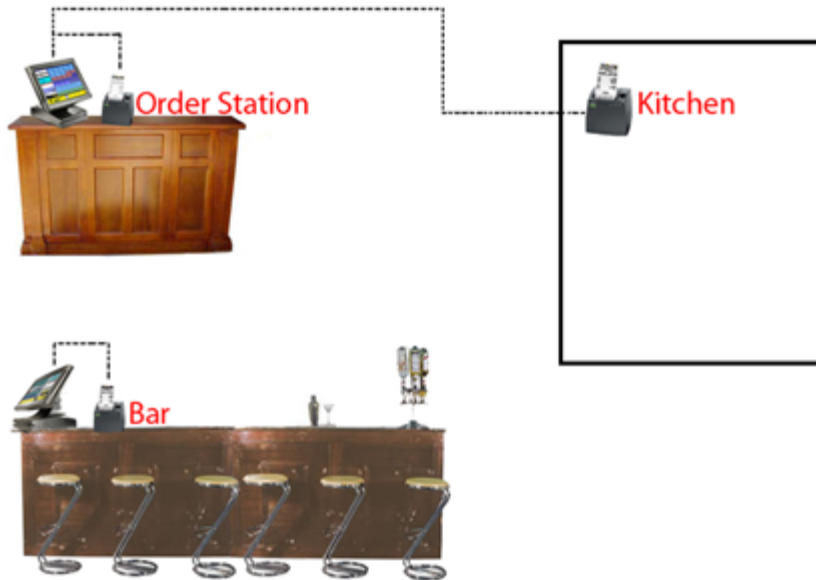
This section discusses basic printing concepts you will need to know before you set up PixelPoint to work with your printer system. The section covers topics like printer names and printer channels. The contents are:

- Naming Printers
- What Is A Printer Channel
- Determining Printer Channels
- Print Consolidation

Since menu options for programming printers and channels are under the Administrator menu, in-depth explanation about how to set these up can be found in that chapter ([See here](#)).

Naming Printers

This section gives you some guidelines for naming printers so they are easy to keep straight and program into the system setup. This section follows a scenario; in this example, the establishment has two stations and three printers. The POS unit at the order station is Station 1. The POS unit at the bar is Station 2. The printer in the kitchen is connected to Station 1.



It is recommended that you name printers with their primary function followed by the station number they are connected to. For instance, in this example the primary function of the printer at the order station is transaction-oriented printing (such as receipts, charge slips, cash out reports). Printing of this nature is localized to the station, so its primary function is called local printing. Therefore, this printer should be named "LOCAL1" (Local for its primary function and 1 for the number of the station it is connected to).

Similarly, the printer at the bar does local printing for Station 2. However, it also serves a second purpose—beverage orders from Station 1 print here as well. This latter kind of printing is called remote printing. It is done on a printer that is not locally attached to the station that started the print. In this case, the primary function is not local printing but bar printing. So this printer should be named "BAR2" (Bar for its primary function and 2 for the station it is connected to).

The printer in the kitchen generates kitchen (or food) orders and is connected to Station 1. Following this same naming scheme, this printer should be named "KITCHEN1" (or "FOOD1").

What Is A Printer Channel

A printer channel is a pre-defined path an item takes when it is being printed. Think of it like a highway where you have lanes for specific types of vehicles (like one for food trucks and one for beverage trucks). While each vehicle may have a different destination, the lane (or path) that type of vehicle takes is specifically intended for them.



Applying this to a restaurant environment, say that an order containing food and beverages is sent from a station; the food will take one channel, likely to the kitchen, and the beverages will take another channel (likely to the bar).

Bear in mind that a channel can have multiple destinations (since, for example, there may be more than one bar or kitchen). Say a Martini is ordered and sent. It will follow the Bar channel, but it could be programmed to go to any of the establishment's bars. The actual destinations are assigned within Station Setup. If the Martini is ordered from Station 1, it may go to Bar1, while a Martini ordered from Station 2 may go to Bar2. However, both Martinis still use the same Bar printer channel.

Printer channels isolate items for specific print jobs. If I added a printer exclusively for printing dessert orders, for example, then I would need a new printer channel to isolate those dessert items. Or if I had one kitchen printer for hot items and one for cold items, I would need two printer channels to isolate the hot items from the cold items (one channel for each). You assign products to print channels within Report Category Setup. Determining what printer channels you need takes some thought; some guidelines and help can be found in "Determining Printer Channels".

Determining Printer Channels

The printing system is an important part of any establishment using POS. It is therefore crucial that it be configured properly. To do this, you first need to determine the establishment's printing needs. Say, for example, they are as follows:

1. All slips and receipts need to print at the station.
2. All food needs to print in the kitchen.
3. All beverages need to print to the bar.

Based on these needs, you formulate the printer channels. Remember that channels are used to isolate items from each other; if you want to print a certain kind of item or order, you need a channel for it. Channels are generally named for the kind of destination they reach (such as kitchen or bar).

#1 above has to do with local printing at the station—it includes all transaction-oriented printing, such as charge slips, cash out reports and receipts. Since the destination is right there at the station, a good name for the channel is "LOCAL". It is important to note that all POS systems need local station printing, so your first printer channel should always be "LOCAL".

#2 addresses the printing of food orders. They are printed in the kitchen, so in this example your next printer channel should be "KITCHEN".

#3 concerns the printing of beverage orders. All alcoholic and non-alcoholic beverages will print to the bar, so your final printer channel here should be "BAR".

You can program up to 9 printer channels (each channel representing one of the 9 possible ports you can configure on a station). In most cases you will only need 3-5 channels; you do not have to use all 9.

Below are some questions and answers that further address the issue of determining printer channels:

- If the establishment had two kitchens, each with a printer, would you need a channel for each kitchen?
The answer is No. Remember that a printer channel is like a specialized lane of traffic. Regardless of the destination (or number of destinations), you only need the one channel (or lane) to handle the common print traffic (being kitchen orders).
- If the establishment added a printer specifically for pizza orders, would you need a channel for this?
The answer is Yes. You need a separate channel to isolate the pizza items from other kitchen items.
- If a second pizza printer was also added, would you need a channel for this?
The answer is No. All pizza items only need the one channel, regardless of how many destinations they may go to.
- If the establishment also wanted desserts to print at the pizza printer, would you need a channel for this?
The answer is No. The products included on the channel have simply increased to include dessert items. For the sake of efficiency however, it would be a good idea to rename the pizza channel to "Pizza & Dessert".

Print Consolidation

A consolidation print is a summary print that separates out the components of the products on an order and tells the reader how much of that component is in the whole order. For example, say an order for more than ten people prints in the kitchen. Time is crucial and the chef needs to know what needs to be put on the grill right away. The consolidation print shows up at the bottom of the kitchen print identifying all grill items and the quantities ordered. It does not provide information such as desired cooking duration or sauces, since that information is provided in the regular order printout and is not needed until after the initial prep stages; the purpose of the consolidation print is only to speed up the preparation of critical items.

Print consolidation is applied to specific printers through Administrator / Network Printer Setup / General Tab and applied to specific items through Products / Product Setup / Product Setup Tab. That is, in order for remote prints to show consolidated items, the printer(s) that print them must have print consolidation enabled, and individual products must be programmed for print consolidation as well.

Products Menu

This menu is used to configure the establishment's menus and products. Options on this menu enable you to do things such as create and modify products, report categories and configuration categories, order pages and menus. Each menu option is explained in its own section of the chapter. In addition, this chapter has several sections that explain important concepts concerning products, such as product types, forced questions and combos.

This chapter's contents are:

- Product Concepts
- Product Types
- Combos
- Product Setup
- Order Page Setup
- Report Category Setup
- Summary Group Setup
- Forced Questions
- Multi Menu Setup
- Menu Setup
- Configuration Setup
- Refund Reasons
- Exit Setup

Product Concepts

This section discusses some important concepts you should be familiar with before reading about products in PixelPoint POS.

Product

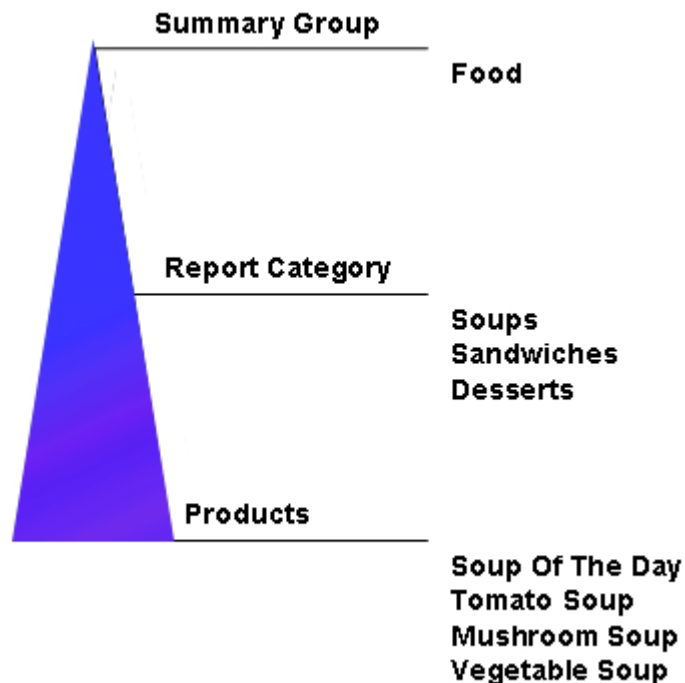
The term "product" includes many things in PixelPoint. Often a product is something that can be ordered by customers; food and beverage items (sometimes referred to as menu items) are the most common kinds of products. However, the term also includes other things that can be bought, like retail items and rentals. Some kinds of products, however, cannot be bought at all. For example, both bussing commands and kitchen commands are products as well. See "Product Types" for a full list and description of all of the types of products in PixelPoint.

Report Category

Similar products are grouped together into report categories for reporting purposes. For example, say the establishment offers several types of soups. These separate products can be grouped together into a Soup report category. When you generate a report category report, you can see how well soups (as a group) are selling.

Summary Group

As a further extension of reporting, similar report categories are grouped into summary groups. For example, all report categories involving food items could be grouped into a Food summary group. When you generate a summary group report, you can compare food sales to the sales of other summary groups, such as beverages and retail items.



Similar products have similar characteristics, such as where they can print, what taxes should be applied and what modifier pages may be needed. Rather than program these settings for each product, you can instead program them into the report category. In doing this, all products in that report category inherit those settings.

Product Types

Not all items that establishments use PixelPoint POS for are things that can be bought. Also, even products that are bought sometimes need to be handled differently, as far as things like pricing go. Because of this, PixelPoint POS has many different product types programmed for your use. Each of these is explained in detail below.

Ordering Product

Any item that is listed on a menu read by customers is an ordering product. Ordering products have a price and print on the receipt. A "Ham Sandwich" is an example of an ordering product.

Option (Hold)

A modifier; something that modifies other products (typical modifiers are things like condiments, sauces, etc.). Options may or may not carry a price. An option must be associated to an ordering product. "Extra Cheese" is an example of an option.

Kitchen Command

A message that prints to a remote printer in the kitchen. It has no price and will not print on the receipt. You can use kitchen commands to give instructions to kitchen staff without having to go to the kitchen and tell them in person. "See server" is an example of a kitchen command.

Bussing Command

A message intended for bussing staff. It has no price, will not print on the receipt and has no screen button associated with it. You access bussing commands through a pop up window when you select [Send Command] on the front end's Table Layout Screen; the system asks you to select the desired table and then the list of bussing commands displays. After you select a bussing command, it prints at the designated printer. "Clear Table" is an example of a bussing command.

Seating Position

A numbered order marker, enabling you to separate seats (and therefore orders) at the same table. By using seating positions, you can separate people's orders on remote prints, split checks more easily, and navigate through a table's order more efficiently. A seating position product has no price and does not show up on the receipt.

Rated/Hour Product

A rental; a product with a price that increases as time passes. The timer for a rated product can be stopped by selecting the [Stop All Timers] function or by printing the receipt. "Pool table" is an example of a rated item.

Delay Print Command

A command that pauses remote printing; used when you want to delay the printing of certain items to the kitchen. These commands can be set for different amounts of time. For example, when placing an order, you could select the appetizers, select "Delay" (which, say, is set for 10 minutes), then select the entrees. In the kitchen, an order would print containing just the appetizers. Ten minutes later, another order would print containing the entrees. Delays can be programmed for any length of time by using the 'Time To Serve' field on the Product Setup Advanced Tab. Delays do not print on the receipt.

Delays can be based on the preparation time of menu items, if this information has been programmed into the menu items' product information. For example, say you order a soup and a salad, apply a delay and then order a steak. The delay will look to the items ordered before it and delay the printing of the steak by the preparation time of either the soup or the salad (whichever is the longest); in this way, the steak will not be prepared before the customer has received the appetizer. In order for this to apply, the 'Time To Serve' field for the Delay product has to be

empty.

Delays can also be applied in a Hold & Fire operation, in which the delay is indefinite. For example, when ordering an appetizer and an entree, the entree will not print in the kitchen until you void the delay. To apply delays in a Hold & Fire operation, you must program the Delay command with feature code "3".

Merchandise

A retail item. It is selected by using a barcode scanner rather than the touch screen. When the barcode is scanned, the item will appear on the check. Merchandise items print on the receipt. "Large Polo Shirt" is an example of a merchandise item. The barcode is applied to the "Ref Code/UPC" field on the Product Setup Advanced Tab.

Minimum Charge

A product with a price that changes to ensure that the check total meets the minimum allowable amount. For example, say that the establishment has a minimum charge of \$10; all customers must pay this amount, no matter if what they order costs less. You select 'Minimum Charge', and then the customer asks for something that costs \$6. When you order the item, the minimum charge will change its price to \$4, so the total is \$10. If the customer now orders something costing \$2, bringing the total worth of items to \$8, the minimum charge will adjust its price to \$2, still keeping the total at \$10. When the amount of the check surpasses the minimum charge, the price of the minimum charge product will be zero and it will not show up on the receipt.

Ticket Number

A product that, when selected, asks you to enter a reference number. The number you enter attaches itself to the product label. A price can be applied to the ticket number and it can show up on the receipt. Ticket numbers are used for things like limited edition products, which have serial numbers used keeping track of what specific copies have been sold. For example, say the establishment sells boxes of Cuban cigars, each of which has a serialized seal label. You select "Box Cuban Cigars" and the system prompts you to enter the box's serial number. The receipt shows both the product label and the serial number.

Cover Charge

An admission ticket. When this item is ordered it generates a ticket. This ticket is then given to the customer as an entry ticket. Admission into a movie theater is an example of a cover charge product. In this case, ordering an "Adult Admission" would print a ticket that the customer would take to use to get into the theater.

Recipe Item

An item that is used to make ordering products; recipe items are food ingredients that are not usually sold by themselves (and so do not have their own buttons on the Order Screen). A recipe item is used to post raw inventory usage. For example, say the chef needs to process the inventory that was used for a buffet. Selecting [Post Inv Usage] at the front-end presents a list of all recipe item products, and the chef selects the items and quantities that were used from this list. This same function can also be used for recording waste.

Manual Keyboard

A product that enables you to type in a name or description. An example of this would be "Message To Chef". When you choose 'Manual Keyboard', the system displays a touch screen keyboard, enabling you to type a brief message that will be included on the remote print. This product is a kind of customizable command product (See kitchen command and bussing command above); instead of selecting a message from a list, you manually enter your own.

Combos

Products / Product Setup / Combo Items Products / Forced Questions

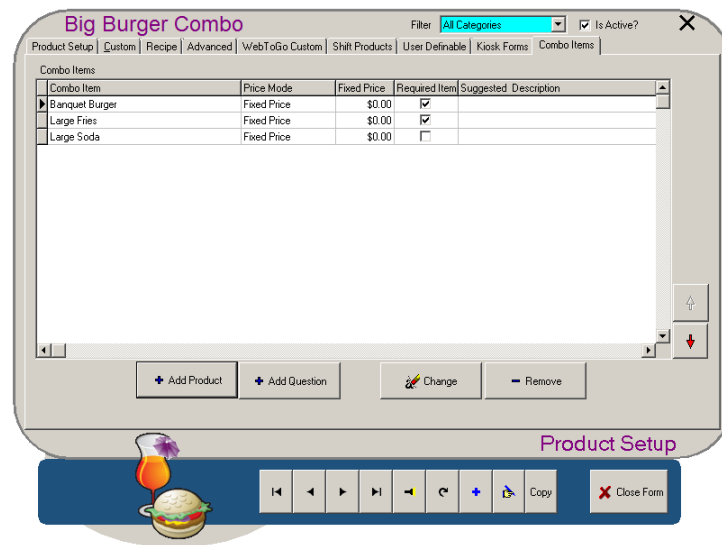
A combo meal is a single product that is made up of several ordering products. The following explains how to program a typical combo. There are a few ways to do this using PixelPoint POS; this section explains two of them, both using the following example combo.

Say there is a combo called the "Burger Combo" that is made up of a hamburger, fries and soda. The individual products and the combo have the prices given below. By ordering the hamburger, medium fries and medium soda in a combo, customers save \$1.

<u>Product</u>	<u>Price</u>
Hamburger	3.95
Medium Fries	1.50
Medium Soda	1.50
Burger Combo	5.95

To Create the Combo:

1. Create the "Burger Combo" product in Product Setup.
2. Switch to the Combo Items tab.
3. Add the products in the combo, using [+ Add Product].
4. Add any forced questions using [+Add Question].

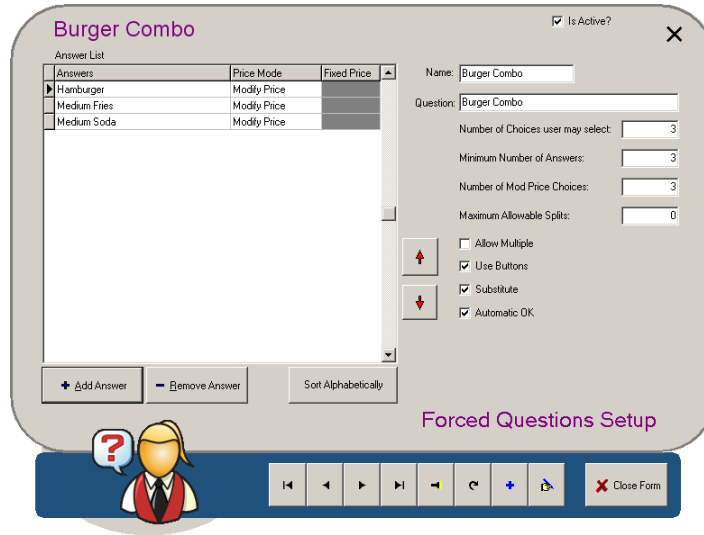


If you want to use Auto Combo Recognition, select the 'Required Item' checkbox for the products you want this combo to display for. That is, if you want this combo to display on the Combo grid automatically when, say, a customer orders a 'Hamburger', then select the checkbox in the 'Required Item' column next to the 'Hamburger' product. If you only want the combo to display when a customer orders both the hamburger and fries, then select the 'Required Item' checkbox next to 'Medium Fries' too.

Note: You must also have the *AutoComboRecognition* policy enabled and an appropriate Order Screen form in use for auto combo recognition to work.

To Create the Combo Using a Forced Question:

1. Create the "Burger Combo" product.
2. Edit the three products in the combo, making their modify price \$0.
3. Create a forced question for the "Burger Combo".



4. Add each item in the combo as an answer to the forced question.
5. Set 'Number of Choices', 'Minimum Number of Answers' and 'Number of Mod Price Choices' to "3" (matching the number of answers in the Answer List).
6. Check 'Automatic OK'.
7. Save and apply the forced question to the "Burger Combo" product.

However you decide to program the combo, when the "Burger Combo" is ordered at the front-end, the system automatically orders all of the individual products and gives them each a price of \$0, with the combo itself costing \$5.95. If any of the combo components have Forced Questions of their own (like one asking about the flavor of soda), they are presented as well.

1	Burger Combo	\$5.95
1	Hamburger	
1	Medium Fries	
1	Medium Soda	

The combo product can also be used in conjunction with [Size Up] and [Size Down] to "Super Size" or "Kid Size" the combo (changing the fries and soda to either a large or small size). See the "Product Setup Advanced Tab" for more information about Size Up and Size Down. You can also use combos in conjunction with shift products for related functionality (See "Shift Products Tab" for more information about shift products).

Product Setup

Products / Product Setup

This menu option enables you to program all of the different features and aspects of individual products, such as ordering products and PLUs (See "Product Types"). Products in PixelPoint POS are feature-rich and highly-customizable, and it is here where you specify exactly what you want each product to be like. Selecting this menu option presents a setup screen with many different tabs, each of which has its own subsection in this section. In addition, this section has a subsection about feature codes, which are very useful for adding even further functionality to individual products. This section is organized as follows:

- Product Setup Tab
- Custom Tab
- Recipe Tab
- Advanced Tab
- Feature Codes
- Combo Items Tab
- Shift Products Tab
- User Definable Tab
- Kiosk Forms Tab

Product Setup Tab

Products / Product Setup

The Product Setup tab enables you to program settings for all of your individual products.

The screenshot shows the 'Product Setup' window for 'Fried Chicken Dinner'. The window has a title bar with 'Fried Chicken Dinner' and a close button. Below the title bar is a navigation menu with tabs: 'Product Setup', 'Custom', 'Recipe', 'Advanced', 'WebToGo Custom', 'Shift Products', 'User Definable', 'Kiosk Forms', and 'Combo Items'. The 'Product Setup' tab is active. The window is divided into several sections:

- Description:** 'Fried Chicken Dinner' (text input), 'Printed Description: FR CHKN DNR' (text input), 'Report Cat: Grill' (dropdown), and 'Type of Product: Ordering Product' (dropdown).
- POS Button:** A preview of a blue button with 'Fried Chicken Dinner' text. Settings include 'Text Color' (white), 'Back Color' (blue), 'Button Font' (font icon), 'Button Image' (image icon), 'Use Grid Settings' (checked), 'Vertical Alignment' (dropdown), and 'Horizontal Alignment' (dropdown).
- Pricing:** A grid of price fields: Price A (\$8.99), Price B (\$8.99), Price C (\$8.99), Price D (\$8.99), Price E (\$8.99), Price F (\$8.99), Price G (\$8.99), Price H (\$8.99), Price I (\$8.99), Price J (\$8.99), and 'Modify Price' (\$8.99).
- Forced Questions:** A section with 'Forced Questions?' (checked) and 'Ask Questions at Once' (checked). It contains several dropdown menus for 'Side Dishes'.
- Course:** '2 - Main Course' (dropdown).
- Printing Priority:** '4' (input) and 'Consolidate on Orders' (checked).
- Option Printing:** Radio buttons for 'Normal' (selected), 'Print Always', and 'Roll-up Price'.

At the bottom of the window is a blue bar with a burger and drink icon, navigation arrows, a 'Copy' button, and a 'Close Form' button. The text 'Product Setup' is visible in the bottom right corner of the window.

Description

The product description that prints on the customer receipt. It is important that short forms be avoided here if possible, as customers want to know what everything on the receipt means, and short forms can be difficult to understand.

Printed Description

The description that prints on remote printers. Short forms can be used here. For example, you could shorten "Fried Chicken Dinner" down to FR CHKN DNR. The only people who see this description are kitchen staff, so this description should be suitable for them.

POS Button

The label on the product's touch screen button. This description should be written with servers in mind, as they are the ones who will be using it to place orders for the product. You can fit three lines of text on the button.

Button Font

Enables you to specify a particular font for this individual button.

Text Color

Presents a color chart you can use to select the color of the text on the POS Button. You can choose from among 48 basic color tiles, or apply custom colors. To apply a custom color, select [Define Custom Colors], pick a custom color box to modify, select the desired color from the rainbow tablet and then select [Add To Custom Colors].

Back Color

Presents a color chart you can use to select the color of the POS Button itself. As with the text color above, you can choose from among 48 basic color tiles, or apply custom colors. See 'Text Color' above for instructions on how to apply a custom color.

Button Image

Enables you to apply an image to the POS Button. You can use this to show a photo of the product itself on the touch screen order menu. It is recommended that you use small images, around 100-150 pixels in size. Square images appear best, though the system will stretch non-square images to fit the button.

Use Grid Settings

If checked, the product button will use the alignment and font settings assigned to the product grid in Form Designer. If unchecked, the button will use the settings assigned to it on this screen.

Vertical Alignment

The vertical position of the text on the button. It can be set to Top, Center or Bottom.

Horizontal Alignment

The horizontal position of the text on the button. It can be set to Left, Center, or Right.

Price A-J

The product's price(s). The product's default price is Price A. If you enter the price of the item in the *Price A* box and press the *Tab* key, the system applies the same price to all of the other price fields. You can set different prices for any of the other fields, however; there are 10 price levels you can use to adjust pricing for a wide variety of circumstances. You can configure the system to apply these different price levels using any of the following criteria:

- **Report Category** - All items in a report category can be set to switch price levels based on the category's schedule in Report Category Setup. For example, say that Wednesday night from 8:00-9:00 is 'Happy Hour.' You can set all liquor report categories to shift to Price B at this time. You can also apply this same function to an individual product by using the schedule in Product Setup.
- **Member Group** - Members are assigned to groups (See "Member Group Setup"). You can set a group to use a different price level than other groups. So, for example, you could set Seniors to use Price B and Students to use Price C.
- **Station** - You can set each station to use a different price level. For example, Station 1 could use Price A and Station 2 could use Price B.
- **Sales Type** - You can set each sales type to use a different price level. For example, Dine-In sales could use Price A and Delivery sales could use Price B.

Modify Price

This is a special price level that applies when an Ordering Product is used as an Option. For example, say a Salad is \$4, but, if you order the Steak Dinner, you can add that Salad for \$1. \$1 would be set as the product's modify price. The modify price is applied through the use of a Forced Question; when Ordering Products are selected as choices in Forced Questions, their modify price is added to the transaction.

Report Cat

The report category the product belongs to. When you select this, the product adopts all of the programming that was applied to that report category (for example, modifier pages, taxes, print location and price schedule). You can use the [...] button to the right of this field to select from existing report categories; you can also use the [New Item] button on the window that displays to create a new report category, or the [Edit] button to modify one of the existing report categories.

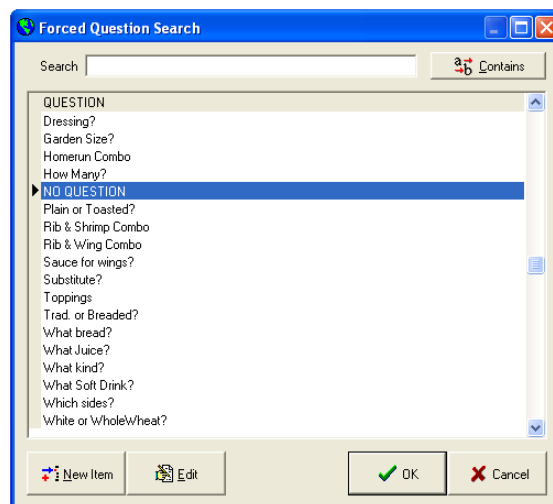
Type of Product

The product's type has a big effect on how it acts in the system. See "Product Types" for details about each product type.

Forced Questions

You can apply up to five Forced Questions to a product (Forced questions apply modifiers to products. See "Forced Questions" for more information). Every product within each Forced Question can also have five Forced Questions as well. For example, say ordering a dinner presents a Forced Question of 'Soup or Salad' and that you choose the salad. That salad product may then have a Forced Question asking about the type of salad.

Continuing with this example, say you choose a type of salad called "Chef Salad". That product may have its own Forced Question asking about the choice of dressing. All of this stems from just the one Forced Question applied to the dinner product. You could still program four more Forced Questions for that dinner if you wanted to.



You can also search, add and edit Forced Questions from this screen. There is a search button [...], located next to each Forced Question selection line, that enables you to do all of this without leaving Product Setup.



Ask Questions at Once

Presents all of the Forced Questions programmed for the product on the screen at the same time (when the product is ordered at the front-end). For example, a burger combo may have all of the following questions—what burger type, what toppings, what side item(s) and what flavor of beverage. If this option is checked, the system will display all of these questions at once, rather than displaying them one at a time. If this option is not checked, the questions will be asked separately, one after the other.

Note: PixelPoint prevents "Ask Questions at Once" from applying to PocketPOS applications, since PDAs are too small to display many questions on the screen at the same time. Instead, PixelPoint prompts you for an answer to each question individually.

Course

Specifies the course this product is typically served. The course you select here affects where the product is printed on remote prints (if set to sort by course). See the "Sort Order Tab" in Network Printer Setup for further details.

Printing Priority

The product's printing priority number; this number determines where the product is in the list of items on remote prints that are sorted by printing priority. The higher the number is, the higher priority it has and the closer to the top of the list of items it will print. You can assign up to 999,999,999 priority numbers. See the "Sort Order Tab" in Network Printer Setup for further details.

Consolidate On Orders

Checking this box tells the system to consolidate this item on remote prints. You can consolidate both options and ordering products. For example, say you place an order for 6 steaks (1 rare, 2 medium, 3 well done) and that consolidation is set for both the steaks and the temperatures. The consolidated print will have a line for the steaks themselves, as well as (indented) lines for each of the meat temperatures, showing how many should be cooked rare, medium and well done.

```

=== CONSOLIDATED ==
Ribeye Steak          6
  Rare                1
  Medium              2
  Well Done           3
=====

```

See "Print Consolidation" for more information about consolidation.

Option Printing

The selection in this box applies if the product type is 'Option'; it determines how options print on receipts. Normally, an option will not print if it has no price. If it does have a price, the option will print on its own line with its price.

- **Normal** enforces the above, where only those options with prices print on the receipt.
- **Print Always** forces the option to print on the receipt regardless of whether it has a price or not.
- **Roll-up Price** adds the price of the option to the option's master item. It thus appears as if the option does not have a price, although the name of the option still prints on its own line. See the example below.

Receipt 1		Receipt 2	
Sandwich	\$2.00	Sandwich	\$2.50
Cheese	\$.50	Cheese	

Custom Tab

Products / Product Setup / Custom

This product setup tab enables you to by-pass product settings inherited from the assigned report category (See "Report Category Setup") and/or configuration category (See "Configuration Setup"). You can also use this tab to apply a security level to the individual product.

The screenshot shows the 'Fried Chicken Dinner' Product Setup window in the 'Custom' tab. The window title is 'Fried Chicken Dinner' and it includes a 'Filter' dropdown set to 'All Categories' and an 'Is Active?' checkbox. The main content area is divided into several sections:

- Product Defaults:** Using Custom Settings (checked).
- Define Custom:** A checkbox that is checked, which activates the other settings.
- Print Channel:** Set to 'No Printer'.
- Modify Screens:** Four dropdown menus, all set to 'No Page'.
- Add Taxes:** Two checkboxes, 'Tax 1' (checked) and 'Tax 2' (unchecked).
- Min Security:** A dropdown menu set to 'Wait Staff Managers'.
- Accounting Codes:** Three text input fields: 'Accounting Code' (2343), 'Cost Acc. Code' (3453), and 'INV. Acc. Code' (4566).
- Schedule:** A button with a circular arrow icon.

 At the bottom of the window is a navigation bar with icons for back, forward, home, and search, along with a 'Copy' button and a 'Close Form' button.

Define Custom

Enables you to define the taxes, schedule, print channel and modify screens for this product individually. By using this feature, you can make these settings unique to this product instead of the same as all other products in the same report category or even in the same configuration category. Checking this box activates the other fields and settings on this screen; if this box is not checked, the other fields will be grayed out.

Print Channel

Sets the printer channel(s) where this item prints. See "Determining Printer Channels" for more information about printer channels.

Modify Screens

The modify order pages this specific product uses. When the product is ordered, these order pages will show up in the Modifier Grid on the Order Screen.

Add Taxes

Taxes that have a check mark next to them are applied to the product. Check and uncheck these boxes to add or remove taxes.

[Schedule]

Selecting this button enables you to set a different price schedule for this one product, rather than using the report category's price schedule. See "Report Category Setup" for more information about setting up price schedules.

Min Security

You can apply security to an individual product so that management authorization will be needed in order to order the product. You would usually use this for expensive products such as rare bottles of wine.

Accounting Codes

These fields are for reporting purposes only. You can have a separate 'Accounting Code', 'Cost Accounting Code' and 'Inventory Accounting Code'. There are reports in Report Viewer that can make use of the contents of each of these fields.

Recipe Tab

Products / Product Setup / Recipe

The recipe tab enables you to program the product's recipe. A recipe is a list of all the inventory or stock items used to make a product. It also includes the amount of each item used to make the product. The system records the fact that these amounts of these stock items were used whenever the product is ordered, enabling you to generate an Inventory Usage Report. If used in conjunction with Inventory Manager, the system will also deplete the recipe items from the specified warehouse(s) whenever the product is ordered.

Note: In order to make use of this tab, you must first have inventory items programmed in Stocked Items.

Inventory item	# of Units	Unit Description	Item Cost
Chicken Breast	2	Piece	.4688
Mashed Potato	4	Ounce	.1625

Total Recipe Cost : \$0.6313
 Product Selling Price \$8.99
 Suggested Selling Price \$8.99
 Percent Cost : 7.02 %

[Inventory Item]

The description or name of the stock item.

of Units

The number of stock units that go into making the product.

Unit Description

The type of unit used in the recipe; the system retrieves this description from the stock item record when you add it to the recipe.

Item Cost

The cost per unit of the stock item, which the system also retrieves from the stock item record, multiplied by the # of units.

[+ Inventory Item]

Adds a stock item to the product recipe. Selecting this button displays a window showing you all

of the stock items. To add one, select the item and then press [OK]. The system then asks how many units it should apply to the recipe.

[- Inventory Item]

Removes an item from the product recipe. Select the item and then select this button.

Total Recipe Cost

The sum total of all stock item costs, giving the total recipe cost of this product.

Product Selling Price

The selling price of the product (Price A).

Suggested Selling Price

A calculated selling price for the product, based on recipe cost and a specified profit margin. You can use the slide bar and percent field below to set how much of the selling price you want to be profit and how much you want to be cost.

In the example above, the cost price of 3 pieces of fried chicken is \$0.42. The selling price is \$8.50. When these values are set, the slide bar positions itself automatically and the value of the percentage field changes— showing that, in this case, the cost price of the meal is 4.93% of the selling price. You can manually slide the bar up and down, changing the amount that recipe cost is a factor in the selling price. You can also enter an exact value by using the percentage field; the slide bar automatically changes positions when you change the percentage field's value.

Note: This is the product cost price and does not include additional expenses.

Product Setup Advanced Tab

Products / Product Setup / Advanced

The advanced tab contains fields to extend the functionality of the product. For example, by changing settings on this tab you can make better use of the Billboard screen, amongst many other things.

Time To Serve

The time (in minutes) it takes to prepare and serve the item. If this product record is a Delay Print Command, this field specifies how long the system should wait until it sends the next item on the order. For further information, see Delay Print Command in "Product Types".

Ref Code/UPC

Either the product's PLU number or its UPC barcode number. If the product type is 'Merchandise Item', then you would enter the UPC code in this field. If you are using the PLU custom function button, you would record the PLU number here.

of Items Remaining (Countdown)

The quantity of this item that is available for order. This number appears in the corner of the product's button on the Order Screen. As the product is ordered, the number gets smaller; when it reaches zero, the item is automatically declared as Sold Out. If no number is entered here, no countdown will occur, and you can order the product indefinitely, unless it is manually set as Sold Out.

Manually Entered

This box contains settings you can specify be manually entered when the product is ordered from the Order Screen. If 'Price Mode' is checked, the system will ask that you enter the product's price every time it is ordered; this overrides any prices applied on the Product Setup tab. If 'Description' is checked, PixelPoint will prompt you to enter a label for the item whenever the item is ordered; this label is printed on remote prints and the receipt.

Feature Code

A special numeric value which enables you to carry out special functions (See "Feature Codes").

Tax Exempt #

If this product is exempt from certain taxes, a special reference number or general ledger number may need to be applied. Use this field to enter this number.

Label Capacity

How many items of this product can fit on a label (used primarily in catering environments). For example, say that order information about 5 sandwiches can fit on one of the establishment's labels. The label capacity in this case would be 5. If there were an order for 12 sandwiches, three labels would print (two with 5 sandwiches each, and one with 2 sandwiches).

Prep Location

A number that indicates the station where this product is prepared, used so employees dealing with the product know where to go to prepare it or get it. This number is reflected on catering print out reports.

Covers

The number of guests one order of this product would normally cover or serve. For example, products such as hamburgers would have a cover of 1 (as they are made individually for each person). But products such as a "Seafood Platter", for instance, would have a larger cover (perhaps 2, 3 or 4), as they are intended for a number of guests.

Points Awarded

Points redemption is one method of client retention that PixelPoint offers. When a member is applied to a check, the member is credited points for each item on the check. The points for each item are configured here. For example, if the Soup of the Day is worth 10 points, you would enter "10" as the value of this field on the "Soup of the Day" product record. Compare this to the other member points system configured in System Setup that offers points by net amount spent on the bill (rounded down). If the system is configured to issue points by net amount spent, the points configured for individual products will be ignored.

Employee Points


The number of points an employee gets if a customer orders this product. Used in employee contests. (See "Contests".)

[Make Info]

Displays a setup screen that enables you to program How to Make information for the product.



Product Image



6 ounce, Grade A, all beef patti on a sesame seed bun. Char grilled with fresh cut tomato, onions and pickle.

Calories: 350 cal.
Fat: 14 grams
Trans Fat: 1.5 grams

Load Image

Clear

Save Changes

Close Form

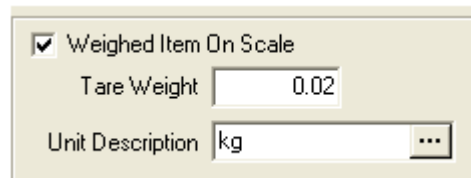
- **Load Image:** Enables you to apply an image of the product
- **Clear:** Removes the currently-applied image.
- **Save Changes:** Saves the information programmed on the screen, including the image.
- **Close Form:** Returns you to the Product Setup Advanced Tab.
- **POS Info tab:** The text entered here displays when you select [How To Make] or [Make Info] at the front end.

This function is very useful for identifying ingredients that may cause allergic reactions, describing preparation instructions or nutritional content, or providing any other information customers may want to know before ordering the product.

Weighed Item On Scale

Checking this box tells PixelPoint to interface with an attached weight scale when this product is ordered; PixelPoint looks to the weight on the scale and applies that as the quantity.

Two fields appear in the box when this checkbox is enabled. 'Tare Weight' enables you to enter the weight of the plate or container the product is stored in; this weight is deducted from the total weight presented on the scale when the product is ordered, so customers do not pay for it.



'Unit Description' is the unit of measurement that the product is weighed in. For example, sliced ham may be weighed in terms of grams or kilograms, or a measure in another system, such as ounces. You can use the browse button on the right to select from currently-used terms or to add a new one.

Reporting Product

The product that you want this product listed as on reports. There may be instances where you do not want this product to be reported as itself. For example, if this product's price is set to \$0.00 because it is used as a modifier or an option to a forced question, you will not get appropriate sales data for your reports. You can use this field to tell the system to report this product as a different product instead.

Size Up/Down Product

Size-Up and Size-Down are two functions that make it easier for the operator to adjust the size of a meal ordered. These functions were designed for the Quick Service industry but may also be applied to Table Service environments.



For example, in the case of pizza orders, if the customer changes the size of their pizza (say, from a medium to a large), the toppings and related inventory recipes are adjusted as well. The same applies in the case of combo orders. Say that someone "super-sizes" their combo. If you use the Size Up function, the corresponding size-up combo will contain the appropriate items

(being a large fries and large soda) and the appropriate ingredients will be depleted from your inventory as well. Of course, prices will adjust accordingly too.

You can specify which product this product changes to when [Size Up] or [Size Down] is selected at the front-end by enabling the checkboxes here and clicking on the green bars. For detailed information about programming Size Up and Size Down, see the PixelPoint POS Installation Guide.

Active Date Range

You can set an active date range for the product. Using this, you can program an item to appear on the POS on a specified date and disappear after a different date. This is ideal for programming daily and weekly specials or promotional items.

Item Special

Changing the selection from 'Normal' here identifies the product as a Special or Dessert. The product then shows up in the corresponding column on the Billboard screen. To remove the item from either column, simply select the 'Normal' box.

Active Surcharge

A surcharge is an additional charge you want to apply to the check. It is a percentage calculation based on either the Net Total (total before taxes) or the Final Total (total after taxes) of the check. You use this checkbox to make the current product record a surcharge.

The image below demonstrates this. When you check the 'Active Surcharge' box, the surcharge definition window displays, enabling you to define its parameters. 'Minimum Charge' means that regardless of what the system calculates as the surcharge, the minimum amount it can apply is (in this case) \$1.00. 'Maximum Charge' means that regardless of what the system calculates as the surcharge, the maximum amount it can apply is (in this case) \$20.00.

The radio buttons below these fields enable you to indicate whether you want the surcharge calculated to be based on the Net total or Final total. This information, in addition to the values you set for 'Minimum Charge' and 'Maximum Charge', is carried across to the pricing section on the Product Setup Tab.

Price A	\$10.00	Price F	\$10.00
Price B	\$10.00	Price G	\$10.00
Price C	\$10.00	Price H	\$10.00
Price D	\$10.00	Price I	\$1.00
Price E	\$10.00	Price J	\$20.00
		Modify Price	\$0.00

On that tab, Price Levels A through H now reflect the surcharge percent to be applied for that price level. If you applied this to a transaction, the surcharge would be 10%. You can set different percentage levels for each price level (A-H).

Price Level I reflects the minimum charge you applied earlier. So say you were working on Price Level A and the amount of the check came to \$8.00. The 10% surcharge would be \$0.80, but

because the minimum surcharge (Price Level I) is set to \$1.00, the surcharge applied would be \$1.00 instead of \$.80.

Price Level J represents the maximum charge you have applied. So say you were still on Price Level A and the amount of the check came to \$220.00. The 10% surcharge would be \$22.00, but because the maximum surcharge (Price Level J) is set to \$20.00, the surcharge applied would be \$20.00 instead of \$22.00.

Active Surcharge works great in a delivery environment where you want to apply a delivery charge to the order. You can configure the Delivery sales type to use a feature called 'Auto Order Item' with the active surcharge, so this surcharge is applied to every delivery order automatically (See "Sales Type Setup").

Feature Codes

The *Feature Code* field in the Advanced tab of the Product Setup screen can be used to add special functionality to your system above and beyond the features and functions that come enabled stock.

To use feature codes, enter the feature code value into the field in the Advanced tab of each applicable product record.

Feature Code 1

Tax Inclusive Pricing

Use this feature if you want the product's price to include applicable taxes. When this feature is in effect, the system internally back-calculates the price of the item so that its price (plus tax) matches the price you entered. For example, say that Beer is priced at \$4. Using feature code 1, the price (including tax) would be \$4—there would be no additional tax added onto the order for this item. However, without feature code 1, Beer would be \$4 plus additional taxes.

This function is commonly used in situations where the bar menu is tax-inclusive but the rest of the menu is not. Of course, establishments under VAT taxation laws do not use this feature, since everything is tax inclusive (this would be addressed using a tax DLL.). It is important to remember that due to rounding and taxation issues, some tax inclusive prices may be off by a cent.

Note: Within Station Setup is a checkbox called 'Use Tax Inclusive Pricing When Feature Code =1'. This must be applied to each station that will honor tax-inclusive pricing. With that being said, it is possible to apply both tax-inclusive pricing and non-tax-inclusive pricing within the same establishment.

Feature Code 2

Default Print Locations. By default, when using an Ordering Product in a Forced Question the product behaves like an Option and prints to the same place as the master product it modifies. Use feature code 2 when you do NOT want the product to follow the item when printing. Instead the product item will print where it is normally set to print in BackOffice.

For example, say you order [Wings & Beer] and that this includes (through a Forced Question) the ordering products [Bucket of Wings] and [Pitcher of Beer]. The problem is, you do not want the wings to print at the bar or the beer to print in the kitchen; because the two products are, in effect, Options in this case, they will both print to the same place. Apply feature code 2 to the ordering products within the Forced Question—the wings will print in the kitchen and the beer will print at the bar, where their product records set them to print.

Note: Feature code 2 will not affect OPTION products.

Feature Code 3

Hold & Fire

Use this feature code to set up a Hold & Fire operation. Create a product called "Hold & Fire" with 'Delay Print Command' as its product type, and feature code "3" on the Advanced tab. When placing an order, the system will send all of the items ordered before the Hold & Fire product to the bar/kitchen. When it comes to the Hold & Fire product, it stops, and it delays printing all items after the Hold & Fire line until you void the Hold & Fire line item.

Multiple Hold & Fire items can be applied to a check. For example, say you order [Soup], [Hold & Fire], [Steak], [Hold & Fire], [Pie]. The soup will be sent first, but the steak will only be sent when you void the first Hold & Fire and the pie will only be sent when you void the second Hold & Fire.

Note: You cannot print a receipt with a Hold & Fire item on it. The system checks for these items and will not print the receipt if it finds one. In addition, you cannot use Hold & Fire with rated items. The system will automatically remove any Hold & Fire feature it finds when you order a rated product.

Feature Code 4

Order Later

This feature code enables you to wait until later before choosing an ordered item. It tells the system that a product is going to be ordered, but that you will specify which product later. This feature code is ideal for "Full Meal" products concepts. For example, say you order a product called the \$20 Meal—it includes your choice of appetizer, main course and dessert. When selecting from the dessert Forced Question, you select a product called "Order Later", which has been programmed to use feature code 4. The system applies this item to the check as the customer's choice for dessert.

When the customer decides what they want for dessert (likely after they have finished the main course), use the [Substitute] custom function button on the [Order Later] item and then select the product the customer wants.

Note: If you want to use this feature, remember to add the "Order Later" product as an answer to the necessary Forced Questions.

Feature Code 5

Quantity Forced Questions

This feature code tells the system to ask the product's Forced Questions for each instance that is ordered. That is, if you use the quantity button to order 3 Steaks, feature code 5 will make sure that any Forced Question accompanying the order of a Steak is asked three times instead of once.

Feature Code 6

Cannot Coupon Item

With this feature code in effect, no coupon discounts can be applied to this item, regardless of any other programming in the system.

Feature Code 9

Quantity Price Equals One

If an ordered item's quantity is less than one, the system will charge the same price as if the quantity were one.

For example, say pizza toppings are \$1 each but a customer wants you to split their toppings—they want half of the pizza to have sausage and the other half to have chicken. Feature code 9 would make sure that the half toppings still cost \$1, rather than \$0.50.

Feature Code 99

Manual Surcharge

When this feature code is programmed on a product using a manually entered price, ordering this product prompts for a % surcharge of the net total. A keypad prompting you to 'Enter Surcharge 15=15%' displays when you select the product on the front-end Order Screen—this can be used for setting gratuity.

Feature Codes 101-104

Auto Order Item

These feature codes are used to tell PixelPoint to automatically order products when a transaction is started. Any product set with feature code 101, 102, 103, or 104 is automatically added to the order when a check is opened. PixelPoint adds products with the highest of these feature codes first and products with the lowest last (that is, it will order 104 items first, 103 items second, etc.).

Note: Some POS functions (such as selling Gift Cards) may be affected by the application of auto-ordered items. Take this into consideration before applying these feature codes.

Also note: Feature codes 101-104 only apply to Table Service mode.

Feature Code 105

Auto Order Item Where Qty = Customers

PixelPoint automatically orders items with feature code 105 in a quantity equal to the number of customers on the check.

For example, you could use this feature code to set your system to automatically apply 3 seating positions when you open a table with 3 customers.

Note: Feature code 105 only applies to Table Service mode.

Feature Codes 301-302

Apply Active Surcharge

These feature codes determine how an active surcharge is applied. Feature code 301 applies the surcharge based on the Net Total. Feature code 302 applies the surcharge based on the Final Total. Feature codes 301 and 302 are entered for you automatically when you set up the Active Surcharge using the radio button options under the Active Surcharge field to the right of the Feature Code field on the Product Setup Advanced Tab. On the other hand, entering "301" or "302" in the Feature Code field causes the Active Surcharge options box to open with the appropriate radio button selected.

Feature Codes 600-699

Linked Modifier Item Groups

These feature codes enable you to set conditions as to when certain modifiers can be applied to a check. Modifiers with these feature codes can only be applied if their linked master item has been ordered.

For example, a modifier item that has feature code 605 can only be used to modify an ordering product that also contains feature code 605.

Feature Codes 700-899

Linked Product Item Groups

These are similar to the linked modifier item groups except they apply to all product types—not just modifiers. The 800 series of numbers scans the entire check, looking for a corresponding 700 series number. If that number is present, the item can be ordered. If it is not, you cannot order the item.

For example, you could program "Soda" with feature code 724 and "Soda Refill" with feature code 824, preventing "Soda Refill" from being ordered unless "Soda" has been ordered. When you try to order a product with feature code "824", PixelPoint scans the check for feature code "724", only adding the 824 product when it finds one with 724.

Feature Codes 901-910

Shift Products Buttons

These feature codes indicate that the product is a shift product button; selecting one of these buttons on the front-end Order Screen will shift a product to one of a possible ten products programmed on a product's Shift Products Tab. Feature code 901 corresponds to the first row on that tab ('Shift 1'), feature code 902 corresponds to the second row ('Shift 2'), and so on. See the Shift Products Tab for more information about configuring products with these feature codes.

Combo Items Tab

Products / Product Setup / Combo Items

The Combo Items tab enables you to program this product as a combo. All of the products and forced questions listed on this tab are automatically added to the order or asked when this product's button is selected on the front-end Order Screen.

Combo Item

The products and forced questions included in this combo. When this combo product is ordered, all of the products here are added to the check and all of the forced questions are asked.

Price Mode

The price level this product uses in this combo. By default, all products are added to the combo using the 'Fixed Price' level. You can change this price level by clicking on it two times and selecting from the drop-down box.

Fixed Price

The value of this product in this combo. This is a manually-entered price level for the product, specific to this combo. By default, the fixed price of all products is "\$0.00" when they are added to combos here. You can set the fixed price to any value by typing the amount into the field. If the product is set to use a price level other than 'Fixed Price', this column will be blank for the product.

Required Item

Used in automatic combo recognition. If the products marked as 'required' on this tab are ordered individually, the Combo Grid on the Order Screen will automatically display the combo's product button, indicating that the products that have been ordered are available in a combo, and enabling users to add the combo directly.

Suggested Description

Used in automatic combo recognition. A description or question for each product that users can ask when suggesting customers upgrade to the combo.

[+ Add Product]

Adds a product to the list of items in the combo.

[+ Add Question]

Adds a forced question to the combo.

[Change]

Enables you to select a different product or question instead of the one that is currently selected.

[- Remove]

Removes the selected item from the combo.

Up / Down Arrows

Change the order the products in the combo are added to the check, and/or the order that forced questions are asked when the combo is ordered.

Shift Products Tab

Products / Product Setup / Shift Products

This tab enables you to link this product to multiple other products, and so create a shift products group. The different products specified here will be ordered if you first select one of the shift buttons on the front-end Order Screen before selecting this product's button. This means that, for all of the products specified here, you only need one button on the menu.

This tab only appears in Product Setup if it has been enabled in Policy Setup. The specific option that controls it is "UseProductShiftsKeys".

Shift	Product	Action
1. 8oz Glass	San Miguel Pilsen	... Clear
2. 12oz Glass	San Miguel Pilsen	... Clear
3. Pitcher	San Miguel Pilsen	... Clear
4. Shift 4		... Clear
5. Shift 5		... Clear
6. Shift 6		... Clear
7. Shift 7		... Clear
8. Shift 8		... Clear
9. Shift 9		... Clear
10. Shift 10		... Clear

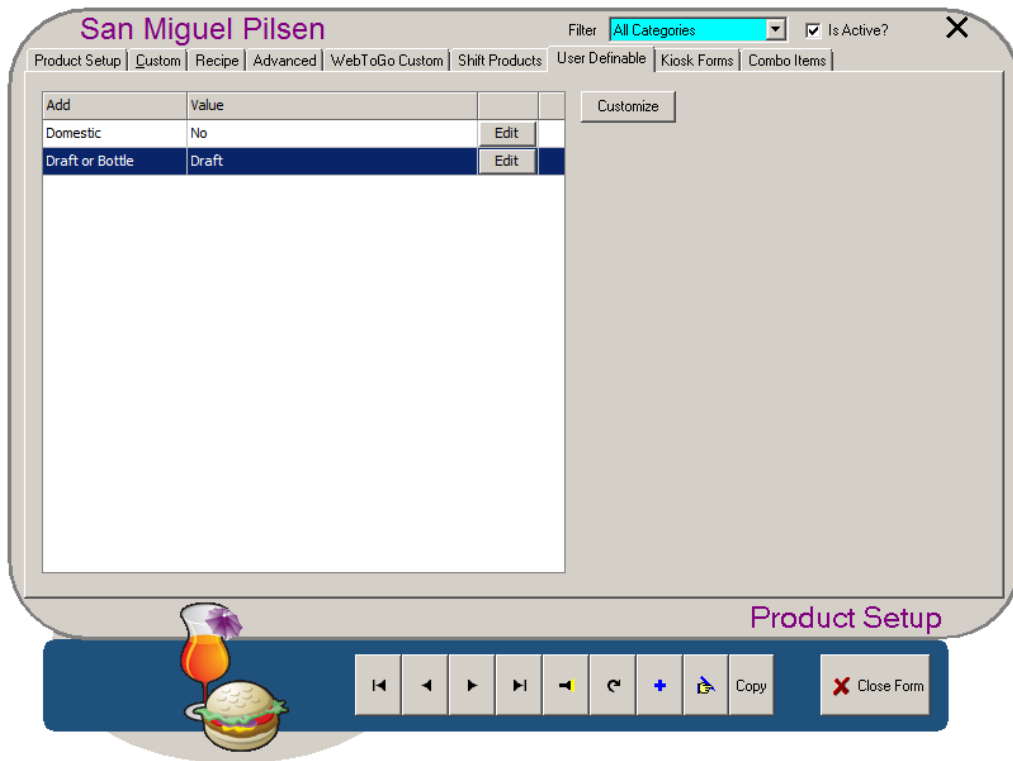
Shift Products are usually used for products that have several different sizes or types. For example, you could have [Small], [Med], [Large] and [Extra Large] shift buttons—selecting one of these buttons and then selecting a menu item on the Order Screen would add the corresponding size of the menu item you selected to the order. Each shift button is linked to one of the fields on this tab. Selecting the [Shift 3] function button on the front-end Order Screen, for example, would shift the product to the product specified in the 'Shift 3' row on this tab (in the example shown in the image above, this would order a "Large Pizza" if you then selected the [Pizza] button on the Order Screen).

For information about how to program shift products, see the PixelPoint POS Installation Guide.

User Definable Tab

Products / Product Setup / User Definable

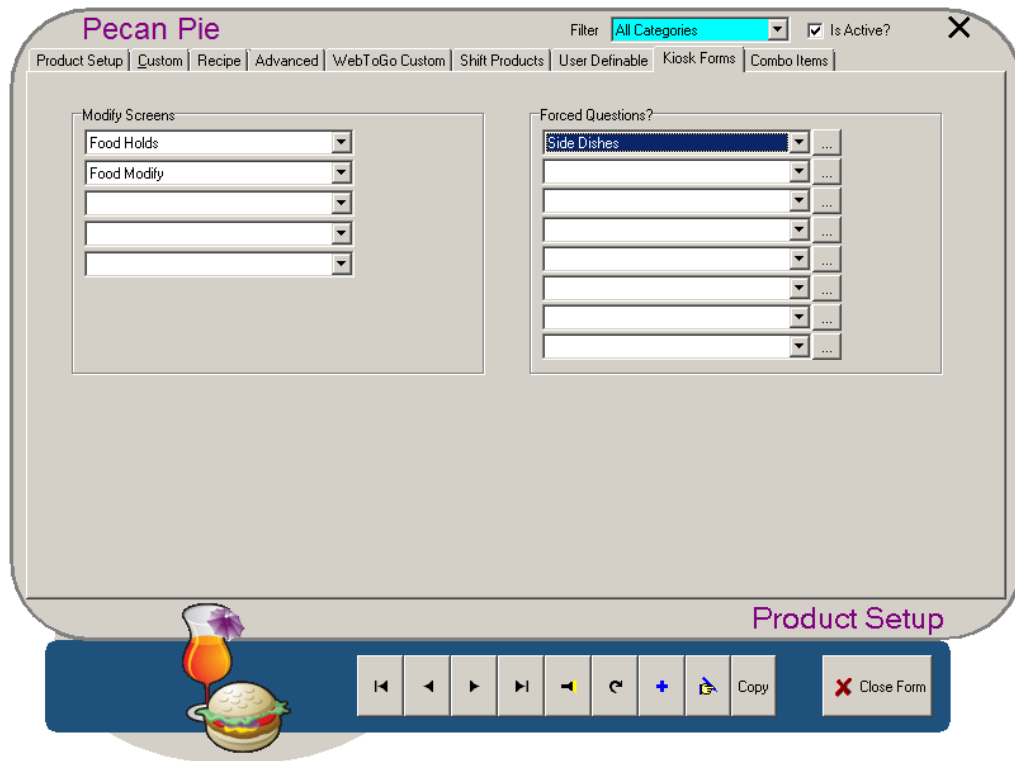
This tab appears when the *ShowProductCustomFields* policy is enabled in Policy Setup. This tab is just like the User Definable Tab in Employee Setup, except it can be used to create custom fields more appropriate for your products. For more information about this tab and about creating custom fields, see "User Definable Tab" in Employee Setup.



Kiosk Forms Tab

Products / Product Setup / Kiosk Forms

This tab enables you to program settings specific to the product's use in a Kiosk application. The tab only appears in Product Setup if it is enabled in Policy Setup. The specific policy that controls it is "UseKioskConfigurations", in the BackOffice folder.



You can use this tab to specify what modify screens this product should use, as well as what forced questions should be asked when it is ordered.

See the Kiosk section of the PixelPoint Form Designer Guide for more information about products used in kiosks.

Order Page Setup

Products / Order Page Setup

At the front-end, order pages are used on the Order Screen to access groups of products; selecting an order page changes what appears in the Product Grid. Modifier pages perform the same function, except with modifier products.

This setup screen is used to create and modify order pages and modifier pages. Order pages and modifier pages must be created before adding products to them in Menu Setup.

Description

The description of the Order Page. Pressing [TAB] applies this description to the POS Button (see below).

POS Button

The title that appears on the touch screen button. This description is intended for the server placing the order. There is no limit to the number of characters you can have in the description, but space on the button is limited (how many characters fit depends on the font type and size).

Button Font

Enables you to specify a particular font for this individual button.

Text Color

Presents a color chart you can use to select the color of the text on the POS Button. You can choose from among 48 basic color tiles, or apply custom colors. To apply a custom color, select [Define Custom Colors], pick a custom color box to modify, select the desired color from the rainbow tablet and then select [Add To Custom Colors].

Background Color

Presents a color chart you can use to select the color of the POS Button itself. As with the text color above, you can choose from among 48 basic color tiles, or apply custom colors. See 'Text Color' above for instructions on how to apply a custom color.

Button Image

Enables you to use a graphic image on the POS Button. It is recommended that you use small images around 100-150 pixels in height. Square images appear best, but the system will stretch other-shaped images to fit.

Use Grid Settings

If checked, the order page button will use the alignment and font settings assigned to the order page grid in Form Designer. If unchecked, the button will use the settings assigned to it on this screen.

Vertical Alignment

The vertical position of the text on the button. It can be set to Top, Center or Bottom.

Horizontal Alignment

The horizontal position of the text on the button. It can be set to Left, Center, or Right.

Type of Menu

The option selected here determines whether the page will be used as an Order Page or Modifier page. If the latter is selected, the page will be included in the drop-down list of modifier pages that displays when setting up things like Report Categories (See "Report Category Setup").

Report Category Setup

Products / Report Category Setup

A report category is a group of similar products. It is a level of product classification between Summary Group (which is a very general grouping of products, such as "Food" or "Beverage") and Product (being individual items, such as "8oz Peppercorn Steak" or "apple pie").

Report categories serve two functions. The first involves reporting. A report category enables you to view the sales activity of groups of related products (such as "Bottled Beers" or "Desserts"). This is useful when you want information that is more detailed than what a summary group can provide, but is broader than what you get in reports detailing the sales of each individual product.

The second function is reducing redundant programming. When a product is assigned to a report category, it inherits the information that was programmed into that report category. So items with common taxes, modifier pages and print location can simply inherit this programming by being assigned to the same report category, instead of having to have all of this programmed in for each item.

Report Category Setup Is Active? ✕

Category Description:

Summary Group:

Revenue Center:

Default Print Location:

Default Taxes for Group:

Tax 1

Tax 2

Default Modify Screens:

Schedule

Printing Priority:

Category Description

The name of the report category.

Summary Group

The summary group the report category belongs to. For example, an Appetizer report category would belong to the summary group "Food" rather than "Beverage" or "Bar". See "Summary Group Setup" for more information.

Revenue Center

If the establishment has multiple revenue centers, you can select which revenue center to apply the report category to. See "Revenue Center Setup" for more information.

Default Print Location

The print channel(s) items with this report category will print to (for remote prints). For example, all appetizers may use the Kitchen (or Food) print channel whereas all beer would print to the Bar print channel.

Note: It is not necessary to include the Local print channel here. This setting has to do with the remote prints only.

Default Taxes For Group

The taxes all items with this report category are subject to. Click on the various checkboxes to select and deselect the different taxes.

Default Modify Screens

The modify pages that you want to appear when items with this report category are selected on the front-end Order Screen. They should be modifier pages that are appropriate for the kind of products in the report category (for instance, if you were programming a Hamburger report category, you likely would not want "Bar Holds" as a modifier page. "Food Holds" would be more appropriate).

[Schedule]

Selecting this button presents a schedule screen that allows you to set times when the price level for products in this report category changes. For example, you could set this report category to use Schedule B on Mondays and Schedule C on Tuesdays. Click and drag on the schedule to select a time range. Then click on the color tile next to the price level you want to set. There is also a 'Not Present' option that sets products in this report category as unavailable for order during that time.

Time	SUN	MON	TUE	WED	THU	FRI	SAT
12AM	Red	Red	Red	Green	Red	Red	Red
1AM	Red	Red	Red	Green	Red	Red	Red
2AM	Red	Red	Red	Green	Red	Red	Red
3AM	Red	Red	Red	Green	Red	Red	Red
4AM	Red	Red	Red	Red	Red	Red	Red
5AM	Red	Red	Red	Red	Red	Red	Red
6AM	Red	Red	Red	Red	Red	Red	Red
7AM	Black	Black	Black	Black	Black	Black	Black
8AM	Black	Black	Black	Black	Black	Black	Black
9AM	Black	Black	Black	Black	Black	Black	Black
10AM	Black	Black	Black	Black	Black	Black	Black
11AM	Black	Black	Black	Black	Black	Black	Black
12PM	Red	Red	Red	Red	Red	Red	Red
1PM	Red	Red	Red	Red	Red	Red	Red
2PM	Red	Red	Red	Red	Red	Red	Red
3PM	Red	Red	Red	Red	Red	Red	Red
4PM	Red	Red	Red	Red	Red	Red	Red
5PM	Red	Red	Red	Red	Red	Red	Red
6PM	Red	Red	Red	Red	Red	Red	Red
7PM	Red	Red	Red	Red	Red	Red	Red
8PM	Red	Red	Red	Red	Red	Red	Red
9PM	Red	Red	Green	Red	Red	Red	Red
10PM	Red	Red	Green	Red	Red	Red	Red
11PM	Red	Red	Green	Red	Red	Red	Red

Setup Menu

Schedule For: Beer

Highlight the Cells and then click Schedule Box

- Schedule A (Red)
- Schedule B (Green)
- Schedule C (Yellow)
- Schedule D (Blue)
- Schedule E (Magenta)
- Schedule F (Olive)
- Schedule G (Teal)
- Schedule H (Light Green)
- Schedule I (Dark Red)
- Schedule J (White)
- Not Present (Black)

Save Changes

Cancel

In the above example, products in the Beer category are unavailable from 7am to noon, and switch to Price B on Tuesdays from 9pm till closing at 3am.

Printing Priority

The priority this report category takes if the receipt is sorted by Report Category (See "Sort Tab").

Summary Group Setup

Products / Summary Group Setup

A summary group is a very wide and generic group of products. It is the highest level of groups of products created for reporting purposes. Common examples of summary groups are "Food" and "Beverage". Summary groups can be broken down into a number of smaller groups, called Report Categories.

Summary Group Setup

Summary Group Description: Bar

Report Type:

- Food
- Beverage
- Liquor
- Merchandise
- Other

Close Form

Report Type

Although the Summary Group is the largest product group you program, multiple summary groups can also be grouped together. Every Summary Group has one of five Report Types. When generating a summary group report, summary groups with the same report type get grouped together. For example, say the summary groups "Hot Food" and "Cold Food" both have the report type "Food". If you generate a summary group sales report, the totals for these two groups would be combined to give an overall "Food" total. In addition, the total cost of all items in each report type is printed at the bottom of customer receipts.

Sales Summary Report

This section discusses the master report for PixelPoint: the Sales Summary Report. This is a compilation of multiple reports, created to give an overall view of the day's activities. You can generate a sales summary report in Report Viewer.

Remember that the numbers and labels included in the example report below are only examples. Excepting the section titles, the contents of your reports will be different. Some sections may or may not be included.

PIXELPOINT		PixelPoint Demo Restaurant	
		Sales Summary	
Sales Summary		From : August 15, 2009	To : August 15, 2009
Sales Summary			
	Default Revenue Center		
	Bar		349.60
	Food		306.30
	Default Revenue Center		655.90
	Gross Sales (no Tax) (no discounts)		655.90
	Round Difference :		0.00
Discount & Comps Summary			
	Default Revenue Center		
	10 % Coupon [1.0]		-2.37
	15 % Coupon [1.0]		-1.19
	Default Revenue Center[2.0]		-3.56
	Total Discounts [2.0]		-3.56
Tax Summary			
Description	Taxable	Tax Exempt	Tax
Default Revenue Center			
State	455.90	0.00	38.72
Fed	455.90	0.00	33.04
Default Revenue Center	Total:	0.00	71.76
	Gross Sales		724.10
	Total:		71.76
	Total Receipts:		724.10

Sales Summary

This section summarizes the sales totals for each Summary Group. It does not include taxes or discounts. The field "Round Difference" represents any rounding that may have been done within the day. For example, the calculation of tax on a split check could result in a half-cent difference. That half cent would be accounted for here. Another situation where you may find round differences is within a 24 hour operation. If a coffee is ordered before the End of Day, and then the End of Day is run before the transaction is closed, the coffee's value will show up as a round difference. However, it would be removed from the round difference when the transaction is closed. You would only see this if you ran the Sales Summary Report immediately after End of Day while the check was still open.

You can cross-check the value for Gross Sales using Total Receipts less taxes, less discounts.

Cross-Check of Gross Sales: $724.10 - 71.76 - (-3.56) = 655.90$

Discount & Comps Summary

This section tracks all discounts and coupons applied during the day. Next to each title is a number in a square bracket. This represents the quantity (number of instances). In the example,

Tender Balance

The tender balance section reports entries made within the front-end Tender Balance screen (if used). For further information on Tender Balancing, see the PixelPoint BackOffice User's Guide.

All pay-ins and pay-outs are recorded within this section. In the example report, a \$25 cash pay-in and a \$35 cash pay-out were applied. We know that each total consisted of one occurrence due to the number indicated in the square brackets.

The 'Calculated' column gives totals that PixelPoint has calculated; the values here are also displayed on the front-end Tender Balance screen. The equation used to calculate these numbers is "Net Total + Tip + Pay In — Pay Out + Floats". The 'Actual' column indicates totals counted and entered by staff on the front-end Tender Balance screen (either as part of the cashout process or End of Day process).

The difference between what PixelPoint has calculated and the amount entered is shown in 'Over/Short'. In this example, PixelPoint calculated \$381.63 in Visa sales. The amount entered into the Tender Balance screen was only \$380.63. The over/short column shows that the total on hand for Visa is short \$1 from what PixelPoint says should be there.

Refunds Summary

This section shows all voids/refunds that have been applied within the system. This section is once again broken down by revenue centers, and it is further broken down by refund reasons, indicating the number of instances as well as the total dollar value of each refund reason.

Job Position Summary					
	# of Shifts	Hours Worked	Wage	% of wage	% Wage/Net Sales
Default Revenue Center					
Management					
Owners	1	2.5	18.75	12.93	2.87
System Administrators	1	0.5	0.00	0.00	0.00
Management	2	3.0	18.75	12.93	2.87
Restaurant Staff					
Wait Staff Normal	7	14.9	126.25	87.07	19.35
Restaurant Staff	7	14.9	126.25	87.07	19.35
Default Revenue Center	9	17.9	145.00	100.00	22.23
Report Totals	9	17.9	145.00		22.23
Transaction Summary					
	Transactions	Customers	Net	Avg/Cust	Avg/Trans
Default Revenue Center					
REGULAR	15	36	652.34	18.12	43.49
Default Revenue Center	15	36	652.34	18.12	43.49
Report Totals	15	36	652.34	18.12	43.49
Sales By Section Summary					
	Transactions	Customers	Net	Avg/Cust	Avg/Trans
Default Revenue Center					
Bay View	2	3	17.70	5.90	8.85
Poolside	13	33	634.64	19.23	48.82
Default Revenue Center	15	36	652.34	18.12	43.49
Report Totals	15	36	652.34	18.12	43.49

Job Position Summary

The information contained in this section is related to time and attendance activity. It is divided into departments, then into job positions.

- **# of Shifts:** Number of employees who worked.
- **Hours Worked:** Total number of hours worked.
- **Wage:** Total wages (sum of wages x hours worked).
- **% of Wage:** Percent of total wages (wage / wage total).
- **% Wage/Net Sales:** Percent of wage to total net sales (wage / total net sales).

Check of % Wage/Net Sales (Wait Staff Normal): 126.25 / 652.34 = .1935 or 19.35%

Transaction Summary

This section describes sales and customer information for the whole establishment.

- **Transactions:** Total number of transactions.
- **Customers:** Total number of customers.
- **Net:** Total net sales (gross sales without tax, discounts and coupons).
- **Avg/Cust:** Average value per customer (Net / Customers).
- **Avg/Trans:** Average value per transaction (Net / Transactions).

Sales By Section Summary

This section describes sales and customer information for each dining section.

- **Transactions:** Total number of transactions.
- **Customers:** Total number of customers.
- **Net:** Total net sales (gross sales without tax, discounts and coupons).
- **Avg/Cust:** Average value per customer (Net / Customers).
- **Avg/Trans:** Average value per transaction (Net / Transactions).

Sales By Type Summary						
	Transactions	Customers	Net	Avg/Cust	Avg/Trans	
Default Revenue Center						
Dine-IN	15	36	652.34	18.12	43.49	
Default Revenue Center	15	36	652.34	18.12	43.49	
Report Totals	15	36	652.34	18.12	43.49	
Member Sales Summary						
	Transactions	Customers	Net	Avg/Cust	Avg/Trans	
Default Revenue Center						
Dine-IN	3	6	109.75	18.29	36.58	
Default Revenue Center	3	6	109.75	18.29	36.58	
Report Totals	3	6	109.75	18.29	36.58	

Sales By Type Summary

This section describes sales and customer information for each sale type.

- **Transactions:** Total number of transactions.
- **Customers:** Total number of customers.
- **Net:** Total net sales (gross sales without tax, discounts and coupons).
- **Avg/Cust:** Average value per customer (Net / Customers).
- **Avg/Trans:** Average value per transaction (Net / Transactions).

Member Sales Summary

This section describes sales specific to member transactions.

- **Transactions:** Total number of transactions.
- **Customers:** Total number of customers.
- **Net:** Total net sales (gross sales without tax, discounts and coupons).
- **Avg/Cust:** Average value per customer (Net / Customers).
- **Avg/Trans:** Average value per transaction (Net / Transactions).

Forced Questions

Products / Forced Questions

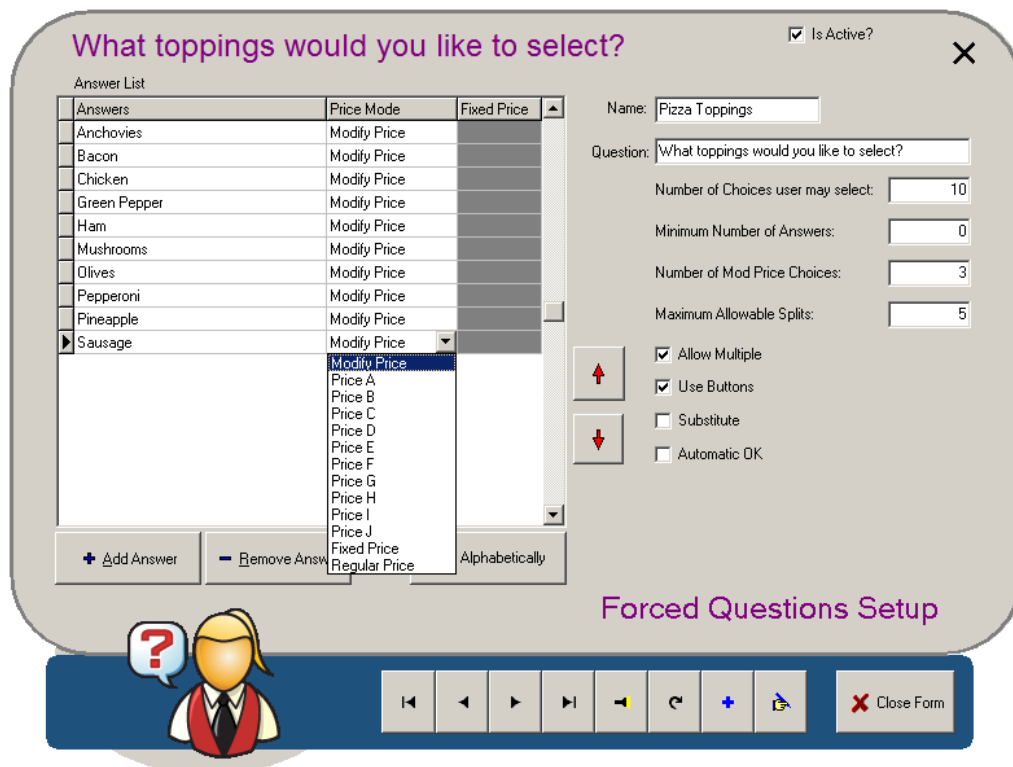
A Forced Question (sometimes called a forced modifier) is a pop-up window that appears when you order an item. It forces the user to select some of the options on it and applies these as modifiers. You can tell where Forced Questions need to be applied when you read, for example, a restaurant's menu; if there are any choices involved in ordering an item, a Forced Question will need to be applied.

Forced Question screens are designed in Form Designer. You can set these screens to include all sort of different elements, including the contents of the current check, company logos, product images, and how to make information.

Examples of common Forced Questions are:

- Dressings — French, Italian or Ranch
- Meat Temperature — Rare, Medium or Well Done
- Sauces — Mild, Medium or Hot
- Flavors — Vanilla, Chocolate or Strawberry

This section discusses how to set up Forced Questions themselves, using the *Forced Questions* menu option under the BackOffice *Products* menu. The different parts of the setup screen are explained below.



Answer List

The possible answers the user could choose from when they are asked the question. Use the arrow keys to the right to arrange the answers in any order. The Price Mode column enables you to apply a specific price level to that answer within that Forced Question. For example, pepperoni may be used in several Forced Questions. One question may use the pepperoni's modify price while another question may use the regular (scheduled) price and a third question may use Price E. The Fixed Price column enables you to set a specific price for the answer when used in this particular question.

[+ Answer] / [- Answer]

Enable you to add and remove answers from the Answer List. Selecting [+ Answer] presents the product list; choose a product and select [OK] to apply it as one of the possible answers. If the product does not currently exist in the product file, choose [New Item] (on the product list window) to create it. You can then apply it to the Forced Question. Select an item from the Answer List and then select [- Answer] to remove it as a possible answer.

[Sort Alphabetically]

Sorts all of the Forced Question's answers alphabetically.

Name

The question's name or title.

Question

The actual question that is asked when the question displays at the front-end.

Number of Choices User May Select

Limits the number of choices customers may select when answering the question. For example, the number of choices for a salad dressing is usually one, in that there is usually only one dressing on a single salad. However, customers usually have several different toppings on a pizza, and so the number of choices customers may select for this question may be quite high.

Minimum Number of Answers

The fewest answers you want customers to choose. For example, if you wanted to permit customers to not choose an option (because, for example, they may want the product to be plain), you would set this to "0". But if the question referred to something such as a cooking time for meat, you would need an answer, and so you would place a "1" in this field, indicating that they must choose at least one of the answers.

Number of Mod Price Choices

One of the prices you can set in Product Setup is called the Modify Price (See "Product Setup Tab"). This price is used when an Ordering Product is used as an Option (such as adding a salad to a meal for only \$1 when you normally charge \$4 for the salad on its own). You can program the Forced Question to use this price instead of other price levels.

'Number of Mod Price Choices' limits the number of modify prices used when the question is answered. For example, say a pizza comes with three free toppings and that every topping added after that costs \$0.50. You could program each topping to have a modify price of \$0.00 and you would then set the Number of Mod Price Choices field to "3". When a customer adds any of the first three toppings, it would be added at no charge, since it is added at its modify price. However, the fourth topping (and any topping added after it) would cost \$0.50, as it is not added at its modify price.

Maximum Allowable Splits

You can split the items applied within a Forced Question. For example, say you want a pizza with a particular topping on one half; this would be a split of 2. This field enables you to choose the maximum number of splits you want the user to select.

When an answer is selected in a split, the quantity of the product will be proportional to the split (as will be the price and the amount of the product depleted from the inventory). You do not have to apply the split as soon as the Forced Question displays, however. For example, you can order a pizza, apply pepperoni to the entire pizza, and then select **[Split]** and order further toppings. The pepperoni will apply to the whole pizza (although it will show up in each split section on the receipt with proportional quantity). Any further toppings will apply only to the one split (and will have proportional quantity).

Allow Multiple

Checking this box enables users to select the same answer more than once. For example, they could order double or even triple cheese on a pizza. Note however, that this only works if the Forced Question is asked using the Button format (see "Use Buttons", below). You can only select items in the list format once.

Use Buttons

Checking this box displays the answers to the Forced Question as individual buttons when the question is asked. Un-checking it displays the answers in a list format. Use the list format when you have insufficient screen space to fit in all of the button answers.



Mozza	\$0.00
Cheddar	\$0.00
Onion	\$0.00
Green Peppers	\$0.60
Mushrooms	\$0.60
Pineapple	\$0.60
Pepperoni	\$0.75
Sausage	\$0.75

Substitute

Checking this box enables you to go back to a selected answer and substitute one of the other answers in its place. For example, you could substitute Fries with Onion Rings. This option is designed for single-selection Forced Questions. It is not recommended for questions involving multiple answers (such as pizza toppings).

Automatic OK

This saves you from having to select [OK] in situations where the customer only has one choice to make. For example, say a Forced Question asks you to choose one (and only one) salad dressing. If Automatic OK has been checked, then, rather than having to select the customer's choice and then [OK] to finish with the question, the Forced Question window will disappear as soon as you select the customer's choice.

Forced Questions From Product Setup

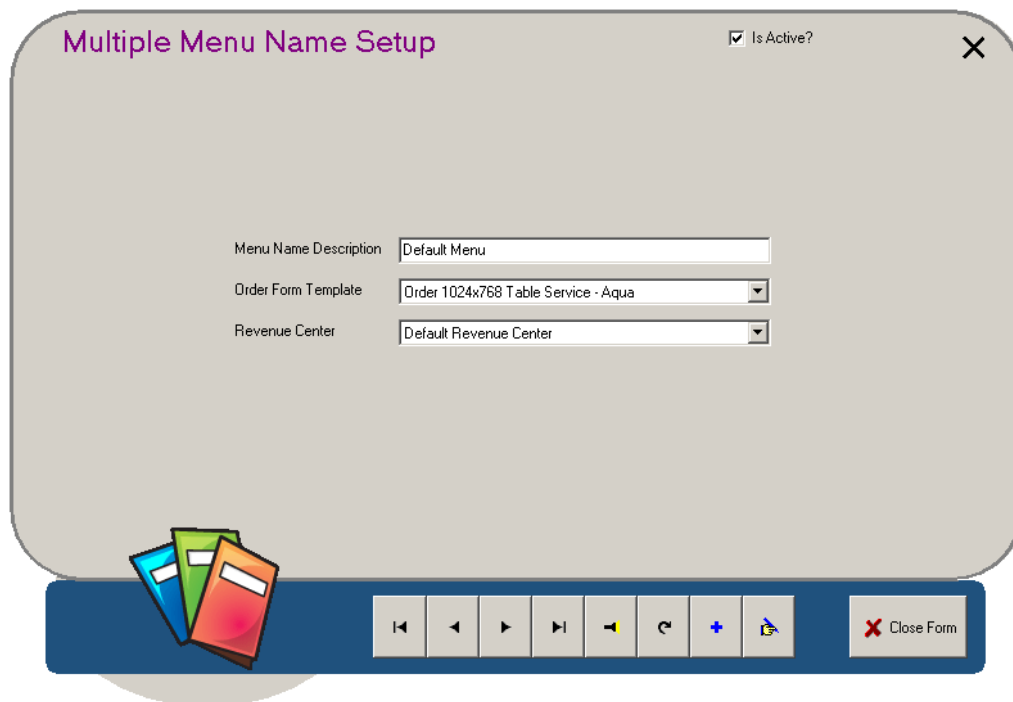
You can also search, add and edit Forced Questions from Product Setup. There is a search button ([...]) located next to each Forced Question drop-down box that enables you to do all of this without leaving Product Setup. (See "Product Setup Tab".)

Multi Menu Setup

Products / Multi Menu Setup

This setup screen enables you to create and modify multiple menus for the establishment. These multiple menus can be completely different, yet be on the same POS system.

This is useful, for instance, in establishments that have different revenue centers. Each revenue center would have its own menu (such as one menu for the dining room and one for the bar lounge). This can also be used in even more complex applications, such as an entire food court. Every store in the food court could work on a single PixelPoint POS system; each store would have its own menu.



The screenshot shows a dialog box titled "Multiple Menu Name Setup" with a close button (X) in the top right corner. A checkbox labeled "Is Active?" is checked. The dialog contains three input fields: "Menu Name Description" with the text "Default Menu", "Order Form Template" with a dropdown menu showing "Order 1024x768 Table Service - Aqua", and "Revenue Center" with a dropdown menu showing "Default Revenue Center". At the bottom of the dialog, there is a blue bar containing a stack of three colorful cards (blue, green, orange) on the left, a series of navigation buttons (back, forward, home, refresh, plus, minus) in the center, and a "Close Form" button with a red X icon on the right.

Menu Name Description

The menu's name or title.

Order Form Template

The order form this menu uses. Select the folder icon on the right to choose the order form. This determines the way the front-end Order Screen will look. Forms are designed using Form Designer.

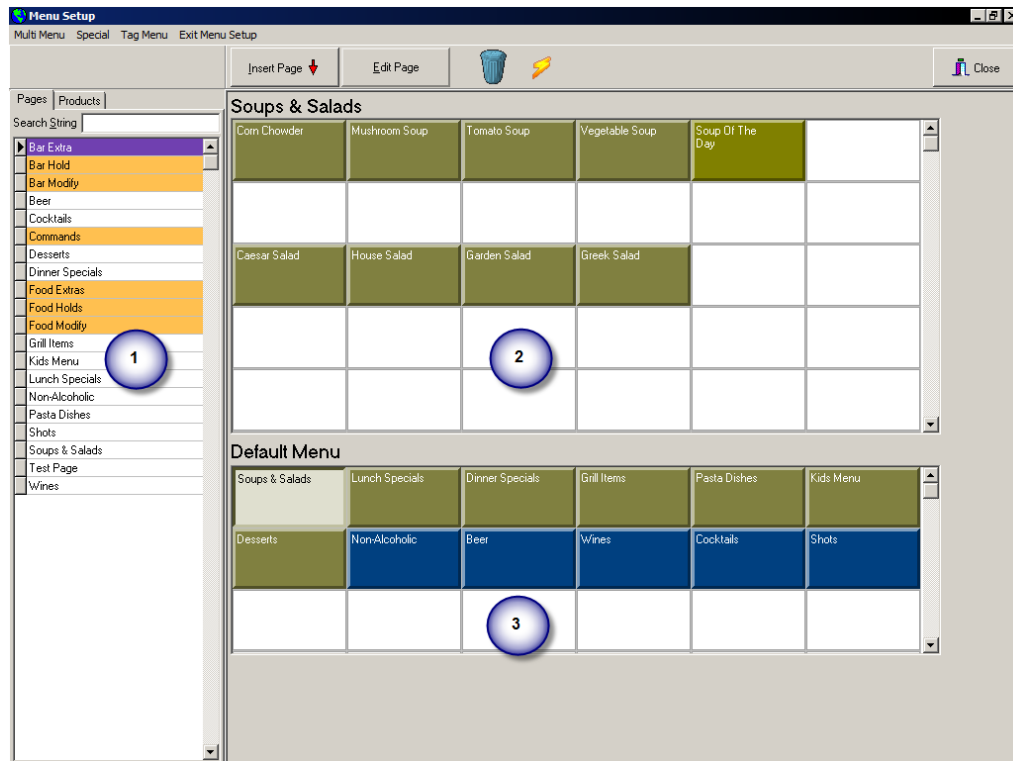
Revenue Center

The revenue center that this menu is assigned to.

Menu Setup

Products / Menu Setup

Menu Setup enables you to program the Order Screen. You can create and modify order pages, create and modify products and assign both to button locations on the Order Screen. The screen is divided into three sections.



Menu Setup Layout

1. Item List

Contains two tabs. The Pages tab contains a list of all order pages that have been created. The Products tab contains a list of all products that have been created.

2. Product Grid

Contains the buttons that appear in the product grid on the front-end. To add a product to this grid, select the product title from the Products tab in the Item List section. Click-and-drag it to the desired button cell in the Product Grid.

3. Order Page Grid

Contains the buttons that appear in the order page grid on the front-end. To add an order page to this grid, select an order page title from the Pages tab in the Item List section. Click-and-drag it to the desired button cell in the Order Page Grid.

Menu Setup Actions

Adding Items

Another way you can add an order page to the Order Page Grid (3) is by selecting an empty cell on the Order Page Grid, right-clicking on an order page title in the Item List (1) and then

selecting *Insert Page* from the menu. Or, rather than right-clicking, you can select the [Insert Page] button at the top of the screen.

Similarly, you can add a product to the Product Grid by selecting an empty cell in the Product Grid (2), right-clicking on a product title, and selecting *Insert Product* from the menu. Or, you can select [Insert Product].

To change the products displayed on the product grid to those on another order page, simply select the order page title from the Order Page Grid or the Pages tab. The title of the Product Grid changes to reflect that order page and the product buttons change to reflect the products currently on it.

Creating & Editing Items

When you select an empty cell in either the Order Page Grid or Product Grid, [Edit Button] (next to the trash can icon) will change to [Create Order Page] or [Create Product], depending on which grid the empty cell is in. [Create Order Page] brings you to a blank record on the Order Page Setup screen (See here) and [Create Product] brings you to a blank record on the Product Setup screen (See here). PixelPoint applies the item to the empty cell when you save the record.

If you click on a cell that already has a button in it, the button in the toolbar will change to [Edit Page] or [Edit Product]. [Edit Page] brings you to that page's record on the Order Page Setup screen (see here) and [Edit Product] brings you to that product's record on the Product Setup screen (See here). PixelPoint updates the item in the cell when you save the record. You can also edit a product or order page by right-clicking on the button and choosing *Edit Page* or *Edit Product*.

Positioning Items

You can arrange the buttons in any order on the grid by clicking and dragging them from one cell to another. You can also remove items from the grid by dragging them to the trash can icon at the top of the screen.

Show Info

Right-clicking on a product button and selecting this option displays the product's price levels and report category.

Lock Position

Lock Position is an option on the menu that appears when you right-click on a button icon. Selecting this option locks the button's position and prevents users with lesser security from moving it. Locked positions have a small lock icon in the corner of the button. This icon disappears when you unlock the position by selecting *Unlock Position* from the right-click menu. You can set different security levels when locking products by selecting another option, *Security Level*, from the right-click menu.

Flash View Button

The lightning-bolt shaped button at the top of the screen (next to the trash bin) enables you to "run" or preview what the menu will look like at the Front-end.

Multiple Menus

If you have created multiple menus (using Multi Menu Setup), you can access each one on the *Multi Menu* pull-down menu at the top of the screen. The Order Page Grid and Product Grid will change to match the order template programmed for the menu that you select.

For example, the order template for the Dining Room menu may contain an order page grid that has 5 rows of 5 buttons, but the order template for the Patio menu may have 3 rows of 8 buttons. The grids on the Menu Setup screen change accordingly when you select each menu.

Modifiers & Modifier Pages

Menu Setup is where you add individual modifiers to the modifier pages. To help you distinguish between order pages and modifier pages, modifier pages are highlighted on the Page tab. Note, however, that modifier page buttons themselves are not applied here. They are applied within Report Category Setup.

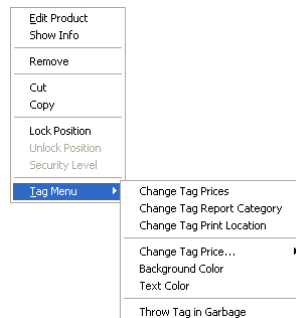
You can apply modifiers to a modifier page by selecting the modifier page title on the Pages tab—this changes the title of the Product Grid to the modifier page title (just as if you had selected an order page button). At this point, simply apply the modifier products to the grid in the same way you add other products (See "Adding Items", above).

Tagging Products

Say you want to apply the same change to many products. Rather than apply the change one product at a time, you can tag the products you want to change and then make the change only once.

To tag products:

1. Hold the CTRL button on the keyboard.
2. Use your mouse to click on the products that you want to make changes to. Buttons will be highlighted as they are selected.
3. Select the *Tag Menu* pull-down menu at the top of the screen.
 - You can also retrieve the tag menu options by right-clicking on one of the tagged items and choosing *Tag Menu* from the menu that appears.
4. Select a tag menu option.



Tag Menu

The tag menu has many options that enable you to make changes to a number of buttons and/or the products behind them. This menu enables you to change the price, report category, and print location of the selected product(s). It also enables you to change the selected button(s) background and text colors. The last option on this menu, *Throw Tag in garbage*, removes the tag.

You can use a tag to lock the position of many buttons at once. Simply tag the items and then select *Lock Position* from the right-click menu.

Special Menu

The *Special* pull-down menu has two options. *Sort Page Alphabetically* sorts the contents of the product grid alphabetically. By default, the Products tab automatically filters products matching the revenue center of the selected menu. *Show Products From All Revenue Centers* enables you to view all products on file, regardless of their revenue center. This option enables you to share common items between revenue centers.

Configuration Categories Setup

Products / Configuration Setup

This menu option enables you to add and modify configuration categories. Configuration categories function as groups of custom-defined products. For example, if multiple items require certain programming to be different from what is defined in their report category, a configuration category could be created and applied to those specific items. The products are still included in the assigned report category, but their settings can be different.

Category Description

The name of the configuration category.

Revenue Center

If the establishment has multiple revenue centers, you can select which one to apply the configuration category to. (See "Revenue Center Setup".)

Default Print Location

The print channel(s) items in this configuration category will print to (for remote prints). For example, all baked goods may use the Kitchen (or Food) print channel whereas all beers would print to the Bar print channel.

Note: It is not necessary to include the Local print channel here. This setting has to do with remote prints only.

Default Modify Screens

The modify pages that you want to appear when items in this configuration category are selected on the front-end Order Screen. They should be modifier pages that are appropriate for the kind of products in the category (for instance, if you were programming a Cheeseburger report category,

you likely would not want "Bar Holds" as a modifier page. "Food Holds" would be more appropriate).

Default Taxes For Group

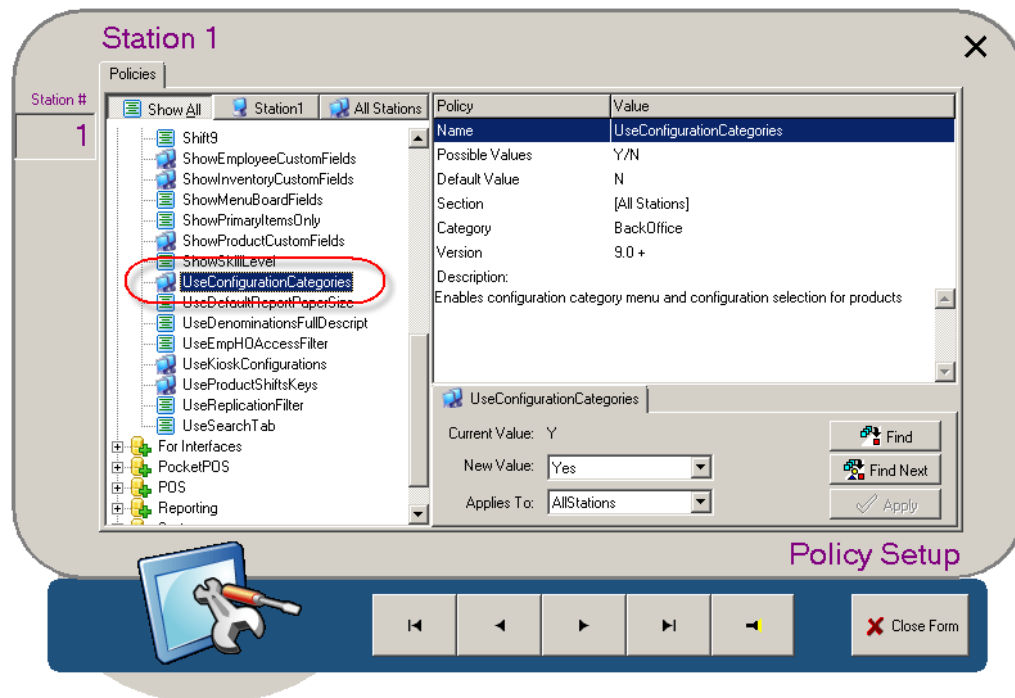
The taxes all items with this configuration category are subject to. Click on the various checkboxes to select and deselect the different taxes.

[Schedule]

Selecting this button presents a schedule screen that enables you to set times when the price level for products in this configuration category changes. As this feature is identical to that in Report Category Setup, see that section for more information.

Enabling Configuration Categories

Configuration Setup is only visible on the *Products* menu if configuration categories are enabled within Policy Setup; the specific option that controls this is 'UseConfigurationCategories', which is located in the BackOffice folder.



When Configuration Categories are enabled, a new field appears on the Product Setup Tab. This field enables you to assign the product to a configuration category, thus giving it those programming settings that are different from the other products in the report category the product is assigned to.

Pecan Pie Filter: All Categories Is Active? X

Product Setup | Custom | Recipe | Advanced | WebToGo Custom | Shift Products | User Definable | Kiosk Forms | Combo Items

Description: Pecan Pie
Printed Description: Pecan Pie

Report Cat: Desserts
Configuration Category: Baked Items
Type of Product: Ordering Product

PDS Button: Pecan Pie
Use Grid Settings:
Text Color: [White] Vertical Alignment: [Dropdown]
Back Color: [Green] Horizontal Alignment: [Dropdown]
Button Font: [Font] Button Image: [Image]

Pricing:
Price A: \$4.99 Price F: \$4.99
Price B: \$4.99 Price G: \$4.99
Price C: \$4.99 Price H: \$4.99
Price D: \$4.99 Price I: \$4.99
Price E: \$4.99 Price J: \$4.99
Modify Price: \$4.99

Forced Questions? Ask Questions at Once
[Dropdown] [Dropdown] [Dropdown] [Dropdown] [Dropdown]

Course: 4 - Dessert
Printing Priority: 0 Consolidate on Orders

Option Printing:
 Normal
 Print Always
 Roll-up Price

Product Setup

Close Form

Note: Although settings defined in the configuration category override the settings for the report category, those defined in 'Define Custom' (on the Product Setup Custom Tab) override the settings for the configuration category.

Refund Reasons

Product / Refund Reasons

When voiding an item that has been sent to the bar or kitchen to be prepared, the system asks you to select a reason for removing the item. It displays a list of reasons that you choose from. This setup screen enables you to configure that list of refund reasons. All of these voids are included in various management reports and are categorized under their respective reasons.

Refund Description

The name or label of the refund type. This appears as a line on the list of refund reasons at the front-end, enabling you to choose this reason.

Reduce Inventory

If checked, the system will reduce the inventory of the voided item each time this refund is selected. If unchecked, no change to inventory will take place.

Print Refund on Receipt

If checked, the system will print the refund and reason on the customer receipt. If unchecked, the item will simply be omitted from the receipt altogether.

Print Refund on Print Channels

If checked, the system will print the refund and reason on the remote printer that received the original order.

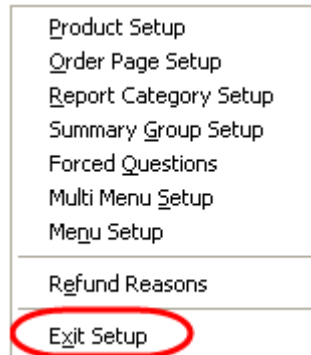
Min Security Required

The job position with the least amount of security authorization needed to approve refunds using this reason.

Exit Setup

Products / Exit Setup

This menu option closes the BackOffice system. If you accessed BackOffice from the front-end, you return to the front-end. If you accessed BackOffice from a Windows desktop shortcut, you return to the Windows desktop.



Mail Menu

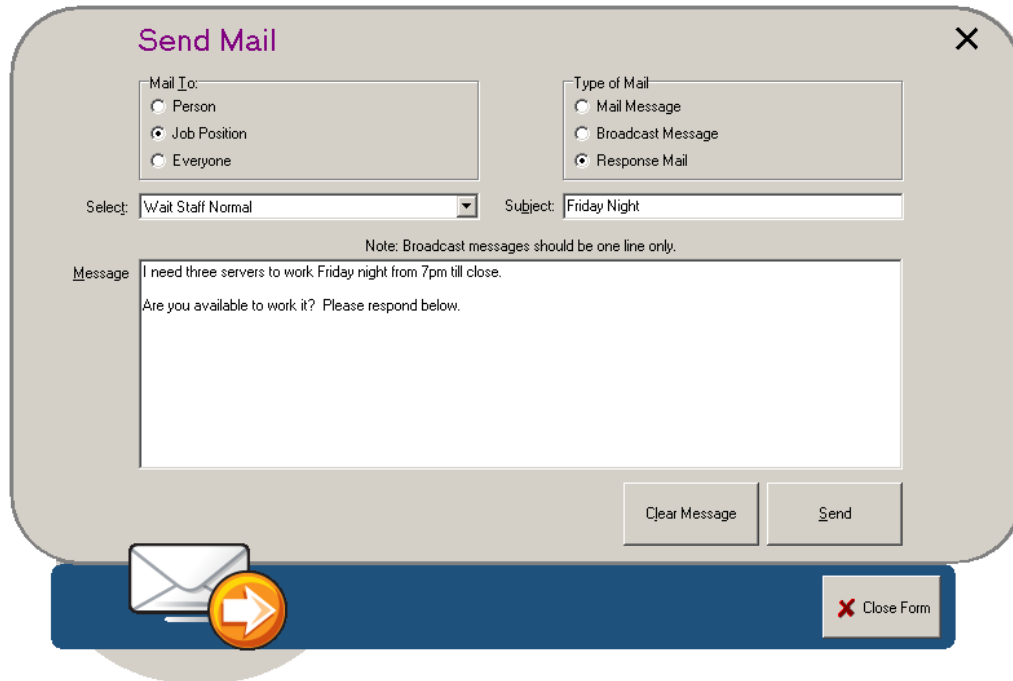
PixelPoint contains an internal e-mail function that enables management to send messages to staff. These messages can be addressed to a specific person, everyone with a certain job position, or everyone who uses the system.

The Mail menu has two options: Send Mail, which enables you to create a mail message, and View Response Mail, which enables you to view the responses employees have given to response mail messages.

Send Mail

Mail / Send Mail

This menu option enables you to create and send a mail message through the system. Simply select from the options at the top of the screen (each of which are explained below), type your message in the white text field, and then press [Send].



The screenshot shows a web-based form titled "Send Mail" with a close button (X) in the top right corner. The form is divided into several sections:

- Mail To:** A group box containing three radio buttons: "Person", "Job Position" (which is selected), and "Everyone".
- Type of Mail:** A group box containing three radio buttons: "Mail Message", "Broadcast Message", and "Response Mail" (which is selected).
- Select:** A dropdown menu currently showing "Wait Staff Normal".
- Subject:** A text input field containing "Friday Night".
- Note:** A small note below the subject field states "Note: Broadcast messages should be one line only."
- Message:** A large text area containing the message: "I need three servers to work Friday night from 7pm till close. Are you available to work it? Please respond below."
- Buttons:** Two buttons are located at the bottom right of the form: "Clear Message" and "Send".

Below the form is a blue navigation bar containing an envelope icon, a right-pointing arrow icon, and a "Close Form" button with a red X icon.

Mail To

Person: Sends the message to one person. Selecting this presents a field enabling you to select the person to receive the mail.

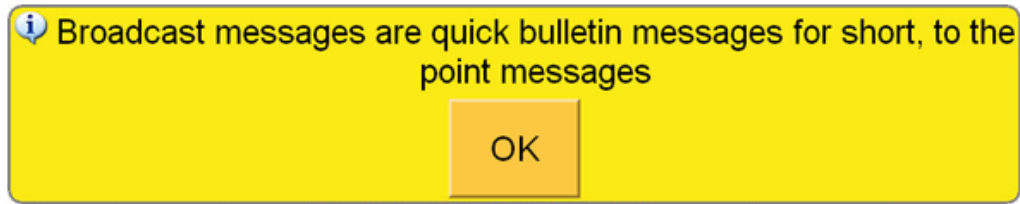
Job Position: Sends the message to everyone with a particular job position. Selecting this presents a field enabling you to specify the job position.

Everyone: Sends the message to all employees in the system.

Type of Mail

Mail Message: This type of message is useful for long messages that contain substantial and detailed information.

Broadcast Message: This type of message is a short, one line message that is received in a broadcast alert such as the one below.



Response Mail: This type of message requires all readers to give a "Yes" or "No" response, and so is used when you want to ask the recipients a question. You should create a unique message title (in the 'Subject' field) when using this kind of mail, since the title is used to record answers and enables you to retrieve them later.

Subject: The subject or title of the message. You should always create unique titles, so you can tell messages apart.

[Clear Message]: Clears the entire message area so you can retype the message.

[Send]: Sends your message to the designated person or people.

Once mail has been sent, the message will be received immediately by anyone currently logged into the system. No matter what screen is currently displayed on their station, the message will appear on top of it. If the recipient is not currently logged into the system, the message will appear when they next log in.

The image below shows what Response Mail messages look like. Mail messages are almost identical, except for the fact that they have an [OK] button instead of the Response Mail's [Yes] and [No] buttons.



View Response Mail

Mail / View Response Mail

Response Mail messages are used when you want each recipient to give you a response to a question. To view all of the responses to a response mail message, select *Mail / View Response Mail* from the BackOffice pull-down menus.

View Response Mail

Subject: Friday Night

Open Response File

Delete Subject

Employees who responded YES

John

Employees who responded NO

Kiosk 4
Sara
Supervisor

Close Form

Subject

The name of the currently loaded response file.

[Open Response File]

Enables you to retrieve a response file by displaying a list of all of the response mail messages. Select one and press **[OK]** to view it.

[Delete Subject]

Removes the currently-loaded response file.

Employees who responded YES

A list of all of the employees who received the message and responded "Yes".

Employees who responded NO

A list of all of the employees who received the message and responded "No".

Inventory Menu

This menu enables you to control components of the system that have to do with inventory. Options on this menu bring you to screens that you can use to program, create and modify stocked items, suppliers and warehouses. You can also use this menu to access PixelPoint's inventory control system. Each of the options on this menu is explained in its own section of the chapter, which is organized as follows:

- Inventory Without StockBoy
- Stocked Items
- Supplier Setup
- Warehouse Setup
- Inventory Manager
- Inventory Order of Programming

Inventory Without StockBoy

PixelPoint POS includes basic inventory functionality right out of the box. This functionality is referred to as "Inventory Without StockBoy" (Stockboy is a separate module with more advanced features).

Inventory Without StockBoy can be used to create stock items and add them to product recipes. PixelPoint will then record the usage of stock items as products are ordered. Inventory usage reports can then be made to see what has been used and in what quantities.

To Use Inventory Without StockBoy:

1. Create a report category for stock items. This will help to keep stock items separate from ordering items. See "Report Category Setup" for further information.
2. Get or make a list of all stock items that the establishment uses. Packaging information, such as how many slices of bread are in a loaf, is very helpful.
3. Get a list of all recipes. If a pre-made list is unavailable, you may need to review the contents of every menu item with the chef.
4. Create a record for each stocked item in *Inventory / Stocked Items*. When creating the stock item, make sure you set descriptions that suit the recipes. For example, you should think about questions like what one unit of Tomato is. Some establishments may only use tomatoes as slices. So a unit could be a "slice" rather than a whole tomato. Other establishments, however, may also use tomatoes diced in salads or blended in sauces. In such cases, one unit of Tomato might be best represented as a "tomato" or a "cup" or "ounce". When creating a stock item, carefully consider how it is going to be used in all recipes and choose a unit that best covers all situations. See "Stocked Items" for more information.

Olive Filter: All Categories Is Active?

Stocked Items | Advanced | Sub-Recipe | How to Make

Description: Olive Report Category: Appetizers

Unit Description: Olive Olive/Jar: 80
 Container Description: Jar Jar/Box: 12
 Package Description: Box Price for Box: 12.000000
 Price Per Olive: 00.012500

Reorder Level: 720 Olive Yield %: 100 On Order: Olive
 PAR Level: 2980 Olive Auto Order: Round Up
 Order By: Box

Supplier

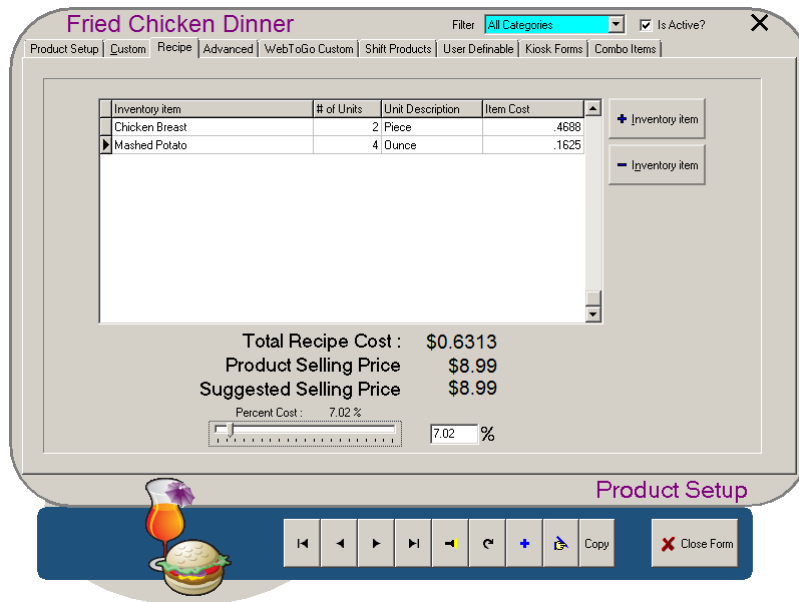
Company Name	Primary	SKU	Bar Code
ABC Supplier	<input checked="" type="checkbox"/>	ABC-123123123	11234567788
XYZ Supplier	<input type="checkbox"/>	XYZ-234234234	112356754544

Contact: George Brayhill Telephone #: (905)121-1544ext4124 Your Account: 8484448J3

Stocked Inventory Control

Close Form

5. Make sure you enter a price per package in the 'Price for' field. Based on this value and the quantities applied on this screen, the system will calculate a static cost per unit.
6. In the Product Setup's Recipe Tab, create the recipe for each product sold (regardless of whether it is an ordering product or option). See "Recipe Tab" for more information.



With the stock items created and applied to recipes, no further data entry is needed for inventory. As products are ordered, the system will record usage of the stock items attached to the recipes.

Note: Programming you do here will migrate to Inventory Using StockBoy, if you choose to switch to that solution. See "Inventory Manager" for more information.

Stocked Items

Inventory / Stocked Items

This menu option, the first on the *Inventory* pull-down menu, enables you to program all of the different features and aspects of stock items. A stocked item is an actual inventory item and so is the basis for all inventory management (whether you use PixelPoint StockBoy or not). The setup screen that displays when you select this menu option has several tabs with many features on them. They are as follows:

- Stocked Items Tab
- Advanced Tab
- Sub Recipe Tab
- How To Make Tab
- User Definable Tab

Stocked Items Tab

Employees / Shift Rules

This tab enables you to program the most essential features of stock items in managing inventory. Stock items are broken down into three size levels—unit, container and package. When defining your units, containers and packages, it is important that you have a clear understanding of what each one represents with respect to recipes, warehouse counts and ordering.

Olive Filter: All Categories Is Active?

Stocked Items | Advanced | Sub-Recipe | How to Make

Description: Olive Report Category: Appetizers

Unit Description: Olive Olive/Jar: 80
 Container Description: Jar Jar/Box: 12
 Package Description: Box Price for Box: 12.000000
 Price Per Olive: 00.012500

Reorder Level: 720 Olive
 PAR Level: 2980 Olive
 Order By: Box Yield %: 100 On Order: Olive
 Auto Order: Round Up

Supplier

Company Name	Primary	SKU	Bar Code
ABC Supplier	<input checked="" type="checkbox"/>	ABC-123123123	112345567788
XYZ Supplier	<input type="checkbox"/>	XYZ-234234234	112356754544

Contact: George Brayhill Telephone #: (905)121-1544ext4124 Your Account: 8484j448JJ3

Stocked Inventory Control

Close Form

Unit Description

The basic measurement of the ingredient; it is what you use in recipes. When a product is ordered, the stock items in its recipe are depleted by units. For example, a unit of rum would be an ounce. You apply 1 or 2 or however many ounces of rum to the recipe of each drink that has rum in it. When entering in the unit description, make sure it represents a unit measurement that is suitable for all applicable recipes.

Container Description

The measurement that contains units of the ingredient; the next step up from a unit. For example, the container for an ounce of liquor would be a bottle; the container for a slice of bread would be a loaf; the container for a pickle would be a jar.

Package Description

The type of measurement that containers of the ingredient come in; the next step up from a container. Generally, this is what the stock item is shipped in. Descriptions at this level are generally things like cases, crates, pallets and so on.

Unit = Olive**Container = Jar****Package = Box**

Each of the container size fields has a search button [...] to the right of it, enabling you to select from a list of pre-existing descriptions when programming stock items. This helps to standardize unit descriptions in the system. If the description you want is not on the list, you can add it.

Reorder Level

The amount of the stock item you want to reorder at. This level is based on units. Referring back to the olives, if you wanted to reorder when you only have 1 box left, you would enter "720" here (1 box = 12 jars of 60 olives each = 720 olives).

PAR Level

The Par level represents the optimum level you want to bring the stock up to. So if you wanted to replenish your olives to, say, 4 boxes, you would enter "2880" (4 boxes = 48 jars of 60 olives each = 2880 olives).

Order By

The default level of measurement when ordering this product. You can choose to order by the item's unit, container or package.

Report Category

The stock item's report category. Unless you want to separate different groups of stock items, you should create a general "Stock Item" report category to separate stock items from other products. See "Report Category Setup".

Unit/Container

The descriptions you program into the record are carried across to the middle column. For example, for the image above, the title of this field changed to 'Olive/Jar' after these descriptions were entered into the system. You use this field to enter the number of units in a typical container. In this example, you would enter the number of olives that are in a typical jar. For example, there may be 60 olives in each jar.

Container/Package

Your descriptions are carried across again to this field, changing the title, in this example, to 'Jar/Box'. Here you enter the numbers of containers that are in each package. In this example, you would enter the number of jars that are in a box. For example, there may be 12 jars in each box.

Note: When you save the stock item record, the units/container and container/package values will be locked. They can be changed using [Edit], just to the right of them. However, this will only work if there is none of the item in stock. Once the stock item has a quantity in stock, the unit/container and container/package numbers cannot be changed.

Price For Package

The price a package of the stock item costs. The system divides the package price by the number of units in it to determine the Price Per Unit (displayed under this field).

Note: This field is only active if using Inventory Without StockBoy. If StockBoy has been activated, this field will be grayed out.

Reference #

PixelPoint automatically creates this number for you. You will be able to look up this item by using it later on.

Yield %

The amount of this item that is usable. For example, a head of lettuce would have an 80% yield, since the core, about 20% of the total head, is unusable.

Auto Order

This field works in conjunction with the *Auto PO* function, and enables you to specify how the system should determine the order amount. You can set it to round up or down to the nearest Order By level; you can also set it to 'Allow Partial', meaning that no rounding will take place. For example, if PixelPoint calculates that 4 jars of olives will be used by the shipping date, the Auto PO may show as follows:

- Round Up = 1 box of Olives.
- Round Down = 0 box of Olives.
- Allow Partial = 240 Olives (that is, 4 jars).

On Order

The number of units that are currently on order and have yet to be received (the amount of this stock item that is included in current POs).

Suppliers

This window enables you to enter suppliers for the stock item. Each row represents a supplier, and includes a checkbox to indicate which one is the primary (default) supplier, as well as fields for applying SKU and barcode numbers. The corresponding contact name, phone number and account code for the selected supplier are shown immediately below this window.

Advanced Tab

Inventory / Stocked Items / Advanced

Vodka Filter: All Categories Is Active?

Stocked Items | **Advanced** | Sub-Recipe | How to Make

Stock Depletion:

- By Recipe
- By Customer
- By Check
- By Day
- By Employee Shift

Exists in: All Warehouses

Is this Item taxable for any of the following taxes?

- Tax 1 Include In Cost?
- Tax 2 Include In Cost?

Weight of Ounce: 0.2
Tare Weight of Bottle: 4.8
Emp Price / Ounce: 0.19
Prep Location: 1
Prep Days: 2

Location and Levels:

Warehouse	Units	Reorder Units	PAR Level
▶ Main Bar Warehouse	3360		0

Stocked Inventory Control

Stock Depletion

Select one of the options in this area to indicate how the stock item is to be depleted from the inventory.

- **By Recipe** - Depletes when it is used in a recipe. For example, any food and beverage would be set to deplete by recipe.
- **By Customer** - Depletes with every new customer. For example, things like mints or toothpicks are usually set to deplete by customer.
- **By Check** - Depletes by check. For example, promotional items that are given away with each order.
- **By Day** - Depletes every day. For example, things that are changed daily, like newspapers laid out for customer to read.
- **By Employee Shift** - Depletes every shift. For example, hair nets and rubber gloves are usually set to deplete by shift, since employees use new ones every time they start a shift.

Note: Selecting customer, check, day or shift displays a quantity field that enables you to specify how many of the item are depleted for each customer, check, etc.

Exists In

If your system has multiple warehouses, you can define which warehouse this stock item will be primarily associated with by using this drop-down box.

[Create Recipe Item]

Adds the stock item to the list of items that shows up when you use the Post Inventory Usage function on the front-end Functions Menu. Selecting this button is not required for adding the ingredient to recipes themselves. When you select this button, you create a Product called '99=stock item' (with the words "stock item" being replaced with the stock item's description). All

products labeled in this way show up when you use **[Post Inventory Usage]** on the Functions Menu. This benefit of this button, then, is that it enables you to specify what stock items show up in the Post Inventory Usage list, and you do not simply get the entire list of stock ingredients when you use the function.

Location and Levels

Lists the warehouses that currently have an amount of this stock item in them, as well as what that amount of stock is. You can specify individual re-order and par levels for this stock item in each warehouse by clicking on the corresponding field under 'ReOrderUnits' or 'ParLevel' and typing the number in.

Is this item taxable for any of the following taxes?

A checked box here indicates that the establishment pays the tax the box represents when it acquires this stock item. An unchecked box means that the stock item is not subject to that tax. The taxes listed here are those that have been programmed into System Setup's System Taxes Tab.

Include in Cost?

If checked, the amount for this tax will be considered to be included in the stock item's cost. If unchecked, the amount for this tax will be added onto the cost.

Liquor Weighing

It is easy to take inventory of a bar if you are only counting full bottles. But counting opened bottles takes more work. If you know the weight of 1 ounce of the liquid and the weight of the empty bottle, you can calculate how many ounces are in the bottle by weighing it. The following three fields are most often used for such calculations.

- **Weight of Ounce** - The weight of one ounce of the liquor.
- **Zero Scale of Bottle** - The tare weight of the bottle (the weight of an empty bottle).
- **Emp Price/Ounce** - The price charged to employees for spillage.

The field labels given here are labeled as they are because the unit measure of liquor is always ounce and the container measure is bottle. Note that in the image of the Olive record above the fields are instead labeled according to the olive's measures.

Prep Location

This field is primarily for catering-related situations. It enables you to link the item to a food preparation station. You can link Stock items, Sub-Recipe items and Product items to prep locations. Assign each prep location a number and enter it here.

Prep Days

The number of days needed to prepare the item. For example, say you have a stock item called "Chicken meat". The prep days for chicken may be 2 days, which is the time needed to thaw the frozen meat. If the ingredient is then used in Chicken Salad, it may take another day to cook the meat and process it with other ingredients to make the sub-recipe item "Chicken Salad".

Say, for instance, that, in several days time, you have an order of products that includes chicken salad. If you have specified the number of prep days, PixelPoint can report that you need to pull out the chicken now so you can have it ready for that order. There are a series of catering-related reports available in the reports folder.

Sub Recipe Tab

Inventory / Stocked Items / Sub-Recipe

A sub-recipe is a recipe within a stock item. For example, say the establishment makes potato salad and includes it as a recipe item in many of its products. You can use this tab to specify the potato salad's own recipe. When you first come to this tab, it will be blank, except for a 'Has Recipe?' box in the top-right corner. To add a sub-recipe, check this box.

Potato Salad Filter: All Categories Is Active?

Stocked Items | Advanced | Sub-Recipe | How to Make

per Batch Has Recipe?

Inventory item	# of Units	Unit Description	Item Cost
Potato	50	Ounce	9.375
Mayo	9	Ounce	.375

Recipe Type Is:
 Batch
 Nested

+ Inventory item
 - Inventory item
 ▲ Move Up
 ▼ Move Down

Total Recipe Cost : \$9.7500

Stocked Inventory Control

Navigation: [Back] [Left] [Right] [Forward] [Home] [Refresh] [Add] [Edit] [Close Form]

The sub-recipe you enter here is for the stock item's package measure (in this case, a Batch). The batch of potato salad would be broken down into several Bowls or Jars (its container measure) and these would have a certain number of ounces in them (its unit measure). The image above shows the recipe for a batch of Potato Salad.

You can specify whether this recipe is a batch recipe or a nested recipe. A batch recipe is one that involves a special process to make, such as the potato salad above. A nested recipe could be something like a hamburger, which itself consists of a patty and a bun (its sub-recipe), and which could be used as one ingredient in many meal recipes.

Add recipe items with [+ Inventory Item] and remove them with [- Inventory Item]. You can change the order of recipe items by using the [Move Up] and [Move Down] arrow buttons.

How To Make Tab

Inventory / Stocked Items / How To Make

You can also apply How to Make information to stock items.



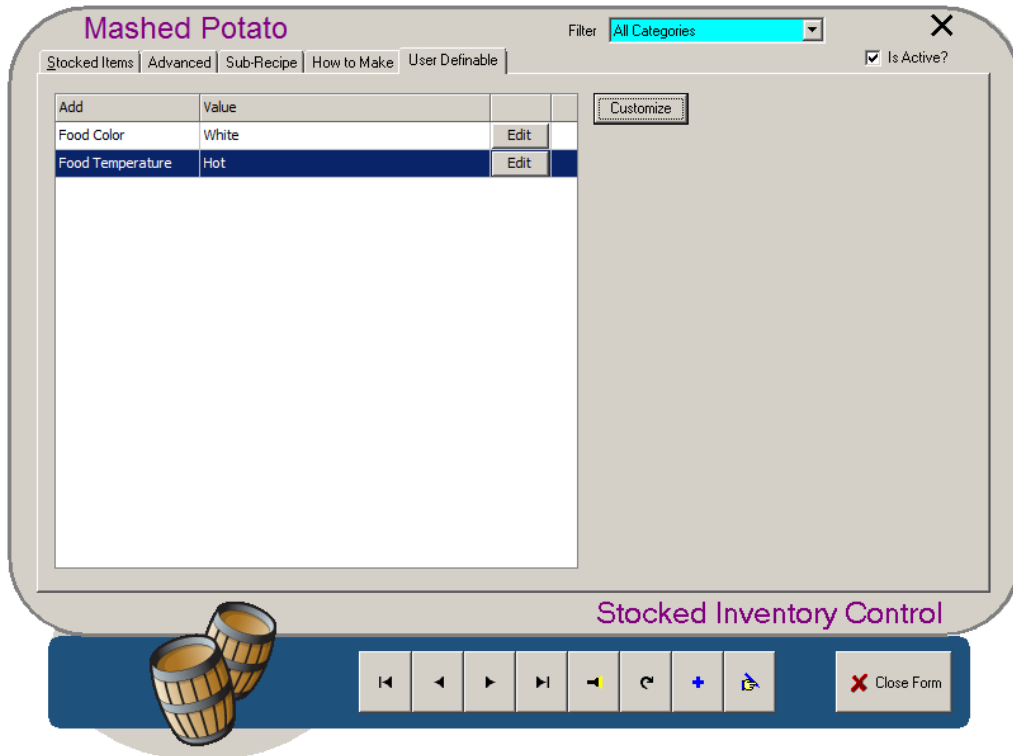
This tab is primarily intended for items with sub-recipes. For example, if someone asks what ingredients go into a potato salad, you can apply this 'How To Make' information to the stock item product with a sub-recipe. See the "Product Setup Advanced Tab" for more information about specifying How To Make information.

User Definable Tab

Inventory / Stocked Items / User Definable

This tab will only appear in Stocked Items when configured to do so by the *ShowInventoryCustomFields* policy in Policy Setup.

This tab is like the User Definable tab in Employee Setup, except that it can be used to create custom fields more appropriate for your stocked items. For more information about this tab and about creating custom fields, see the "User Definable Tab" in Employee Setup.



Supplier Setup

Inventory / Supplier Setup

Use this function to set up stock suppliers on the system. The default supplier record, called ABC Supplier, can be set as inactive by unchecking the 'Is Active?' box located in the top right corner of the screen.

This form mostly contains contact information for the supplier. The few other fields on this screen are explained below.

ABC Supplier Is Active? ✕

General | **Advanced**

Supplier Name: ABC Supplier

Address: 1435 Smith Ave.
Willowdale, NY
484774
USA

Contact Name: George Brayhill

Telephone #: (905)121-1544ext4124

Fax #: (215)121-5454

Email:

Your Acct #: 8484j448J3

Payment Terms: COD

Ship Via: UPS

Supplier Setup Form

⏪ ⏩ ⏴ ⏵ 🔍 ↺ + ✕ Close Form

Your Acct

If you have an account set up with the supplier, enter the account number here. The information on this screen will be reflected in your Purchase Orders (See "Purchase Orders Menu").

Payment Terms

The terms of payment you have arranged with the supplier.

Ship Via

The method of shipping the supplier uses to ship items to you.

Supplier Setup

Inventory / Supplier Setup / Advanced

This tab has a section that enables you to indicate whether your orders from this supplier are exempt from any of the system taxes (which are programmed on System Setup's System Taxes Tab).

The screenshot shows a web application window titled "ABC Supplier" with a close button (X) in the top right corner. A checkbox labeled "Is Active?" is checked. Below the title bar are two tabs: "General" and "Advanced", with "Advanced" selected. The main content area contains a section titled "Are you Exempt from the following taxes?" with two checkboxes: "Tax 1" (checked) and "Tax 2" (unchecked). Below this section is a button labeled "Show Linked Inventory Items". At the bottom of the window, there is a blue navigation bar containing a cartoon character icon, a set of navigation buttons (back, forward, search, etc.), and a "Close Form" button.

[Show Linked Inventory Items]

Displays all inventory items that have this company set as one of their suppliers.

Warehouse Setup

Inventory / Warehouse Setup

A warehouse can be anything from a walk-in refrigerator to a cupboard behind a counter, to a full wholesale building. Use this menu option to set up the warehouse(s) on the system. Each station is set to deplete inventory from a particular warehouse; you assign warehouses to stations in Station Setup.

Most of the information on this form is contact information. It can be filled manually, or by using [Copy From Company Info].

Warehouse Setup

Warehouse Description: Wet Goods Storage Warehouse

Warehouse Reference #: WG123

Contact: Haley Barcovich

Telephone #: (905)242-4455

Address 1: 123 Walnut Street

Address 2:

City: Chicago

Prov/State: Illinois

Postal/Zip: 02914

Country: USA

Email: Haley@website.com

Copy Address From Company Info

Navigation: Back, Forward, Search, Close Form

Warehouse Reference

Used for reporting purposes, this enables you to relate inventory items to an accounting system or to invoices and documents about the warehouse and its items.

[Copy From Company Info]

Enables you to copy the establishment's contact information (programmed into System Setup's "Company Info Tab") to this screen, thus filling in this screen's fields automatically. If the warehouse address is different from the establishment's, enter the contact information manually. This information serves as the warehouse's 'Ship To' information.

Station Depletion By Warehouse

If you assign a warehouse to a station, the system will deplete inventory ordered at that station from that warehouse. For example, say that Station 2 is assigned to a Bar warehouse (and that this warehouse is just a refrigerator unit behind the bar—it has drinks and nothing else). As beverages are ordered from the station, they deplete from the stock in that warehouse.

However, if food were ordered from Station 2, the inventory would not come from the Bar warehouse. In this case, the system will record the depletion nonetheless, and will show a negative stock level. (For example, "Olives -10".)

The warehouse that does contain the stock item (the Food warehouse, say) will not deplete the inventory, but will show its stock level as being over by that quantity. (Following the above example, "Olives +10".)

When it comes times to do a physical inventory count, the Variance By Warehouse report will show overages and shortages, identifying what happened to the stock.



Inventory Manager

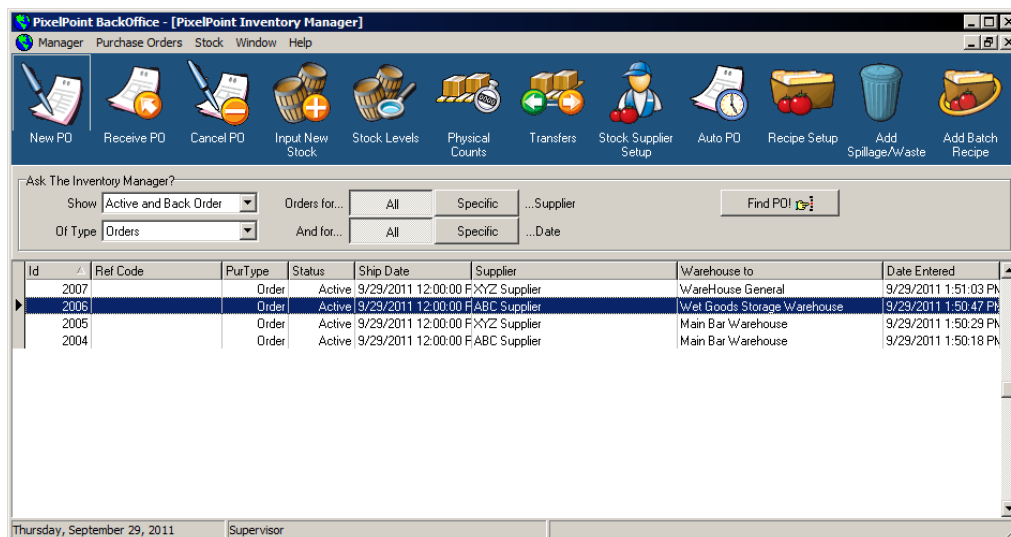
Inventory / Inventory Manager

Inventory Manager integrates the various functions for managing inventory. You can create and process purchase orders (POs), add and update stock levels, and transfer stock between warehouses, all using this screen. StockBoy must be enabled in System Setup, on the System Tab.

The pull-down menus at the top of the screen are explained and discussed in separate sections. They are:

- Manager Menu
- Purchase Orders Menu
- Stock Menu

The remainder of this section discusses the other parts of the main Inventory Manager screen.



Icon Summary

Below are short descriptions of each of the icons that appear on the default toolbar. Other menu options and icons you can add to the toolbar are described and explained in other sections of this chapter.

The blue toolbar across the top is customizable just like the toolbar in other parts of BackOffice. Simply right-click on the blue area and select *Customize*. Click and drag icons between the icon window and the toolbar to add and remove them from the screen display. Remember that the various functions these icons perform are also accessible from pull-down menus listed above the toolbar (and so are also described in the sections of this chapter about menus).



Creates a PO . You can either save the PO or apply the stock immediately.



Receives a PO into the system. Processes the delivery of goods, closing off the PO and applying stock.



Cancel a PO.



Enables you to immediately add new stock. Can also be used for creating POs.



Enables you to view stock levels in any warehouse. It will point out stock levels that are low.



Displays stock levels and enables you to adjust those levels.



Transfers inventory from one warehouse to another.



Enables you to set up your supplier records. Starts the same function as selecting *Inventory / Supplier Setup* on the main BackOffice menu.



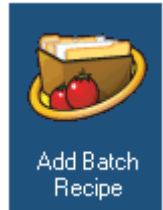
Automatically creates a PO for you, based on stock levels and usage; orders items based on programmed re-order and PAR levels.



Sets up recipes for products. Performs much the same function as selecting *Products / Product Setup* on the main BackOffice menu.



Allows you to record spillage and waste.



Allows you to record the process of creating a batch recipe. Within this process, it will remove the raw ingredients from stock and re-apply them back in as the processed stock item.

Ask the Inventory Manager?

This section enables you to filter the PO records shown below it, in order to isolate POs of a certain kind and find the POs you want quicker.

Show

Enables you to view either all POs or only those with a certain status (Active, Closed, Canceled or Back Order).

Of Type

- **All** - Displays both POs and warehouse transfers.
- **Orders** - Displays all open POs.
- **Transfers** - Displays all outstanding warehouse transfers.

Orders for...

Enables you to filter POs by supplier. You can toggle between displaying all POs or those from a specific supplier by selecting [All] or [Specific]. When you select [Specific] a list of all of the suppliers programmed into the system displays, enabling you to choose one.

And for...

Enables you to control the date range of the POs you want to be displayed. You can toggle between displaying all POs or those for a specific date range in the same way as with the 'Orders for...' line (except that calendars display when you select [Specific]).

[Find PO!]

Enables you to retrieve any PO, regardless of its status.

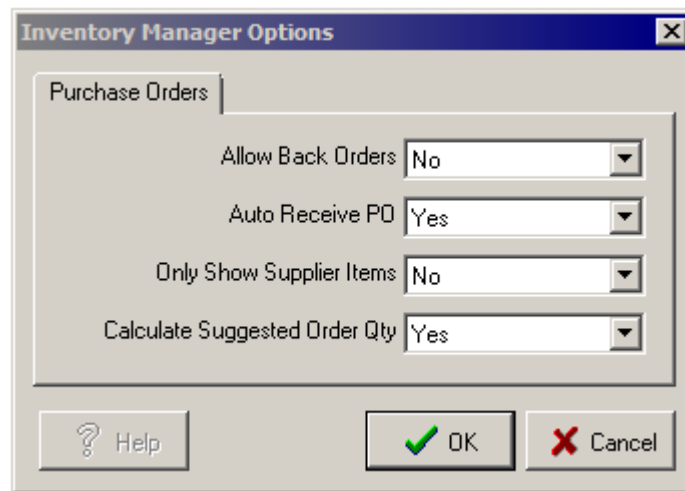
Manager Menu

Inventory / Inventory Manager / Manager

Inventory Manager's *Manager* menu has two options. The first is *Options*, which configures settings for Inventory Manager itself. The second is *Pause Inventory Depletion*, which stops stock levels from being reduced until you start inventory depletion again. Both of these are explained in more detail below.

Options

Selecting this menu option displays the following dialog box, which enables you to change purchase order settings. You can set each setting to "Yes" or "No".



AllowBackOrders

Determines whether or not the system allows POs to be partially received or not. If set to "No", the system will alert you when you accept a partial PO; it will ask you to confirm that you want to place the remainder of the PO on back order. If set to "Yes", the PO will be accepted automatically, and any items that have a 'Rcvd' quantity that is less than the 'Order' quantity will be put on back order.

AutoReceivePO

The default setting of "Yes" tells the system to assume that the full amounts of stock items are received in POs, unless you specify otherwise. After selecting [Receive PO] from the toolbar, you can simply select [Receive PO] on the PO screen to receive the order, and the full amounts will be entered into inventory.

When this option is set to "No", you must manually enter in the amount of each stock item you received before you can select [Receive PO] on the PO screen.

OnlyShowSupplierItems

When set to "Yes", the list of stock items displayed while adding items to POs is limited to only those items distributed by the selected supplier, and the option to show 'Show All Supplier Items' is not available.

When set to "No", the system gives you the choice of viewing items distributed by the currently selected supplier or by all suppliers.

Pause Inventory Depletion

Temporarily suspends stock depletion, enabling you to enter physical counts while the system continues to operate.

When inventory depletion is paused, the menu option label changes to *Restart Inventory Depletion*; selecting this resumes stock depletion. During the paused time, stock depletion is stored or "spooled". Once depletion is re-activated, the system will catch up.

Purchase Orders Menu

Inventory / Inventory Manager / Purchase Orders

This section discusses each menu option on Inventory Manager's **Purchase Order** menu and fully explains purchase orders (POs) themselves.

New PO

When you select [New PO], the system prompts you to select a supplier from the drop-down box. Other fields on the screen open up once you do this.

Ref Code	Inventory item	Order	Units	Cost Each	Line total	Item Taxes	Status
2004	Cheddar		2 Case	\$9.00	\$18.00		Active
2007	Red Onion		1 Case	\$0.56	\$0.56		Active
2015	Egg		3 Box	\$10.00	\$30.00		Active
2009	Garlic (clove)		1 Case	\$0.25	\$0.25		Active
2013	Olive		1 Box	\$12.00	\$12.00		Active

Sub-Total	State	Local	Total Tax	Shipping	ShipTax	Total
\$60.81	\$0.00	\$0.00	\$0.00	\$0.00		\$60.81

Warehouse to: The system prompts you to select the warehouse the order will be going to. If the order is for a mixture of items (such as food as well as beverages), then select Warehouse General; upon delivery, the different types of items can be separated and put in appropriate warehouses by using the Transfers function (on the Stock pull-down menu) (See "Stock Menu").

Ship via: Enter the shipping method by typing it in or by selecting the search button ([...]) and choosing from previously-used terms.

Date Entered - The date the PO was created; this is automatically entered when you select [New PO].

Ref Code - You can enter a code here to keep track of POs for reporting purposes.

Payment Terms - How the order is going to be paid for.

Ship Date - The date when you want the PO to ship.

Ship Time - The time when you want the PO to ship.



The buttons shown above control the list of items contained in the order and changes you make to them. You can also press the down arrow to add another item to the order.

Ref Code: A reference code for the stock item. This number is usually automatically entered for you. A list of products available from the current supplier will display if you double-click on this field, however, and you can choose a product from the list to add to the order. In the event the item you wish to order has not been ordered from this supplier before, select the supplier field and choose [All Suppliers] to retrieve the complete list of stock items. Double-click on an item to enter it into the PO.

Inventory Item: A description of the stock item. This is displayed automatically when you add a product to the PO.

Order: The quantity of items being ordered. You need to specify this quantity.

Units: The item's package description; this is automatically entered for you when you add a product. However, you can change this to either the container or unit description by double-clicking the field.

Cost Each: The price for one unit (be it a package, container or stock unit). Enter the price of the item here. You can also double-click on this field to view the order history of this item from all suppliers.

Line Total: The cost for the number of units you have entered. The system automatically calculates Units x Cost Each.

Item Taxes: The taxes this stock item is subject to. If taxes have been specified for the particular stock item in its record, they will be displayed here when it is added to the PO. In addition, selecting this cell displays a full list of the taxes in the system, enabling you to add or remove them from this order of the stock item.

Status: The PO's status. Created, saved and unreceived POs are flagged as 'Active'. Received POs are flagged as 'Closed'. Deleted or cancelled POs are flagged as 'Cancelled' (and are not actually removed from the system). POs that are not wholly received are kept open and flagged as 'Back Order'.

Taxes: The lower part of the screen has a column for each tax that is marked with a blue numbered icon. You can apply the taxes before or after the order has been received.

Shipping: The amount it costs to have the PO shipped; double-click on this field to enter a shipping amount.



Ship Tax: If a shipping amount has been put in the 'Shipping' cell of a row, this cell will display each of the blue tax number icons that apply to the shipping charges. You can double-click on this cell to remove or add taxes that apply to the shipping.

Print To: Prints the PO[Preview]), an actual printer ([Printer]), or various file formats ([Send To]). You can send the PO to a printer or save it in different file formats from the screen that displays if you select [Preview], too.

Save PO: Saves the PO in the system and adds a row to the list of POs on the main Inventory Manager screen.

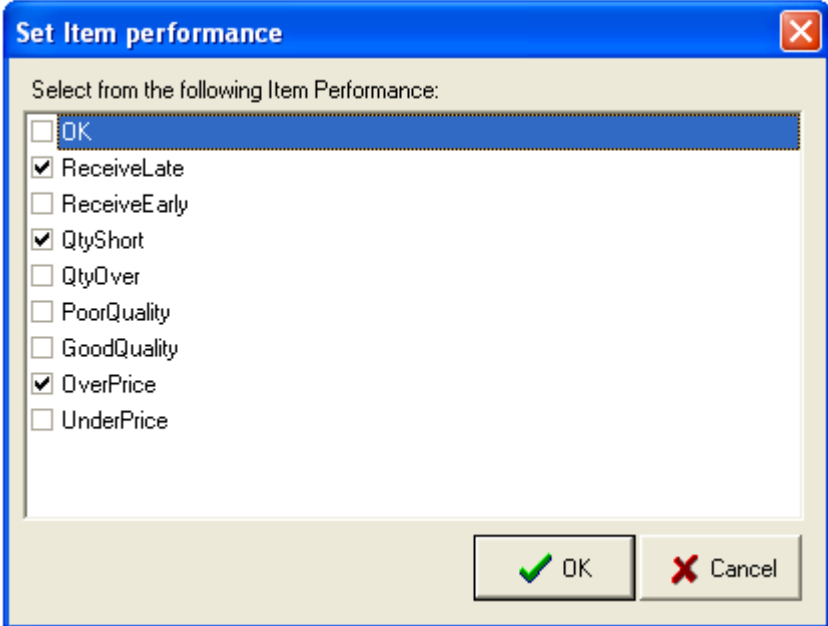
Line Item Menu

Right-clicking on a line item in a Purchase Order displays the Line Item Menu. This enables you do various things to the line item, such as canceling the item, changing the unit cost or applying a comment.

Line Item Menu		
	Add	F4
	Remove Item [F5]	F5
	Units	F6
	Cost Each	F7
	Line total	
	Item Taxes	F8
	Item Comment	
	Performance	
<input checked="" type="checkbox"/>	Save Edits	F9
<input checked="" type="checkbox"/>	Cancel Edits	F10
Cancel Menu		

One option unique to this menu is *Performance*. This applies to items that have been ordered and are about to be received, and thus is only active when you right-click on the PO screen after selecting [Receive PO]. This function enables you to evaluate the delivered item.

For example, if you find that your orders of olives from supplier ABC are typically slow, understocked and overpriced, you can make note of this using Performance (by checking the boxes next to those terms (as has been done in the image above)). You can later review performance information from this and other POs as an aid for selecting suppliers and negotiating prices for new orders.



The image shows a dialog box titled "Set Item performance" with a close button in the top right corner. The dialog contains a list of checkboxes for item performance metrics. The "OK" option is selected. At the bottom, there are two buttons: "OK" with a green checkmark and "Cancel" with a red X.

Select from the following Item Performance:	
<input type="checkbox"/>	OK
<input checked="" type="checkbox"/>	ReceiveLate
<input type="checkbox"/>	ReceiveEarly
<input checked="" type="checkbox"/>	QtyShort
<input type="checkbox"/>	QtyOver
<input type="checkbox"/>	PoorQuality
<input type="checkbox"/>	GoodQuality
<input checked="" type="checkbox"/>	OverPrice
<input type="checkbox"/>	UnderPrice

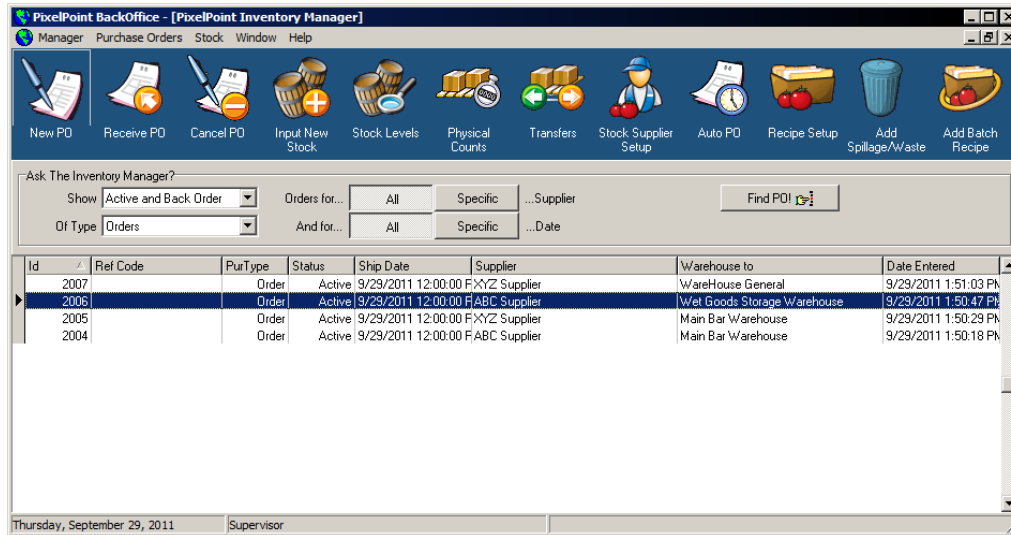
Revise PO

Enables you to change the details of the selected PO.

Receive PO

Enters the inventory included in the PO into the system. That is, this indicates that you have received the PO. Use it when an order comes in and you want the system to update with the new inventory.

Begin by selecting the corresponding PO from the main screen (see image). Then select this menu option.



The PO then displays on the screen. At this point you can enter the received units or adjusted units (if the shipment is incomplete), make additional changes to the contents, and/or re-print the PO.

To finish receiving the PO, select [Receive PO]. The system will ask if you want to process into inventory. Select [Yes] to add the contents to inventory and to clear the PO from the list. Selecting [No] saves any changes that were made to the order, but keeps it on the list and makes no changes to inventory levels.

Cancel PO

Removes the selected PO from the PO list without updating inventory.

Input New Stock

Enables you to create and process a PO in one step. This function is for adding in the initial inventory at a location or for processing shipments in which a PO was not initially created (such as in a forced order). The process is the same as with [New PO], except you automatically receive the PO and are asked whether the system should process the order into the inventory right away.

Auto PO

Automatically creates POs for you based on stock levels and usage. Selecting this causes the following dialogue box to display.

Auto Order

Select From The Following:

Warehouse to: Main Bar Warehouse

Ship Date: 9/29/2011

Include Forecast Up To ShipDate...

Future Orders:

Include Future Orders Up To...

...Date: 9/29/2011

How it works...

Based on Par, Reorder, Current Stock, and Onorder levels including optional Future Orders including sub-recipe items and days to ShipDate. AutoPO will forecast inventory requirements and auto-fill purchase orders by supplier.

Please verify all POs afterwards.

Help OK Cancel

Identify the warehouse you want the PO to be added to and the date you want the order to ship. Then click on [OK]; doing so tells the system to create a PO for each applicable supplier.

The calculation method for creating the Auto PO uses the following information:

- Historical daily usage
- Projected usage from the current date up to the shipping date
- Saved future orders from the current date up to the shipping date

Find PO!

Enables you to find a specific PO by entering the PO number into the window that displays.

Print PO

Enables you to print a hardcopy of a PO. Selecting this menu option displays a window that gives you a choice between getting a print preview, printing to a printer, or sending the PO to one of several file formats.

Stock Menu

Inventory / Inventory Manager / Stock

Stock Levels

This menu option displays a screen that shows you the current amount of stock you have. You can use the two drop-down boxes at the top of the screen to filter the inventory items displayed by warehouse, and/or by report category. You can also manually sort the order of inventory items by using the two arrow buttons at the bottom of the screen.

Inventory Item	Warehouse	Report C.	+	+	=	Unit D.
Baguette	WareHouse General	Ingredients	1 pallet	bag	baguette	45 baguette
Tomatoes	WareHouse General	Ingredients	case	bushel	67 tomato	67 tomato
Red Onion	WareHouse General	Ingredients	Case	Bushel	26 Onion	26 Onion
Basil	WareHouse General	Ingredients	Case	Bag	280 Gram	280 Gram
Garlic (clove)	WareHouse General	Ingredients	Case	Box	40 Clove	40 Clove
Olive Oil	WareHouse General	Ingredients	Case	Box	12 Bottle	12 Bottle
Cheddar	Bar Fridge	Ingredients	Case	2 wheel	block	12 block
Baguette	Bar Fridge	Ingredients	pallet	bag	25 baguette	25 baguette
Red Onion	Bar Fridge	Ingredients	Case	Bushel	36 Onion	36 Onion
Olive	Bar Fridge	Ingredients	11 Box	6 Jar	Olive	8280 Olive
Basil	Bar Fridge	Ingredients	Case	Bag	Gram	Gram
Garlic (clove)	Bar Fridge	Ingredients	Case	Box	10 Clove	10 Clove
Cheddar	Food Fridge	Ingredients	Case	wheel	12 block	12 block
Basil	Food Fridge	Ingredients	Case	5 Bag	Gram	500 Gram
Cheddar	Food Fridge	Ingredients	Case	wheel	block	block
Olive	Food Fridge	Ingredients	1 Box	0 Jar	Olive	720 Olive
Tomatoes	Food Fridge	Ingredients	case	bushel	tomato	tomato

Physical Counts

This screen is quite similar to the Stock Levels screen discussed above, except this is used to record a manual count of inventory. It enables you to compare your own numbers to those that the system calculates you should have.

Inventory Item	Warehouse	Report C.	+	+	=	Phys units	Unit D.	Variance	Unit D.
Baguette	WareHouse General	Ingredients	0 pallet	0 bag	42 baguette	42 baguette	-1	baguette	
Tomatoes	WareHouse General	Ingredients	0 case	0 bushel	68 tomato	68 tomato	1	tomato	
Red Onion	WareHouse General	Ingredients	0 Case	0 Bushel	26 Onion	26 Onion	0	Onion	
Basil	WareHouse General	Ingredients	0 Case	0 Bag	0 Gram	0 Gram	0	Gram	
Garlic (clove)	WareHouse General	Ingredients	0 Case	0 Box	40 Clove	40 Clove	0	Clove	
Olive Oil	WareHouse General	Ingredients	0 Case	0 Box	12 Bottle	12 Bottle	0	Bottle	
Cheddar	Bar Fridge	Ingredients	0 Case	0 wheel	0 block	0 block	0	block	
Baguette	Bar Fridge	Ingredients	0 pallet	0 bag	25 baguette	25 baguette	0	baguette	
Red Onion	Bar Fridge	Ingredients	0 Case	0 Bushel	36 Onion	36 Onion	0	Onion	
Olive	Bar Fridge	Ingredients	11 Box	5 Jar	0 Olive	8220 Olive	-60	Olive	
Basil	Bar Fridge	Ingredients	0 Case	0 Bag	0 Gram	0 Gram	0	Gram	
Garlic (clove)	Bar Fridge	Ingredients	0 Case	0 Box	10 Clove	10 Clove	0	Clove	
Cheddar	WareHouse General	Ingredients	0 Case	0 wheel	12 block	12 block	0	block	
Basil	Food Fridge	Ingredients	0 Case	0 Bag	0 Gram	0 Gram	0	Gram	
Cheddar	Food Fridge	Ingredients	0 Case	0 wheel	0 block	0 block	0	block	
Olive	Food Fridge	Ingredients	1 Box	0 Jar	0 Olive	720 Olive	0	Olive	
Tomatoes	Food Fridge	Ingredients	0 case	0 bushel	0 tomato	0 tomato	0	tomato	

The variance column automatically calculates the difference in levels between your physical count and what the system calculates as being in stock. You can click on 'Show System' to see what PixelPoint shows as being in stock.

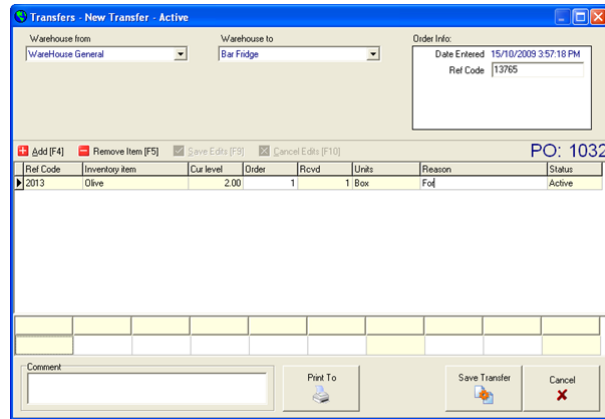
If you do not modify any of the stock item quantities, the system will not post any variance to the existing totals. This enables you to take inventory on a select group of items more frequently than on others.

In addition, adjustments will not be posted until you select [Process Variance]. You can leave this information in here indefinitely, without selecting [Process Variance]. Note that the adjustments do not affect the average cost per unit. It is simply posted as a direct adjustment.

The arrow buttons enable you to adjust the sort order of stock items within a warehouse. This order is carried across to the Stock Count report, which is used to take physical counts of inventory within a warehouse. You can set the order of this display to match the way your stock is organized in the actual warehouse (such as grouping your steaks together, then your chicken pieces, then the fish and so on). It is much easier to take physical counts when the order of the list you are using matches the order of items residing in the warehouse.

Transfers

The Transfer Screen enables you to record the exchange of inventory items from one warehouse to another.



To Transfer Inventory:

1. Select the source of the inventory from the 'Supplier' drop-down box at the top of the screen.
2. Select the warehouse the inventory is going to.
3. Double-click on the 'Inventory Item' cell of a blank row, or select the expansion button [...] that appears in this field box when you click on it once, to select the item you want to transfer.
4. Identify how many of the item you have selected you want to transfer; you can also enter a reason for the transfer, if you wish.
 - The list of items includes each item's current stock level.
5. Press [Save Transfer].
6. Press [Yes] when asked whether you want to process the transfer into inventory. Inventory levels will be updated immediately.

Note: Transfers is between warehouses within the same establishment. This is NOT an inter-store transfer.

Add Batch Recipe

This function records the fact that a batch recipe has been made or used and so adds the product to the inventory. A batch recipe is a stock item that contains a sub-recipe and which is itself made out of other stock ingredients. See Stocked Items' "Sub Recipe Tab" for more information.

The 'Add Batch Recipe' dialog box is shown with the following fields:

- Warehouse: WareHouse General
- Inventory item: Potato Salad
- Enter Batch Qty: 1
- Reason: (empty)

The unit 'batch' is selected in the dropdown menu next to the quantity field. Buttons at the bottom include Help, Ok & Next, OK, and Cancel.

When you use this function, Inventory Manager depletes inventory by the raw ingredients and applies the processed inventory to stock all in one easy step. This function only applies to inventory items containing a sub-recipe with a 'Batch' recipe type (it does not apply to inventory items with a 'Nested' recipe type).

Though the fields in this example use "Batch" (being the Package description for "Potato Salad"), you can also apply it in Unit or Container levels by selecting either of those descriptions from the drop-down box that says "Batch" in the image above.

Add Spillage/Waste

This function enables you to apply spillage/waste adjustments to inventory in one easy step.

The 'Add Spillage/Waste' dialog box is shown with the following fields:

- Warehouse: WareHouse General
- Inventory item: Olive Oil
- Enter Spill Qty: 1
- Reason: Bottle flipped over.

The unit 'Bottle' is selected in the dropdown menu next to the quantity field. Buttons at the bottom include Help, Ok & Next, OK, and Cancel.

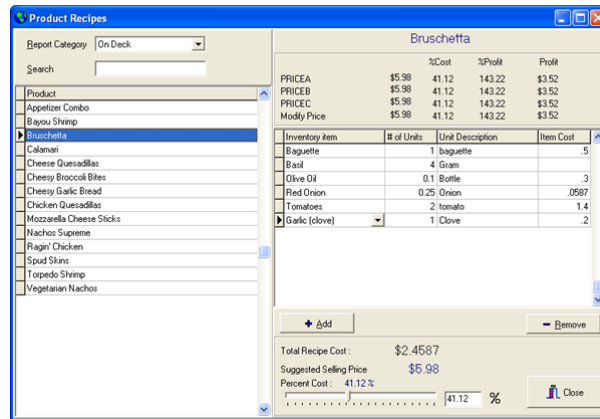
The Inventory Item field will enable you to choose from any stock item on file. Although the fields in this example use the item's container description ("bottle"), you can also use the Unit or Package descriptions by selecting either of them from the drop-down box that says "bottle" in the image above.

Stock Item Setup

This menu option displays the Stocked Items screen and function. See "Stocked Items" for more information.

Recipe Setup

This method of setting up recipes is similar to the Product Setup method (*Product Setup / Recipe Tab*) (See "Recipe Tab") except that the emphasis is placed on the recipe rather than on the product it is being applied to.



The list of products on the left is filtered by Report Category. Select from the 'Report Category' drop-down box at the top to change report categories. Select a product from the left panel. When you do, the product's description is displayed on the top-right of the screen, with all of its price levels underneath.

To add an item to the product's recipe, select [+ Add], or select the pull-down arrow in the 'Inventory Item' field below the price levels. This will show all stock items; select the one you want to add to the recipe. As you apply items to the recipe, PixelPoint calculates your cost and profit margin automatically.

The slide at the bottom helps you determine a selling price. For example, say you have the entire recipe for a product put in, and you want the cost of the product to equal 25% of the selling price. Simply move the slide to 25% (or enter "25" in the % field next to the slide) and the system will calculate what that price is.

Stock Supplier Setup

This menu option displays the *Supplier Setup* screen and function. See "Supplier Setup" for more information.

Inventory Order of Programming

Following is the recommended order for applying Inventory to PixelPoint if you are using StockBoy. The procedure below presumes that you have the conventional POS system set up and all ordering products and modifiers programmed.

1. Determine what your inventory consists of.
 - Create lists of suppliers, stock items, required order dates, recipes, and purchase orders, so all inventory-related information is readily available for entry into the system.
 - Determine stock reorder levels and par (top-up) levels.
2. Create report categories, using Report Category Setup.
 - Stock items must be assigned to a report category. It is recommended that stock items have their own unique report category (or categories), and so these should be created before creating stock items.
3. Activate the StockBoy agent.
 - StockBoy should be activated now since data entry screens will vary in slight ways if it is activated later. However, if the establishment wishes to begin with an "ideal cost" for each stock item, then wait until all stock items have been programmed and the 'Price For Package' field has been entered on each stock record.
4. Select the StockBoy icon in the system tray and set how inventory is to be calculated (if you did not do step 3, you cannot do this step yet).
5. Create suppliers, using Supplier Setup.
 - Program each supplier into PixelPoint. Even if a supplier is not used often, you should still include them; multiple suppliers can be assigned to each stock item.
6. Optionally, create warehouses using Warehouse Setup.
 - Avoid using multiple warehouses if possible, as having many warehouses makes it more difficult to manage and monitor inventory depletion. For example, as orders are received, they must be assigned to a warehouse. If the order contents are spread out amongst multiple warehouses, then the *Transfers* function will be required to move those items across.
 - Stations may also need to be assigned to a warehouse, depending on how warehouses are used. If this is the case, then assign stations to a warehouse on Station Setup's Advanced Tab. See "Station Depletion By Warehouse" for more information.
7. Create Stocked Items.
 - If uncertain of what to enter for the 'Unit Description/Container Description' or 'Container Description/Package Description' fields, enter an estimated value. You can change these fields later, so long as there is none of the product in stock.
 - If you did not do steps 3 or 4 because you wanted to program an "ideal cost" for stock items, make sure you enter your ideal cost into the 'Price For Package' field during this step.
8. Create sub-recipes for those stock items that have them, using the Sub Recipe Tab.
 - Creating all sub-recipes after creating actual stock items ensures that the required items for the sub-recipes are already in the system.
9. Apply stock items to recipes, using Product Setup's Recipe Tab.
 - If you entered an "ideal cost" for the stock items, the 'Item Cost' column will be populated. If an "ideal cost" was not applied, this field will be blank until the first order containing the stock item has been received.
10. Open Inventory Manager. If you did not do Steps 3 and 4 above, do them now.
11. Record all existing purchase orders, using *Input New Stock* (See "Purchase Orders Menu"). This enables you to process the quantities into inventory immediately.
 - If you have multiple warehouses, and all items on any of the initial POs go to the same warehouse, then you can choose to input the items there directly. However, it is recommended that you input all items at the General Warehouse and then transfer them.
12. Transfer stock from the General Warehouse to other warehouses (if using multiple warehouses), using *Transfers*.
 - Note the physical counts in each warehouse you set up above and transfer the

appropriate amount of each stock item to each location.

13. Perform a physical count of all stock not included in an existing purchase order. Use *Input New Stock* for these items and apply the most likely supplier at an "ideal cost".

14. Review all counts and create new POs (using [*New PO*]) to bring inventory up to its par levels.

15. Establish inventory flow.

- Monitor stock usage and stock level reports closely and daily for about a month to get a feel for the flow of depletion and ordering. Cost information for each product will get more accurate as orders are received and recorded, as prices are updated when POs are entered.
- Use the *Auto PO* function, but note that its calculations will also tighten up over time; it may not be 100% accurate if you use it during your first few weeks of inventory control.

Employees Menu

This menu is where you make employee-specific changes. It enables you to change an individual employee's job position, their department, the level of security clearance they have, and many other things. Before presenting information about each individual menu option, this chapter has a small section about important concepts to do with employees. The chapter is organized as follows:

- Employee Concepts
- Employee Setup
- Department Setup
- Employee Performance Points
- Job Position Setup
- Security Level Setup
- Time Clock Manager
- Employee Scheduler
- Shift Rules
- Collaboration
- Cash Management
- Contests

Employee Concepts

You must have Job Positions and Departments set up before applying employees to the POS.

Job Position

A job position is a role that an employee is paid to fill (like waiter, busser, dishwasher, chef, etc.). Every employee is assigned to a job position. The employee record will inherit all programming associated with that job position (such as the security level and tip declaration settings, for example). This also enables the person scheduling work shifts to group people, making it easier for them to focus on specific job positions (and so do things like schedule a shift specifically for bartenders).

Department

A department is a group of job positions performing a similar role or working in a similar area, such as the kitchen. All job positions are grouped into departments; this makes for easier reporting.

Instructions for setting up job positions and departments are found in their respective sections of this chapter. See "Job Position Setup" and "Department Setup".

Employee Setup

Employees / Employee Setup

This is where you create records for all employees who will have access to the system and where you configure how each employee will be able to use the system. Employee Setup has several different tabs, each of which is explained in its own section. The tabs are as follows:

- Employee Info Tab
- Advanced Tab
- HR Tab
- User Definable Tab

Employee Info Tab

Employees / Employee Setup / Employee Info

This tab displays by default when you select *Employee Setup* from the Employee pull-down menu. Most of the fields on this tab are self-explanatory. Any fields that may need some explanation are described below.

Sara Is Active? ✕

Employee Info | Advanced | EmployeeHR

Employee Name: Sara Start Date: 09/22/2011 End Date: 01/01/6000

Last Name: Smithers POS Functions: Revenue Center: Default Revenue Center

P.O.S. Name: Sara Visible

Address Line 1: 123 Hanover Street Swipe #: ***** Assign Card

Address Line 2: Apartment 123 Reference #: EMP-123 Set Password

City: Chicago

Prov/State: Illinois

Postal/Zip: 02910

SIN: 23455-456345-2342

Home Phone: (905)234-5554

Business Phone: (905)234-2044

Cell Phone: (905)234-4949

Email: Sara@Website.com

Birth Date: 11/02/1976 Age: 34

Training Mode

Job Position Setup

Job Position	Pay Rate/Hour	Primary	Yearly Salary
Wait Staff Managers	10	<input checked="" type="checkbox"/>	

+ Add
- Remove

Picture Schedule

Employee Setup

Navigation: ⏪ ⏩ ⏴ ⏵ ↶ ↷ + 🔍 ✕ Close Form

P.O.S. Name

The name that shows up on the customer receipt (that is, the name that tells customers who served them). It is recommended that you only provide the server's first name or commonly used nickname.

POS Functions

This menu provides options for displaying employees in the POS. "Visible", the default option, shows the employee's name in POS functions employee lists. For example, the Transfer Check function in the POS displays a lists of employees that checks may be transferred to. All employees that appear in this list have the "Visible" option selected from this menu in Employee Setup. Employees do not show up in POS functions employee lists when this options is set to "Invisible to POS Functions". "Invisible and cannot login" prevents employees from logging in to the POS and keeps their names off function employee lists.

SIN

Social Insurance Number. Also called Social Security Number (SSN). This is a secured field; numbers entered here are masked to prevent those with low security authorization from seeing it. The security level that controls who can see the value of this field is 'Access SIN' (See "Security Level Setup").

Training Mode

Checking this box restricts the way the employee affects the POS system, in order to minimize problems due to mistakes made while training in the establishment. The employee can open

checks, place orders and use functions, but nothing prints, either remotely or locally. The system does not retain any transaction information while in training mode, nor does it report transaction information in the day's sales numbers.

Swipe #

The employee swipe card number. You can assign either a number or an actual swipe card by selecting [Assign Card]. You cannot view the contents of the 'Swipe #' field on records of employees whose security level is higher than your own.

Reference #

This field is for reporting purposes only; you can use it, for example, to create a payroll reference number.

Job Position Setup

This is where you designate what job position the employee has. This determines the employee's level of security on the system. You can also assign a pay rate with the job position; this is reflected on time and attendance reports. You can assign more than one job position to the employee record. For example, on Mondays the person could be a server and on Tuesdays they could be a bartender. The rate of pay can vary with each job position too.

The primary column enables you to place a check in the box next to the job position that the employee normally or most frequently works, to better distinguish the job positions.

You can change the job position either by clicking on the job position title or by using the [+/- Job Position] buttons. You cannot assign someone a job position that is higher than your own.

Yearly Salary

If the employee, or the job position they usually perform, is paid on salary, you can enter the salary into this checkbox.

[Picture]

Enables you to add an image of the employee to the record. Selecting this button displays the following window.

The screenshot shows a software interface for managing employee information. The main window is titled 'Sara' and has a close button in the top right corner. Below the title bar, there are tabs for 'Employee Info', 'Advanced', and 'EmployeeHR'. The 'Employee Info' tab is selected. The form contains several input fields: 'Employee Name' (Sara), 'Start Date' (09/22/2011), and 'End Date' (01/01/6000). Below these fields, there is a section for 'Sara' featuring a photo of a woman with glasses. To the right of the photo are buttons for 'Select Source', 'Acquire Image', and 'Print Emp Card'. Below the photo is a 'Load Image' button. To the right of the photo is an 'Info' field containing text: 'Good employee. Has 2 children (Sam and Suzy). Prefers to work weekdays from 8am to 4pm. Has to pick up the kids from school on Wednesdays. Can work some weekends.' Below the photo and 'Info' field is a 'Save Changes' button. At the bottom of the window is a navigation bar with several icons (back, forward, etc.) and a 'Close Form' button.

- **[Load Image]** - Loads a pre-saved JPG image on the hard drive instead of acquiring one from a connected input source.
- **[Select Source]** - Selects the input source (such as a scanner, digital camera, etc.) of the image, if multiple sources are available.
- **[Acquire Image]** - Pulls the image from the source.
- **[Print Emp Card]** - Uses the picture and pertinent information from the rest of the employee record to print a card for the employee (if a card printer is attached to the system).
- **[Save Changes]** - Saves the image and other changes you made and returns you to the Employee Setup screen.

[Schedule]

Enables you to define the employee's schedule preferences. There are three preferences you can schedule:

Employee Schedule Form

	SUN	MON	TUE	WED	THU	FRI	SAT
12AM	Green	Green	Green	Green	Green	Green	Green
1AM	Green	Green	Green	Green	Green	Green	Green
2AM	Green	Green	Green	Green	Green	Green	Green
3AM	Green	Green	Green	Green	Green	Green	Green
4AM	Green	Green	Green	Green	Green	Green	Green
5AM	Green	Green	Green	Green	Green	Green	Green
6AM	Black	Green	Green	Green	Green	Green	Green
7AM	Black	Green	Green	Green	Green	Green	Green
8AM	Black	Green	Green	Green	Green	Green	Green
9AM	Black	Green	Green	Green	Green	Green	Green
10AM	Black	Green	Green	Green	Green	Green	Green
11AM	Black	Green	Green	Green	Green	Green	Green
12PM	Black	Green	Green	Green	Green	Green	Green
1PM	Black	Green	Green	Green	Green	Green	Green
2PM	Black	Green	Green	Green	Green	Green	Green
3PM	Black	Red	Red	Red	Red	Red	Red
4PM	Black	Red	Red	Red	Red	Red	Red
5PM	Black	Red	Red	Red	Red	Red	Red
6PM	Black	Green	Green	Green	Green	Green	Green
7PM	Black	Green	Green	Green	Green	Green	Green
8PM	Black	Green	Green	Green	Green	Green	Green
9PM	Black	Green	Green	Green	Green	Green	Green
10PM	Black	Green	Green	Green	Green	Green	Green
11PM	Black	Green	Green	Green	Green	Green	Green

Schedule For:
Liz Cameron

Not wanted
 Wanted
 Cannot work

Hours preferred: Skill level 1 - 10:

- **Not Wanted (Red)** - Can work at this time but would prefer not to.
- **Wanted (Green)** - Can work and wants to work.
- **Cannot Work (Black)** - Is unable to work.

The *Hours Preferred* field enables you to indicate how many hours a week the employee wants to work. There is also a *Skill Level* field that enables you to indicate their general skill level.

The schedule information you input here is transferred across to the Employee Scheduler, although you can override this process if you want to.

Advanced Tab

Employees / Employee Setup / Advanced

The Advanced tab contains information about the employee's operational interface and shift-related settings.

System Interface

This determines the operational interface that the employee uses upon logging in. This setting can be changed at the front-end through the Your Settings screen. The system brings you to a different screen or displays different features in each system interface:

- **Restaurant Seating:** Presents you with the Table Layout screen; you must select a table in order to open a check.
- **Quick Order:** Presents you with either a blank check or the Transaction View screen. You do not select tables to open checks.
- **Host/Hostess:** Presents you with the Host(ess) screen for taking reservations and seating people.
- **Driver:** Presents you with the Delivery Driver screen for taking orders for delivery.
- **Delivery Mode:** Presents you with the Delivery Order Taker screen for taking delivery and pickup orders.
- **Clock In/Out Only:** Presents you with the Your Settings screen; you are only able to use PixelPoint's time & attendance functions.

Security

When *Enable Strong Employee Passwords* is turned on in the Security tab of System Setup (see "System Setup>Security Tab"), these options are available:

- **Must change password on next login:** Forces the employee to change their password on next login. This option is disabled when *Cannot change password* (the next option) is selected.

- **Cannot change password:** Disables the employee's ability to change their password in the POS via the Change Password function.
- **Password never expires:** Overrides the global password expiry settings configured in System Setup.
- **[Reset Password]:** Overrides the existing employee password with a new one.

Ref#

A reference number for reporting purposes. For example, you could enter a payroll reference number here.

Shift Rules

Enables you to override the normal Shift Rules settings and apply a specific set of rules for this employee (See "Shift Rules").

Disregard Employee Shift Hours

This is used for Till Employees. A till employee is an employee record created for a drawer insert that is assigned to a station (just like an employee). At the end of a shift, the till is cashed out. All staff who used that till share responsibility for the balance of its contents.

Checking this box sets the till's hours to zero on clock-out. This prevents confusion when reviewing employee time & attendance reports in that it eliminates all time calculations for the tills; by using this function, you will not have to schedule tills.

Manager On Duty

This indicates that the employee, when clocked in, should be assumed to be the manager on the floor. As a result, this person will receive all Shift Rules alerts as well as other related alerts (like printer errors).

Till Employee/Card

This options makes an employee a till employee and allows a particular station to be locked to that till employee/card.

HR Tab

Employees / Employee Setup / EmployeeHR

The Human Resources tab enables you to apply employment-related information that may be pertinent for governmental reporting and accountability.

Sara Is Active? ✕

Employee Info | Advanced | EmployeeHR

Personal

Gender: Female ...

Marital Status: Married ...

Hire Status: New Hire ...

EEOC: Caucasian ...

Driver's License

Number: DL234-345432-3454

Expiry Date: 09/28/2012 19

Alien Card

Number:

Expiry Date: / / 19

Notes

Good employee. Has 2 children (Sam and Suzy). Prefers to work weekdays from 8am to 4pm. Has to pick up the kids from school on Wednesdays. Can work some weekends.

Employee Setup

Close Form

Personal

- **Gender:** Specifies the individual's gender.
- **Marital Status:** Specifies whether the employee is married or not.
- **Hire Status:** Specifies whether the employee is a new hire, re-hire, transfer, borrow, or on leave.
- **EEOC:** Specifies the individual's ethnicity; called so after the Equal Employment Opportunity Commission.

The search boxes next to each of these four fields enable you to choose from a list of labels. In addition, the dialog box that pops up has an [Add] button that enables you to create new labels that may be more appropriate.

Driver's License

These two fields enable you to input driver's license information. This is critical information for staff designated as delivery drivers.

Alien Card

These two fields enable you to input the employee's work visa information; this is necessary if the employee is from a foreign country.

Notes

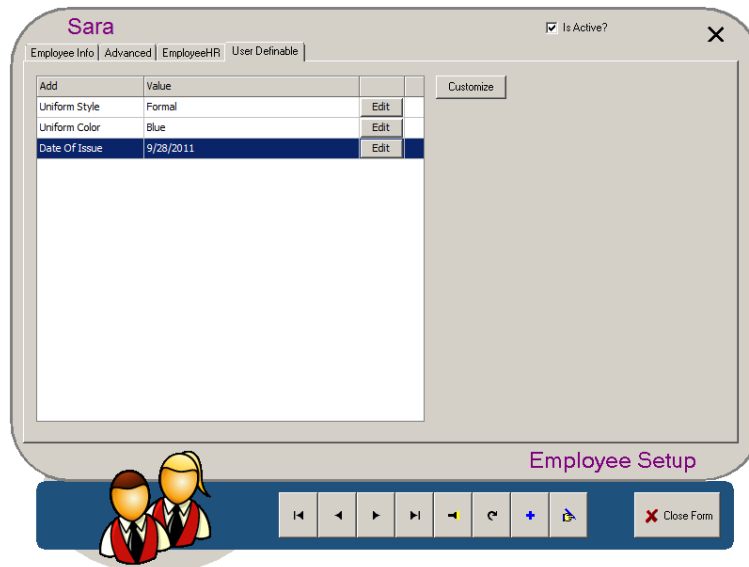
This text field enables you to enter in any other pertinent information about the individual.

User Definable

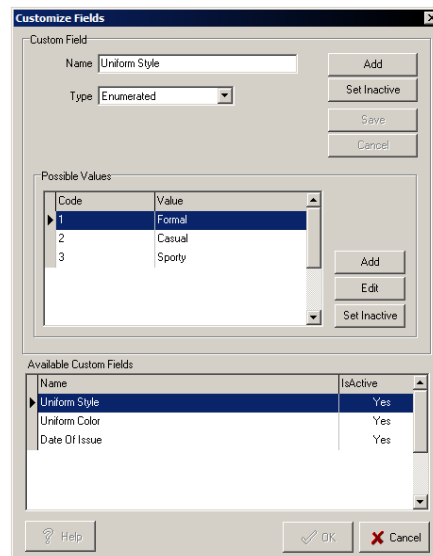
Employees / Employee Setup / User Definable

This tab enables you to create and edit your own custom fields relevant to employees. There are also User Definable tabs for Stocked Items and Product Setup that you can customize to create custom fields more appropriate for stocked items and products. These tabs appear when turned on in Policy Setup; for example, this Employee User Definable tab is controlled by the *ShowEmployeeCustomFields* policy in Policy Setup.

User definable fields can be used to apply custom information that you may need for interfacing with third-party software.



To create a custom field, select [Customize]. The following screen displays.



There are six possible types of fields you can create, and each one can be set as optional or required. The types are distinguished by the kinds of values or answers they can have:

- **Integer:** Numeric integer value (1,2,3,-1, -5...).
- **Enumerated:** Custom added word values (Small, Medium, Large, e.g.).

- **Text:** General text; input when using the field, not creating it.
- **Boolean:** Yes or No.
- **Real:** Real Number (1.2, 0.5, 3, 6, -7, -1.478...).
- **Date/Time:** Calendar Date or Time.

Once you have created a custom field, it is available on all applicable records. You do not need to create it for each record. However, the field needs to be assigned a value for each record. To do this, select the [Edit] button on the field's line.

Department Setup

Employees / Department Setup

Employees are assigned to departments; this screen is where you create the different departments you want to assign employees to.

The screenshot shows a window titled "Employee Departments" with a checked "Is Active?" checkbox in the top right corner. The main content area includes a text input field labeled "Department Description" containing the text "Kitchen Staff". Below this is a "Report Type" section with five radio button options: "Kitchen Staff" (selected), "Restaurant Staff", "Managers", "Owners", and "Other". The bottom of the window features a blue bar with a chef's hat icon on the left, a set of navigation buttons (back, forward, search, refresh, add), and a "Close Form" button on the right.

Department Description

The name or description of the department.

Report Type

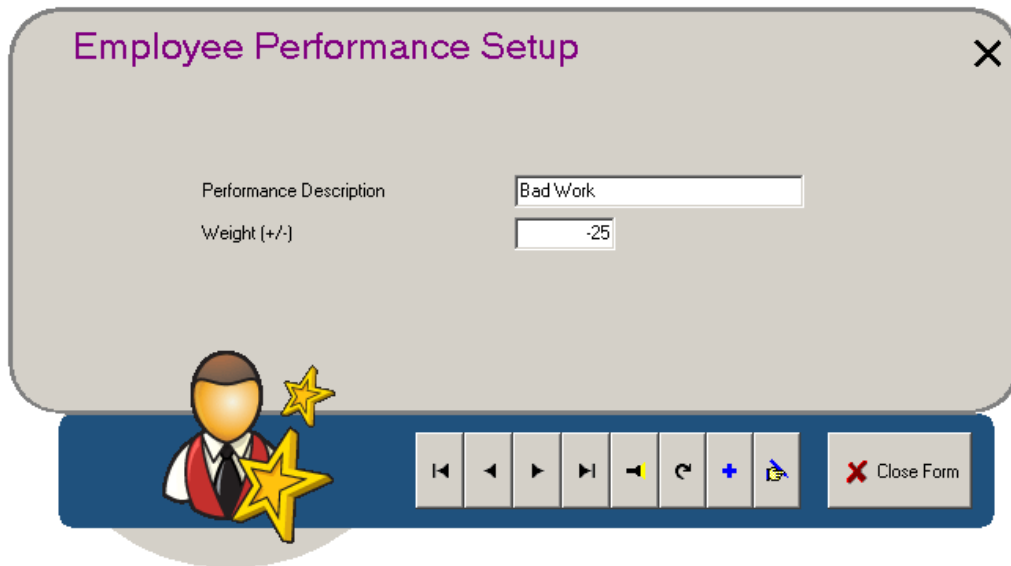
The employee type that best matches the department. When you generate a departmental report, all departments with a matching report type will be grouped together in calculating totals.

Employee Performance Points

Employees / Employee Performance Points

PixelPoint can record the compliments and complaints management receives about employee performance. Each compliment and complaint has a point value tagged onto it. Every time you apply performance points, the employee they are for is automatically notified by an onscreen bulletin that they received a good or bad performance rating.

This information is retained in the system and is available for review in the form of a report.



The screenshot shows a software window titled "Employee Performance Setup" with a close button (X) in the top right corner. The window contains two input fields: "Performance Description" with the text "Bad Work" and "Weight (+/-)" with the value "-25". Below the form is a blue bar with a cartoon character icon, navigation buttons (back, forward, search, etc.), and a "Close Form" button.

Performance Description

A description of the reason for awarding or removing employee points.

Weight (+/-)

A numeric value (positive or negative) that tells the system how many performance points should be added or removed for this type of performance. Compliments should have positive values and complaints should have negative values.

Job Position Setup

Employees / Job Position Setup

Before adding employees, you need to set up job positions. Default job positions have already been created for you. However, you can change or create new ones to suit your needs.

The screenshot shows a 'Job Position Setup' dialog box with the title 'Clock IN-OUT Only' and a checked 'Is Active?' box. The dialog has two tabs: 'General' and 'Advanced'. The 'General' tab is active, showing the following fields:

- Position Title: Clock IN-OUT Only
- Department Description: Restaurant Staff
- Security Level For Position: 1 (0=Lowest...99=Highest)
- Enforce Declared Cash Tips:
 - Do Not Enforce
 - On Cash Out
 - On Clock Out
- Do not Send POS Announcements

At the bottom of the dialog, there is a 'Job Position Setup' label, a cartoon illustration of a chef and a server, and a navigation bar with buttons for back, forward, search, and close. The 'Close Form' button is highlighted in red.

Position Title

Name of the job position.

Department Description

The department this position belongs to. See "Department Setup" for more information about departments.

Security Level For Position

A numeric value that represents the authority available to this position. The higher the number, the greater the authority this position holds. See "Security Level Definitions" for more information.

Enforce Declared Cash Tips

You can use the options here to require employees with this job position to declare their cash tips. By default, 'Do not Enforce' is selected.

- **Do Not Enforce:** Employees are not required to declare cash tips.
- **On Cash Out:** Employees must declare cash tips when they cash out.
- **On Clock Out:** Employees must declare cash tips when they clock out.

When declaring cash tips is enforced, the system displays a window requiring employees to enter cash tips; they will be prevented from cashing out or clocking out (depending on which option is selected) until they declare their tips.

Do Not Send POS Announcements

Prevents messages about changes concerning products (such as "Sold Out" or "Sold In") and

other things typically relayed to all current POS users from displaying for people in this job position.

Job Position Setup Advanced Tab

Employees / Job Position Setup / Advanced

This tab contains additional settings and fields for the job position.

Initial Float

This area enables you specify the float that employees with this job position start with. There are three options:

- **Don't Prompt:** Does not prompt for float declaration and assumes no float.
- **Prompt:** Prompts for float declaration when employees clock in.
- **Start With:** Does not prompt for float declaration, but automatically assumes a float of the amount indicated within the adjoining field.

Employee Cash Out Report

This enables you to apply a cash out report that is specific to this job position. This is useful, for example, if the establishment uses cashiers; because the person who closes the check gets credit for the sale, servers do not get credit for sales when cashiers are working—the regular cash out report shows zero values for servers. Changing the Employee Cash Out Report for the server job position to show sales based on Employee Who Started would enable you to see servers' activity.

% of Tip Out Received

The percentage of the tip pool that employees with this job position receive as a group. If the establishment does not pool tips, do not enter any value here.

So, if this field is set to 25% for the Bartender job position, then the bartenders will share 25% of the tip pool. This 25% will then be broken down based on the hours each bartender worked. For example, if Tom worked 8 hours, Sue worked 2 hours and Fred did not work at all that day, then Tom will get 80%, Sue will get 20% and Fred will get 0% of the bartender portion of the total tip pool.

Shift Rules

The set of shift rules that apply to this job position. You can override this setting for a specific employee through the Employee Setup Advanced Tab. See "Shift Rules" for more information about Shift Rules.

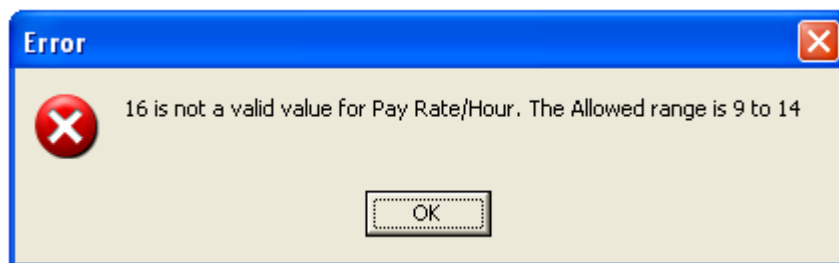
Biometric Authentication Required

This area enables you to set when employees with this job position need to use fingerprint scanning in order to clock in or out. You must have a biometric system installed for this to apply.

- **Never:** Employees never need to scan their fingerprint to log in.
- **Clock In/Out:** Employees need to scan their fingerprint at the beginning and end of their shift.
- **Clock In/Out and Breaks:** Employees need to scan their fingerprint at the beginning and end of their shift, as well as when they go on or come back from taking a break.

Min/Max Pay Rate

This enables you to set a minimum and maximum allowable pay rate for this job position. This prevents the 'Pay Rate/Hour' field (on the Employee Info Tab) for employees with this job position from being outside the range these settings define.



Security Level Setup

Employees / Security Level Setup

This screen addresses the application of security levels to all major functions of the POS. Though security can also be applied in other areas (such as Payment Method Setup and Coupon Setup), everything to do with granting access to secured functions and applications is set here.

Security Levels Setup

Function: A/R module for Accounts

Min Security Required: 75

Ask for Reason: Always

Reasons	Ask for Ref
Bad Preparation	<input type="checkbox"/>
User Error	<input checked="" type="checkbox"/>

Buttons: Add, Remove, Change

Minimum Job Title Required:

- Owners
- System Administrators
- Managers
- * Lead Cashier
- * Wait Staff Normal
- * Clock IN-OUT Only

* No access with current settings

Log Security Activity

Navigation: Back, Forward, Search, Close Form

Function

A description of the function. This description is also used for the search function (which is accessed by selecting the flashlight icon in the navigation bar).

Minimum Security Required

The security level needed for this function. Click on the up arrow or down arrow to change the security level. By default, the level values are set to 1, 25, 50, 75 and 99 (each of which corresponds to a pre-programmed job position). However, you can set up additional numbers in Job Position Setup.

Minimum Job Title Required

A list of all of the job positions; those that cannot use the currently-displayed function have an asterisk next to them, whereas those that can use the currently-displayed function are listed without an asterisk. As you change the 'Minimum Security Required' setting, asterisks will appear and disappear next to the job titles.

Ask for Reasons

[Ask For Reasons] will allow you to specify which reasons can be applied to this action and identify the frequency of use. When set to "Always" or "Always and Override", a list of reasons will appear (as shown above). See "The Reasons List" below.

Log Security

Checking this will apply the activity of this task to the System Log.

The Reasons List

When the logged-in user selects a function in the POS that requires a security level above their clearance and the *Ask for Reason* option described above is enabled, a reason for this attempt to use a secured function will need to be selected. To configure a list of reasons to appear, begin by selecting [Add].

Add: Opens a window with saved security reasons. If an applicable reason is not already in the list, select the [Add] button to enter your own. To edit an existing one, select [Edit]. Otherwise, choose a reason from the list and select [Apply].

Remove: Removes the selected reason from the list for that function.

Change: Replaces the selected reason with a new one.

Ask for Ref: When a checkbox is selected beside a reason, the the POS will ask for a reference when that reason is selected.

Tip: To allow a security reason to be entered in the POS that has not been predefined here, add a reason called "Other Reason". The POS automatically recognizes that this particular option should be logged differently from the other security reasons and opens an onscreen keyboard to allow the user to list their own reason. Make sure that both the *TrackReceipts* and the *LogAction* policies are enabled in Policy Setup. They are required in order to use this feature.

To change the wording of "Other Reason", enter the line "204493,XYZ" in the NewLanguage text file (where "XYZ" is the new wording) and then edit the "Other Reason" security reason in Security Level Setup to match "XYZ".

Security Level Definitions

This section contains explanations of all of the security levels programmed into Security Level Setup. The names of the security levels are listed in bold and their explanations are to the right of them.

A/R Module For Accounts	Inactive	Access SIN	Ability to see SIN/SSN #s in Employee Setup
Access To All Tables	Access to Another Person's Table	Access To Any Table	Access to Any Table on the Floor Layout
Access To Authorization Manager	Access to Authorization Manager within Manager	Access To Changing Cash Drawer	Access to Cash Drawer within Your Settings
Access To Detailed Button		Access To Employee Settings	Access to Employee Functions within Manager
Access To Lock Components		Access To Lock Order Pages	Ability to lock order page buttons in Menu Setup
Access To Lock Products	Ability to lock product buttons in Menu Setup	Adding Coupons	
Adding New Report Or Group		Adding Products	Ability to add Products
Adding Products After Coupon		Alert Manager	Access to Alert Manager
All Employee Time Clock	Access to Employee Time Clock within Manager	Allow Edit Default Member	
Assign New Member PIN		Attach Coupon To Receipt	
Backup Now	Access to Backup Now!	Bar Interface Manager	Access to Bar Interface within Manager
Cash Management	Access to Cash Management	Cash Out Employee	Access to Cash Out within Your Settings
Cashout Management	Ability to cash out through Cash Management	Change Employee Interface	Access to System Interface within Your Settings
Change Own Password In POS	Controls who can change their password in POS	Change PunchClock Times	Access to Punch Clock within Manager/BackOffice
Charge Gratuity	Access to Charge Gratuity within Functions	Clocking In Employee Self	Ability to Clock In without management authorization
Clocking Out Employee Self	Ability to Clock Out without management authorization	Closing Special Function	Inactive
Closing Tables	Access to Finish	Credit (PayOut)	Access to Pay Out within Your Settings
Customize BackOffice Toolbar		Deposits (Cash Drop)	Access to Pick Up within Your Settings
Driver Order Rejection	Ability to reject orders on the Driver Screen	Easy-Add POS Item	Access to Easy Add New Item within Functions
Employee Contests	Access to Employee Contests in BackOffice	Employee Performance Bad	Access to Poor Performance within Functions
Employee Performance Good	Access to Good Performance within Functions	Employee Schedule	Access to Employee Schedule within Manager
Employee Till Assignment	Ability to override Till Assignment	Employee User Defined Fields	Access to user-defined fields in Employee Setup
Enter Configuration Category	Access to Configuration Setup	Enter Expenses	Access to Pay Expenses in Manager
EULA Acceptance		Exit POS Software	Access to Exit POS Software within Manager
FixPixelBase - Database Editor	Access to Database Editor in FixPixelBase	FixPixelBase - Login	Ability to log in to FixPixelBase
Form Designer	Access to Form Designer	Fractional Ordering	Ability to order non-integer quantity values within [@1]
HO Access Filter		Identity Switching	Ability to log in as other employees using [Identity]
Inv Manager: Access	Access to Inventory Manager	Inv Manager: Add Batch Recipe	Access to Add Batch Recipe within Inventory Manager
Inv Manager: Add Spill/Waste	Access to Add Spill/Waste within Inventory Manager	Inv Manager: Change PO	Access to Change PO within Inventory Manager
Inv Manager: Delete PO	Access to Delete PO within	Inv Manager: Input Stock	Access to Input Stock within

Inv Manager: New PO	Inventory Manager Access to New PO within Inventory Manager	Inv Manager: Physical Counts	Inventory Manager Access to Physical Counts within Inventory Manager
Inv Manager: Purchase Orders	Access to Purchase Orders within Inventory Manager	Inv Manager: Receive PO	Access to Receive PO within Inventory Manager
Inv Manager: Setup Recipes	Access to Setup Recipes within Inventory Manager	Inv Manager: Show Sys/Variance	Ability to enable 'Show System' in Physical Counts within Inventory Manager
Inv Manager: Stock Levels	Access to Stock Levels within Inventory Manager	Inv Manager: Transfers	Access to Transfers within Inventory Manager
Inventory User Defined Fields	Access to user-defined fields in Stocked Items	Joining Tables	Access to Move Tables for joining within Functions
Keep CC Info		Lookup: Lookup Values	Ability to add/edit Lookup words.
Manual Card Entry	Ability to manually enter an Employee Card Number	Manual Price Limit	
Manually Entered Credit Card	Ability to manually enter a Credit Card Number	Manually Entered Member Card	Ability to manually enter a Member Card Number
Member Browser	Access to Member Browser	Member Payment	
Modifying Locked Transaction		Move Open Trans To Current Day	
Moving Items Between Splits	Ability to move items from one split to another	Moving Items To Another Table	Access to Move Items within Functions
Moving Tables	Access to Move Tables within Functions	Negative Final Total	Ability to settle with a Negative Final Total
No Sale Transaction Closing	Ability to settle to a zero dollar value	Ordering Products	Ability to order products
Payment (PayIn)		Payment (PayOut)	
Payment Reassignment	Ability to process payments for un-owned checks.	PixelPoint CreditCheck	Access to [Setup] in Authorization Manager.
POS: Add New Member	Access to Add Member within Functions	POS: Member/Delivery	Access to Member/Delivery within Functions
POS: No Tax Button	Ability to apply No Tax within Finish	POS: Reorder Button	Access to Reorder within Functions
Post Inventory Usage	Access to Post Inventory Usage within Functions	Pre-Void Bar Interface Items	
Price Override	Ability to pre-void items added through the Bar Interface	Print Employee Reports	Access to [Print Reports] in Your Settings
Printer Manager	Access to Printer Manager within Manager	Printing Receipts	Ability to apply the Print Receipt button
Product User Defined Fields	Access to user-defined fields in Product Setup	Quick Order Access	Ability to apply the Quick Order button
Re-Cashout Employee	Ability to perform a Cash Out more than once	Receipt Reprint Audit	Ability to reprint more than one receipt at a time.
Receivables (PayIn)	Access to Pay In within Your Settings	Release Station Employee Lock	Ability to override Employee Lockout on multiple stations
Remove Discounts (Coupons)		Remove Pending Charges	
Rep Svr: Config Report Server	Ability to modify Report Server	Rep Svr: Run Report	Ability to run reports within DataMiner
Rep Svr: Tree Management	Ability to modify your personal report Tree within DataMiner	Replication Rules	
Reports	Access to Report Viewer	Reservation	Access to Reservations within Manager
Re-Print Checks	Ability to Reprint a Check/Receipt	Return/Exchange Items	Access to Return/Exchange Items within Functions
Retip	Ability to apply a Charge Tip more than once	Schedule Future Order	Ability to Schedule a Future Order on a member order
Schedule Configuration	Access to Schedule Setup in Employee Scheduler and Time-Clock Manager	Selling In Items	Access to Sold In in Manager
Selling In Items	Access to Sold In in Manager	Selling Out Items	Access to Sold Out in Manager

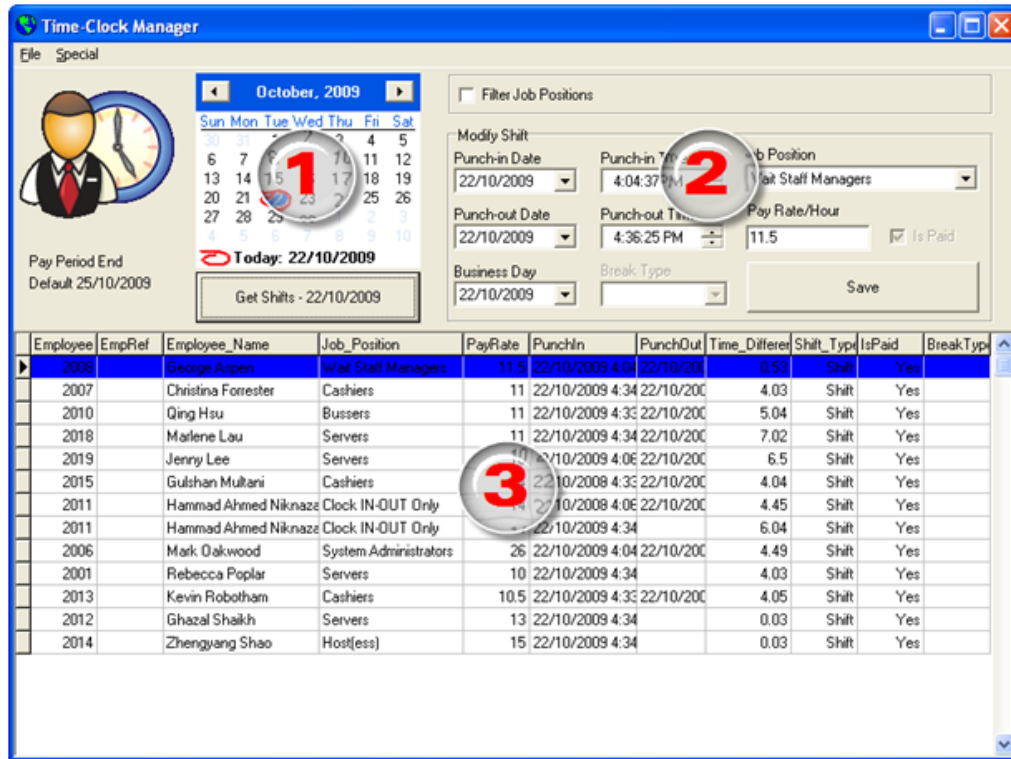
	Billboard		/ Billboard
Setting Countdown	Access to Item Countdown within Manager	Setting Employee Access	Access to Set Employee Access Card within Manager
Settling Charges	Access to Settle All Charges within Manager	Setup: Access Collaboration	Access to Collaboration Setup
Setup: Banner Message	Access to Banner Setup	Setup: Billboard Message	Access to Billboard Setup
Setup: Coupons	Access to Coupon Setup	Setup: Employee Performance Points	Access to Performance Points Setup
Setup: Exit Setup	Access to Exit Setup	Setup: Forced Questions	Access to Forced Questions Setup
Setup: Internet Setup		Setup: Item Category Setup	Access to Report Category Setup
Setup: MealTime Setup	Access to Meal Time Setup	Setup: Menu Setup	
Setup: MultiMenu Setup	Access to MultiMenu Setup	Setup: Order Page Setup	Access to Order Page Setup
Setup: Order Templates	Access to Order Template Setup	Setup: Pay In/Out Reasons	Access to Pay In/Out Reasons Setup
Setup: Payment Adjustment Reasons	Access to Pay In/Out Reasons	Setup: Policies	
Setup: POS Functions Setup	Access to POS Functions Setup	Setup: Price Change	Access to Price Change within BackOffice (HeadOffice)
Setup: Product Setup	Access to Product Setup	Setup: Receipt	Access to Receipt Setup
Setup: Refund Reasons	Access to Refund Reasons Setup	Setup: Regions Config	Access to Regions Setup within BackOffice (HeadOffice)
Setup: Replication		Setup: Schedule	Access to Schedule in BackOffice
Setup: Send Mail	Access to Send Mail	Setup: Setup Companies	Access to Member Company Setup
Setup: Setup Delivery Zones	Access to Delivery Zone Setup	Setup: Setup Departments	Access to Departments Setup
Setup: Setup Employees	Access to Employee Setup	Setup: Setup Job Positions	Access to Job Position Setup
Setup: Setup Member Groups	Access to Member Group Setup	Setup: Setup Members	Access to Member Setup
Setup: Setup Network Printers	Access to Network Printers Setup	Setup: Setup Payment Methods	Access to Payment Methods Setup
Setup: Setup Printer Channels	Access to Printer Channel Setup	Setup: Setup Printer Codes	Access to Printer Codes Setup
Setup: Setup Revenue Centers	Access to Revenue Center Setup	Setup: Setup Sales Type	Access to Sales Type Setup
Setup: Setup Security Levels	Access to Security Levels Setup	Setup: Setup Stations	Access to Station Setup
Setup: Setup System	Access to Setup System	Setup: Shift Rules	Access to Shift Rules Setup
Setup: Stock Adjustment	Inactive	Setup: Stocked Items	Access to Stock Item Setup
Setup: Stores Config	Access to Store Setup within BackOffice (HeadOffice)	Setup: Summary Group Setup	Access to Summary Group Setup
Setup: Supplier Setup	Access to Supplier Setup	Setup: System Setup	Access to System Setup within Manager
Setup: Table Layout	Access to Table Layout Setup	Setup: Table Sections	Access to Table Sections Setup
Setup: Table Settings	Access to Table Settings	Setup: Time-Clock Manager	Access to Time-Clock Manager
Setup: View Response Mail	Access to View Response Mail	Setup: Warehouse Setup	Access to Warehouse Setup
Setup: Weather Conditions	Access to Weather Conditions Setup	Shift Rules Override	Ability to over-ride shift rules (at the front-end)
Shut Down System For Day	Access to Day: Finish Sales within Manager	Shut Down Windows® Environment	Access to Shut Down System within Manager
Splitting Checks	Access to Split Check within Functions	Start Day Receipts	Access to [Start Day] on the screen after End of Day is performed.
Starting/Ending Rated Products	Ability to order Rated Items & access Stop All Timers within Functions	Station User Defined Fields	
SysLog Access	Access to System Log	System Setup	Ability to access BackOffice
Tender Settlement - Cash Out	Ability to perform a tender balance on cash out	Tender Settlement - EOD	Ability to perform a Tender Balance on End of Day
Tip Entry Over % Warning	Ability to add tips greater	Training mode On/Off	Ability to place an employee

	than the programmed % level.		in/out of Training Mode
Transaction View Filter		Transaction Viewer	Access to Transaction Viewer within Manager
Transfer Table Ownership	Ability to Transfer Check/ Transfer All Checks	Un-Close Check	Ability to Unclose a Check
User Defined Fields	Access to all user-defined fields	View Current Day Sales	Access to View Current Day Sales
View Guests	Access to Who Is Here on the Table Layout screen	Void Items Before Print	Ability to perform a Void before sending
Your Transactions View	Access to Transaction Viewer within Your Settings		

Time Clock Manager

Employees / Time-Clock Manager

This function enables you to make changes to an employee's time clock. It is used in situations where you need to modify their clock-in or clock-out times, or to alter their rate of pay or change their job position for a specific shift.



Time Clock Manager Layout

1. Calendar Area

An interactive calendar, which you can use to select the day for the schedule you wish to review. Use the arrow buttons at the top to change the month.

2. Modify Shift Area

Displays, in adjustable fields, the details of the record selected in the Shift Display area (3). This enables you to modify the values displayed there. Using these fields, you can change the employee's clock-in and out times, the business day (posting date) they worked, their rate of pay for the shift and the job position they worked. You can also use this area for applying breaks and designating whether it is a paid shift or not. Select [Save] to apply the changes.

3. Shift Display Area

Displays shift information for each employee who worked on the day selected in the Calendar area (1). Shift records display here after you press [Get Shifts]. You can use this area to select a shift record so you can make changes to it in the 'Modify Shift' area (2).

File Pull-down Menu

Located at the very top of the screen. *Setup* configures what is displayed on the main Employee Scheduler screen and *Exit* closes the Time Clock Manager function.

Special Pull-down Menu

- **Add Shift:** Enables you to create shifts from scratch. For example, several people may have worked when the establishment is closed and the POS time and attendance features were not used (they were not scheduled beforehand to work then). You can go in after-the-fact to create the shifts and apply work and break times. Shifts are stored in order based on the date of the shift.
- **Delete Shift:** Removes an existing shift from the system. Select the shift and then select this.
- **Delete Break:** Removes a break from the selected shift.
- **View Change Log:** Displays any changes that have been applied to the shift.

[Get Shifts]

Retrieves the shift records for the date you have selected on the Calendar area (1).

Filter Job Positions

Checking this box enables you to filter the shifts displayed in the Shift Display area (3), such that the area only shows shifts from a certain job position. When you check this box a drop-down menu appears beside it; you can use this menu to select the job position you want to filter for.

Employee Scheduler

Employees / Schedule

Employee Scheduler is a management tool designed for coordinating employee work schedules and time off. When you select *Schedule* from the Employees menu, the system displays a calendar with the current day highlighted and circled, prompting you to select a schedule.

By default, a schedule represents 1 week. Select the day you wish to look at. It will load the entire schedule for that week and take you directly to the schedule settings for that specific day.

The Employee Scheduler has its own menus and toolbar, and contains many different features and functions. Accordingly, there are many sections in this chapter. For ease of reference, they are listed below.

- Employee Scheduler Toolbar
- Schedule Tab
- Scheduled Shift Times Tab
- Shift Type Setup
- Schedule Setup
- Template Setup
- Template Tab
- Forecast Setup
- Forecast Tab

Toolbar

At the top of the Employee Scheduler screen is a blue toolbar containing quick access icons to all of the major functions of the employee scheduler system; generally speaking, you use the buttons on this toolbar to modify or create shifts. For explanation of the other buttons you see on this screen, see "Schedule Tab".



Loads another schedule. Selecting this icon presents a calendar you can use to select a day. When you selecting the day, the schedule for that week loads.



Applies the current shift type to selected cells. Click and drag across the time cells you want to apply to a shift and then click this button.



Adds the selected cell, through to the closing hour of the establishment, to the shift. Select the first cell for the employee's shift and then select this; you must have your establishment's hours of operation configured in Schedule Setup.



Adds the selected cell, back to the opening time of the establishment, to the shift. Select the last cell for the employee's shift and then select this; again, you must have your establishment's hours of operation configured in Schedule Setup.



Enables you to make changes to the selected shift. When you select this icon, the Modify Shift window displays (see below). You can also access this by right-clicking on a shift and selecting *Modify Shift*.

Modify Shift

FORRESTER Christina

Start Date: 10/10/2009 Start Time: 10:00:00 AM

End Date: 10/10/2009 End Time: 5:00:00 PM

Shift Type: Shift

Wage for Schedule: 11 Total Hours: 7.00

OK Cancel



Removes the selected shift from the schedule.



Displays an employee's scheduled times for the current schedule. Click on a shift or employee name, then click on this icon. You can also access this by double-clicking on the employee's name.

Employee shifts

BAIG Shannon

Home Phone () -
 Business Phone () -
 Cell Phone: () - Email

Shift	Description	Start Time	End Time	Wage for Schedule	Job Positi
2176	Shift	22/10/2009 4:00:00 PM	23/10/2009 12:00:00 AM	13	Cashiers
2177	Shift	23/10/2009 2:00:00 PM	23/10/2009 8:00:00 PM	13	Cashiers
2178	Shift	24/10/2009 12:00:00 PM	24/10/2009 7:00:00 PM	13	Cashiers
2179	Shift	25/10/2009 4:00:00 PM	26/10/2009 12:00:00 AM	13	Cashiers
2180	Shift	26/10/2009 4:00:00 PM	27/10/2009 12:00:00 AM	13	Cashiers
2181	Shift	27/10/2009 6:00:00 PM	28/10/2009 12:00:00 AM	13	Cashiers

Close



Prints an 8.5x11 copy of everyone's shifts for that schedule. This report includes non-working schedules (such as holidays and time off).



Copies the selected employee's previous schedule's shifts to the current schedule.



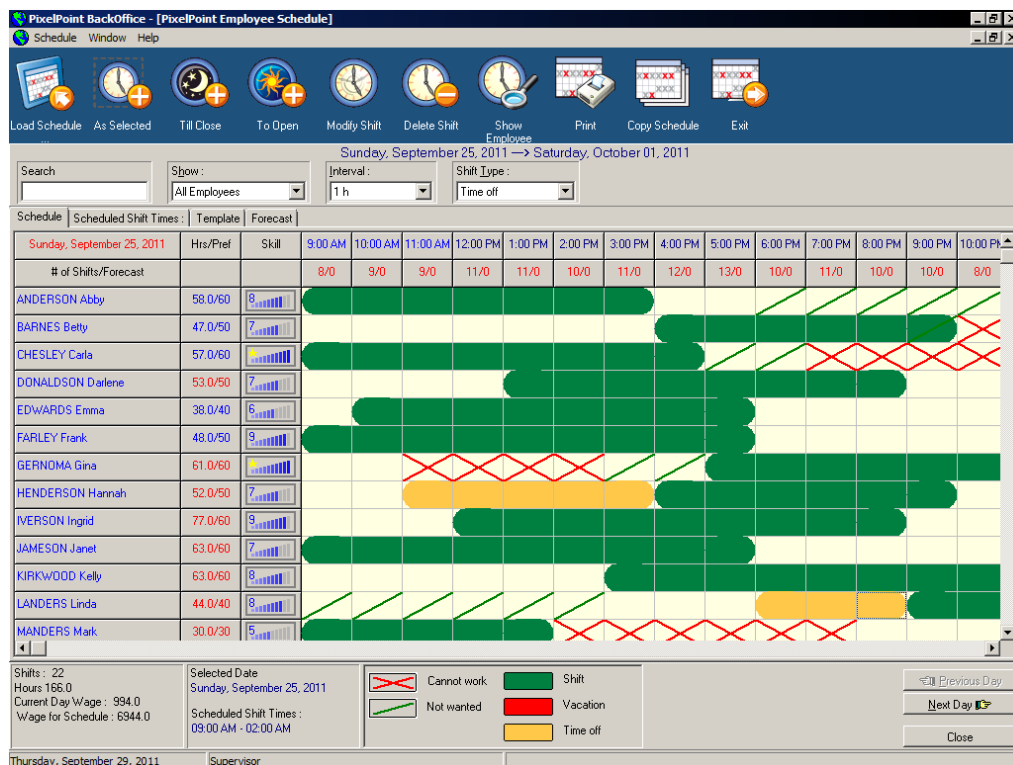
Exits the Scheduler, returning you to the main BackOffice screen.

Although there are other parts of the Employee Schedule screen that appear no matter what tab is selected, they are explained in the next section, about the "Schedule Tab".

Schedule Tab

Employees / Schedule / Schedule

The Schedule tab displays by default when you open the Employee Scheduler. You use it to view and make employees' work schedules. The screen contains rows that represent employees and columns that represent intervals of time. The rows and columns intersect to form cells. These can be filled with different colored bars to indicate the type of shift activity the employee is scheduled for during that time.



By default, green cells indicate when the employee is scheduled to work, yellow cells indicate when the employee has time off and red cells indicate when the employee has scheduled vacation time. These colors, however, can be changed (See "Shift Type Setup").

This application interacts with the Schedule part of Employee Setup (on the Employee Info Tab), reflecting the employee's preferences for the number of hours they want to work, the specific times and days they prefer not to work and the times and days they cannot work. Green diagonal lines show up where the employee prefers not to work and red 'x's show up where they have stated they cannot work.

For an explanation of each of the buttons on the blue toolbar at the top of the screen, see "Employee Scheduler Toolbar".

Search: Enables you to type in the last name of an employee in order to speed up finding that particular employee in a long list of names.

Show: Enables you to filter the list of employees by job position, such that the employee schedules shown will only be those with the job position you selected.

Interval: Defines the amount of time each cell in the schedule area represents. Options for this setting vary from 15-minute to 4-hour intervals.






Shift Type: Enables you to change the type of shift that is added when you select one of the add buttons.

Cell Definitions

October 31, 2009	Hrs/Pref	Skill	12:00 AM	1:00 AM
# of Shifts/Forecast			1/0	1/0
HSU Qing	46.0/57			

Hrs/Pref

Cells in this column contain two numbers. The first number indicates the total number of hours the employee is scheduled to work within the current schedule. The second number represents the number of hours they want to work within the schedule. For example, if the cell shows 12/15, then the employee has 12 hours scheduled and they want to work 15 hours. The second number ('Pref') is pulled from the employee's personal schedule specified on Employee Setup's Employee Info Tab (or accessed through this screen by double-clicking on the employee name and then selecting [Employee Preferences]). Double-clicking on this column title changes the cells from the numerical display discussed above to a graphic one, showing a bar chart with hours scheduled compared to hours wanted.

October 31, 2009	Hrs/Pref
Total Wage	
OAKWOOD Mark	
POPLAR Rebecca	
ROBOTHAM Kevin	
SHAIKH Ghazal	
SHAO Zhengyang	

Skill

Shows the skill level of the employee (on a scale of 1 to 10). This number is also specified on the Employee Info Tab (and can also be changed through this screen by double-clicking on the employee name and then selecting [Employee Preferences]).

of Shifts/Forecast

Cells in this row contain two numbers. The first number indicates the number of employees scheduled to work during that time period. The second number represents the average number of employees who worked during that time period on the last three schedules; this number tells you how many employees you usually schedule for that time period. For example, if you are scheduling Bartenders and the cell shows 2/3, then you currently have two Bartenders assigned to a time slot where (on average) you usually designate three Bartenders.

Total Wage

If you double-click on [# of Shifts/Forecast], the button changes to [Total Wage] and the contents of the row change as well. [Total Wage] shows the total amount of money it will cost to pay all those employees who are scheduled to work during that time slot. As you assign more employees to work, the amount of the wage field goes up. In order for this field to provide

accurate information, every employee's job position must be assigned a wage on the Employee Setup Employee Info Tab.

October 31, 2009	Hrs/Pref	Skill	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM
Total Wage			52	52	66	65	65	66	54	24	45

Summary Area

Displays the total number of employees, hours, wages for all of the selected day's shifts, and wages for the overall schedule. These numbers are calculated from the content in the rows and columns above.

Shifts : 13
 Hours 78.0
 Current Day Wage : 803.0
 Wage for Schedule : 3895.0

[Previous Day] / [Next Day]

Moves you from one day of the schedule to the next, so you can see scheduled times for different days of the shift. You can go back as far as the first day of the shift and forward as far as the last day of the shift. To select a day outside of that range, you must load another shift.

[Close]

Closes the Employee Scheduler.

Scheduled Shift Times Tab

Employees / Schedule / Shift Times

The Shift Times tab contains cells that display the start and end time of each employee's shift for each day. Double-clicking on a cell displays the Modify Shift window (See here), showing the start time, end time, shift type and wage of that shift (and enabling you to modify this information, if you want to). You can also double-click on an empty cell to add a new shift.



This screen is particularly useful for getting an overview of all shifts applied to the schedule. For example, you can easily see what an employee's work schedule looks like for the week and can get a good idea of whether it makes sense or could use some adjustment. In the event an employee has been given a split shift (more than 1 shift on a single day), the first shift time will have an asterisk next to it, alerting you about it.

Employee Scheduler Right-click Menu

Right-clicking in Employee Scheduler enables you to access many of the options on the blue toolbar, in addition to some found on the *Schedule* pull-down menu at the top of the screen and a few that are not found elsewhere.

<u>A</u> dd Shift To <u>O</u> pen Till <u>C</u> lose
<u>M</u> odify Shift <u>D</u> elete Shift
Setup Shift <u>T</u> ypes <u>S</u> etup
Copy Schedule Copy All Schedules Send Schedule via Email Send All Schedules via Email
Employee Preferences

The first five options on the right-click menu (in addition to *Copy Schedule*) are also default icons on the blue toolbar at the top of the screen and are discussed in the section about that toolbar (See "Employee Scheduler Toolbar"). The remainder of this section discusses options not found on the toolbar.

Shift Type Setup: Presents the Shift Type Setup screen (See here).

Setup: Presents the Schedule Setup screen (See here).

Copy All Schedules: Copies the shifts of all employees from the previous schedule to the current schedule.

Send Schedule via Email / Send All Schedules via Email: Schedule information can also be emailed to employees using either *Send Schedule via Email* for selected individuals or *Send All Schedules via Email* for all staff.

Though email addresses are contained in employee records, setup of the email function within PixelPoint is done on the Email Setup Tab.

Adding A Shift

There are several ways you can add a shift in Employee Scheduler.

A.

1. Click and drag across the cells you wish to apply to a schedule.
2. Click [Add As Selected] on the toolbar.

B.

1. Click and drag across the cells you wish to apply to a schedule.
2. Right-click and select *Add Shift*. The word 'Shift' on the menu may change based on the current shift type.

C.

1. Click the first cell of a block you wish to apply to a schedule.
2. Right-click and select *Till Close*, or select [Till Close] on the toolbar. This schedules the employee to work every hour from the cell you selected up until when the establishment closes. Hours of operation must be pre-defined in Schedule Setup for this function to work (See here).

D.

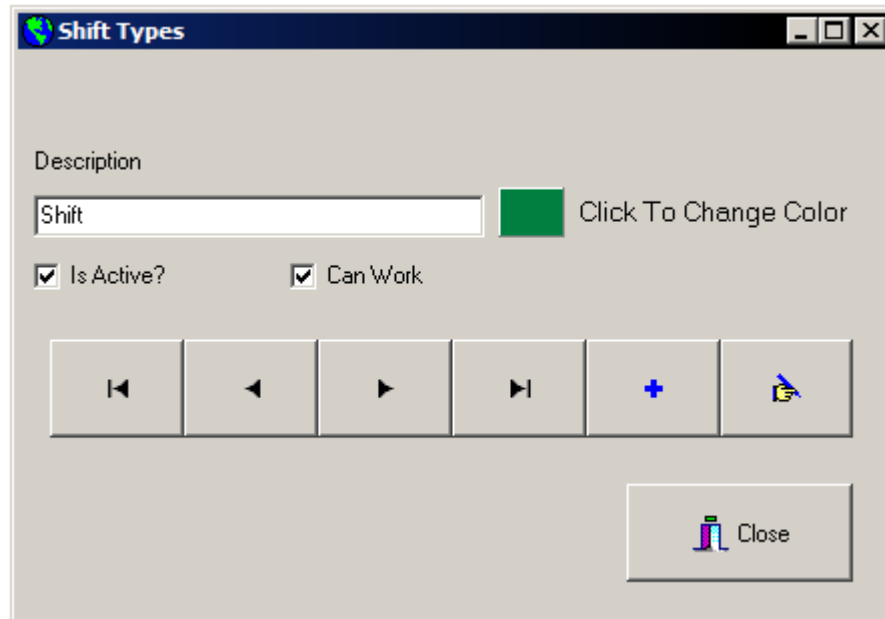
1. Click the last cell of a block you wish to apply to a schedule.
2. Right-click and select *To Open*, or select [To Open] on the toolbar. This schedules the employee to work every hour from the time the establishment opens up to the cell you selected. Hours of operation must be pre-defined in Schedule Setup for this method to work (See here).

Note: You can schedule shifts for any cell, regardless of its status (closed, not wanted or cannot work).

Shift Type Setup

Employees / Schedule / Schedule / Shift Type Setup

Using this menu option, you can modify existing shift types (Shift, Vacation, Time Off) and create new ones.



Description

The name of the type of shift. The color tile to the right of this field shows the color this kind of shift will be on schedules. You can change this color by clicking on the color tile.

Is Active

Indicates whether this shift type is an active option or not. You will not be able to schedule anyone to work this type of shift if this box is not checked.

Can Work

Indicates whether this shift is a work shift or a non-work shift (vacation and time off, for example, are non-work shifts). Work shifts print in black on schedule printouts. Non-work shifts print in gray.

This checkbox also determines whether shifts of this type increase the staff and wage totals calculated for the rows and columns on the Schedule and Scheduled Shift Times tabs.

Schedule Setup

Employees / Schedule / Schedule / Setup

The Setup screen is where you define the establishment's hours of operation. It is also where you set the number of days to be included in a schedule, the default time interval for scheduling shifts and the first day of the schedule. To access Setup, select the *Schedule* pull-down menu at the top of the screen, then select *Setup*.

Day	Start Time	End Time
MON	9:00:00 AM	2:00:00 AM
TUE	9:00:00 AM	2:00:00 AM
WED	9:00:00 AM	2:00:00 AM
THU	9:00:00 AM	2:00:00 AM
FRI	9:00:00 AM	2:00:00 AM
SAT	8:00:00 AM	2:00:00 AM
SUN	11:00:00 AM	5:00:00 PM

Payroll Info

Pay Periods Per Year: Bi-Weekly

Last Pay Period End: 01/01/2011

Edit Days Prior Pay Period End: 2

Week Start Day: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday

Days To Load: 7

Interval: 1 hours

Show Skill Indicator: Yes

OK Cancel

Start Time: The time the establishment opens each day. Change the times by using the up/down arrows on each day's field.

End Time: The time the establishment closes each day. Change the times by using the up/down arrows on each day's field.

Pay Periods Per Year: The duration of pay periods, or how long there is between pay days.

Last Pay Period End: Anchors pay periods to a specific calendar date. This field tells the system when the last pay period ended, so it can calculate dates for upcoming pay periods.

Edit Days Prior Pay Period End: The number of allowed grace days past the last pay period end that are permitted to edit punch clock information.

Week Start Day: Designates the first day of the schedule; some establishments' work week starts on a different day than other establishments' do. For example, if you want to exclude weekends, set *Days To Load* to 5 and set this field to Monday.

Days To Load: Specifies the number of days a single schedule is for. By default, a schedule

represents 7 days (1 week). You can reduce or increase the number of days if you want to exclude weekends or extend shifts to a period greater than one week.

Interval: Defines the default amount of time each cell on a schedule screen represents. Options for this setting vary from 15-minute to 4-hour intervals.

Show Skill Indicator: Shows/hides the skill level indicator column.

Template Setup

Employees / Schedule / Schedule / Template Setup

Using this menu option, you can create and modify templates for use on the Template Tab. For example, the establishment may be extra busy on Friday nights after 5pm. So, you could design a template to ensure that each department is properly staffed for that time slot. If you have a banquet booked for a given night, a schedule template could be designed to properly staff that as well.

Selecting this menu option displays the screen shown below. Select the drop-down box to select an existing template or [New] to create a new one.

Template Setup

Templates

Name: Tuesday

New Edit Delete

Schedule

Sunday	count	Schedule
Clock IN-OUT Only	2	09:00 AM-04:00 PM;
Wait Staff Normal	3	09:00 AM-04:00 PM;
Wait Staff Managers	1	09:00 AM-04:00 PM;
Cashiers	2	09:00 AM-04:00 PM;

Add Edit Delete

Close

There are two types of templates: Fixed and Custom. A Fixed template is programmed for a specific day of the week and has a set name, start and end time. A template designed for busy Friday nights is an example of a fixed template. Fixed templates are pre-created and applied to the schedule.

Custom templates are created manually and identified by name; you can use custom templates for events such as banquets or sporting events that may require special templates to ensure sufficient staff are scheduled to work.

After selecting the template, simply add the shift job positions by selecting [Add] (or use [Edit] to modify a job position already on the template). Indicate the number of staff needed for each, as well as the start and end times for the shifts. This information is loaded with the template when you go to fill it in with staff on the Template Tab.

Job Position ✕

Name
Clock IN-OUT Only
Wait Staff Normal
Wait Staff Managers
▶ Managers
Owners
System Administrators
Cashiers
Host(ess)
Bussers
Servers

count
3

Start Time: 05:00 AM End Time: 02:00 AM

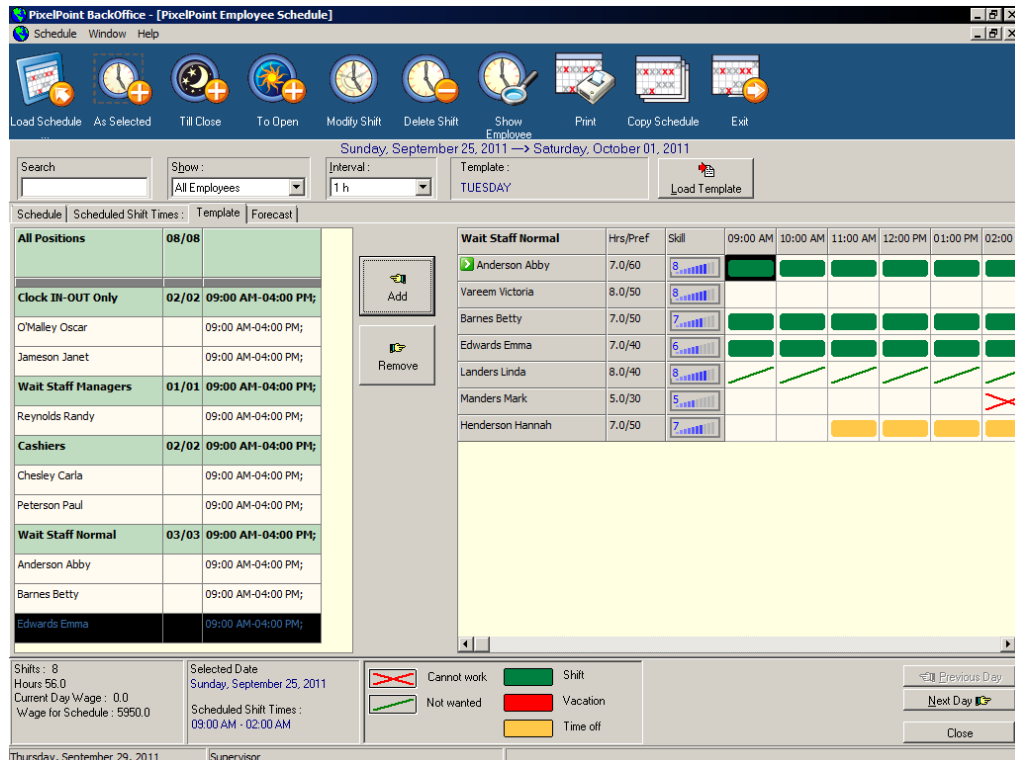
OK Cancel

Template Tab

Employees / Schedule / Template

This tab enables you to fill schedule templates for specific days and events. You can create and modify templates by selecting *Schedule / Template Setup* from the pull-down menu at the top of the screen (See "Template Setup").

The 'Template' field next to the [Load Template] button tells you which template is currently loaded, and [Load Template] itself loads an already-made template.



The template tab is divided into two main sections. The left window pane contains the template; it contains a list of the job positions needed, the number of employees needed for each position, the employees who are currently scheduled to fill those spots, and the times they are scheduled to work. In the example above, you can see that three out of three managers are scheduled to work, but only four out of the six needed wait staff employees are scheduled.

The right window pane contains a list of all of the employees who have the job position that is currently selected in the left window pane. It lists the hours they are currently scheduled to work, the number of hours they would like to work (both of which are in the 'Hrs/Pref' column), and their skill level. A graphic representation of the employees' schedules, like that on the Schedule Tab, is on the very right of the pane.

You can add and remove employees from the schedule by using the [Add] and [Remove] buttons in between the two panels. To add an employee, just select a row under the job position title and then the employee's name. Now select [Add]. To remove an employee, select the row on the left window pane and then select [Remove]. The currently-selected row in the job position window pane is highlighted in blue, and its title is listed at the top of the right window pane. The currently-selected employee has a green icon with a white arrow on it next to their name.

Forecast Setup

Employees / Schedule / Schedule / Forecast Setup

This menu option enables you to set up and modify how the Employee Scheduler builds labor forecasts on the Forecast Tab.

Forecast Setup

Forecast period

Number of weeks
4

Adjust forecast values

No adjustment

Adjust by...

Required employees

Job Position	Number	Hourly sales amount
Bussers	3	1000
Cashiers	2	1500
Clock IN-OUT Only	4	1000
Host(ess)	1	2000
Managers	1	2000
Owners		
Servers	6	1000
System Administrators		

The number of employees needed per hourly sales amount.
For example, a store might need 2 waitresses for every \$1000 in sales and 1 manager for every \$2000.

OK Cancel

To set up the forecast, enter the number of staff in each job position the establishment needs working for every X amount of dollars sold. Then enter the hourly sales amounts for each position (the X amount of dollars sold). You can adjust the number of weeks of sales data the forecast is based on by changing the value in the 'Number of weeks' field. You can also adjust the forecast values by any given percentage, by selecting 'Adjust by...' and then changing the % value that appears.

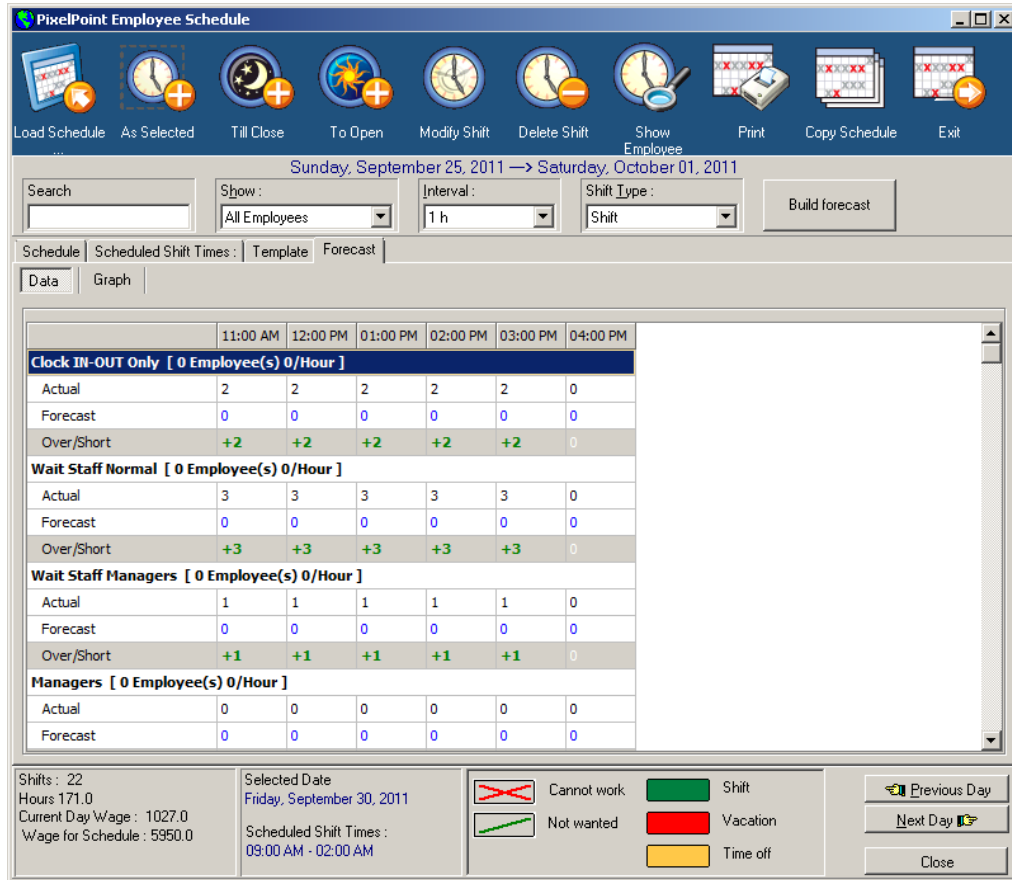
For example, say that the sales for Monday at 12:00 for the past 4 weeks has been: \$1000, \$2000, \$1000 and \$2000. The system will forecast that next Monday's sales at 12:00 will be \$1000. Since, using the example in the image above, 6 servers are required for every \$1000, the system will forecast that the establishment needs 6 servers to be working Monday at 12:00.

If that Monday's sales are as predicted, the following Monday's sales at 12:00 would be forecast to be \$2000 and the system would forecast that the establishment needs 12 servers to be working during that hour. Regardless of the actual dollar amount, the forecast is calculated using (in this example) \$2000 as the benchmark.

Forecast Tab

Employees / Schedule / Forecast

The Forecast tab enables you to compare labor to past sales over a range of time, and thus to forecast how many employees of certain job positions you will need at a certain time.



The forecast is based on sales amounts for a specified number of previous weeks (a minimum of 4); they are determined in Forecast Setup.

To forecast the amount of labor required for a given period, select [Build Forecast] below the blue toolbar. This populates the Forecast tab with information pulled from Forecast Setup and the sales history in the database. It displays each job position, the number of employees used in the forecast, and the \$/hour value used. For each job position, the screen has a row for the actual number of employees scheduled to work, a row for the number of employees the system has forecast should be working, and a row showing the difference between the two rows ('Over/Short').

The Forecast Tab also has tabs of its own. The tab shown above is the Data Tab, where numbers display the forecasted labor schedule. However, you can also select on the Graph Tab to get a visual look at the predicted sales amounts during the day, to help you better understand the forecast and assist with scheduling more or fewer employees.

Shift Rules

Employees / Shift Rules

This section enables you to set shift parameters and save them as a set of rules. You can create multiple sets of Shift Rules and apply them globally in System Setup, to a specific group of employees through Job Position Setup, or to individuals through Employee Setup (See "Where Shift Rules Are Applied").

The Shift Rules Setup General Tab has two sets of options for two different kind of breaks—regular breaks and meal breaks. Each shift rule record can be for one or both of these types of breaks.

Note: This section shows and explains options for a Meal Break. The options and fields for regular breaks are identical, however (except they do not have the word 'Meal'), and so this section nevertheless applies to regular breaks as well.

Description

The description or title of this set of rules. This label is used throughout the POS to reference this shift rule (when doing things such as applying shift rules to job positions, for example).

Alert Employee on Log IN

If checked, PixelPoint will alert employees about break events when they log in.

Enable

If checked, the settings and rules for this shift rule can be changed and modified. If unchecked, break settings will default to being unpaid with no parameter settings. When creating a new shift rule, select this checkbox so the options become available for modification.

Is It Paid

If checked, employees will be paid for the time during their breaks. If unchecked, employees' time clocks will pause during the break (and they will therefore not be paid for the time).

Is a manager override required when employee exceeds break time?

If checked, employees will need management authorization to return from a break when they have taken longer than the Maximum Duration.

Meal Break Every

The amount of time between breaks, and before the first break. For example, in some areas meal breaks are required every 300 minutes, by law.

...and alert before

The amount of time before a break you want the system to send a message to the employee, telling them that their break is coming up. For example, you may want to alert the employee 5 minutes before a meal break that it is coming up.

Minimum Required Duration

The shortest amount of time the employee is allowed to take as a break.

...to a Maximum Duration

The longest amount of time the employee is allowed to take as a break.

Can employee waive a Meal Break?

The option selected here determines whether employees can decide whether to take a scheduled break or not.

- **No** - Employees must take all scheduled breaks.
- **Yes With Manager Override** - Employees can decide not to take a break, but need management authorization each time they do.
- **Yes Without Manager Override** - Employees can decide not to take a break and do not need any authorization or permission to do so.

Early Meal Break IN?

The option selected here determines whether employees can return from breaks before the minimum required duration is up.

- **Not Allowed** – Employees cannot punch in early.
- **Yes with manager override, break remains** – Employees may punch in early, if given management authorization, and the break is considered taken.
- **Yes with manager override, break is canceled** – Employees may punch in early, if given management authorization, but the break is removed, and considered not taken.
- **Yes without manager override, break remains** – Employees may punch in early, without manager authorization, and the break is considered taken.

Advanced Tab

Employees / Shift Rules

The Advanced tab contains additional features you can program for the Shift Rule.

The screenshot shows a software window titled "General Meal Breaks" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "General" and "Advanced", with "Advanced" being the active tab. A checkbox labeled "Is Active?" is checked. The main content area is divided into two sections. The first section, "Upon Clock In", has a checked checkbox "Show The Following Message" and a text area containing the message: "State law requires that a 30 minute paid meal break be provided after working 6 hours. In accordance with state law, you will be notified 5 minutes prior to your meal break and you MUST take it. If you exceed that break by as much as 15 minutes, management authorization will be require in order for you to log back into the POS system." The second section, "Additional Options", has a label "Overtime Warn Hrs (Day)" and a text input field containing the number "8". At the bottom of the window, there is a blue bar with a "Shift Rules Setup" label, a calendar icon, a set of navigation buttons (back, forward, search, etc.), and a "Close Form" button.

Upon Clock In

Show the Following Message

If checked, the text in this field displays when employees who are using this rule clock in.

Overtime Warn Hours

This is the number of hours in the employee's work day. If employees work more hours than allotted here, the manager on duty will be warned about them going into overtime.

Where Shift Rules Are Applied

As mentioned briefly in the main shift rules section (See here), shift rules can be assigned in three different areas. Where specifically this is done is explained in more detail below.

Global Assignment

The field for assigning a Shift Rule to all employees is located on the System tab of System Setup, which is found on the *Administrator* pull-down menu. (See "System Tab".)

Job Position Assignment

The field for assigning a Shift Rule to employees with a particular job position is located on the Advanced tab of Job Position Setup, which is found on the *Employees* pull-down menu. (See "Job Position Setup Advanced Tab".)

Employee Assignment

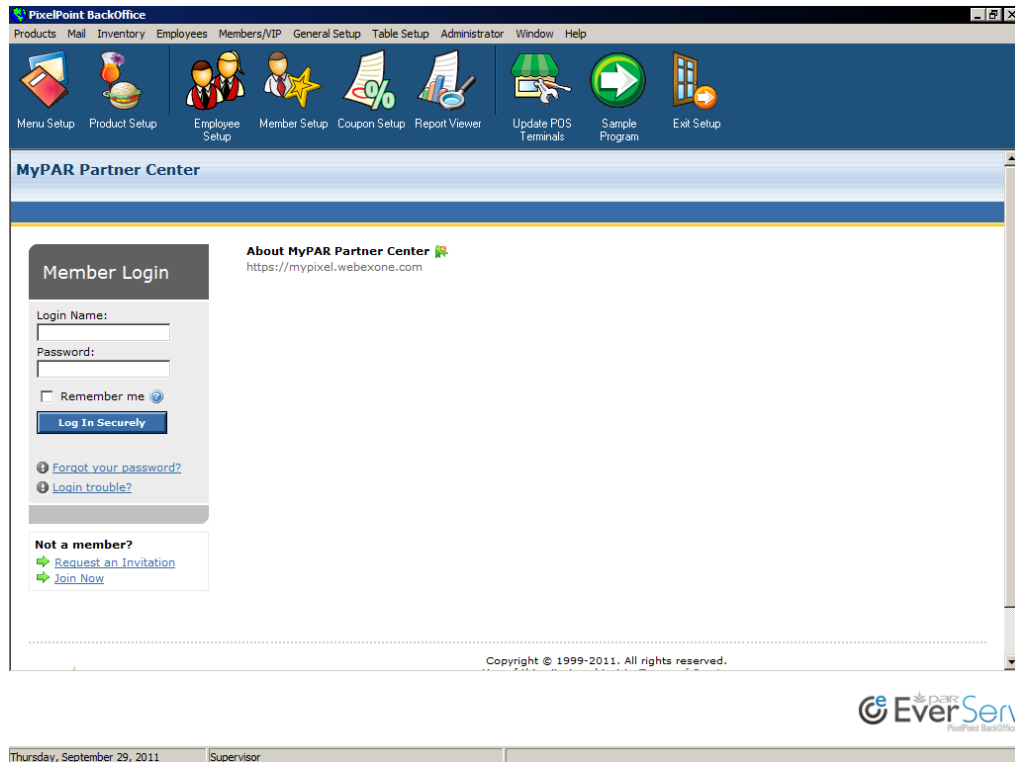
The field for assigning a Shift Rule to a specific employee is located on the Advanced tab of Employee Setup, which is found on the *Employees* pull-down menu. (See "Employee Setup Advanced Tab".)

Collaboration

Employees / Collaboration

Selecting this menu option turns the collaboration screen on and off. When you leave BackOffice and then return, the system will default back to having it turned on.

If you have set up an intranet site, as discussed in the section on System Setup's Collaboration Tab, turning the collaboration screen on may make the main BackOffice screen look something like the image below.



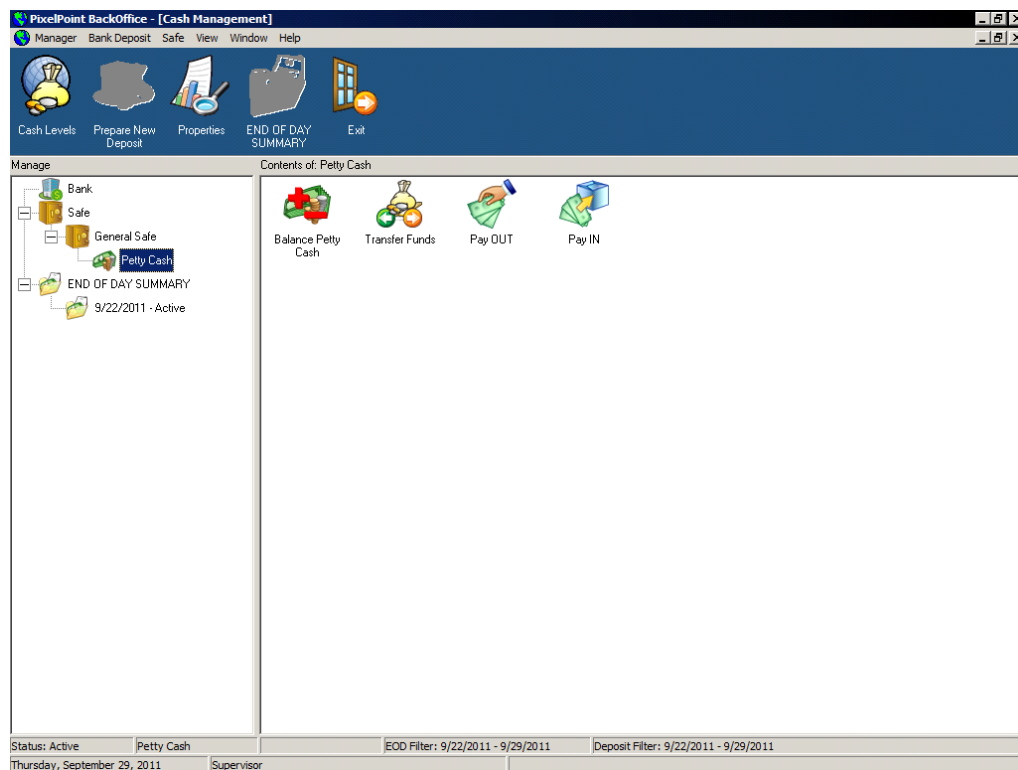
You must have something in the *Collaboration URL Address* field in System Setup's Collaboration Tab for this menu option to be active.

Cash Management

Employees / Cash Management

The Cash Management function enables you to take greater control over the management of cash and deposits.

When you select *Cash Management* from the Employees pull-down menu, the toolbar changes to display icons for commonly-used cash management functions. The pull-down menus located across the top also change to enable you to access all cash management functions. The main area below the tool bar is divided into two window panes. The one on the left shows a tree of the various processes you can select from. Choosing one displays all related functions in the pane on the right.



You can execute functions by using the pull-down menus, by selecting icons on the toolbar or in the "Contents of:" window pane, or by selecting them from the right-click menu that displays when you right-click on icons in the "Contents of:" window pane.

Some key functions of Cash Management are:

Cash Levels

Enables you to quickly view the contents of each safe, all active deposits and petty cash levels.

Cash Levels

# of Items	Pay Methods	Amount	EnteredAsAmnt	IsCurrency
1	Fifties	550.00	Yes	Yes
1	Twenties	220.00	Yes	Yes
1	Tens	110.00	Yes	Yes
1	Fives	205.00	Yes	Yes
1	Ones	42.00	Yes	Yes

CASH	Total Amount
\$1,127.00	\$1,127.00

Bank Deposits

Enables you to view and manage all deposits to an external bank or other institution. This not only includes cash, but all deposits that are not transferred electronically, like checks, foreign currency and credit slips from a manual credit system.

Bank Deposit - Active

Bag Reference: S3667 Date Entered: 9/29/2011 1:10:23 PM
 Deposit Via: Courier Service Entered By: Supervisor
 Ref Code: AJ-234-S Processed By: **No.: 1201**

Available Cash Levels In: All Safes

# of Items	Pay Methods	Amount	Safe
0	Fifties	300.00	General Safe
0	Twenties	140.00	General Safe
1	Tens	110.00	General Safe
1	Fives	205.00	General Safe
1	Ones	42.00	General Safe

Deposit Cash Levels: Confirm Transfer Operations

# of Items	Pay Methods	Amount
1	Fifties	250.00
1	Twenties	80.00

CASH	Total Deposit
\$330.00	\$330.00

Comment: This is a sample Bank Deposit.

Buttons: Help, Print To, Deposit Later, Deposit Now!, Cancel

Safe Management

Enables you to create and manage multiple safes, and do things like transfer funds from one safe

to another.

Petty Cash

Enables you to create, balance and transfer the contents of Petty Cash. You can also have multiple petty cashes and transfer contents from a safe to petty cash or from one petty cash to another.

Petty Cash - Active

Description: Petty Cash Assigned To: No.: 1000
Ref Code: PC-3234

Transfer

Available Cash Levels In: All Safes Cash Levels In: Petty Cash Confirm Transfer Operations

# of Items	Pay Methods	Amount	Safe
0	Fifties	200.00	General Safe
0	Fifties	100.00	Cashier Drawer Saf
0	Twenties	100.00	General Safe
0	Tens	70.00	General Safe
0	Fives	65.00	General Safe
0	Fives	95.00	Cashier Drawer Saf
0	Ones	20.00	General Safe

# of Items	Pay Methods	Amount
1	Tens	40.00
0	Fives	15.00
1	Ones	22.00

CASH Total Amount
\$77.00 \$77.00

Buttons: Help, Process Transfer, Cancel

Petty cash can also be broken down by denomination, in the same way as safes.

Cash Management

Options

EOFilterDays: 7
DepositFilterDays: 7
UseDenominationsFullDescript: No
CashOutOverShortAmountLimit: 50
ConfirmMoveAll: Yes
AutoFillSettlementAmount: Yes

Buttons: Help, OK, Cancel

For in-depth information about Cash Management, see the PixelPoint Cash Management Guide available on the PAR Partner Center website.

Contests

Employees / Contests

You can set up contests and reward systems for the employees at your establishment, to encourage friendly competition and give employees incentive to perform better. Contests can be scheduled to last for different time periods and to give different amounts of points for any number of different products.

Most Desserts Is Active? X

General | Advanced

Name: Most Desserts

Contest Period:

Recurring Daily
 Recurring Weekly
 Recurring Monthly
 Date Range

Description: This is a contest to see who can sell the most desserts.

Products | Categories | Job Positions

The following categories are included in the contest:

Name	Points
Desserts	10

Select
Change Points
Remove
Remove All

Active | Recurring Daily

Employee Contest Setup

Close Form

Name

The contest's name.

Contests Period

How long the contest lasts. You can set it to last for the day, the week, the month, or a manually-specified date range.

Description

A text field for you to program a written description of the contest, explaining things like what it is for and the rules involved.

Products

The products that are included in this contest. If any product listed here is ordered, then the employee who sold it will receive points for it.

Categories

The report categories that are included in this contest. If any product included in one of the report categories listed here is ordered, then the employee who sold it will receive points for it.

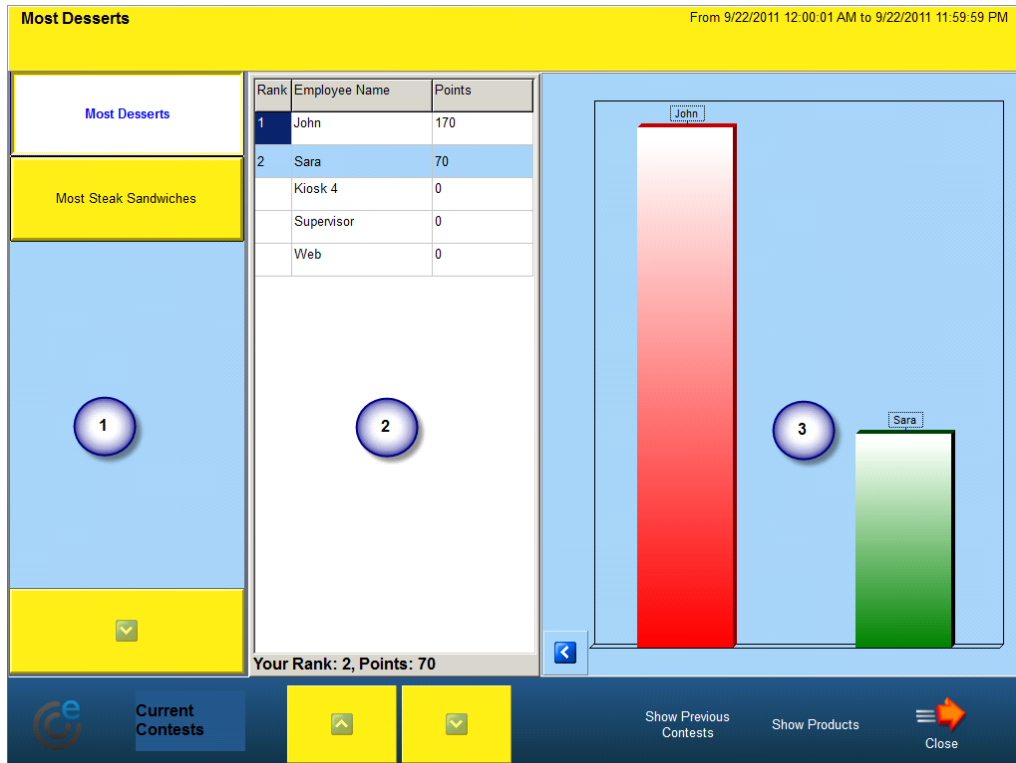
Job Positions

The job positions that are included in this contest. If any employee with a job position listed here sells a product that is part of this contest, the employee who sold the product will receive points for it.

[Change Points]

Changes the number of points the selected item is worth in this contest. For products, the default number is programmed on the Product Setup Advanced Tab, but can be changed here for this specific contest.

To program the contest further, switch to the "Advanced Tab" shown in the next section. The contest results are presented in the front-end in Your Settings.



Section 1 shows the list of all active contests. Section 2 shows the results (usually being the top 3 contenders). Section 3 shows a graphic representation of the results.

Advanced Tab

Employees / Contests / Advanced

The Advanced tab contains additional settings for the employee contest.

The screenshot shows a dialog box titled "Most Desserts" with a close button (X) in the top right corner. Below the title bar, there is a checkbox labeled "Is Active?" which is checked. The dialog has two tabs: "General" and "Advanced", with "Advanced" selected. The "Advanced" tab contains the following settings:

- A checkbox labeled "Contest runs all day" is unchecked.
- Next to it, the text "Contest runs between..." is followed by two time pickers, both set to "12:00 AM".
- A "Show top" text box contains the number "3", followed by the text "employees (set to 0 to show all employees)".
- A checked checkbox labeled "Hide other employee product quantities sold".
- A checked checkbox labeled "Show employees with points only".
- An unchecked checkbox labeled "Disable editing once contest starts".

At the bottom of the dialog, there is a blue bar with a notebook and pen icon on the left, a set of navigation buttons (back, forward, home, refresh, etc.) in the center, and a "Close Form" button with a red X icon on the right.

Contest runs all day

Sets the contest to be active for all hours of each day that it is programmed to run (That is, each day of its 'Contest Period').

If you do not enable this option, you can use the clock fields next to 'Contest runs between' to program which daily hours the contest will be active for.

Show top X employees (set to 0 to show all employees)

Restricts the front-end Contests screen to show only how this number of employees are performing in the contest. The employees that are shown will be the highest-ranking employees in the contest, whether or not the current employee is amongst them.

Hide other employee product quantities sold

Displays, when a user selects [Show Products] on the front-end Contests Screen, only those products which that employee has sold — not products sold by other employees in the contest. With this checkbox enabled, employees cannot see what products their co-workers have sold in the competition. Employees can still see how many points their co-workers have when they select [Show Employees].

Show employees with points only

Displays, on the front-end Contests screen, only those employees who have accumulated points. That is, an employee will be visible on the front-end Contests screen only when they have sold at least one of the products included in the contest.

Disable editing once contest starts

Prevents changes from being made to the contest once its 'Contest Period' has started.

Members/VIP Menu

This menu is where you program components of the system that have to do with members. It is therefore especially important for Delivery Service and Pickup Service. The menu contains options that enable you to create and modify members' records, as well as do things such as set up and specify the member group they belong to, the company they work for and the delivery zone they are in. This chapter is organized as follows:

- Member Concepts
- Member Group Setup
- Company Setup
- Member Setup
- Delivery Zone Setup
- Member Browser

Member Concepts

Before getting into details about the BackOffice menu options and setup screens that deal with members, there are some important things to note about what members are and how they are used in PixelPoint POS. This section explains some basic concepts involving members on the system.

Client Retention

Some establishments may want to reward their customers (especially those who are repeat customers). The establishment can track and reward customers who make purchases by granting them membership. As a member, the customer can acquire points which are assigned to specific products. As these products are ordered, the member accumulates points. Upon achieving a certain number of points, the member can redeem them for rewards such as a discount or promotional item.

Reservations and Ordering

Member records also keep specific customer information for functions that need particular details about a member.

For example, for reservations, the establishment needs a name and phone number in order to hold a table for a customer. Similar to a reservation, the establishment also needs a customer name and phone number for a take out order. This links the order to a person's name for retrieval when the customer arrives. The phone number is needed in case it is necessary to contact the customer regarding the order.

In the case of a delivery order, the establishment needs further information, such as an address and directions for delivery. The member record can hold this information as well.

Member Defaults Record

Whenever you first go to Member Setup or some of the member functions, the record that is retrieved is the Member Defaults record. It is the record, for instance, that appears automatically on the Search Tab. Any changes you apply to this record will be transferred as default field settings when you create a new member record. This can save you a lot of time in member creation. However, it is easy to unintentionally modify this record and therefore cause trouble for yourself later on—you should always look at what record is displayed before changing member information, to make sure that it is not the Member Defaults record you are modifying.

Member Group Setup

Members/VIP / Member Group Setup

Members can be categorized into groups. These groups can behave differently in the POS, depending on how they are programmed. This setup screen enables you to create and program member groups.

The screenshot shows a 'Member Group Setup' dialog box with the following fields and options:

- Group Name:** Text input field containing 'Seniors'.
- Points Rate:** Text input field containing '1'.
- Is Active?:** Checked checkbox.
- Tax 1 Exempt:** Unchecked checkbox.
- Tax 2 Exempt:** Unchecked checkbox.
- Auto apply coupon:** Checked checkbox.
- Coupon:** Dropdown menu showing '10% Off'.
- Member price level (must also configure stations):** Dropdown menu showing 'Use Schedule Pricing'.
- Navigation:** A set of navigation buttons (back, forward, search, etc.) and a 'Close Form' button with a red X icon.

Group Name

The name of the member group.

Points Rate

Point amounts can be applied to products; when a member is assigned to a check, all points accumulated from products on that order will be applied to the member record. The idea behind this is that you can create member incentive rewards that members get when they redeem accumulated member points.

The 'Points Rate' field enables you to set each group to have a unique rate of point accumulation. For example, you could set Group #1 to have a points rate of 1 (meaning a 10-point item is worth 10 points), but Group #2 to have a points rate of 5 (meaning a 10-point item is worth 50 points).

This then enables you to have different incentive programs that are appropriate to different types of groups. Say that the establishment has a product, "Steak", that is worth 10 points, and that there are two incentive programs defined in Coupon Setup. The first incentive program offers a \$10 discount in exchange for 100 points. The second offers an expensive watch in exchange for 1,000 points. Keeping with the groups and points rates given as examples above, a member from Group #1 would be able to achieve the \$10 discount but would (in all practicality) find the expensive watch unattainable. However, a member of Group #2 could more easily achieve the 1,000 points needed for the watch because Group #2 accumulates points 5 times faster than Group #1.

Auto Apply Coupon

Checking this box displays a window that asks you to select a coupon that will be automatically applied when a member from this group is applied to the check. This is one easy way, for

example, to give every member of a group a discount on all purchases. You could have a "10% off" coupon automatically applied to every purchase a student makes, for instance.

Member Price Level

This drop-down box enables you to set different member groups to use different price levels. For example, a hamburger may cost a different amount for student members than for VIP members; this can be programmed by having the student member group use a different price level.

Note that if you apply different price levels here, you must also configure price levels in Station Setup to 'Use Member Group' (See Station Setup's Advanced Tab). You must do this for all stations you want to use this setting.

TAX Exempt

Checking one of these boxes exempts ALL members in this group from the particular tax in the box's label.

There is a checkbox here for each tax programmed into the system. Individual members can be exempt from taxes on the Advanced Tab.

Company Setup

Members/VIP / Company Setup

When you are creating or modifying member records, you can specify the company the member works for or belongs to. Doing this enables the establishment to invoice the company for employee purchases. This invoice is a report available in Report Viewer.

In order to apply companies to member records, however, you need to enter information about the company. You use this setup screen to do that. Most of the fields here are straightforward contact and address information fields and do not require explanation.

Company Setup		<input checked="" type="checkbox"/> Is Active?
Company Name	ABC Company	
Owner	Harry Wilson	
Contact	Donna Cairns	
APContact	Frida Wilson	
Address1	123 Walnut Street	
Address2	Unit 234	
City	Chicago	
Prov/State	Illinois	
Postal	90210	
Comment	Branch Office	
RefNum	ABC-123	

When you have created the company record, it can be applied to member records on Member Setup's "Member Info Tab".

RefNum

A reference number for reporting purposes. It is entered manually and can have any format you want.

Member Setup

This menu option enables you to create member records by inputting information about customers who regularly come to your establishment, or who place delivery or takeout orders. Selecting this option from the menu displays a Member Setup screen that has five tabs, each of which is explained separately in this section. They are:

- Search Tab
- Member Info Tab
- Ship To Tab
- Notes Tab
- Stats Tab
- History Tab

Search Setup

Members/VIP / Member Setup / Search

The search tab enables you to locate a specific member record quickly.

Scott Dunlop Is Active? ✕

Search | Member Info | Ship To | Notes | Stats | Internet Settings | History | Advanced

Search By: Last Name

Last Name	First Name	City	Home Telephone	Address	Bi
Cassidy	Carl	Toronto	(123)456-7890	255 Wells Road	(
DEFAULT	MEMBER		() -		(
Dunlop	Scott	Vaughan	(905)267-4700	123 Walnut Street	(9
Dunwald	Edgar	Toronto	(888)888-8888	355 Hoover Cres.	(
Dunwood	Wanda	Toronto	(555)555-5555	555-102 Marborn Cres.	(
Jordan	James	Toronto	(234)234-2342	92 Mallory Blvd.	(
Vander Dunn	Nadia	Toronto	(234)535-3443	234 Hannover Street	(
Young	Yolanda	Toronto	(232)324-3333	123 Walnut Street	(

Member Setup Form

Search By:

This drop-down box enables you to search for members using one of a wide variety of criteria. You can search by last name, first name, city, home telephone, address, business telephone, card number, email or reference number.

Enter your search terms in the text field next to the drop-box and then select [Search].

[Show All]

Displays the entire list of member records.

You can use the scroll bars on the right of the screen, or the keyboard arrow keys, to scroll through the list of member names. Double click on any row to view the full record.

Member Info Tab

Members/VIP / Member Setup / Member Info

This tab contains the selected member's information; it is the main part of the member record. Most of the fields are self-explanatory. Those that are not are discussed below.

Scott Dunlop Is Active? ✕

Search | Member Info | Ship To | Notes | Stats | Internet Settings | History | Advanced

Mr. <input type="text" value="Scott"/>	Last Name <input type="text" value="Dunlop"/>	<input type="checkbox"/> Is Gift Certificate
Group <input type="text" value="VIP"/>		<input type="checkbox"/> Do Not Solicit
Company <input type="text" value="ABC Company"/>		Credit Limit <input type="text" value="\$500.00"/>
Address 1 <input type="text" value="123 Walnut Street"/>		Balance <input type="text" value=""/>
Address 2 <input type="text" value="Apartment 12B"/>		<input type="button" value="Picture"/>
City <input type="text" value="Vaughan"/>		
Prov/State <input type="text" value="Ontario"/>	Postal/Zip <input type="text" value="L4M 5K5"/>	Unit No. <input type="text" value="6"/>
Country <input type="text" value="Canada"/>		Buzzer Code <input type="text" value="321"/>
Home Phone <input type="text" value="(905)267-4700"/>	Delivery Zone <input type="text" value="Zone A"/>	Member Since <input type="text" value="05/03/2010"/>
Bus. Phone <input type="text" value="(905)267-4724"/>		Expiry Date <input type="text" value="04/28/2030"/>
Card # <input type="text" value="2001"/>	<input type="button" value="Assign Card #"/>	Anniversary Date <input type="text" value="04/01/2010"/>
Ref# <input type="text" value=""/>		Birth Date <input type="text" value="01/14/1963"/>
Email <input type="text" value="scott@website.com"/>		

Member Setup Form

The phone number, card number, and last names entered here may be used as search parameters in PixelPoint POS to locate the member.

Card

The member record can be retrieved by name, phone number or card number. To use the last of these, the member will have to be assigned a number. You can assign the member either a swipe card or a manual entry number for quick retrieval by selecting the [Assign Card #] button next to this field.

Ref

This number is used for reporting purposes only. If you want to include this member in your reporting processes, type a unique number in this field.

Is Gift Certificate

A gift certificate (gift card) is a member record that has a credit balance on it. Checking this box tells the system that the Balance field reflects pre-purchased funds. As these funds are already spent, the balance will be reduced as the member makes purchases, but the amount owing will not increase, as these funds are not owed to the establishment (like in a credit situation). Gift certificate balances can be replenished. No matter the balance on the card, the card can still be used for things like point redemption programs (even if the balance is \$0).

Do Not Solicit

Indicates that this member does not want to be contacted (about things like promotions and special offers, for example).

Credit Limit

Members can be granted a "house account" credit limit with which the member can pay On Account. In doing this, the amount owing on the check will be deducted from the "Credit Limit"

field and added to the "Balance" field. The member would then be invoiced at a later date for the outstanding balance. If you are programming a house account, make sure 'Is Gift Certificate' is NOT checked.

Note: PixelPoint's Authorization Manager program is required if applying either member Gift Certificates or Credit Limits.

[Picture]

You can apply a JPG image of the member to their record. You can also print this image on a member card. Selecting [Picture] displays the screen below.

The screenshot shows a user interface for adding a picture to a member's record. At the top left, the name "Mr. Scott Dunlop" is displayed. Below the name is a placeholder for a photo, which currently shows a man in a blue shirt standing outdoors. To the right of the photo are three buttons: "Select Source", "Acquire Image", and "Print VIP Card". Below the photo is a "Load Image" button. To the right of the "Load Image" button is a "Save Changes" button. At the bottom right is a "Close Form" button with a red 'X' icon.

- **[Load Image]** - Loads a pre-saved JPG image on the hard drive instead of acquiring one from a connected input source.
- **[Select Source]** - Selects the input source (such as a scanner, digital camera, etc.) of the image, if multiple sources are available.
- **[Acquire Image]** - Pulls the image from the source.
- **[Print VIP Card]** - Uses the picture and pertinent information from the rest of the employee record to print a card for the employee (if a card printer is attached to the system).
- **[Save Changes]** - Saves the image and other changes you made and returns you to the Employee Setup screen.

Delivery Zone

You can assign members to delivery zones to reduce the randomness of delivery destinations. For example, if several orders are ready to be delivered, you could have one driver deliver orders to the East and another driver deliver orders to the West. See "Delivery Zone Setup" for more information.

Dates

- **Member Since:** When the member record was created.
- **Expiry Date:** When the record is no longer active.
- **Anniversary Date:** Special member date.
- **Birth Date:** Member's birthday.

Ship To Tab

Members/VIP / Member Setup / Ship To

This tab enables you to program addresses used exclusively for shipping orders and products to the member. You can program in multiple addresses, giving each a description (like "Office" or "Building 2"). Users will be able to select these addresses when taking orders at the front-end. This tab is visible when the "ShowMemberShipTo" policy in the "POS" folder of policies in Policy Setup is enabled (See "Policy Setup").

Scott Dunlop Is Active? ✕

Search | Member Info | **Ship To** | Notes | Stats | Internet Settings | History | Advanced

ABC Client New Remove Cancel

Contact

First Name: Home Phone:
 Last Name: Business Phone:
 Company Name:
 Email:

Address

Address: City: ...
 Suite: Prov/State: ...
 Unit No.: Buzzer Code: Postal:
 Delivery Zone: Country: ...
 Directions:

More

Member Setup Form

⏪ ⏴ ⏵ ⏩ ↶ + 🔍 ✕ Close Form

If there are shipping addresses programmed in to the system already, they will be listed as buttons on the left side of the window.

You can enter a new shipping address on this tab by filling in the contact information fields on it. Select [Save] when you are finished. Select [New] to add an additional address.

[Remove] deletes this particular shipping address.

Notes Tab

Members/VIP / Member Setup / Notes

This tab contains two text fields you can use to enter information about the member.

The screenshot shows a web application window titled "Member Setup Form" for a member named "Scott Dunlop". The window has a navigation bar with tabs: Search, Member Info, Ship To, Notes (selected), Stats, Internet Settings, History, and Advanced. In the top right corner, there is a checkbox labeled "Is Active?" which is checked, and a close button (X). The main content area contains two text input fields. The first is labeled "Comment" and contains the text: "Mr. Dunlop is a regular customer. He is friendly and tips well. Just make sure you do not sit him near the kitchen as he prefers to be seated by the window to see the people coming and going. His wife's name is Nancy and his dog's name is Clyde. Ask him about his career in professional dance. He loves to brag about it." The second field is labeled "Directions" and contains the text: "North on Hwy 400 to Langstaff Rd. Drive East to first lighted interesection. Turn left and head South. Big yellow house on the left." At the bottom of the window, there is a blue bar with a cartoon character icon, a yellow star, and a set of navigation buttons (back, forward, search, etc.), and a "Close Form" button.

Comment

You can use this window to enter extra information about the member that is only viewable on the member's record. It does not print anywhere. You could, for example, enter information such as where the customer likes to seat or any allergies they have.

Directions

This field contains driving instructions for getting to the member's address. This information will print on the delivery order so that the driver will know how to get there.

Stats Tab

Members/VIP / Member Setup / Stats

The information contained here is updated automatically when members place orders. This tab can be used to view statistics collected for each member.

Scott Dunlop Is Active? ✕

Search | Member Info | Ship To | Notes | **Stats** | Internet Settings | History | Advanced

# of Visits	<input type="text" value="4"/>
Last Visit Date	<input type="text" value="9/22/2011 5:12:39 PM"/>
# of Deliveries	<input type="text" value="1"/>
Last Delivery	<input type="text" value="9/22/2011 5:08:45 PM"/>
Current Points	<input type="text" value="1500"/>
Points Used	<input type="text"/>
TOTAL:	<input type="text" value="1500"/>

Member Setup Form

 ⏪ ⏩ ⏴ ⏵ ↶ + 🔍 ✕ Close Form

of Visits: The number of in-person (non-delivery) orders this member has placed.

Last Visit Date: The date of the latest transaction the member made in person.

of Deliveries: The number of delivery orders this member has placed.

Last Delivery: The date of the last delivery to this member.

Current Points: How many points the member currently has. Points are earned by purchasing products that are set to award points, or automatically when the system is configured to issue points based on the net amount spent.

Points Used: The total number of points the member has redeemed.

TOTAL: The total dollar amount the member has spent.

History Tab

Members/VIP / Member Setup / History

This tab shows details about all of the member's transactions and orders. It represents the member's history with the establishment.

Scott Dunlop ☑ Is Active? ✕

Search | Member Info | Ship To | Notes | Stats | Internet Settings | History | Advanced

Select Period

- Today
- Last 30 Days
- Last 60 Days
- Date Range

Show

- Sales
- Payments On Account

Transact	Dpendate	TimeStart	FinalTotal	PointsEarned	PointsRedeemed
2018	9/22/2011	9/22/2011 3:05:53 PM	18.84	0	0
2039	9/22/2011	9/22/2011 4:56:00 PM	83.79	0	0
2040	9/22/2011	9/22/2011 5:02:25 PM	12.57	0	0
2041	9/22/2011	9/22/2011 5:09:00 PM	0	0	0
2043	9/22/2011	9/22/2011 5:11:46 PM	149.68	1500	0
2044	9/22/2011	9/22/2011 5:12:06 PM	20.95	0	0
2045	9/22/2011	9/22/2011 5:12:49 PM	8.38	0	0

Payment Details

Transaction Details

Balance: \$0.00 | Current Points: 1500 | Period: 8/29/2011 - 9/28/2011 | Is Gift Certificate: No

Member Setup Form

Navigation: ⏪ ⏩ ⏴ ⏵ ↺ + 🖨️ ✕ Close Form

Select Period: By choosing one of the four options here, you can review transaction details for the current day, the last 30 days, last 60 days or a date range that you specify yourself.

Show: By default, the window on the right shows sales transactions. However, you can select 'Payments On Account' here in this section to switch the transactions displayed to those that were paid for On Account.

Transactions: A list of all of the member's transactions during the selected time period.

Payment Details: Information about how the selected transaction was paid for.

Transaction Details: Information about each product in the selected transaction, including the time it was ordered, its quantity and price.

Advanced Tab

General Setup / Coupon Groups / Advanced

Apply To Members Only

Selecting this box restricts the availability of the coupon group to checks that have a member applied to them. The coupon group will not appear on the list that displays when you select [Coupons] at the front-end, but will instead appear on the list of specials displayed when you select [Specials] (both buttons can be added to the Finish Screen).

Auto Calculate

If checked, the value of the applied coupon in the group or the value of the products it applies to will be recalculated if the check is modified. If unchecked, the coupon will only apply to what is on the check at the time; the % discount or other value will not change, even if the check's amount does.

For example, say you apply a coupon group to a check, and the coupon that gets applied is a 50% off coupon. You then order additional items. If this box is checked, the coupon will recalculate so that it applies to the whole check—the total value of the coupon will be greater, because it is now giving 50% off more items than it was before. If this box is unchecked, the coupon will only give 50% off those items that were already on the check.

Note: This field does not work if the coupons in the group are 'Manually Entered' type coupons.

Auto Apply

Automatically applies the coupon group to each transaction, as long as the criteria for the group

are met. If one or more of the criteria is not met, then the coupon group will not apply. If this option is enabled, users at the front-end do not need to select the coupon group from a list and apply it themselves — the system will do it automatically.

Client Points Coupon

Indicates that this is a points redemption coupon group. When a coupon in the group is used, points will be deducted from the member's points balance.

Points Required

The number of points this coupon group uses. This number of points is deducted from the member's points balance when a coupon in this group is applied.

Barcode

Enter the UPC that matches the barcode printed on the coupons in the group. Scanning the barcode will automatically retrieve the coupon group.

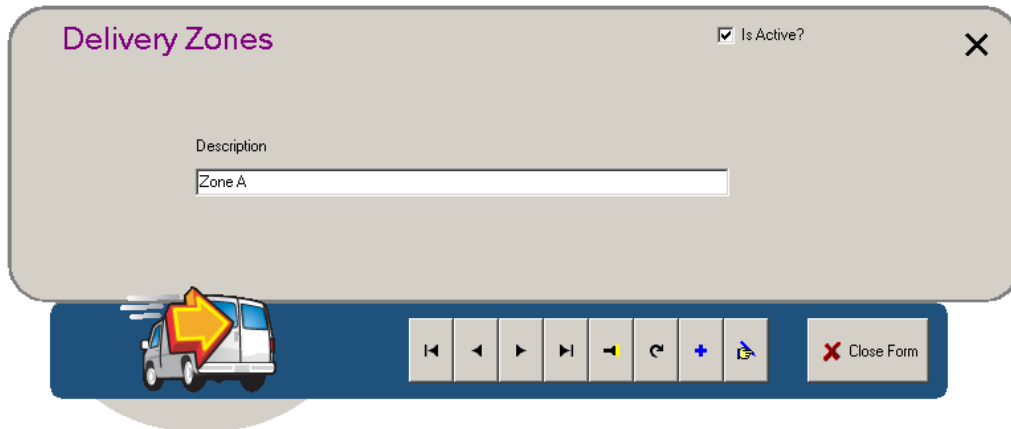
Schedule

Enables you to schedule times when the price value of the coupons in the group change. See 'Percent Off' on the Coupon Tab, regarding applying different values.

Delivery Zone Setup

Members/VIP / Delivery Zone Setup

This menu option enables you to create the establishment's different delivery zones. Creating these zones allows order takers to assign members to geographic regions, which will aid in the allocation of delivery orders.



The screenshot shows a web form titled "Delivery Zones" with a close button (X) in the top right corner. A checkbox labeled "Is Active?" is checked. Below the title is a text input field labeled "Description" containing the text "Zone A". At the bottom of the form is a dark blue navigation bar containing a white van icon with a yellow arrow, a set of navigation buttons (back, forward, search, etc.), and a "Close Form" button with a red X icon.

Delivery zones are text strings describing the zone in such a way that order takers and drivers can easily understand what area the name refers to.

When you have created the delivery zones, they can be applied to member records on the Member Info Tab in *Member Setup*. (See here.)

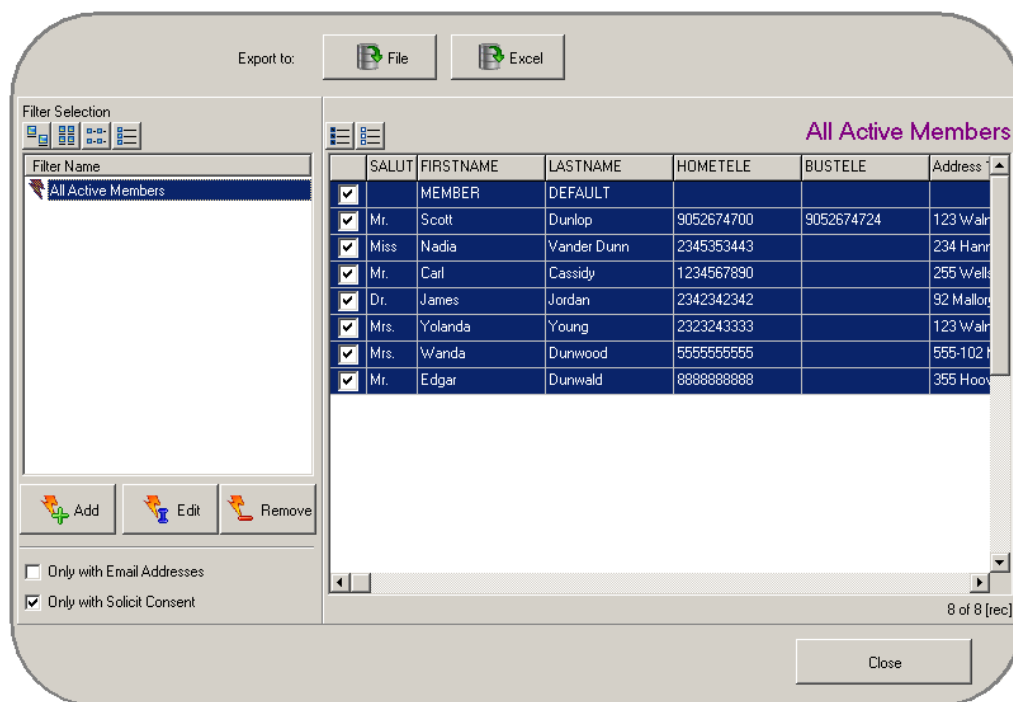
Member Browser

Members/VIP / Member Browser

This function enables you to export member information from the PixelPoint system, so you can use it elsewhere. This can be used for things such as mail-outs and importing data into third-party software.

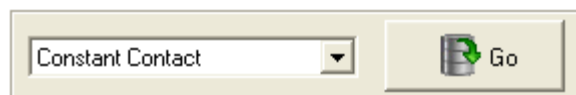
This function works by using filters to control what members and what information about them is exported. Select a filter from the list on the left and then select one of the export buttons at the top of the screen.

Filters are saved SQL statements which you can write yourself. Specifically, the filter is the 'where' clause for a statement that selects information from the member table in the PixelPoint database.



Export to:

Exports the currently selected data to the format indicated. [File] exports data to an XML or CSV file. You can select which format to save to and type in a name for the file. [Excel] opens Microsoft Excel (if installed) and loads the data into a spreadsheet for you. Your system may also have a [Go] button and a drop-down box to the right of these buttons that enable you to export data into third-party software.



Filter Selection

The buttons below this label change how the filters are listed. They represent the basic Windows folder views (large icons, small icons, list, report).

Filter Name

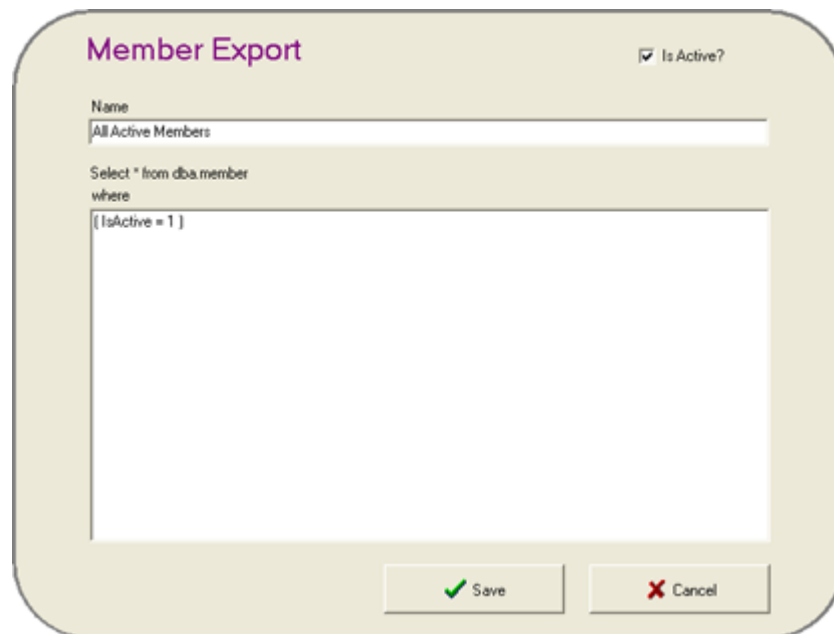
Lists the filters currently saved in the system. Select a filter name here to load data into the window on the right.

[Add]

Opens a blank filter screen, enabling you to program a new filter.

[Edit]

Opens the currently selected filter, enabling you to change it.



The screenshot shows a dialog box titled "Member Export" with a light beige background and rounded corners. In the top right corner, there is a checked checkbox labeled "Is Active?". Below the title, there is a text input field containing "All Active Members". Underneath, the SQL query is displayed: "Select * from dba.member where [IsActive = 1]". At the bottom of the dialog, there are two buttons: "Save" with a green checkmark icon and "Cancel" with a red X icon.

Only with Email Addresses

Displays only those members who have e-mail addresses entered in the system.

Only with Solicit Consent

Displays only those members who have not indicated they do not want to be contacted. Members who do not want to be solicited are not included if this is enabled.

General Setup

This menu enables you to configure various components of the POS system. Options on this menu enable you to, among other things, modify and set up the establishment's receipt, coupons and mealtimes. Another important function of this menu is that it enables you to access the system's reporting functions. Each menu option is explained in its own section of the chapter; they are listed below.

- Coupon Setup
- Receipt Setup
- Mealtime Setup
- Pay In Out Reasons
- Billboard Message Setup
- Banner Message
- Weather Conditions
- System Log
- Backup Now!
- Alert Manager

Coupon Setup

General Setup / Coupon Setup

This menu option sets up coupons, discounts and member incentive rewards. There is no limit to how many of each of these you can program and provide.

Coupon Setup has two main tabs:

- Coupon Tab
- Advanced Tab

Tip: A Search tab can be configured to appear in Coupon Setup via the *UseSearchTab* policy in Policy Setup.

The "ShowCouponList" Policy

You can also further configure coupons in PixelPoint POS through the "ShowCouponList" policy in Policy Setup. "ShowCouponList" is included in the "POS" group of policies.

This policy determines the list of coupons available for users to select at the front-end. By default, the system displays all coupons (the policy has a default value of "0"). Changing this policy to another value ("1" or "2") hides all those coupons that do not apply at the time.

In particular, setting this policy to "1" shows all currently-applicable coupons with amount discounts greater than "0.00". Setting this policy to "2" shows all those coupons displayed when the policy is set to "1", but also shows all auto-calculating coupons as well.

Groups

You can use the Coupon Groups option on the General Setup pull-down menu to create groups of similar coupons, in which only one coupon will apply at a certain time.

For example, you can set up volume discounting for a product, where you have one coupon for if a customer purchases 4 of an item, another coupon if they purchase 5, another if they purchase 6, and so on.

Typically, you would offer a greater discount if more products are purchased, and this discount is programmed using separate coupons for each different level. You can add these coupons to a coupon group, and, since only one of these coupons applies at a time, the POS can determine which one to apply, so users do not have to do so every time a customer orders those products.

Coupon Tab

General Setup / Coupon Setup / Coupon

10% Off Is Active? ✕

Coupon | Advanced

Description: 10% Off

Security Level: Managers

Revenue Center: All Revenue Centers

Max Coupon Amount:

Category: September Promo ...

Type of Coupon

Percent Off

Amount Off

Fixed Price

Manual by Amount

Manual by Percentage

Minimum

Quantity

Price

Coupon

Applies to certain categories

Applies to all categories

Applies to a product Bacon Cheese Burger Combo

Applies to selected product

Applies to certain products

X for Y Coupon X Value Y Value

Apply to lowest priced items first

One per check maximum Auto Calculate

Allow other category coupons Auto Apply

Allow other product coupons Auto Remove

Apply only once if multiple products found Apply to members only

Coupon

Auto Order Item

Client Points Coupon

Coupon Setup

⏪ ⏩ ⏴ ⏵ ↺ ↻ + 🔍 ✕ Close Form

Description

The coupon's description or label. This shows up on the Finish screen under either [Coupons] or [Special] (which applies to member incentives).

Security Level

You can restrict usage of the coupon by selecting the minimum job position needed to apply it. For example, you may want a server to be able to apply a 10% discount but not a 100% discount.

Revenue Center

Restricts application of this coupon to a specific revenue center.

Max Coupon Amount

Places a dollar value cap on the coupon. For example, the coupon may give you 50% off your order, but only up to a maximum savings value of \$20.

Category

Applies a coupon category to the coupon/coupon group. Choose from existing coupon categories, or create/edit a category using the [...] button to the right of the menu.

Type of Coupon

There are four general types of coupons:

- **Percent Off:** Deducts a percentage, such as 10% off.
- **Amount Off:** Deducts a dollar value, such as \$10.00 off.
- **Fixed Price:** Reduces the price of all applicable items to a set dollar value. For example, any large pizza could be \$10.00, regardless of its regular price.

- **Manual by Amount:** Deducts a dollar value that is determined at the time the coupon is used.
- **Manual by Percentage:** Deducts a percentage off, determined at the time the coupon is used.

Percent Off / % Discount B / % Discount C

You can set three separate values for the coupon, each of which may be used at particular times you specify on the Advanced Tab. For example, a coupon may be good for 20% off on any day except Tuesdays, when prices are ordinarily reduced. On Tuesdays, the coupon may be 10% off, because of the already-reduced prices. The label for this area of the Coupon Setup screen is replaced with 'Amount Off' for Amount Off coupons and 'Fixed Price' for Fixed Price Item specials.

Minimum

- **Quantity:** Enables you to set a minimum quantity of products that must be ordered before the coupon can be used.
- **Price:** Enables you to set a minimum price the item or items must cost before the coupon can be used. For example, if this field is set to \$10, it will not work if you try to apply it to a check for \$9 or less.

Calculation Method

When 'Quantity' is enabled, a 'Calculation Method' drop-down box appears. This enables you to determine how the 'Quantity' value is used by the system.

- **Minimum - Default:** The 'Quantity' value determines the minimum quantity of the item(s) that a customer needs to have ordered in order for the coupon to apply. The coupon will still apply if more of the item(s) is ordered, but up until this particular quantity is ordered, the coupon will not apply. For example, if the value specified here is "3", then the coupon will apply if the customer ordered 3 or more of the item(s), but not if they only ordered 1 or 2. This is the default way in which the system uses the 'Quantity' value.
- **Increment:** The 'Quantity' value determines the number of items in a set, with the coupon applying for each set of the item(s) the customer has ordered. For example, if the value specified here is "3", then the coupon will apply for every set of 3 the customer orders (that is, it applies when they have ordered 3, 6, 9, etc., not if they have ordered 1, 2, 4, 5, 7 or 8).
- **Volume:** The 'Quantity' value determines the exact quantity of the item(s) the customer needs to have ordered in order for the coupon to apply. For example, if the value specified here is "3", then the coupon will only apply if the customer ordered 3 of the item(s), not any other amount.

Coupon

- **Applies To Certain Categories:** Applies the coupon to specific report categories. For example, a coupon may give 10% off any Soup or Salad. Select [Set Report Categories] to specify what report categories the coupon should apply to.
- **Applies To All Categories:** Applies the coupon to the entire check.
- **Applies To a Product:** Applies the coupon to a specific product. For example, a coupon may give 10% off Tomato Soup, but no other product. Select [Product] to choose the product you want the coupon to apply to.
- **Applies To Selected Product:** Applies the coupon to one item on the check at the time when the coupon is selected. At the front-end, you select the product on the check and then apply the coupon. For example, for a 10% discount coupon, you could select the Tomato Soup that was ordered and then apply the coupon to give the customer 10% off the Tomato Soup.
- **Applies to Certain Products:** Applies the coupon to a group of products you specify by selecting [Select Products]. This group can contain any product and may be any size. The coupon will apply to any and all of the products in the group that have been ordered and added to the check.

...But Requires

Determines which other products (besides the product(s) the coupon gives a discount for) must be ordered on the check in order for the coupon to apply. By default, 'No Other Items' is selected, meaning that it does not matter what else is on the check — the coupon will apply if the other criteria are met. The other options for this drop-down box enable it to be used to program coupons along lines such as "Get \$X off Y when you purchase Z." These non-default options enable you to determine what Z can be.

- **No Other Items:** The coupon does not require any other particular item(s) to be on the check. This is the default option.
- **Other Categories:** The coupon requires an item in any of the specified report categories to be on the check in order to apply. The item can be any item as long as its report category has been specified using the [Select other categories] button that appears when this option is selected.
- **Other Products:** The coupon requires a specific item to be on the check in order to apply. The item can be any one of the items that have been specified using the [Select other products] button that appears when this option is selected.

X for Y Coupon

If this option is selected and an 'X Value' and 'Y Value' is configured, the most expensive item on the bill (or the least expensive, depending on the chosen settings) with a quantity of X will be charged Y times instead of X times. If X were set to 2 and Y were set to 1, the customer would receive two of the same item for the price of one. In the event that a matching item is not present, it looks for the closest-priced item on the check and applies the discount to that. For example, say the coupon is for 2 large pizzas for the price of 1, and the order contains one large, one medium and one small pizza. In this case, the discount will apply to the medium pizza, since there is no other large pizza, and since the medium pizza is closer in price to the large pizza than the small pizza.

Apply To Members Only

Selecting this box restricts the availability of the coupon to checks that have a member applied to them. The coupon will not appear on the list that displays when you select [Coupons], but will appear on the list of specials displayed when you select [Specials] instead (both buttons can be applied to the Finish Screen).

One Per Check Maximum

Limits the use of this coupon to one per check. If unchecked, you can apply more than one of these coupons to the same check.

Allow Other Category Coupons

Enables the use of other coupons on the same check, provided they do not apply to the same report category as this coupon does.

Allow Other Product Coupons

Enables the use of other product coupons on the same check, provided they do not apply to the same product as this coupon does.

Apply Only Once If Multiple Products Found

Restricts the use of the coupon to only one applicable item in the event there are several applicable items on the check. For example, say the coupon is for a free slice of pie, but the customer ordered four slices. Selecting this box would apply the coupon to only one slice, not all four.

Auto Calculate

If checked, the value of the coupon or the products it applies to will be recalculated if the check is modified. If unchecked, the coupon will only apply to what is on the check at the time; the % discount or other value will not change, even if the check's amount does.

For example, say you apply a 50% off coupon to a check and then order additional items. If this box is checked, the coupon will recalculate so that it applies to the whole check—the total value of the coupon will be greater, because it is now giving 50% off more items than it was before. If this box is unchecked, the coupon will only give 50% off those items that were already on the check.

Note: This field does not work with 'Manually Entered' type coupons.

Auto Apply

Automatically applies the coupon to each transaction, as long as the criteria for the coupon are met. If one or more of the criteria is not met, then the coupon will not apply. If this option is enabled, users at the front-end do not need to select the coupon from a list and apply it themselves — the system will do it automatically.

Auto Order Item

Causes an item to be automatically ordered when the coupon is used. For example, the coupon may be for a promotional item, such as a toy, that customers get when they order a specific product. Select the product that will be automatically ordered by pressing the [Product] button that appears. You can specify how many of the promotional items are ordered by changing the value in the 'Quan' field next to [Product].

Client Points Coupon

Indicates that this is a points redemption coupon. Specify the number of points needed for a customer to be eligible to use this coupon in the 'Points Required' field that appears to the right. When a member uses the coupon, this points value will be deducted from the member's points balance.

Advanced Tab

General Setup / Coupon Setup / Advanced

The screenshot shows a software window titled "10% Off Item" with a close button (X) in the top right corner. The window has two tabs: "Coupon" and "Advanced", with "Advanced" selected. The "Advanced" tab contains the following fields and controls:

- Active Date Range:** Two dropdown menus. The first is set to "7/11/2011" and the second to "1/ 1/6000".
- Schedule:** A button with a clock icon and the text "Schedule".
- Deduct Taxes:** A group box containing two checkboxes: "Tax 1" and "Tax 2", both of which are unchecked.
- Accounting Code:** A text input field.
- Bar Code:** A text input field.
- Requires Voucher:** A checked checkbox.
- Part of a coupon group:** A section with a dropdown menu currently showing "Summer Coupons" and up/down arrow buttons.
- Custom DLL:** A text input field followed by a "Browse" button.

At the bottom of the window, there is a blue bar with a coupon icon on the left, a set of navigation buttons (back, forward, home, etc.), and a "Close Form" button on the right. The text "Part of a coupon group" is displayed in the bottom left, and "Coupon Setup" is displayed in the bottom right.

Active Date Range

Sets a start date and an end date for the coupon. These dates default to a start date of the current date (that is, the coupon is effective immediately) and a very distant expiry date (that is, the coupon is effective indefinitely). These dates can be changed to enable you to program future promotions with specific cutoff dates.

Accounting Code

This field is for reporting purposes only. You can use it to set a reference code, such as a general ledger account code.

Schedule

Enables you to schedule times when the price value of the coupon changes. See 'Percent Off' on the Coupon Tab (Click here), regarding applying different values.

Barcode

Enter the UPC that matches the barcode printed on the coupon. Scanning the barcode will automatically retrieve the coupon.

Deduct Taxes

Enables you to specify whether to include or exclude certain taxes in the discount. For example, a 100% off coupon could apply to the total before or after taxes.

Requires Voucher

Sets whether a voucher must be presented by the customer and kept in the cash drawer for reporting purposes.

Part of a coupon group

Lists the coupon groups this coupon is included in.

Custom DLL

Enables you to specify a DLL for this coupon. If a coupon requires extra programming, a custom DLL may be developed for it and placed in the \PixelPOS\DLLS folder.

Coupon Groups

General Setup / Coupon Groups

This menu option sets up groups of coupons, the members of which are coupons that are typically all programmed along the same lines, excepting one or two features or criteria (like the minimum quantity of items required or the dollar amount off, for example).

A coupon group appears in the front-end list of coupons as a single item, enabling users to select it once, like a single coupon, and leave the work of determining which coupon best fits the situation to the POS. You can also set coupon groups to automatically apply, making the POS determine the appropriate discount amount according to what you have programmed.

When a coupon group is applied, the POS scans through the coupons in the group and determines which single coupon best matches the circumstances with the items on the check. It does this by starting at the bottom of the list and applying the first coupon it finds that has all of its criteria met; this process is performed each time the check changes, too, making sure that the best coupon always applies.

For example, if you have programmed volume discounting for a particular product, you can use a coupon group to have the highest-volume coupon automatically apply without users needing to find a particular coupon for the specific number of items a customer has purchased and then having to apply a different coupon if the number of items changes. The POS will automatically change the applied coupon to be the one for the new quantity.

Coupon Groups has two main tabs, each of which is explained in its own section:

- Coupon Tab
- Advanced Tab

Note: Coupons themselves are programmed in [Coupon Setup](#).

The "ShowCouponList" Policy

You can also further configure coupon groups in PixelPoint POS through the "ShowCouponList" policy in Policy Setup. "ShowCouponList" is included in the "POS" group of policies.

This policy determines the list of coupons and coupon groups available for users to select at the front-end. For more information about this policy, see "Coupon Setup".

Coupon Tab

General Setup / Coupon Groups / Coupon

The Coupon tab enables you to set the name of the coupon group and determine which coupons are included in the group.

To add a new coupon group or find a particular one that already exists one, use the buttons on the navigation bar as you would in other parts of BackOffice (See "Navigation Bar").

Description

The coupon group's description or label. This is what displays as the label in the list of coupon (groups) that appears when users press either [Coupons] or [Special] (which applies to member incentives) on the Finish screen at the front-end.

In this list individual coupons and coupon groups are indistinguishable, but coupons which are included in a coupon group will not appear in the list as individual items.

Security Level

You can restrict usage of the coupon group by selecting the minimum job position needed to use it. For example, you may want a server to be able to apply certain coupon groups, but not others. In this case, you would set the 'Security Level' of the coupon groups you do not want servers to be able to use to a job position with greater security authorization than what servers have.

Revenue Center

Restricts application of this coupon group to a specific revenue center.

Coupon Group Detail

Lists the coupons that are currently a part of the group. Use the [Move Up] and [Move Down]

buttons to change the order of the coupons.

Program the coupons in increasing order, so that the higher-value coupons are nearer the bottom. In the example, the coupon for customers purchasing fewer items are at the top of the list, and those for more items are at the bottom.

Add Coupon

Adds a coupon to the group. Select the coupon you want to add from the list that appears.

Remove

Removes the selected coupon from the group.

Change

Substitutes the coupon for another one. Select the coupon you want to change the selected coupon to from the list that appears.

The group can be scheduled, have a common security level and have a set start/end date.

Advanced Tab

General Setup / Coupon Groups / Advanced

Apply To Members Only

Selecting this box restricts the availability of the coupon group to checks that have a member applied to them. The coupon group will not appear on the list that displays when you select [Coupons] at the front-end, but will instead appear on the list of specials displayed when you select [Specials] (both buttons can be added to the Finish Screen).

Auto Calculate

If checked, the value of the applied coupon in the group or the value of the products it applies to will be recalculated if the check is modified. If unchecked, the coupon will only apply to what is on the check at the time; the % discount or other value will not change, even if the check's amount does.

For example, say you apply a coupon group to a check, and the coupon that gets applied is a 50% off coupon. You then order additional items. If this box is checked, the coupon will recalculate so that it applies to the whole check—the total value of the coupon will be greater, because it is now giving 50% off more items than it was before. If this box is unchecked, the coupon will only give 50% off those items that were already on the check.

Note: This field does not work if the coupons in the group are 'Manually Entered' type coupons.

Auto Apply

Automatically applies the coupon group to each transaction, as long as the criteria for the group

are met. If one or more of the criteria is not met, then the coupon group will not apply. If this option is enabled, users at the front-end do not need to select the coupon group from a list and apply it themselves — the system will do it automatically.

Client Points Coupon

Indicates that this is a points redemption coupon group. When a coupon in the group is used, points will be deducted from the member's points balance.

Points Required

The number of points this coupon group uses. This number of points is deducted from the member's points balance when a coupon in this group is applied.

Barcode

Enter the UPC that matches the barcode printed on the coupons in the group. Scanning the barcode will automatically retrieve the coupon group.

Schedule

Enables you to schedule times when the price value of the coupons in the group change. See 'Percent Off' on the Coupon Tab, regarding applying different values.

Receipt Setup

General Setup / Receipt Setup

Receipt Setup is where the header and footer of the establishment's receipts are set up.

The legend identifies the different codes you can use on each line. Note that the code for Print Logo (^G) requires that (1) the receipt printers are capable of retaining a graphic image and (2) the print string of the graphic image has been applied within Printer Code Setup.

Receipt Header: Contains the graphic indicators and text that appear at the top of the receipt.

Receipt Footer: Contains the graphic indicators and text that appear at the bottom of the receipt.

Note: This receipt setup is for the master receipt for the entire POS. You can override this receipt and set up a different receipt header/footer for specific stations in the Administrator / Station Setup / Receipt Setup Tab.

Tip: Receipts can be reprinted a certain number of times through the use of the *ReprintXReceipt* policy. Use the *ReprintWhatReceipt* policy to establish the type of receipt that the *ReprintXReceipt* policy governs (closed transactions, unclosed transactions, or both).

Another option for receipts is the ability to print receipt type labels on receipts. Use the *ReceiptTypeOnReceipt* policy to print the following receipt types on receipts:

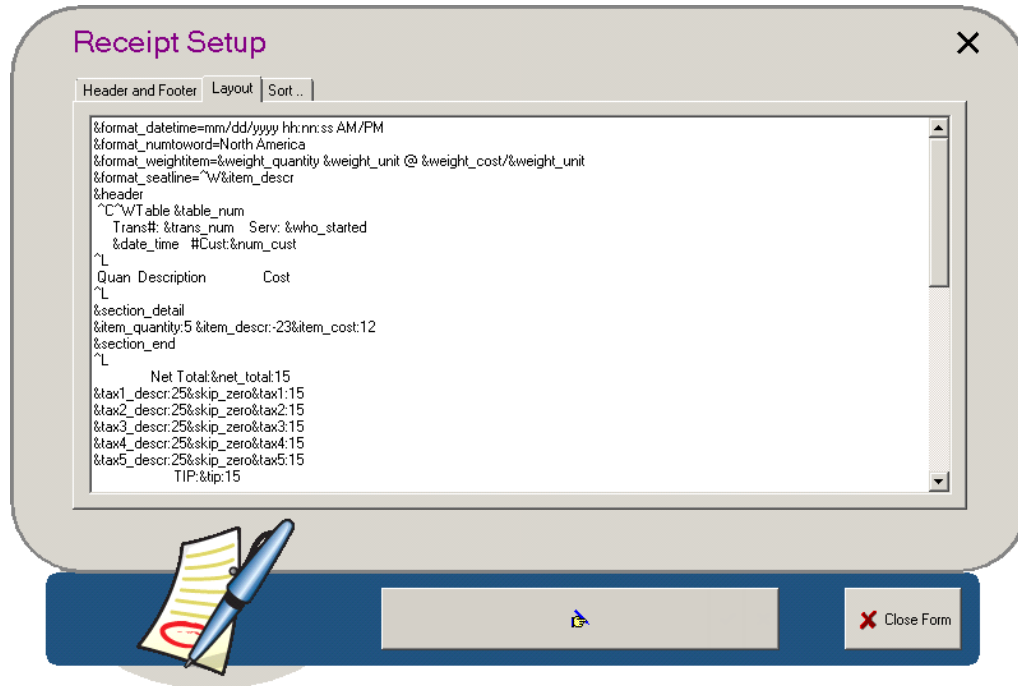
- <-TRAINING-> (Language ID: 204301)
This receipt, belonging to a training employee, prints after a payment has been finalized.
- <-REFUND-> (Language ID: 204302)
This receipt prints after a negative value payment has been applied.
- <-NO RECEIPT-> (Language ID: 204303)
This is a presentation receipt given to the customer before finalizing the order with a payment method.
- <-COPY-> (Language ID: 204304)

This is a copy of a normal receipt. If the *AllowPrintReceiptAfterPayment* policy is disabled, this label does not apply.

Receipt Setup Layout Tab

General Setup / Receipt Setup / Layout

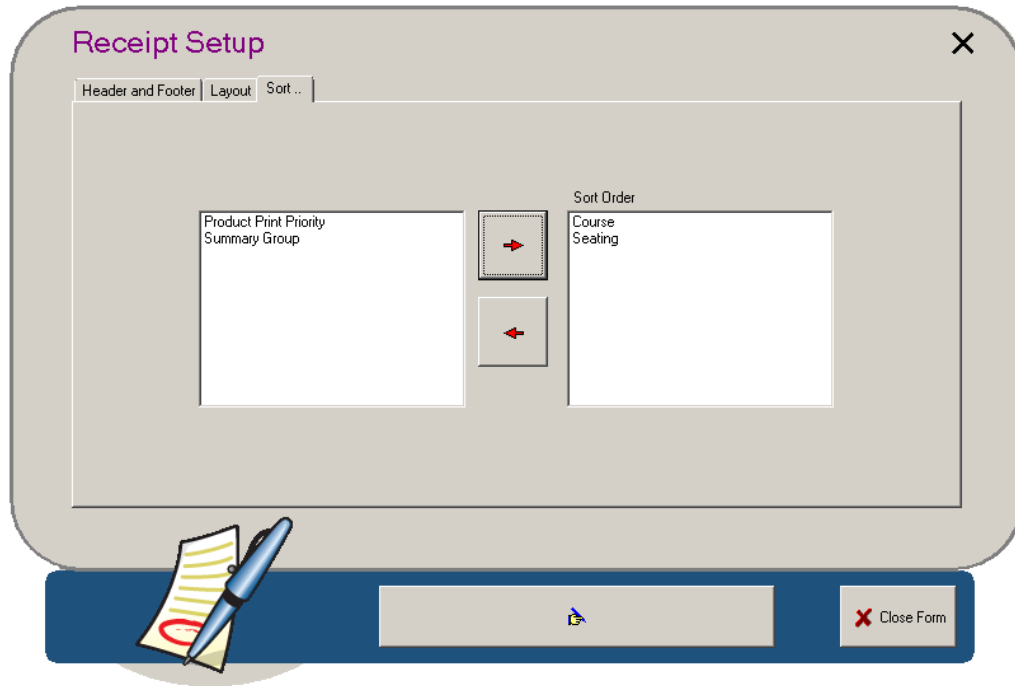
This tab enables you to create a layout for the global guest receipt.



Sort

General Setup / Receipt Setup / Sort

This tab enables you to sort the guest receipt by Course, Printing Priority, Summary Group Report Type or Seating Position. It is similar to the Network Printer Sort Order Tab—for more information, see that topic.



Mealtime Setup

General Setup / Mealtime Setup

Mealtime Setup enables you to group hours of the day together into periods and therefore enables you to compare and gauge activities among each period. Each of these periods is a meal time. For example, you could define the Breakfast Mealtime as being 6:00am-11:00am. This will enable you to generate a mealtime report, providing you with information about sales revenue generated during the breakfast period.

Mealtime Schedule
✕

Day of week: Name of day:

	0-15	15-30	30-45	45-60
0:00	1	1	1	1
1:00	1	1	1	1
2:00	1	1	1	1
3:00	1	1	1	1
4:00	1	1	1	1
5:00	1	1	1	1
6:00	2	2	2	2
7:00	2	2	2	2
8:00	2	2	2	2
9:00	2	2	2	2
10:00	2	2	2	2
11:00	3	3	3	3
12:00	3	3	3	3
13:00	3	3	3	3
14:00	3	3	3	3
15:00	3	3	3	3
16:00	3	3	3	3
17:00	4	4	4	4
18:00	1	1	1	1

⏪
⏴
⏵
⏩
↶
↷
↺
↻

✕ Close Form

Day of Week

Each day of the week is assigned a number within the database.

Name of Day

You define what day will be Day 1, Day 2, and so on, by entering the name of the day here. This is reflected in your reports.

Cell Titles

Each row (1:00, 2:00, 3:00...) represents an hour of the day. Each column (0-15, 15-30...) represents a 15 minute interval. For example, the cell in row 13:00 and column 30-45 represents 1:30pm-1:45pm.

Cell Contents

All cells are defaulted to Mealtime 1. This means that, by default, mealtime reports group all sales for the day into one period. Changing a cell to a 2, 3, 4, etc., distinguishes the sales activities during that time period from period 1. You can set up to 9 mealtimes per day and they can vary from day to day.

Pay In Out Reasons

General Setup / Pay In/Out Reasons

A pay-in is money put into a till outside of a conventional transaction. For example, someone may pay money into the till for a deposit or debt owed. A pay-out is money that is taken out of a till for something other than making change for customers. For example, the server may take money out of the till to pay for supplies or services.

Pay in/out reasons are used to categorize all pay-ins and pay-outs. When performing a pay-in or a pay-out, PixelPoint prompts you to select one of these reasons.

Pay In/Out Reasons Is Active? ✕

Description

Reference #

Pay IN

Pay OUT

Open Cash Drawer

← → ⏪ ⏩ 🔍 + 🗑️ ✕ Close Form

Description

The description of the reason.

Reference

This field is for reporting purposes only. You can place a reference code, such as a general ledger account code, in this field.

Pay In / Pay Out

Checking either box causes this particular reason to appear in the front-end list of reasons for that pay type.

Open Cash Drawer

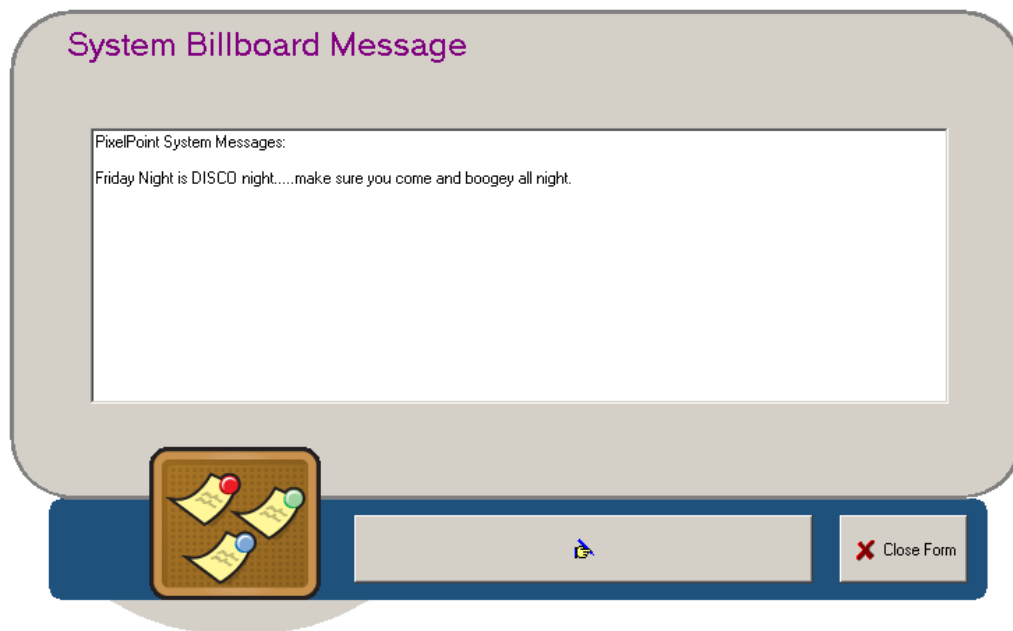
Checking this box causes the cash drawer to open when the reason is selected. If this box is unchecked, the cash drawer will not open when the reason is selected.

Billboard Message Setup

General Setup / Billboard Message Setup

When you select [Billboard] on the Table Layout screen, it displays three windows, identifying the current Specials, Desserts and Sold Out items. But above these three windows is a billboard message window that can contain a message intended for all staff.

This setup screen, *Billboard Message Setup*, is where you program that message window.



You can use your mouse and keyboard to edit the text within this window. The new version will be applied to stations immediately.

The only exception is that, if a user is currently logged in when this message is saved, it will not appear until the user has logged out and then back in again.

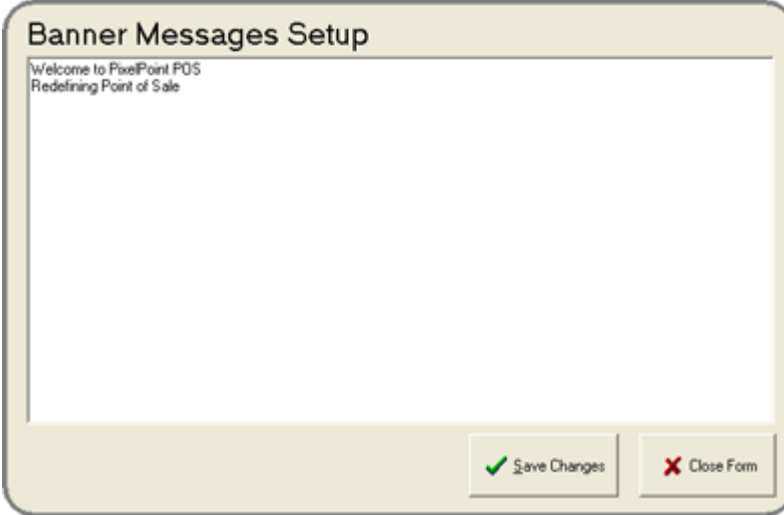
Banner Message

General Setup / Banner Message

A pole display unit displays transaction information on a small LCD or CRT window, enabling the customer to view the total and change due.

When the station is not in the middle of an order, the pole display will instead show a Banner Message.

You can customize this banner message by editing the text on this window. For example, you might want to change it to help advertise your latest promotion or special.



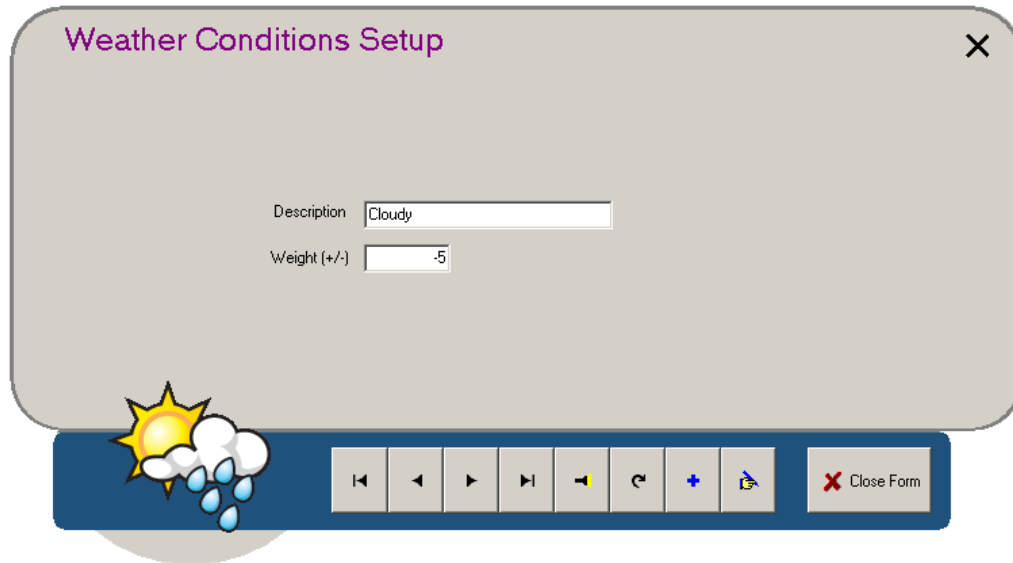
The image shows a software window titled "Banner Messages Setup". The window has a light beige background and a thin border. At the top left, the text "Welcome to PixelPoint POS" and "Redefining Point of Sale" is displayed. The main area of the window is a large white rectangle, which is currently empty. At the bottom right of the window, there are two buttons: "Save Changes" with a green checkmark icon and "Close Form" with a red X icon.

To change the banner message, simply click on the white space on this screen and then type in and/or delete the text characters. Since the banner message is presented as a scrolling marquis, the first line will display followed by a blank space then the next line of text.

Weather Conditions

General Setup / Weather Conditions

Weather conditions can be applied to the End of Day report to help explain revenue totals for outdoor dining sections, such as a patio. This screen is where you define the different types of weather conditions the establishment may possibly experience and adjust their weight value.



The screenshot shows a window titled "Weather Conditions Setup" with a close button (X) in the top right corner. Inside the window, there are two input fields: "Description" with the text "Cloudy" and "Weight (+/-)" with the value "-5". Below the form is a blue toolbar containing a weather icon (sun, clouds, rain) and several navigation buttons (back, forward, home, refresh, add, delete) and a "Close Form" button.

Description

The description of the weather condition; this displays in the Set Weather window at the front-end.

Weight (+/-)

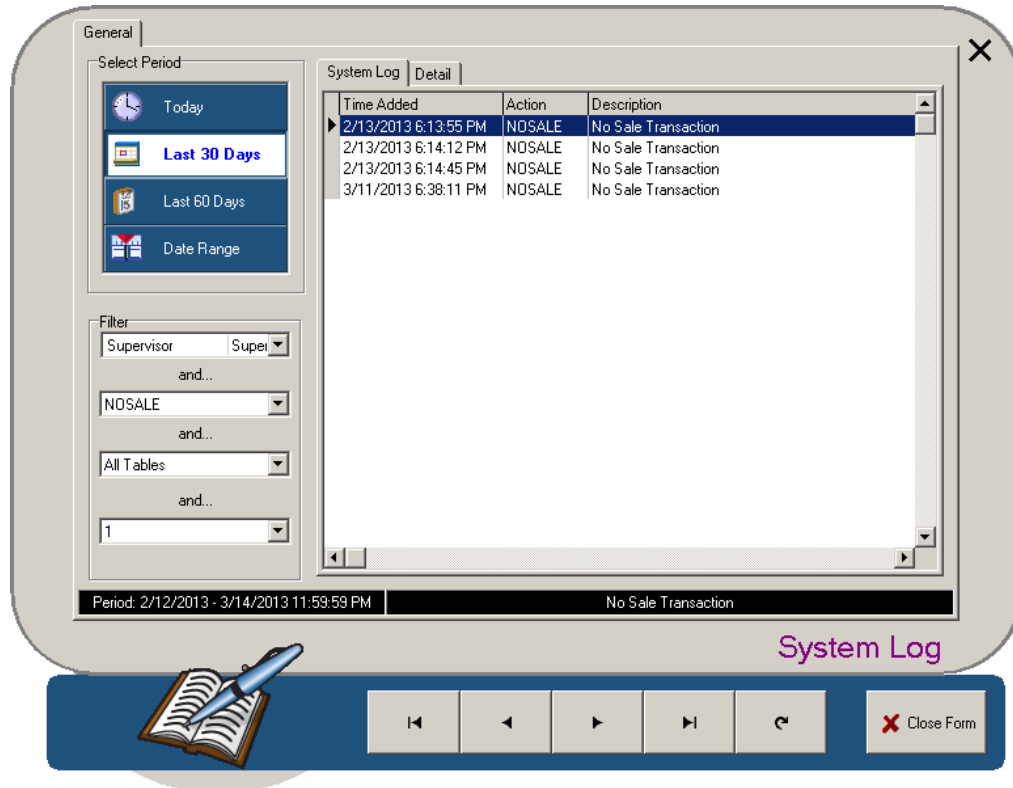
A numeric value that explains the severity of the type of weather, and thus the amount it would affect the establishment's sales.

A negative value should be applied to poor weather and a positive value applied to good weather (since, for outdoor patios, at least, poor weather decreases sales and good weather increases sales).

System Log

General Setup / System Log

This screen enables you to audit all BackOffice activity. It logs all program changes and provides specific details about those changes.



You can control what activity is displayed on the right side of the screen by using the controls on the left.

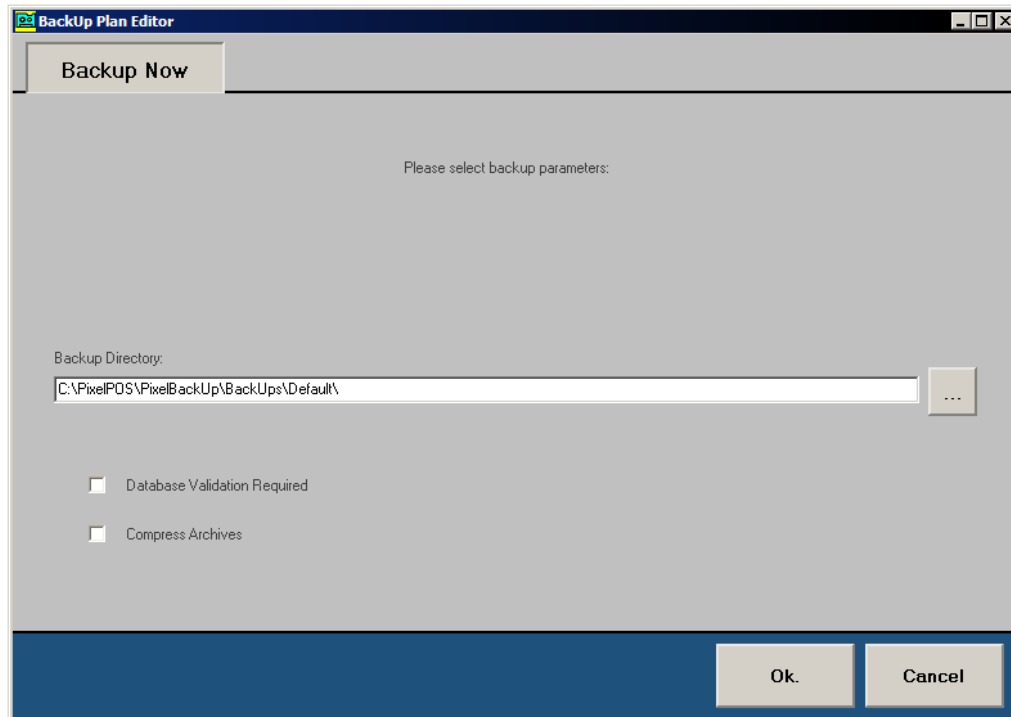
You can filter the data by employee, database table, specific actions, and station number by using one or more of the drop-down boxes on the bottom-left of the screen. You can also choose to review actions from the current day, the last 30 days, last 60 days, or a different specified date-range, by selecting the respective blue button on the upper-left. Only actions that have occurred at least once will appear in the Actions filter list.

Tip: With the *EnhancedSysLog* policy enabled and the *SecEventLog* policy set to Yes, the system log will be merged with security event logs.

Backup Now!

General Setup / Backup Now!

This menu option runs PixelPoint's Backup program, enabling you to perform backups of the database from right within BackOffice.



This version of the Backup program runs with the following options:

Backup Directory

The directory where you want the backup stored. Use the browse button [...] to the right of this field to select an alternate path, or type it in the field itself. The path can be a local folder or a valid network path. Note that selecting a network path will slow down POS speed. Make sure you only do this when the system is not busy.

Database Validation Required

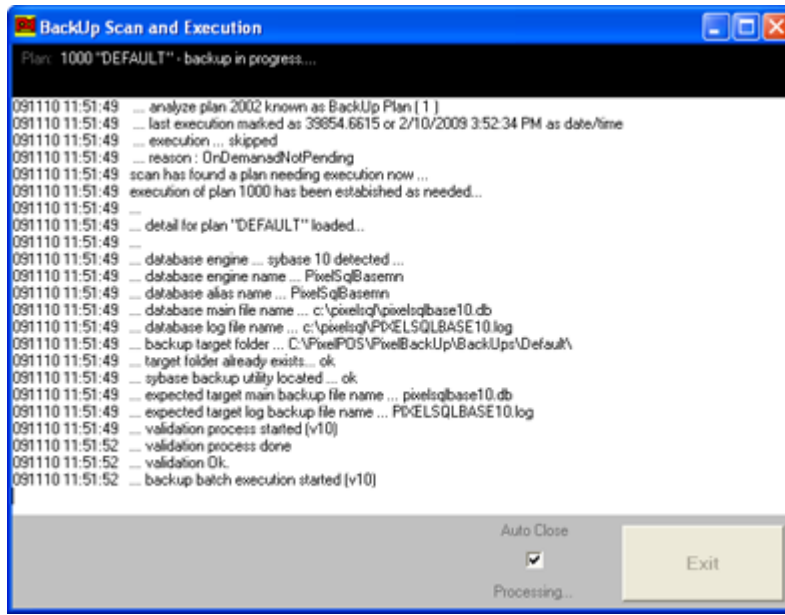
Validates the backup before saving it. The purpose of this is to check data integrity, making sure that the contents are undamaged and will be able to be used if you need to restore the database. Though it is an extra step in the backup process, you should enable this as a precaution against making an unusable backup. If validation fails, the process will stop and a backup will not be made.

Compress Archives

Compresses the data in the backup in the form of a ZIP file. While this saves space, it takes a little longer to do the backup.

[Ok.]

Starts the backup running. It displays a number of separate windows showing the backup's progress.

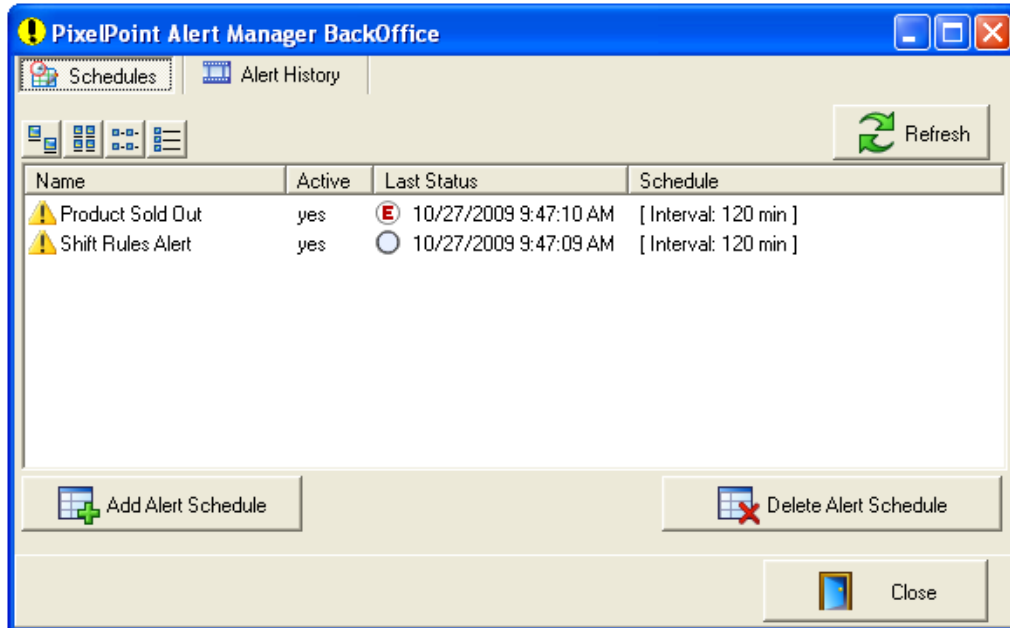


Other options are available if you run the Backup program from outside of BackOffice. See the PixelPoint POS Installation Guide for more information.

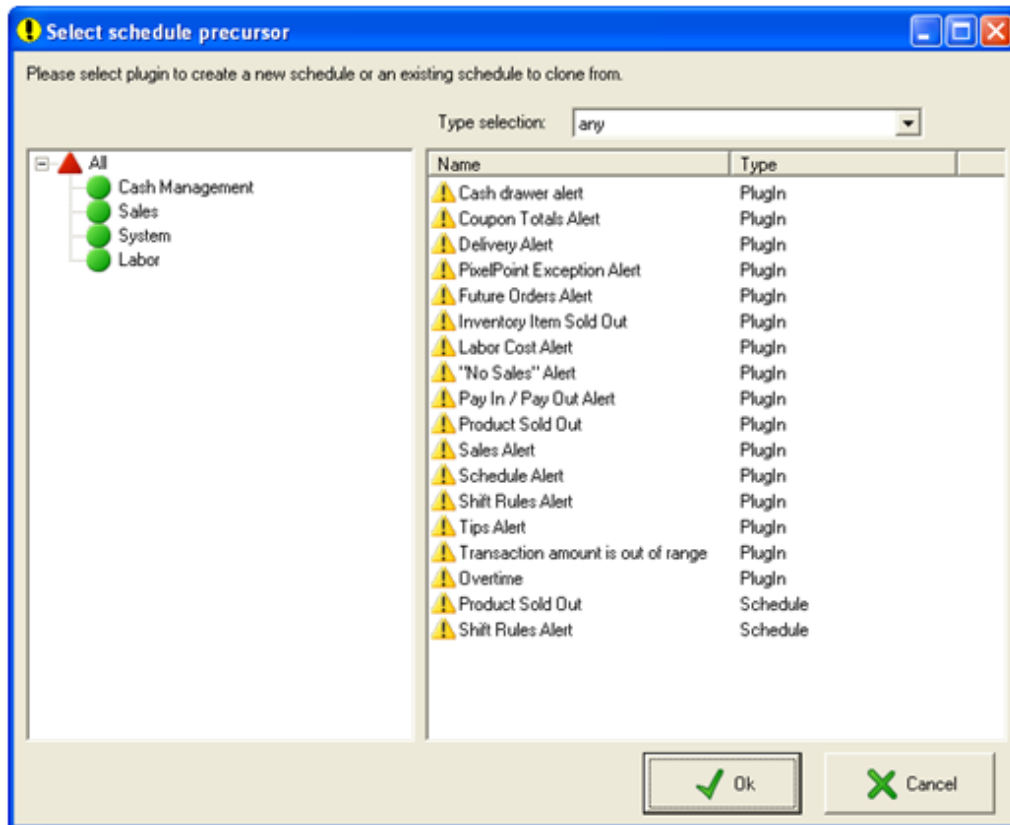
Alert Manager

General Setup / Alert Manager

Runs a version of PixelPoint's Alert Manager, enabling you to configure POS alerts right from within BackOffice.



You can enable and program alerts by selecting [Add Alert Schedule].



The Alert Manager also has a History tab which you can switch to see a list of the alerts that the program has sent out.

You can also filter this history list to make it more specific. For example, you may want to just see alerts from a particular schedule, or just a certain number of the most recent alerts.

See the PixelPoint POS Installation Guide for more information.

Table Setup Menu

This menu is used for configuring the dining area(s) in establishments that offer Table Service. Options on this menu enable you to modify and set up the floor plan, floor sections, and individual tables. Each menu option is explained in its own section in this chapter. The menu options are:

- Table Section Setup
- Table Settings
- Table Layout Setup
- Table Drawing
- Reservations

Table Section Setup

Table Setup / Table Section Setup

Many Table Service establishments divide their dining area into table sections (such as Smoking and Non-smoking areas). This tab enables you to set up and modify table sections, so you can quickly navigate to those sections on the Table Layout Screen at the front-end.

Section Description

The name of the table section. This description appears in the Sections window on the Table Layout Screen. When on that screen, selecting this section title moves the display to that dining section.

Revenue Center

You can assign different dining sections to different revenue centers. This is reflected in your sales and operations reports.

Enforce Employee Lockout

Checking this box prevents other employees from accessing a table in this section if someone has opened a check on it. When unchecked, this allows multiple servers to access the check.

Enforce Rated Item Before Ordering

Used for sections with tables that are or have rated items (like pool tables). If checked, this ensures that tables within this section cannot accept a food or beverage order if a rated item (rental) has not been ordered first.

Hide From Floor Layout

Removes this particular table section from the Sections window on the Table Layout Screen. This can be used, for example, to remove an outdoor patio during the winter season.

Table Settings

Table Setup / Table Settings

This screen enables you to designate the section and number of seats, in addition to other details, for each table.

Table #	# of Customers	Section Description	Min:	Max:	Can Reserve	Sales Type
5	2	Poolside	6	6	Yes	Use Station Default
6	2	Poolside	2	2	Yes	Use Station Default
7	2	Poolside	2	2	Yes	Use Station Default
8	2	Poolside	6	6	Yes	Use Station Default
9	2	Poolside	2	2	Yes	Use Station Default
10	2	Poolside	2	2	Yes	Use Station Default
11	4	Poolside	4	4	Yes	Use Station Default
12	4	Poolside	2	2	Yes	Use Station Default
13	4	Poolside	2	2	Yes	Use Station Default
14	4	Poolside	2	2	Yes	Use Station Default
15	6	Terrace	2	2	Yes	Use Station Default
16	6	Terrace	2	2	Yes	Use Station Default
17	6	Terrace	2	2	Yes	Use Station Default
18	4	Terrace	2	2	Yes	Use Station Default

Click on any cell and apply your changes directly to the field. There is no limit to the number of tables you can have. However, certain number ranges have been set aside for specific applications. Table numbers 5,000-29,999 are reserved for tab cards and 30,000-32,000 are reserved for quick order table numbers.

Double-clicking on the 'Section Description' field presents a drop-down box with the various table sections, which are set up in Table Section Setup. To remove a table from the list, click on the table's record and select the minus (-) button.

'# of Customers' is the number of guests the table is regularly set for. 'Min:' is the minimum numbers of guests that can be seated at the table. 'Max:' is the number of guests that can possibly be seated at the table. 'Can Reserve' determines whether hosts and hostesses can book reservations at that particular table or not.

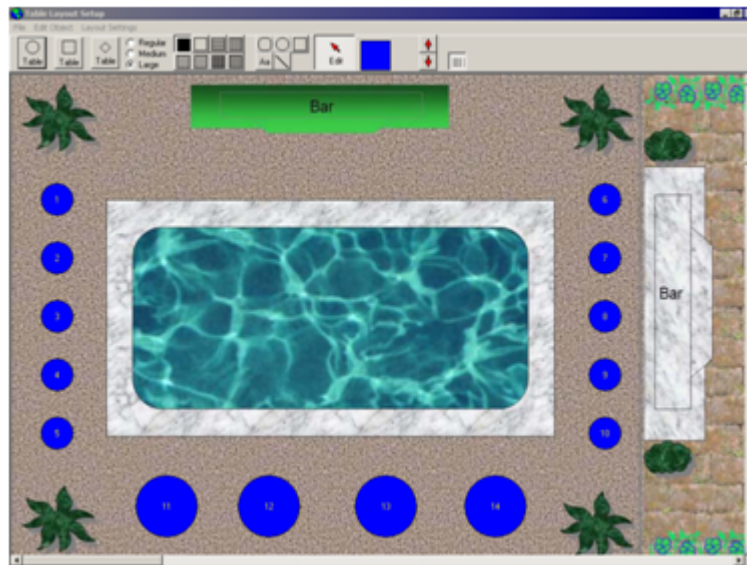
'Sales Type' is the default sales type for checks opened on the table. Tables are programmed by default to use the station's default sales type, programmed on Station Setup's Station Options Tab, but if you double-click in this 'Sales Type' column, you can use the drop-down box that appears to pick a different default sales type for the table.

Table Layout Setup

Table Setup / Table Layout Setup

The Table Layout screen is a graphic representation of the dining area of the establishment. It is used to access to customer checks and employee-related functions.

Table Layout Setup enables you to create the floor layout portion of the Table Layout screen. You can add, remove, modify and position the various tables within the establishment, defining their size, shape and number. You can also draw objects such as walls, platforms and dividers to reflect the appearance of the establishment. Select File / Load Layout to make changes to an existing floor plan.



The File menu has an option entitled "Print Layout Section" that prints a paper copy of the selected floor section. This is particularly useful for establishments that use a manual system for seating customers. Selecting this option prompts you to select a floor section, which is then saved as a BMP and loaded in the Layout Print Editor. This editor enables you to perform many functions that modify the printout (such as labeling sections and adding colors to different parts). You can also access this editor by selecting *File / Open Print Editor* from the Table Layout Setup screen; you can open any saved BMP or JPG file after opening the editor in this way.



Tool Bar

The toolbar is used to apply tables and objects to the layout.



Table Buttons

There are three table buttons: circle, square and diamond. Click-and-drag from any of these buttons onto the floor layout to create a table with that button's shape. After you release the mouse button, a numeric keypad will pop up, asking you to give the table a number. Each time you create a table after that, the system will automatically increase the number by one for you. Of course, you can still change the number to whatever number you like.

Table Size Selections

You can standardize table sizes using the Regular, Medium and Large radio buttons. You can also, however, resize tables individually, but only when in Edit mode (refer to the Edit Button, below).

Object Pattern Buttons

These buttons enable you to apply a pattern to an object. Select an object in edit mode (refer to the Edit Button), then select the pattern you want to apply to it.

Object Buttons

There are four object buttons to the right of the pattern buttons; there is a rounded square, circle, square and straight line. To create an object, click on one of these, then click-and-drag on the layout area; the farther you drag, the larger the object will be.

Text Button: [Aa]

The text button, [Aa], enables you to add text to the floor layout. To add text, select this button and then click on the floor layout where you wish the text to go. Now type in the text. You can change the text size and font by selecting *Layout Settings / Layout Font* from the pull-down menus at the top of the screen. The font used for table numbers is the Medium font setting specified within Station Setup, on the Fonts tab (See "Fonts Tab").

Edit Button

Selecting the Edit button puts you into edit mode. When in this mode, you can change the size, shape, color and pattern of any object. You can also resize tables, by clicking-and-dragging the top-left corner of the table.

Color Button

The Color button enables you to set the color of an object. The default color is blue. To change the default color of objects click on this color button and select a new color. To change the color of a particular object, select the color button when in Edit mode (refer to the Edit button, above).

Arrow Buttons

These buttons enable you to layer tables and objects. For example, say that you create an object that represents a rug. If you create it on an area that already has tables on it, the object will cover them. To fix this, select [Edit], the object, and then the down arrow. This will send the object (the rug) to the back, making the tables visible. The up arrow button brings the selected object to the front. The down arrow button sends the selected object to the back.

Snap To Grid Button

When selected, objects and tables are moved within a hidden 10 x 10 grid, and snap to positions along this grid. This means that the system will automatically move the object to the grid position

it is closest to when you finish moving it. This option is useful in ensuring objects are aligned properly. When this button is not selected, the system will not adjust the position of objects at all when you move them, and you will be able to position them freely without being forced to the 10 x 10 grid.

Sections

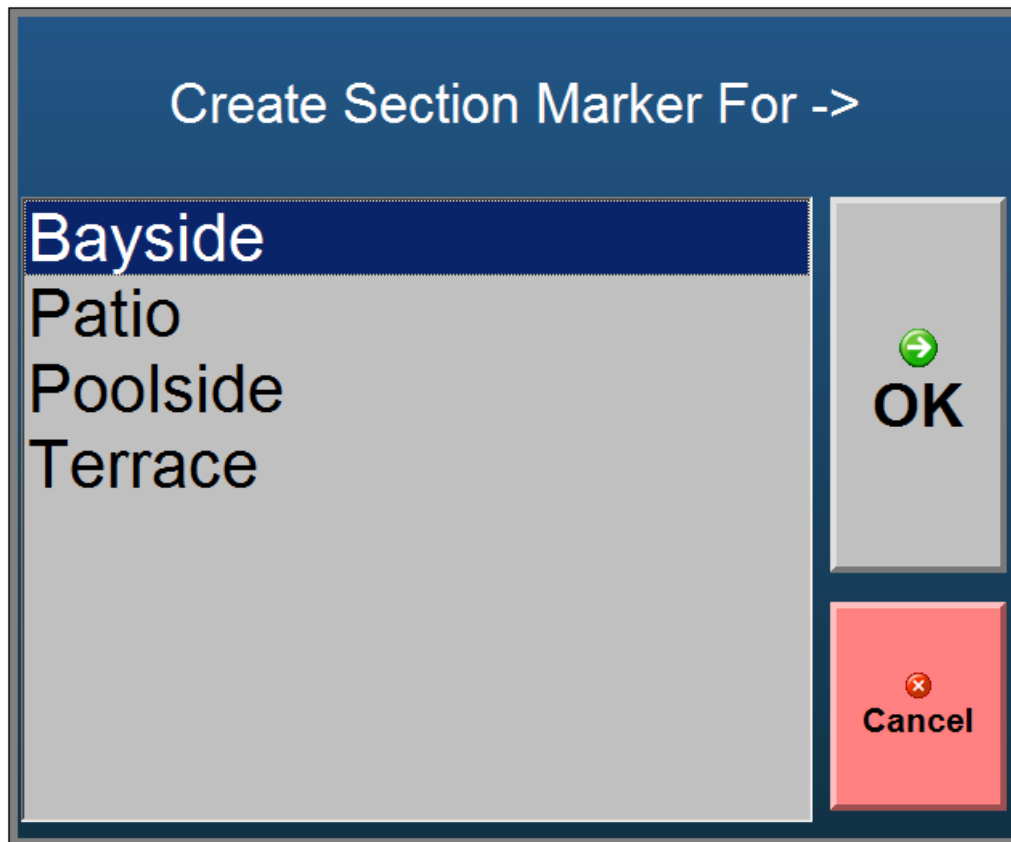
Table sections are created in Table Section Setup, but are defined here on the floor layout.

Guide Lines

The horizontal and vertical lines on the layout screen are dimension guides; they help you to gauge the size of each dining section layout. You can adjust the area size of these guide lines by selecting *Layout Settings / Layout Resolution* from the top of the screen. You can set the guidelines for standard resolutions like 640x480, 800x600 or 1024x768, but you can also set them to a custom dimension or remove them from the layout screen. Guidelines never show up on the floor layout at the front end, whether you remove them from this screen or not.

Section Markers

After you have created the table layout and table sections, you need to indicate where each section is. Go to the middle of one of your sections and double-click. When the section marker window displays, select the desired dining section. At the front end, when you select the dining section from the list of sections on the Table Layout screen, the system will move the display to that particular area of the floor layout.



Background

Color

The default background color of the floor layout is white. You can change this by selecting *Layout Settings / Floor Color*. This will display a color template, from which you can select a color.

Image

You can place a graphic image in the background to represent the layout of the establishment, texture of flooring or company logo. To do this:

1. Create or download the image. Make sure it is in JPG format and that the size matches (or closely matches) your layout dimensions.
2. Copy the file to the "\\PixelPOS" folder.
3. Rename the image to "floorlayout.jpg".



The JPG image is separate from the floor layout file (which is an FLR file in the "\\PixelPOS" folder). When you go into Table Layout Setup, the background JPG image appears automatically and can be seen underneath any FLR file. The floor file contains the layout of the tables and objects which lie over top of the JPG image. You can turn the background off by either renaming the JPG file or selecting *Layout Settings / Display Background* from the pull-down menu in Table Layout Setup.

Tagging Tables

You can work with multiple tables at the same time. To do this, you can tag them by holding the left CTRL key and clicking each of the tables you want to apply the change to. They will be highlighted as they are selected.

Right-click on one of the tables to display a table edit menu. You can select from any of the following options.

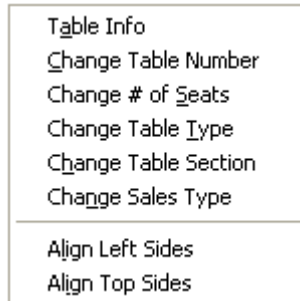


Table Info

Provides set up information for each table, starting with the table that has the lowest number in the group. It shows the table's number, section and seating capacity.

Change Table Number

Changes the selected table's table number. If multiple tables have been tagged, the change will be applied to the lowest table number only.

Change # of Seats

Changes the seating capacity of all selected tables. If you use this, all selected tables will have the same number of seats.

Change Table Type

Changes the selected tables' shape, shifting from circular to square to diamond (and then back to circular, etc.)

Change Table Section

Changes the floor section the selected tables belong to; selecting this displays a list of all of the table sections and enables you to select the one you want.

Change Sales Type

Changes the default sales type of checks that are started on the selected tables. You can use this to easily create, for example, Quick Service and Dine-IN sections on the same layout. Or, say you have an area where you process Take-Out orders, you can use this to change the sales type for those tables to 'Pick-Up'.

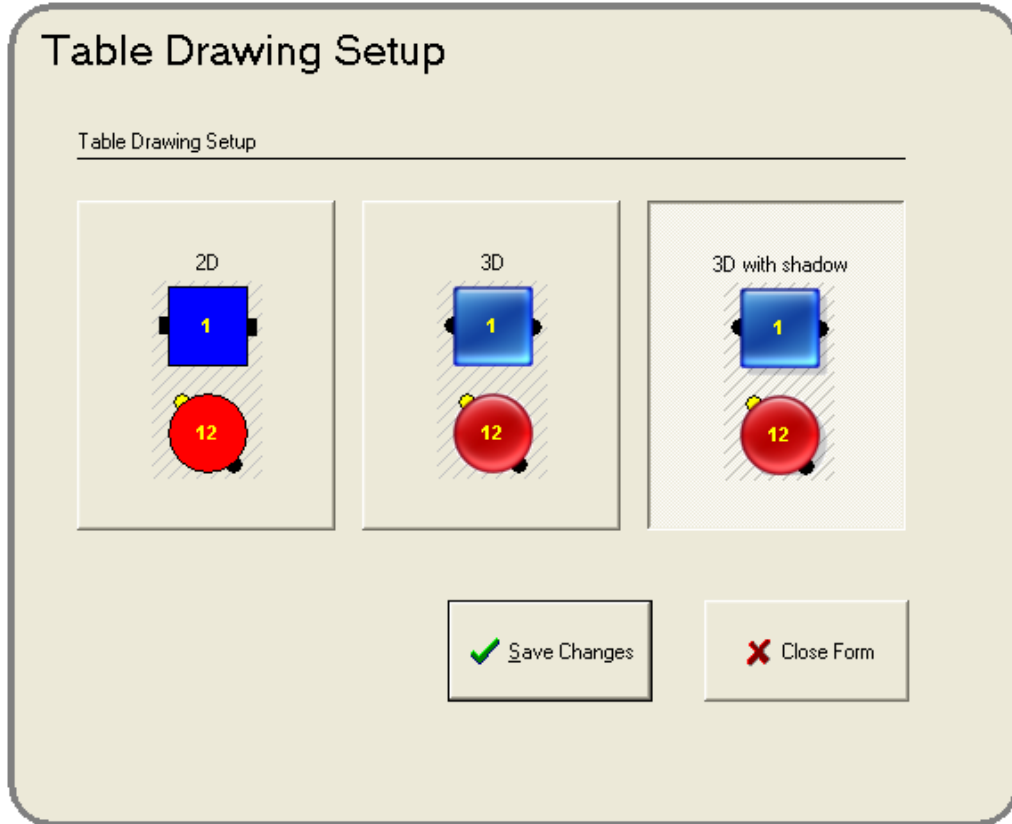
Align Left/Top Sides

These two options help you line up tables on the floor layout; you need to have more than one table selected for them to be effective. Align Left Sides moves selected tables to be vertically-aligned with the left-most table of the group; it moves the tables so all of the left sides are perfectly aligned. Align Top Sides does the same thing, but moves the selected tables so they are horizontally-aligned with the top-most table of the group.

Table Drawing

Table Setup / Table Drawing

This menu option displays a window that enables you to determine the overall style of the tables on the front-end Table Layout Screen.



[2D]

Draws tables with a flat, two-dimensional look, making them look as they did in versions earlier than 9.0.

[3D]

Draws tables with greater-detailed images, adding visual effects that give them the appearance of three dimensions.

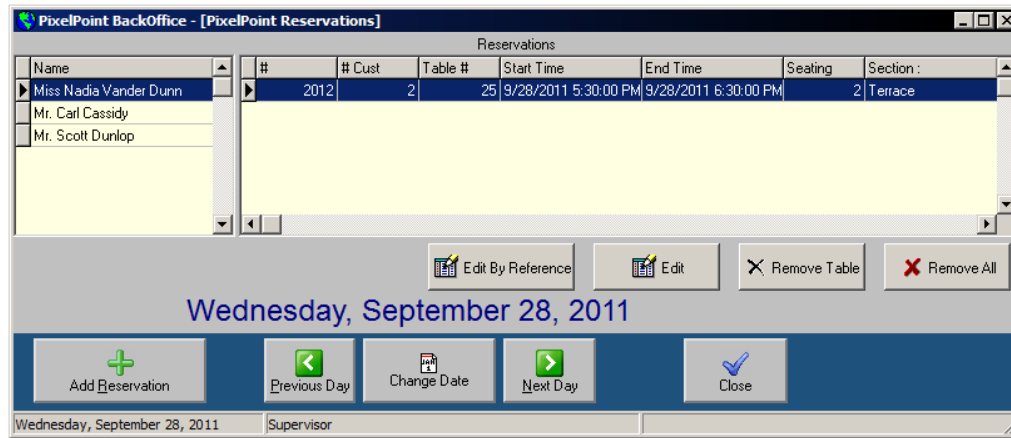
[3D with shadow]

Draws tables with the same greater-detailed images as the [3D] option, but adds a shadow effect to them as well.

Reservations

Table Setup / Reservations

You can view, edit and accept dining reservations in BackOffice by selecting this option from the pull-down menus.



Viewing Reservations

The Name window on the left of the screen shows all of the day's reservations. Selecting any one of them displays its details on the right. In the image above, the selected member is in a party of two, and has reserved table 25 in the Terrace section for 5:30pm on September 28th.

You can view the reservations for any other day by using either the arrow buttons or [Change Date].

To Add a Reservation:

1. Select [Add Reservation]. The following screen displays.
 - The remaining steps follow the buttons on the image below.

MEMBER DEFAULT Wednesday, September 28, 2011 6:45 PM

Reference # Customers 2
Duration 2.00 H

Jan							
Feb							
Mar					1	2	3
Apr	4	5	6	7	8	9	10
May	11	12	13	14	15	16	17
Jun	18	19	20	21	22	23	24
Jul	25	26	27	28	29	30	
Aug							
Sep							
Oct							
Nov							
Dec							

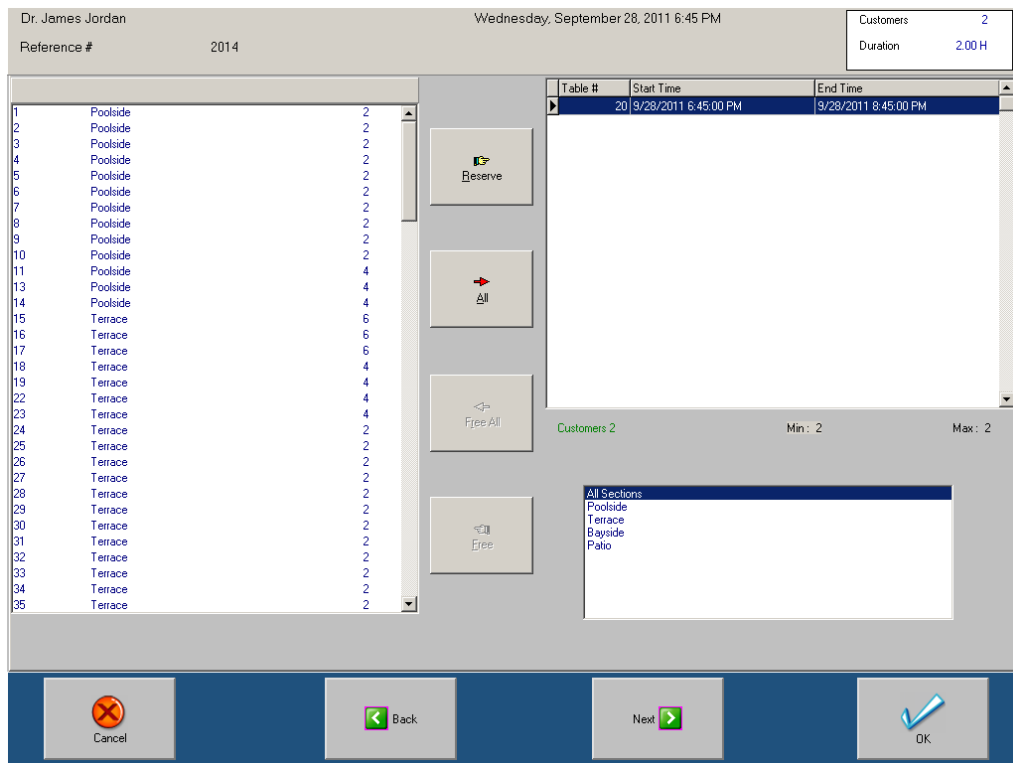
6:45 PM Reservations
Reservations tables Customers
0 0 0

12	:00	Customers	Duration
1	:05	1 11	30 Min
2	:10	2 12	1.0 H
3	:15	3 13	1.5 H
4	:20	4 14	2.0 H
5	:25	5 15	2.5 H
6	:30	6 16	3.0 H
7	:35	7 17	3.5 H
8	:40	8 18	4.0 H
9	:45	9 19	4.5 H
10	:50	10 20	5.0 H
11	:55		

AM PM Other Other

Cancel Back Next OK

2. Select the year for the reservation by using the arrow keys.
3. Select the month.
4. Select the calendar day.
5. Select the time when the reservation will start. Select [AM] or [PM] to change from one to the other.
6. Select the number of guests who are expected.
7. Select the estimated duration of the reservation.
8. Select [Next]. A screen displays, listing all of the tables and prompting you to specify where the guest wants to dine.
 - The guest can request a specific dining section, table or group of tables. You can reserve an entire dining section or the entire restaurant for the guest, if necessary.



9. Select a table or tables.
10. Select [Reserve].
11. Choose the member from the Member Screen when it displays. If the guest is not in the system already, create a new member record.
 - If a member has already been applied to this reservation, the member screen will not display. Proceed to step 13 if this is the case.
12. Select [Use Member] to finish the member selection process. The system returns you to the table list screen.
13. Select either [Next] or [OK]. If you select [Next], you can identify the reason for the reservation (such as an anniversary or birthday) and also add a comment.

To Edit a Reservation:

1. Select the reservation you wish to edit from the list on the left of the main Reservations screen.
2. Select [Remove Table].
3. Select [Edit] (or [Edit By Reference] if you know the reservation's reference number). The Add Reservation screen displays, enabling you to change any of the reservation's details.

The reason for un-reserving the table first is to ensure that the selected tables are appropriate for the revised reservation. For example, if you reserved Table 3 for 6:00 and needed to move the reservation to 7:00, it may conflict with another reservation on Table 3. Or, if the number of customers changes from 4 people to 6 people, the 4-seat table originally selected would not be big enough for the new number of guests.

Note: Licensing for PixelPoint's TableTime module is required for this function to work. Make sure you have checked "Use Reservations" in *Administrator / System Setup / System* tab.

Administrator

The content and options in the items on the Administrator menu are crucial for the programming of the PixelPoint system. Unlike with many other changes, for which you only need to log out before they take effect, changes you make here often do not take effect until you restart the system.

The options on the Administrator menu are:

- System Setup
- Station Setup
- Revenue Center Setup
- Sales Type Setup
- POS Functions Setup
- Payment Method Setup
- Printer Channel Setup
- Printer Code Setup
- Network Printer Setup
- Policy Setup
- Form Designer

System Setup

Administrator / System Setup

System Setup addresses programming that has to do with the overall operation of the system. For example, it is here where you enter your company name and information and where you tell the system what taxes you want to apply to all of the orders. This chapter has many tabs, each of which is presented in its own section. They are organized as follows:

- System Tab
- System Taxes Tab
- Company Info Tab
- POS Reports Tab
- Preset Payment Tab
- Orders Tab
- Defaults Tab
- Collaboration Tab
- Email Setup Tab
- Advanced Tab
- Security Tab

System Tab

Administrator / System Setup / System

The main focus of this tab is the opening of interfaces to various PixelPoint modules.

Company: The establishment's name. This field is used for reporting purposes.

Open 24 Hours: Specifies whether the establishment ever closes for the day or whether it is open for 24 hours. This checkbox enables the establishment to do its "End of Day" while it is open for business. During End of Day, open tables are moved over to the next day and employees remain clocked-in.

Use Inventory Manager (StockBoy): Checking this indicates that the PixelPoint (StockBoy) Module is being used with the POS Software. Only use this function if you are running the StockBoy agent in the background.

Use Authorization Manager: Checking this indicates that the PixelPoint Authorization Manager (Authorization Manager) module is being used. Only use this function if you are running the Authorization Manager agent in the background.

Use Reservations: Checking this indicates that the PixelPoint Reservation Module is being used with the POS software.

Ask For Daily Weather Conditions: Causes a prompt for the day's weather conditions to display automatically when End of Day is run, ensuring that weather information is included in the End of Day report.

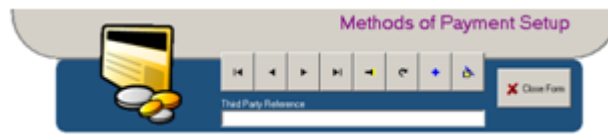
Printers Have Dual Ply Paper: Sets the system to only print charge slips once, since having dual-ply paper in the printer means that two copies will print at the same time. If this field is unchecked, the system will print a customer copy (without a signature line) and a store copy (with a signature line).

Num Stations: The number of stations set up on the system. This number is used for reporting purposes.

Store No: The store's number. If this is the only location, keep this as "1". If the establishment is one of a chain of stores, change this to the appropriate number. This number is used for reporting purposes.

Disable Auto-Prompt For Member Coupons: When a member is eligible for a coupon, the system will ask you if you wish to apply the coupon. Checking this field disables this auto-prompt.

Show Third Party Reference Field: Reveals hidden fields at the bottom of BackOffice setup screens (shown below). These fields can be filled with text (including spaces and symbols) and are intended to help with interfacing with third party software.



When you uncheck 'Show Third Party Reference Field', the fields will be hidden once again. However, the contents of those fields will remain in the system and can be revealed again at a later date.

Customer Display: Some terminals have two displays: one used by the order taker and the other facing customers. This field specifies the Form Designer form to be used on secondary or customer displays throughout the establishment. This setting can be overridden for specific stations by assigning different forms in Station Setup. The image below shows the default customer display form as it appears at the front-end.



Screen Saver: If you have specified a customer display form for the system (in the field above),

you can use this field to specify a form that determines how customer displays appear when not in a transaction. If nothing is assigned here ('None Selected'), the customer display form will always be displayed, no matter whether terminals are in open transactions or not. The 'Screen Saver' field only appears if a customer display is specified for the whole system.

Shift Rules: The default shift rule for all employees in the system. Use the drop-down box to select from a list of the different shift rules set up in Shift Rules Setup (See "Shift Rules"). If there are shift rules assigned to particular job positions (in "Job Position Setup") or to particular employees (in "Employee Setup"), they will take precedence over the Shift Rules assigned here in System Setup.

Auto End of Day System: Determines whether the system should automatically attempt to perform End of Day. 'Auto-EOD time' is the time it should do so. If the establishment is not open for 24 hours, End of Day can be done at any time after the establishment has closed.

System Telephone Mask: The format for all phone numbers entered into the system. The default format is (000)000-0000, which is common to North America and many countries worldwide. The default mask used for this format is "!\\(000\\)000-0000;0;_".

If your establishment is located in a region that does not use this format for telephone numbers, you can change this mask by changing the number of zeros and other characters.

For example, London, England phone numbers have this format: (000) 0000 0000. To change the mask for this, simply add a zero after the parentheses, remove the hyphen and replace it with a space. You should get "!\\(000\\)0000 0000;0;_".

Numbers in Shanghai have eight digits in them, with the format 0000 0000. To change the mask for this, remove everything in the parentheses, add a zero after the remaining backslash, remove the hyphen and add a space. You should get "!\\0000 0000;0;_".

There are many different formats throughout the world, but PixelPoint's system telephone mask can be changed to fit any of them just by adding or removing characters in the way described above.

Taxes Tab

Administrator / System Setup / Taxes

One of the most critical elements of the system is the application of taxes. This section looks at how to apply taxes in several different situations. Taxes themselves are programmed in the System Taxes tab in Product Setup (which is found on the Administrator pull-down menu in BackOffice) and are applied to report categories and products on their respective BackOffice setup screens.

The System Taxes tab enables you to set up all tax rates that are to be applied in the system. The actual application of these taxes takes place in Report Category Setup and Product Setup. However, it is here that you define the taxes and set their values.

System Setup Options [X]

System | Taxes | Company Info | POS Reports | Preset Payment | Orders | Defaults | Collaboration | Email Setup | Advanced | Security

System Taxes

Tax Desc.	Tax Rate	Apply To Gratuity	Accounting Code
Tax 1 Desc. Tax 1	Tax 1 Rate 8.25	<input checked="" type="checkbox"/> Apply To Gratuity	43215
Tax 2 Desc. Tax 2	Tax 2 Rate 5	<input type="checkbox"/> Apply To Gratuity	
Tax 3 Desc. Tax 3	Tax 3 Rate 6	<input type="checkbox"/> Apply To Gratuity	
Tax 4 Desc.	Tax 4 Rate 0	<input type="checkbox"/> Apply To Gratuity	
Tax 5 Desc. Round	Tax 5 Rate 0	<input type="checkbox"/> Apply To Gratuity	

Least Common Unit

Cash 5 Charge 1 Round Up 3

VAT Environment Include VAT in Product Cost in Reports

[Close Form]

You can set up five different taxes. Each one has a field for its description, its rate, and an accounting code. Also, rates can be set to apply to gratuity or not, on a case-by-case basis.

Tax "x" Desc.

The name or description of the tax. This will be displayed in many areas of the system. If this tax is applied to any ordering products, it will be displayed on the customer receipt when any of those products are ordered.

Tax "x" Rate

The rate this tax is applied at. The number entered here represents the percent (for example, "8" = 8%).

Accounting Code

The tax's accounting code can be used with reports and accounting software packages. The code must be numeric in value. If your particular interface needs a format that is not recognized, you may need custom programming for this field.

Least Common Unit

Specifies the least common unit of the base currency and determines how the system handles it (for things such as rounding).

For example, countries that no longer use 1 cent coins (pennies) have their smallest denomination in 5 cent coins. The least common unit for installations in these countries would be "5" (in contrast to installations in countries that do use 1 cent coins, where the least common unit would be "1"). If you need to program in a least common unit, first set the 'Cash' field; the value specified here tells the system to round cash transactions to this value.

Because it does not matter for charge transactions what kind of coins a country uses, set 'Charge' to "1"; this tells the system to round charge transactions to the nearest cent (resulting in no change to the transaction total).

Lastly, set 'Round Up' to "3"; this is a database code setting that tells the system to initiate rounding. For Least Common Unit to work properly, certain DLL files must be listed in the [DLLS] section of "Pixel32.ini" and be installed in the PixelPOS folder. The necessary DLLs are CalcTransv81 or CalcTransVATv81. In addition, in Australia, "Australia=Y" must also be present in "Pixel32.ini".

Note: This function may not work with Quick Swipe, voice authorizations, split payments and future ordering.

VAT Environment

Value Added Tax (VAT) is a form of taxation in which everything is tax-inclusive. Check with your local tax laws to determine whether this is an acceptable configuration before you configure it. If checked, the system will treat the prices used throughout the system as including the taxes listed above. That is, the system will presume that the establishment is working in a VAT environment.

After enabling *VAT Environment* in BackOffice, make sure that no other VAT DLLs are called on in Pixel32.ini:

1. Open the "Pixel32.ini" file.
2. Remove any "CALCTAX=" line that calls on a VAT DLL. For example, remove "CALCTAX=DLLS/CALCTransVAT.DLL" but keep "CALCTAX=DLLS/CALCTrans.DLL".
3. Save the file.

Tax-Inclusive Pricing

When you are given the menu(s) for an establishment, you may notice that the bar prices are round numbers (such as \$5.00 for a bottle of beer, \$30.00 for a bottle of wine, etc.). This suggests that the prices are to be considered tax-inclusive (meaning the tax is included in the price) and is typical of most establishments that serve alcohol.

To change a product from "Price + Tax" to "Price including Tax", go into the Advanced Tab in **Product Setup** and apply a "1" to the 'Feature Code' field. PixelPoint will take the taxes programmed into the system into account and will internally calculate the product's price so that "price + tax" matches the price you have entered on the main Product Setup tab.

Regional Tax Laws

Some countries and regions may require special programming to accommodate their particular tax laws. PixelPoint has developed special tax DLLs that you can apply to the [DLLS] section of "Pixel32.ini" in order to program regional taxes.

For example, if you look in the "\\PixelPOS\\DLLs" folder, you will see that there are such files for

Australia, Ohio and Ontario. If you are installing a PixelPoint system in any of these regions, make sure you change the CALCTAX line in "Pixel32.ini" from "CALTRANS.DLL" to the appropriate DLL file. This will take into account all of the elements of that region's tax laws.

If you know that the state or country you are installing in has particular tax laws that may require a special DLL (aside from those in the DLLS folder), contact PixelPoint Support to see if such a DLL is available for download.

Note: If your regional tax laws need functionality beyond what is defined on this screen, this can be done by using a custom DLL applied within "Pixel32.ini".

Company Info Tab

Administrator / System Setup / Company Info

This tab contains address and contact information for the establishment.

System Setup Options [X]

System | Taxes | **Company Info** | POS Reports | Preset Payment | Orders | Defaults | Collaboration | Email Setup | Advanced | Security

Owner: Mr. John Smith

Contact: Mrs. Jane Smith

Telephone #: (905) 264-4700 Fax #: (905) 264-4711

Address 1: 123 Walnut Street

Address 2: Unit 2B

City: Vaughan Prov/State: Ontario

Postal/Zip: L4L 8K9 Country: Canada

Email: sales@pixelpointpos.com

Web Site: www.paritech.com

Report Comment: This comment will appear on reports.

Company logo: [Load Image] [Clear]

[Globe Icon] [Close Form]

The information contained here is applied in two other areas. The first is member billing, so that the establishment's mailing information is included on the invoice. The second area is mapping routes for delivery drivers. The driver map application needs a starting point in order to assemble directions to the delivery destination. It pulls that information from here.

POS Reports Tab

Administrator / System Setup / POS Reports

This tab focuses on the application of reports to various front-end operations.

System Setup Options

System | Taxes | Company Info | **POS Reports** | Preset Payment | Orders | Defaults | Collaboration | Email Setup | Advanced | Security

Employee Cash Out Report: SQLPOSEmpCashoutSummary.rpt

End of Day Batch Reports: SQLPOSEndofDaySummary.rpt

Employee Clockout Report: SQLWeeklySalesSummaryReport.rpt,SQLWa

Reports	Report Type	Report File Name
2	View Category Sales	ReportCategorySales.rpt
3	View Category Sales Summ	ReportCategorySalesSummary.rpt

Close Form

Employee Cash Out Report: The report to be used when an employee cashes out. By selecting the folder icon, you can choose different reports to run; hold the CTRL key to select more than one. The default report was specially designed for employee cash outs and it is recommended that you use it.

End of Day Batch Reports: The report(s) to be applied to the End of Day process. [Add Reports] enables you to include additional reports.

Note: You can only use 40-column reports for the Employee Cash-Out and End of the Day report. 40-column reports start with "SQLPOS" in the file name. The browse window for selecting the reports automatically filters the appropriate reports for you.

Employee Clockout Report: The report(s) to be used when an employee clocks out.

Reports Table: At the front-end, located within the Manager Functions menu, is a Sales Function sub-menu that enables you to get quick views of sales-related reports. This table enables you to specify what reports will be available for quick viewing. The reports here are 80 column reports.

Preset Payment Tab

Administrator / System Setup / Preset Payment

This tab has to do with the management of money with respect to preset payments, pay-ins and pay-outs, and tender balancing.

System Setup Options [X]

System | Taxes | Company Info | PDS Reports | **Preset Payment** | Orders | Defaults | Collaboration | Email Setup | Advanced | Security

Auto Apply Preset Payment Allow Pay Ins/Pay Outs

Preset Payment 1

Preset Payment 2

Preset Payment 3

Preset Payment 4

Preset Payment 5

Preset Payment 6

Tender Balancing

Balance on Cashout

Balance on End of Day

Auto Apply Preset Payment

When checked, this tells the system to presume that preset payments are cash. For example, if this is checked, and a server placing an order selects the 100 preset payment button on the Finish Screen, PixelPoint will assume a customer has given the server a \$100 cash bill. If unchecked, it will accept \$100 as payment, but will ask you to select the method of payment (such as a foreign currency) instead.

Preset Payment 1-6

Each of these fields that has a value makes a custom function button appear on the front-end Finish Screen. Each field represents a fixed amount of currency. For example, say the total of a check is \$86.53 and the customer gives you a \$100 bill. Rather than selecting three separate buttons, [1] [0] [0], on the keypad, you can simply select the [100] button on the Finish screen (see the image below). When you select the method of payment, the system will then calculate and display the appropriate change.

You can apply up to six preset payment values. If a field is left blank, the button will not appear on the Finish Screen. In the image below, there are four preset payment buttons.

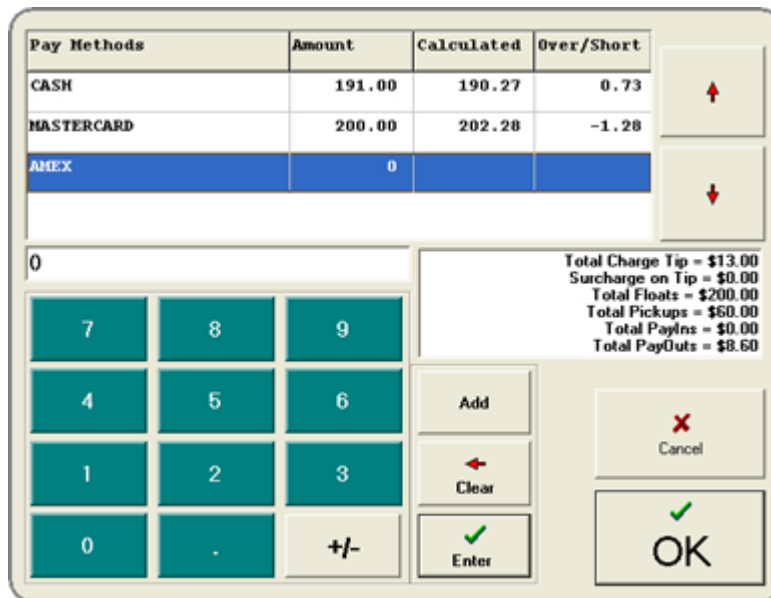


Allow Pay Ins/Pay Outs

Determines whether you can process pay-ins and pay-outs at the front end. If checked, [Pay In] and [Pay Out] will be present on the Your Settings screen.

Tender Balancing

You can apply tender balancing in one of two ways. If you select the 'Balance On Cashout' option, the tender balance screen will be incorporated into the Employee Cash Out process. When you select [Cash Out] at the front end, the tender balance screen (shown below) will appear and prompt you to enter values for each applicable method of payment.



If you select the 'Balance On End of Day' option, the tender balance function will take place as part of the End of Day process. In this case, you can access the tender balance screen by selecting [Tender Balance] on the Sales Functions sub-menu of the Manager Functions Menu at the front-end. The totals entered there, however, are for the entire establishment, not just one employee. For more information about Tender Balancing, see the PixelPoint User's Guide.

Orders Tab

Administrator / System Setup / Orders

The Orders tab addresses three areas: future ordering, line prefixes on kitchen prints, and gratuities.

Future Orders

Entering values into the three fields in this section activates the future ordering function. For example, if a call comes in for a pick up order, the customer can indicate when they would like to pick it up. Future orders can extend beyond the current day without interfering with the End of Day process. Future orders only apply to member transactions; customers who place future orders are entered into the system as members.

Order will be processed this number of minutes before scheduled time

The lead time you need in order to prepare the order. In the example shown above, the order will print in the kitchen 30 minutes before the scheduled time. For example, say an order is to be picked up at 6:00. The order will print in the kitchen at 5:30, so there is 30 minutes to prepare the order before the customer arrives.

Order must be scheduled at least this many hours into the future

How much of a lead time you need to process a future order. In the example shown above, the future order must be at least two hours from now.

Order can be scheduled no more than this many hours into the future

The maximum number of hours ahead you want to permit a future order to be placed. In the example shown above, you can place one up to 48 hours in advance. This means, for example, that customers cannot place orders they want to receive in three days time.

Course Prefixes

You can apply courses to your ordering process and have the characters in this field show up on kitchen prints. If your system is set as in the example image above, every line containing an appetizer will begin with an A. You can use numbers, symbols and words as prefixes. It is recommended, however, that you keep the prefix short, as line space is limited on remote prints. Use the drop-down box to change from one course to another, and type in text to set the prefix in the 'Prefix' field. You can also select [...] to type in a new name for each course.

Auto Gratuity

Automatically applies set gratuity amount to guest checks. Default receipts will print with an indication that the total amount either includes the suggested tip or the enforced tip, depending on whether or not *Enforce Gratuity Amount When Closing Check* is selected.

Auto Gratuity Charge

The size of the gratuity. For example, "13.5" means that the gratuity will equal 13.5% of the net total.

When # of Customers >=

This is one of two criteria that control when you want the auto gratuity to apply. The gratuity will be applied when the number of guests dining at the table is greater than or equal to this number. So, in the example image above, the auto gratuity will be applied when there are 8 or more people seated at the table.

When Amount of Check >=

This is the second of the two criteria. The gratuity will be applied when the amount of the guest check is greater than or equal to this number. So, in the example image, the auto gratuity will be applied when the total cost of the items on the check exceeds or is equal to \$100.

Note: The auto gratuity applies when the check matches either criterion. If you want only one criterion to apply, set the other to an unattainable number. For example, if you only want 'When Amount of Check' to apply, set the number of customers to "999".

Enforce Gratuity Amount When Closing Check

Some local laws permit an establishment to force the customer to pay the total including gratuity. Establishments in some locations can only offer it as a "suggestion". This field determines whether the 'Amount Owing' field in the Finish Screen includes the gratuity or not. If checked, the amount will include the gratuity and the check will not settle for less than the amount including tip. If unchecked, you can close the check for the amount excluding tip.

Refer to the System Setup section of this manual for further information.

Auto Gratuity	
Auto Gratuity Charge (15 = 15%)	10
When # of Customers >=	5
When Amount of Check >=	100
Calculate Gratuity: Before Taxes	
<input type="checkbox"/> Enforce Gratuity Amount when Closing Check	
<input checked="" type="checkbox"/> Allow Coupon to lower Gratuity	

Tip: The *ChargeGratuityHandling* policy offers additional options regarding the manner that gratuity gets saved to transactions.

Member Points System

Member points in PixelPoint POS can be issued based on the particular product sold, or by the gross or net total on the bill. When they are issued by gross or net total, points can be either rounded down to the nearest amount, or rounded up when the *Round Points* option is enabled and the total is at least midway to the next nearest amount. Point amounts that are issued by product are set in Product Setup.

No. of Points	Per Amount
<input type="text" value="10"/>	<input type="text" value="1"/>
<input type="checkbox"/> Round Points	

Tip: To prevent users from cashing in the points that they just earned from the current check towards a discount, modify the *AllowCurrentTransactionPoints* policy.

Defaults Tab

Administrator / System Setup / Defaults

This tab is generally only used for troubleshooting purposes, if some programming that should not be changed has been changed. Note that these fields are already programmed for you when you first run PixelPoint POS. Those programming the database for the first time may find these options useful, but careful attention should be paid to the way in which they are used.

The screenshot shows a window titled "System Setup Options" with a close button (X) in the top right corner. Below the title bar is a navigation menu with tabs: System, Taxes, Company Info, POS Reports, Preset Payment, Orders, Defaults (selected), Collaboration, Email Setup, Advanced, and Security. The main content area contains three rows of configuration options, each with a label and a text input field:

- Default Split Comment Product is:
- Default Seating Position is:
- Default Coupon(OnFinish Check Plugin) is:

At the bottom of the dialog, there is a blue bar containing a globe icon on the left, a small mouse cursor icon in the center, and a "Close Form" button with a red X icon on the right.

Default Split Comment Product is

The product that PixelPoint POS uses to print the labels for splits ("Split 1 of 2", for example). You can select any product with a 'Manual Keyboard' product type, but the actual content of the label is determined in the language table of the database or the "NewLanguage.txt" file your system is using. By default, the product here is "Default Message", which is a product that comes preprogrammed in the database. If you want to change the label for each "split", you must modify the entry in the language table of the database.

Default Seating Position is

A product PixelPoint POS uses for seat labels. The product here should be one with a "Seating Position" product type (like the default product, "Default Seat"). If you want to create a seating position product, follow the steps below.

To program seats:

1. Go into Product Setup.
2. Create a product with a 'Seating Position' product type.
3. Name the product according to what you want each seating position to be called.
 - "Seat", or "Guest", for example.
4. Add the seating position product to an order page in Menu Setup.
 - A useful option for seating positions is feature code 105, which automatically orders items in the amount equal to the number of customers as soon as you open a check.

With this done, your remote prints that use seats will include identifiers such as 'Seat 1', 'Seat 2'

and so on. If you labeled the product, say, "Guest", the identifiers will be "Guest 1", "Guest 2", etc.

Default Coupon (OnFinish Check Plugin) is

An OnFinish Check Plugin DLL may be programmed to use a particular coupon or the default one. The default one is selected here. Refer to the OnFinish Check Plugin Interface document for more information regarding this feature and its use.

Collaboration Tab

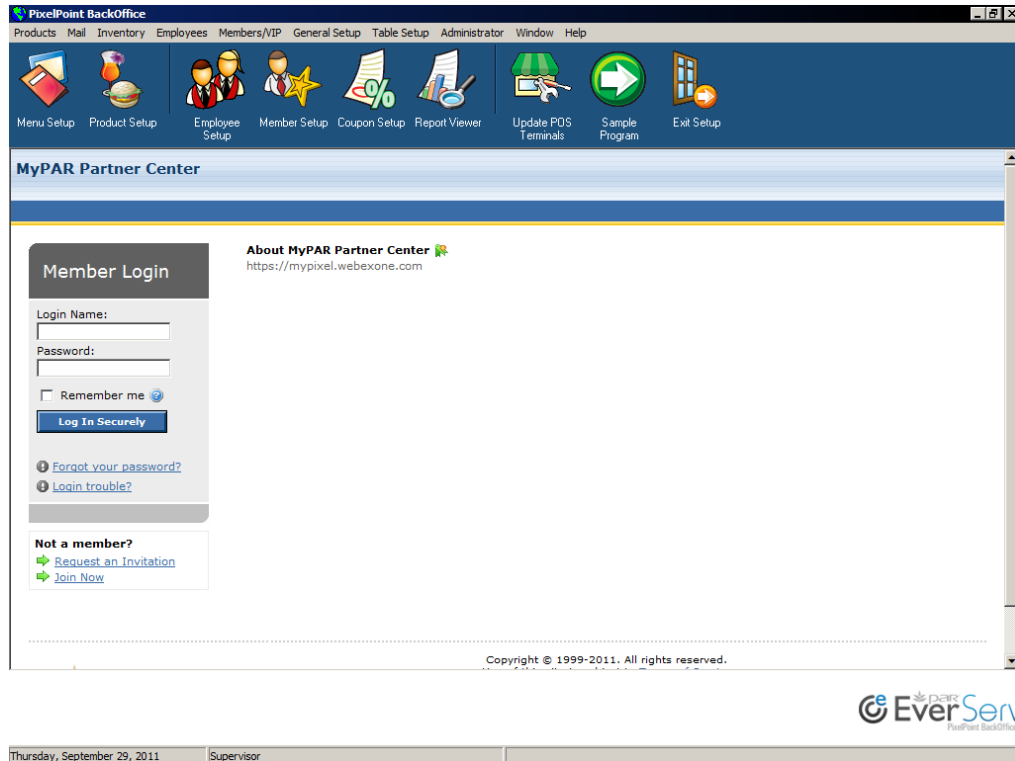
Administrator / System Setup / Collaboration

The collaboration tab enables you to apply intranet functionality to your PixelPoint system.

When set up, users can log into a corporate intranet site from within the BackOffice screen. From here, managers can manage and share schedules, documents and messages (among many other things), and so collaborate with each other on various tasks and projects.

To Set up an Intranet:

1. Enter the intranet URL. The address should be something like "clientname.website.com". You can enter the URL by copying and pasting from a web browser.
2. Check the 'Auto Connect' and 'Auto Logon' boxes if you want the intranet to open automatically when authorized users log on.
 - Checking only 'Auto Connect' connects users to the intranet site, but does not log them in.
 - Checking neither box means that users will have to both manually connect and log-in to the intranet site.
3. Go to the Advanced tab in Employee Setup (See here).
4. Open the records of employees you want to have access to the intranet.
5. Click the checkbox for 'Web Access'.
 - Depending on the intranet service, you may have to ensure the record has an email address.
6. Select [Set Password] and apply one.
7. Log out.
8. Log back into BackOffice as one of the employees whose record you just updated, to ensure that the intranet has been configured properly. The setup screen may appear similar to the one shown below.



Note: If the server PC has Internet access, you can apply any web site URL to the collaboration field and browse from there. You will not have access, however, to browser functions like [Home], [Back] or an address field.

Applying a Background Image

You can also set up a BackOffice wallpaper image by using the collaboration tab. Instead of having an intranet site as the 'Collaboration URL Address', you can simply refer to a local JPG file (for example, "C:\Image.jpg"). As with setting up an intranet, you need to edit employee records to enable 'Web Access'. In addition, on the Collaboration tab, 'Auto Connect' must be checked.

Email Setup Tab

Administrator / System Setup / Email Setup

Several PixelPoint applications are capable of sending emails to staff and customers. Use this tab to configure email service functionality within the POS system.

In this tab, there are three sub-tabs - Overview, Employee Schedule, and Confirmation Agent.

Overview: An overview, which allows you to select which function(s) you wish to interact with.

Employee Schedule: A tab for configuring employee emailing of work schedules.

Confirmation Agent: A tab for emailing order confirmations.

The content in the subject and body fields on each of the sub-tabs serves as a template for email the system sends. Make sure you set up settings in accordance with your establishment's mail server settings.

The screenshot shows a software window titled "System Setup Options" with a close button (X) in the top right corner. The window has a menu bar with the following items: System, Taxes, Company Info, POS Reports, Preset Payment, Orders, Defaults, Collaboration, Email Setup, Advanced, and Security. The "Email Setup" menu item is selected, and within it, the "Employee Schedule" sub-tab is active. The "Overview" sub-tab is also visible.

The "Employee Schedule" sub-tab contains the following elements:

- A checkbox labeled "Enable sending email for Employee Schedule" which is currently unchecked.
- A "Subject" text field containing the template: "<#BUSNAME> : Your Employee Schedule".
- A "Body" text field containing the template: "Employee : <#EMPLOYEE>
Date Range : <#DATERANGE>
<#SCHEDULE>
Please arrive on time. Thank you".
- A "Set Default" button located at the bottom right of the sub-tab area.

The "Overview" sub-tab contains the following elements:

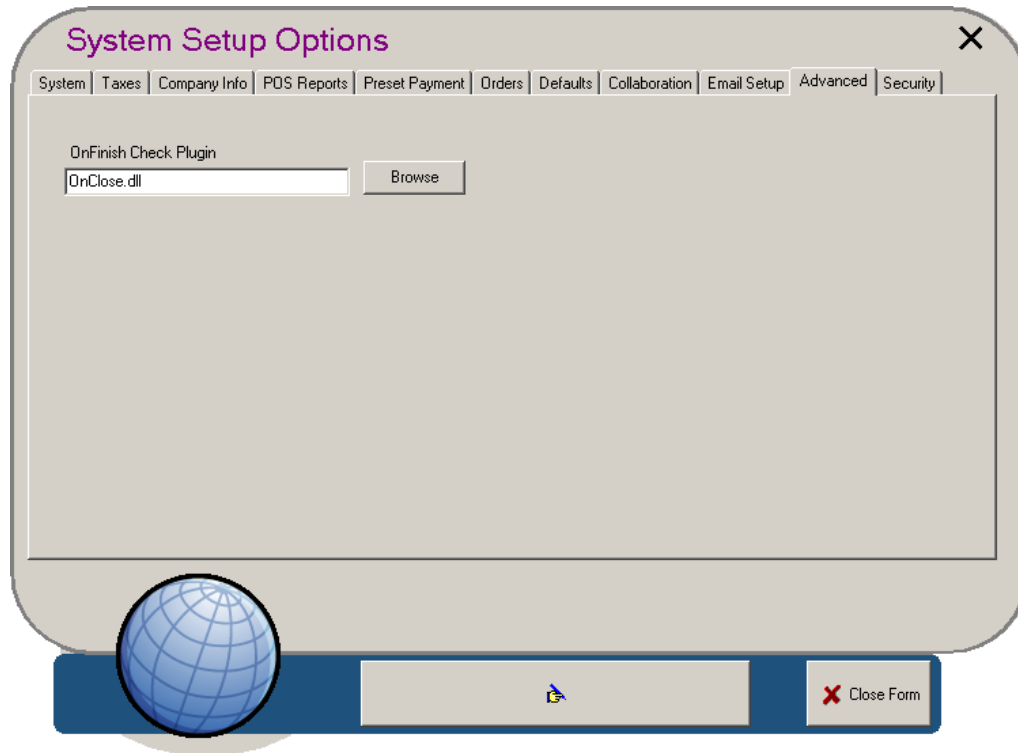
- A text field for "Email server's address or network name" with the value "smtp.pixelpointpos.com".
- A "Port" text field with the value "586" and a checked "SSL" checkbox.
- A "User Name" text field with the value "pixel".
- An "Enter password" button.
- A "Sender" text field with the value "pixel@pixelpointpos.com".
- A "Display Name" text field with the value "PixelPoint".
- A "Send test email" button with an envelope icon.

At the bottom of the window, there is a blue bar containing a globe icon on the left, a mouse cursor icon in the center, and a "Close Form" button with a red X icon on the right.

Advanced Tab

Administrator / System Setup / Advanced

This is where the global OnFinish Check Plugin DLL that is to be used across all stations is set. Use the [Browse] button to locate the DLL and then save changes.



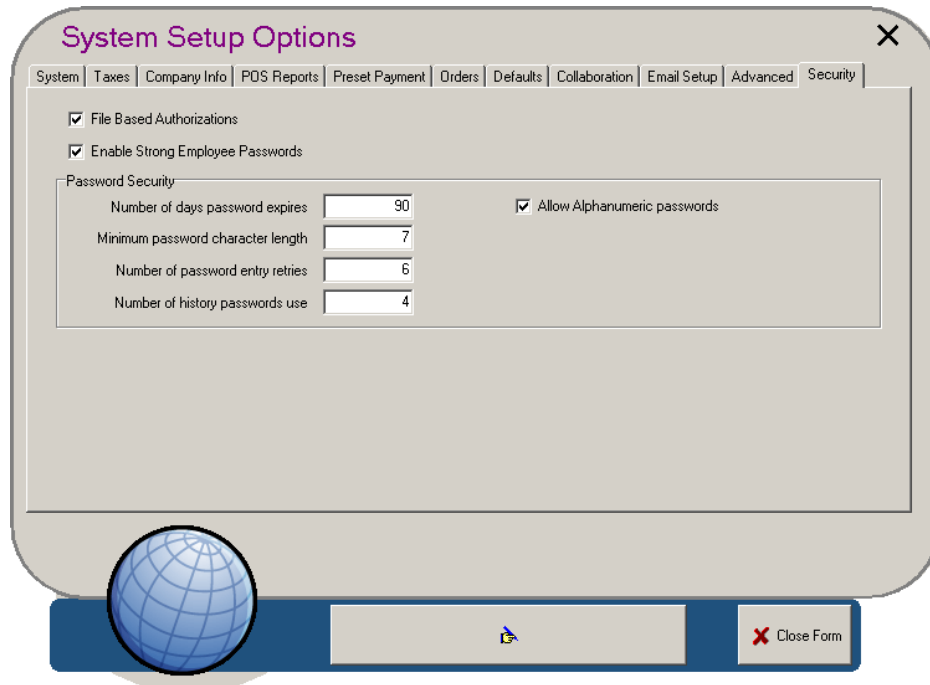
The screenshot shows a dialog box titled "System Setup Options" with a close button (X) in the top right corner. The dialog has a tabbed interface with the following tabs: System, Taxes, Company Info, PDS Reports, Preset Payment, Orders, Defaults, Collaboration, Email Setup, Advanced (selected), and Security. The "Advanced" tab is active, displaying a section labeled "OnFinish Check Plugin". Below this label is a text input field containing "OnClose.dll" and a "Browse" button. At the bottom of the dialog, there is a blue bar with a globe icon on the left, a mouse cursor icon in the center, and a "Close Form" button with a red X icon on the right.

To set the interface plugin on a per-station basis, use the Advanced tab in Station Setup.

Advanced Tab

Administrator / System Setup / Security

This tab in System Setup provides options governing password security, and configures PixelPoint POS to store authorization data using file-based methods for PCI PA-DSS compliance.



The screenshot shows a window titled "System Setup Options" with a close button (X) in the top right corner. The window has a tabbed interface with the following tabs: System, Taxes, Company Info, POS Reports, Preset Payment, Orders, Defaults, Collaboration, Email Setup, Advanced, and Security. The Security tab is selected. Inside the Security tab, there are two checked options: "File Based Authorizations" and "Enable Strong Employee Passwords". Below these is a section titled "Password Security" containing four input fields and one checked option:

Field	Value	Option
Number of days password expires	90	<input checked="" type="checkbox"/> Allow Alphanumeric passwords
Minimum password character length	7	
Number of password entry retries	6	
Number of history passwords use	4	

At the bottom of the window, there is a blue bar with a globe icon on the left, a small icon in the center, and a "Close Form" button on the right.

File-Based Authorization

To temporarily store authorization data outside the PixelPoint database in order to adhere to PCI PA-DSS requirements, select the *File Based Authorizations* option.

Strong Employee Passwords

Several options are available to increase employee password security. They are:

Number of days password expires: Determines how many days the same password can be used for before a change is required.

Minimum password character length: Determines the minimum number of characters required within the password.

Number of password entry retries: The number of failed login attempts allowed before the employee is locked out and their password must be reset.

Number of history passwords use: The number of password changes before an old password may be reused.

Allow Alphanumeric passwords: Switches to an alphanumeric keyboard at login instead of numeric keypad. This is necessary if employee passwords contain alphanumeric characters and a physical keyboard is not available.

Select *Enable Strong Employee Passwords* to make these password options available. Doing so will enable additional password options in Employee Setup (see "Employee Setup>Advanced Tab") and also prompt employees to enter their password (instead of swipe #) at login.

Station Setup

Administrator / Station Setup

Station Setup controls the programming of each individual station. It is here where you tell the system things like what menu each station should use and which printers they should print to. Each setting you change has an effect on one station only. You can switch from the settings of one station to the next by using the Navigation Bar (See here). Station Setup has five tabs, each of which is presented individually below:

- Station Options Tab
- Printer Ports Tab
- Fonts Tab
- Advanced Tab
- Receipt Setup Tab

Station Options Tab

Administrator / Station Setup / Station Options

The main focus of the station options tab has to do with operational configuration of the station.

Station

Each station is assigned a number. You can move from one station to another by using the left and right arrow buttons on the navigation bar. Though 20 stations are created by default, you can add far more. To add another station, select the [+] button in the navigation bar. There is virtually no limit to the number of stations you can create. To remove a station, make the record inactive by unchecking the 'Is Active?' box.

Description

The station's description or name. Each station is labeled as Station 1, Station 2 and so on by default. While these descriptions should be sufficient for most any application, you can change them if you want.

Auto Logout In Seconds

Should a server forget to log out of the station and leave it on the table layout, the next server could accidentally open a new table under the previous user. To help prevent this from happening, you can program the station to automatically log out (if the screen remains untouched) after the number of seconds defined in this field.

Menu

You can program multiple menus into the system (such as a bar menu, a floor menu, or menus involving different revenue centers). This field enables you to identify which menu this particular station should use. For example, Station 1 may use the Bar Menu and Station 2 may use the Dining Room Menu (because they are each situated in those areas). The order screens on each would look different and may contain different items simply because each station is using a different menu.

Finish Form

The form that determines how the front-end Finish screen appears; you can program a different Finish screen form for each and every station. Forms are created in Form Designer.

Question form

The form that determines how Forced Questions appear on this station; you can program stations to display Forced Questions differently by using this field and forms created in Form Designer.

Floor File

The floor layout this station uses. You can program multiple table layouts into the system and assign these to the various stations using this field. For example, say that Station 1 is on the first floor and Station 2 is on the second floor. You would want the table layout screen for each to look different, so that each station shows the dining sections in its respective area.

Customer Display

Some terminals have two displays: one used by the order taker and the other facing customers. This field specifies the form to be used on this station's secondary or customer display. Forms assigned here will override the system default specified on System Setup's System Tab. Customer display forms are listed as 'Other' forms in Form Designer (See "Other Forms").

Screen Saver

If you have specified a customer display form (in the field above), you can use this field to specify a form that determines how the customer display appears when not in a transaction. If nothing is assigned here ('None Selected'), the customer display form will always be displayed, no matter whether the station is in an open transaction or not. This field only appears if a customer display is specified for the station.

Keyboard Form

The form this station should use for the keyboard screen that displays when users select [Keyboard] or otherwise enter into an editable text field (such as on the Member Screen). Keyboard forms are listed as 'Other' forms in Form Designer (See "Other Forms").

Floor Zoom %

The dining areas on the table layout screen can vary greatly in size, depending on the application. A small dining section may only need to cover 10 tables, while a banquet area may include over 100 tables. In the banquet case, you can program the default zoom scale for each station so the Table Layout Screen displays a much wider dining area. The default scale is set to 100. Decreasing the zoom scale will zoom out from the floor area. Increasing the scale will zoom in closer.

Always Print Receipt On Close

This checkbox sets the station to automatically print the receipt when you close the check. If it is unchecked, the user will have to use [Print Receipt] in order to generate the receipt.

Tip: It is possible to suppress the printing of receipts for non-authorized payment methods by enabling the *SuppressReceiptOnNoAuthPayment* policy.

Station Has A Magnetic Card Reader Attached

Checking this box removes [Manual Login] from the log-in screen, making a magnetic swipe card the only way to access the station. If this box is unchecked, you can use both manual entry numbers and swipe cards.

Print Type of Sale On Orders

This checkbox controls whether the system prints the sales type on remote prints. For example, it would be important to kitchen staff to know whether the order is dine-in or take-out; that would determine whether they serve it on a plate or in a container. So you may want to check this box

for stations that print orders to the kitchen. If this box is unchecked, the sales type will not appear on remote prints.

Default Sales Type

Each station has a default sales type that is specified in this drop-down box. If a station is situated at the take-out counter, you would want the default sales type to be take-out. If it is situated on the dining floor, you would want it set to dine-in. The sales type can be changed using [Sales Type], but having this default setting programmed appropriately prevents the server from having to change the sales type for every order that is different from orders on another station.

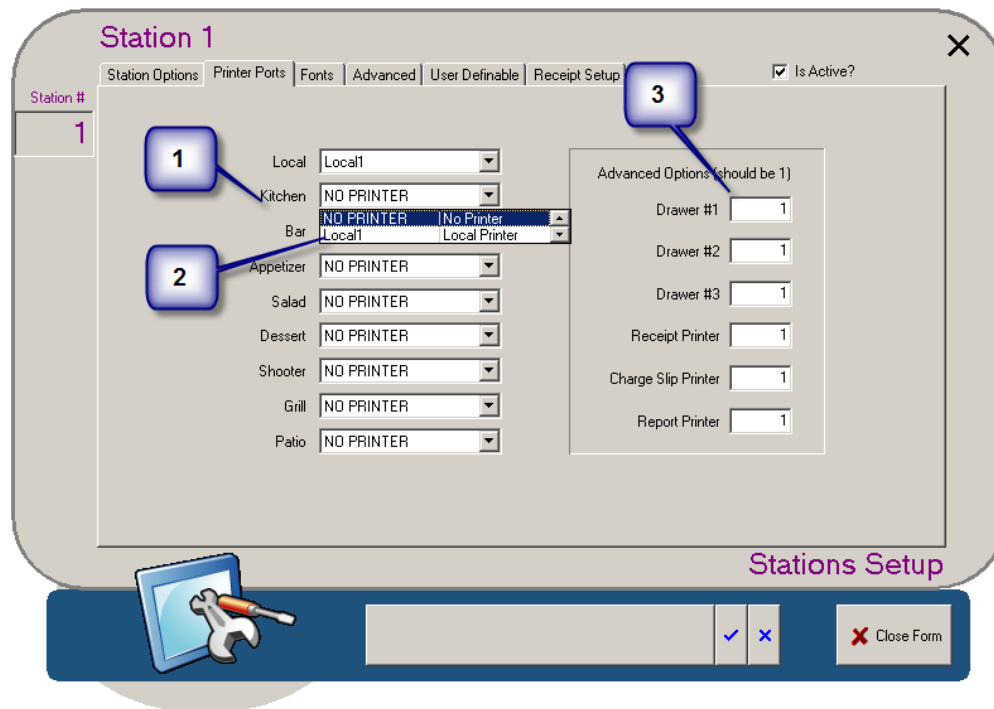
Revenue Center

You can assign stations to specific revenue centers. This can then be reflected in your reports, enabling you to see sales by revenue centers (which would cover a group of stations) as well as by individual stations.

Printer Ports Tab

Administrator / Station Setup / Printer Ports

Once you have defined your printer channels (See "Printer Channel Setup") and programmed all network printers (See "Network Printer Setup"), you need to ask questions like, "If I want to print something from this station, where do I want it to print?" It is on this tab that you specify those printing destinations.



Printer Ports Tab Layout

1. Printer Channels

This is the list of the printer channels you have programmed into PixelPoint. What appears here represents what you have put in Printer Channel Setup.

2. Network Printers

Each drop-down box contains a list of all of the network printers programmed into PixelPoint (Specified in Network Printer Setup). Match up the printer channel to the desired printer for the current station. In the example shown above, Station 1's drink orders (the Bar channel) will print to the bar printer attached to Station 2 (Bar2).

Note: The print requirements for each station may vary. Each station's printing requirements must be treated as unique when you program them.

3. Advanced Options

Notice that the values of these fields are all 1. 1 refers to the first printer channel (being Local). When set in this way, each of these settings will print on the local channel. If you ever want to change one or more of these to print elsewhere, you do so by changing the value of these fields.

So, for instance, in the example image above, the 'Receipt Printer' setting is set to 1, meaning

that receipts will print at the printer programmed to channel #1 (which in this case is the Local printer). If you were to change this setting to 6, then whenever you print a receipt from Station 1, the receipt would print at the printer programmed to channel #6, being the Salad Printer (the sixth one down).

- **Drawer #X:** You can program up to three cash drawers per station. These settings identify which printer each drawer will print to when activation of that drawer is needed.
- **Receipt Printer:** The printer this station will print receipts to.
- **Charge Slip Printer:** The printer this station will print charge slips to.
- **Report Printer:** The printer this station will print reports (such as Cash Outs) to.

Fonts Tab

Administrator / Station Setup / Fonts

This tab enables you to change the type and size of font used on each station. You can set different stations to use different types and sizes of fonts.

The screenshot shows the 'Fonts' configuration window for 'Station 1'. The window includes a title bar with a close button, a tabbed interface with 'Fonts' selected, and a 'Station #' field set to '1'. The 'Is Active?' checkbox is checked. The main configuration area contains three rows of font settings:

Font Type	Font Name	Size
System Font	Arial	10
Medium Size Font	Arial	12
Large Size Font	Arial	14

At the bottom of the window, there is a 'Stations Setup' label, a toolbar with navigation and utility icons, and a 'Close Form' button.

System Font

Used for navigational buttons, information boxes, table numbers and report information.

Medium Size Font

Used for floor sections, modifier prompts and payment types.

Large Size Font

Used for all other areas of the POS, except for items that are automatically-scaled (see below).

Auto-Font Sizing

Auto-Font Sizing is a feature built into PixelPoint POS. Its effect is that fonts for items that display in a list on the front-end, such as methods of payments and system interface selections, adapt to the display configuration of the system; text will get bigger or smaller, depending on the display settings.

Advanced Tab

Administrator / Station Setup / Advanced

This tab contains advanced-level settings for the station.

Station Price Level

This field enables you to set price levels by station. For example, Station 1 may be set to use Price Level A whereas Station 2 would use Price Level B. If left at the default setting of 'Use Schedule Pricing', the stations will default to Price Level A, unless another price level has been specified in the report category's schedule (See "Report Category Setup"). This drop-box also has options that set the station to use price levels assigned to member groups or sales types ('Use Member Group' and 'Use SalesType Pricing', respectively). See "Sales Type Setup" and "Member Group Setup" for more information.

Warehouse Depletion

Each station is assigned to a warehouse from which it will deplete stock. If the station uses inventory that exists in other warehouses (such as for a food and beverage order when the station is assigned to a beverage-only warehouse), the depletion will show as a shortage on the assigned warehouse and an overage at the actual warehouse. See "Station Depletion By Warehouse" for more information.

Quick Order Table Num

If a quick order check is saved at this station, the order has a special table number assigned to it. That table number is defined here, and must be between 30001 and 32000. When you use [Save Check], the order will be saved to the table number identified in this field; only stations that have that same table number programmed into their 'Quick Order Table Num' field will be able to retrieve the order by using [Get Check]. This is commonly done in Bar Tab and Drive-Thru applications where you want to limit saved checks to a restricted group of stations, preventing other stations from seeing and retrieving them.

Print Receipt Reminder Message

The content of this field displays on the screen as a bulletin whenever a receipt is printed. Employees will not get a bulletin message if this field is blank.

Kiosk Employee

The employee who will be credited with sales ordered on this kiosk station. This is mostly used for reporting purposes. Create an employee record with general server (Wait Staff Normal) security settings, name it something generic like "Kiosk Employee", and apply it to this field.

OnFinish Check Plugin

The OnFinish Check Plugin chosen here applies to a particular station. Global plugins can be set in BackOffice System Setup in the Advanced tab. Refer to the OnFinish Check Plugin Interface document for more information regarding this feature and its use.

Play Animation on Main Screen

If checked, the default flash animation plays on the login screen. If unchecked, a stationary PixelPoint logo appears on the login screen instead.

Disable Save/Get Check Function

If checked, this removes [Save Check] from the quick order screen. Because of this, [Get Check] becomes unavailable too.

Disable Floor Zoom IN/OUT Buttons

If checked, this removes [Zoom In] and [Zoom Out] from the Table Layout screen.

Tax Inclusive Pricing When Feature Code = 1

This enables tax-inclusive pricing for the station. Any item containing Feature Code 1 and ordered from this station will have tax included in the price. For example, say Station 1 has this field checked and Station 2 does not. You order a beer for \$4 at Station 1, and the price is \$4 including tax. If I ordered that same beer from Station 2, the price would be \$4 plus tax. (This is assuming that the 'Feature Code' field in the beer item's product record has a "1" in it.)

Start Quick Order Mode in Transaction View

If checked, anyone in quick order mode who logs into this screen will be presented with the transaction view screen. If unchecked, those users will be presented with a blank check. The transaction view screen is shown below.

Use Check		New Check			
1 Torpedo Shrimp		Table #	Transaction	Total	Since order
1 Medium Pizza		Q#1	2240	\$46.87	5 min
1 Pepperoni		Q#1-2	Keegan	\$11.98	4 min
1 Onion		Q#1-2	2242	\$24.05	3 min
1 Green Peppers		Q#1-2	2243	\$12.65	3 min
1 Chicken		Q#1-2	Zhiyang	\$24.56	1 min
1 Juices					
Orange Juice					
1 Soft Drinks					

Show Quick Order Summary by Default

This field works in conjunction with the 'Start Quick Order Mode In Transaction View' field. If checked, the summary screen displays on the Transaction View screen by default. Using this, a Quick Service user can easily retrieve either a saved check or generate a new check. The image below shows the upper part of a Transaction View screen when this checkbox is not checked; the summary window does not display—instead, multiple checks display alongside each other.

Mary \$46.87 USE CHECK	Mary \$11.98 USE CHECK	Mary \$24.05 USE CHECK
1 Chicken Quesadillas	1 T-K-O Burger	1 Torpedo Shrimp
1 Soup of the Day	Jalapeños	1 Medium Pizza
1 Oriental Chicken Salad	1 French Fries	1 Pepperoni
1 French Onion Soup	1 Soft Drinks	1 Onion
1 Louisiana Chili	Diet Pepsi	1 Green Peppers
1 Chicago's Bull's-Eye Ribs		1 Chicken
1/2 Rack		1 Juices
		Orange Juice
		1 Soft Drinks

Disable Transaction View in Floor Layout

If checked, this removes [Transaction View] from the Table Layout screen.

Disable Auto-Gratuity

If auto-gratuity has been programmed at the establishment (See "Orders Tab"), this option enables you to apply it selectively to individual stations. This works well in situations where, for example, you do not want auto-gratuity to apply to a station that manages take-out orders.

Sale Auth (No PreAuth)

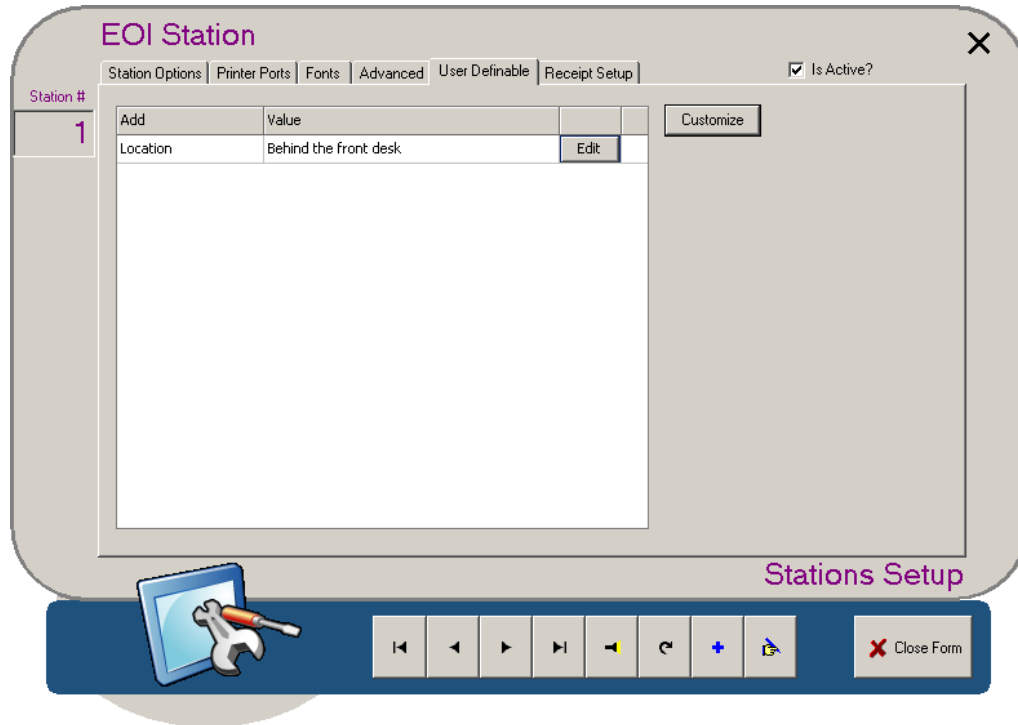
If you are using Authorization Manager, this enables you to set the station's credit authorizations for immediate, rather than pre-authorized, credit settlement. If immediate settlement is enabled, charge tipping is not needed, and the charge is settled right away. This is usually applied to stations that are used for Take Out orders and Retail transactions.

User Definable Tab

Administrator / Station Setup / User Definable

This tab allows user definable fields (such as unique station identifiers, for example) to be created and printed on receipts.

Note: This tab is only visible when the *ShowStationCustomFields* policy is configured to make it visible.



Customize

Use the [Customize] button to open the custom field setup.

The screenshot shows a 'Customize Fields' dialog box with the following sections:

- Custom Field:** Name: External Fiscal Reporter, Type: Integer. Buttons: Add, Set Inactive, Save, Cancel.
- Possible Values:** A table with columns 'Code' and 'Value'. Buttons: Add, Edit, Set Active.
- Available Custom Fields:** A list with columns 'Name' and 'IsActive'. 'External Fiscal Reporter' is selected. Buttons: Help, OK, Cancel.

Code	Value

Name	IsActive
Location	Yes
External Fiscal Reporter	Yes

To create a new field::

1. Select [Add]
2. Enter a name for the field and choose a data type.
3. Select [Save].

If creating a custom field of type "Enumerated", you will also need to add possible values in the Possible Values section.

To edit an existing field, choose one from the Available Custom Fields list and modify the name, data type, and possible values (if applicable) for it.

Select [OK] to return to the User Definable tab in Station Setup and use the [Edit] button to associate a value with the defined field(s).

To show these fields on a receipt, add "&user_stn_field_" followed by the field name and "&user_stn_value_" followed by the field value in the desired location. Make sure to surround names and values with quotation marks if there are spaces in them. For example:

```
&user_stn_field_"External Fiscal Reporter"
&user_stn_value_"External Fiscal Reporter"
```

? * N O T F O R R E S A L E * ?

Pixel Bar & Grill
23 John Street
Vaughan, Ontario

T a b l e # 2 9



Trans#: 2082 Serv: Supervisor

External Fiscal Reporter #119

01/14/2013 03:59:37 PM #Cust:1

Quan	Description	Cost
1	Cheese Steak 6"	\$3.75
1	ADD Chips	\$0.80
	Net Total:	\$4.55
	Tax1	\$0.36
	T O T A L :	\$ 5 . 4 8
	Food: \$4.55	
	Cash	\$4.91

W a t c h f o r N e w
D a i l y S p e c i a l s . .
F i l l O u t a S u r v e y
F o r a C h a n c e t o W i n !

? * N O T F O R R E S A L E * ?

Receipt Setup Tab

Administrator / Station Setup / Receipt Setup

This tab enables you to change the header and footer on each station's receipts.

By default, stations use the receipts set up in General Setup / Receipt Setup (See "Receipt Setup"). If you check the 'Custom Receipt' box on this Station Setup screen, however, the station will use the receipts set up here. Refer to "Receipt Setup" for additional receipt options that are enabled through policies.

When you check the 'Custom Receipt' box, the screen displays the header and footer windows and enables you to modify them. The header information prints at the top of the customer receipt and the footer information prints after the check total at the bottom of the receipt.

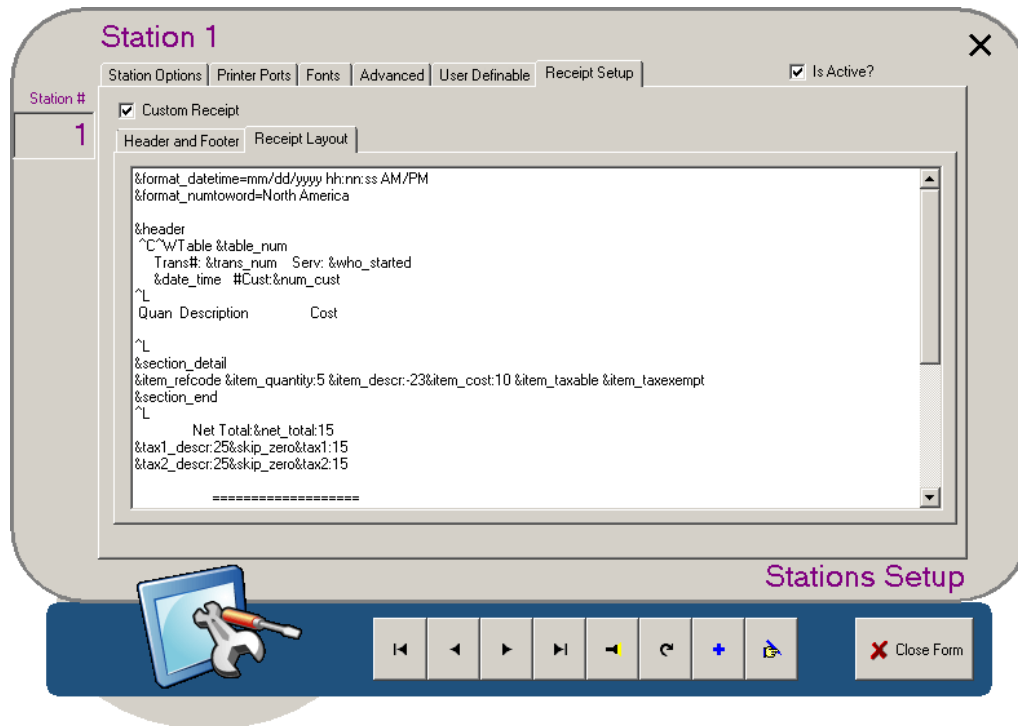
The special characters listed in the legend on the left of the screen can be applied to the header and footer as well. Note that the Red Print feature will only work if the printer attached to the station has red ink in it.

Note also that the Print Logo feature will only work if the designated printer has the ability to print a graphic image. In addition, you must first have the print string for the image entered into the Print Logo field located in Printer Code Setup. Only then can you use the ^G feature. It is suggested that you leave the graphic image left-justified. Centering it may affect the appearance of the image.

The custom receipt screen should only be used if stations need different headers and footers (such as in an establishment with multiple revenue centers). As mentioned, the main receipt header and footer setup is found in General Setup / Receipt Setup (See here).

Receipt Setup Tab

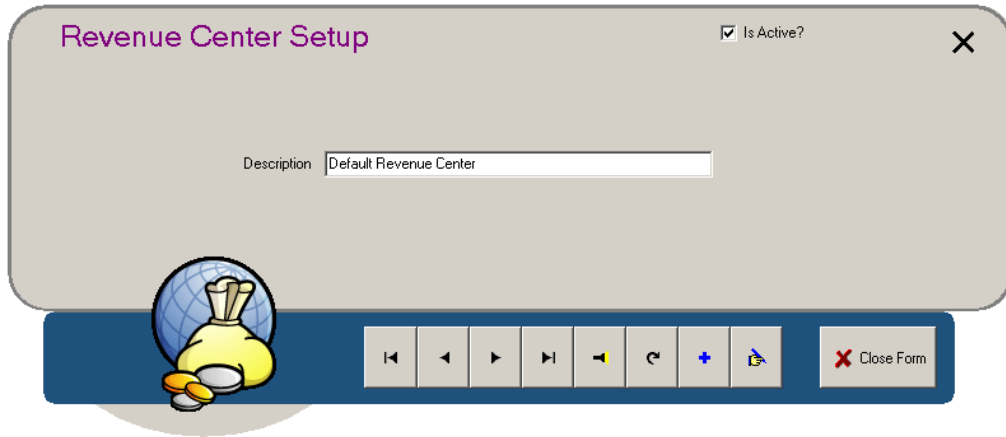
This tab enables you to have a separate receipt layout for this station. See the "Receipt Setup Layout Tab" for the system-wide receipt layout.



Revenue Center Setup

Administrator / Revenue Center Setup

A revenue center is a business that operates within a larger business (and is sometimes referred to as a profit center). For example, a hotel may contain a restaurant, a lounge and a retail shop. Though all three businesses reside in the one establishment, they are each run independently and each may have completely different POS requirements.



This setup screen enables you to create these revenue centers and program the system to accommodate the different menus, screens and methods of operation for each one. When you create a new revenue center, you will be able to apply stations, menus and employees to it. You do this on each of these components' respective setup screens—on Station Setup's Station Options Tab, in Multi Menu Setup, and on Employee Setup's Employee Info Tab.

Sales Type Setup

Administrator / Sales Type Setup

PixelPoint easily manages multiple sales types. Several of the most common sales types have been programmed by default. They are: Dine-in, Pick-up, Delivery, Catering, Drive-Thru and Quick Service.

Note: Try to avoid making changes to the sales types that are already programmed. If you need to change the programming, it is recommended that you set the originals as inactive and create new ones.

The screenshot shows a 'Catering' sales type setup form. At the top left is the title 'Catering' and a close button 'X'. Below it is a checkbox 'Is Active?' which is checked. The form contains several input fields and checkboxes:

- Sales Type Description:** A text box containing 'Catering'.
- Sales Type Price Level (must also configure stations):** A dropdown menu showing 'Use Schedule Pricing'.
- Delivery Mode:** A group box containing three radio buttons: 'Dine-In', 'Delivery' (selected), and 'Pick Up'.
- Tax Exempt:** A checkbox that is checked.
- Print Receipt Location:** A text box containing 'Local' and a printer icon.
- Print Member Information:** A checkbox that is checked.
- Other checkboxes:** 'Sale Auth (No PreAuth)', 'Enforce Member', 'Enforce Future Order', and 'Auto Order Item' are all unchecked.
- Buttons:** 'Load Image' (with a truck icon) and 'Clear'.

At the bottom of the form is a blue navigation bar with icons for back, forward, and other actions, along with a 'Close Form' button.

Sales Type Description

The sales type's name or description. It can be up to 30 characters in length.

Sales Type Price Level

This field enables you to set price levels by sales type. For example, you may want the price of a sandwich to vary based on the type of sale (Say, \$5 for Pick-Up orders, but \$6 for Dine-In orders). The default setting for this field is 'Use Schedule Pricing', which means the system uses whatever price level has been programmed elsewhere. The other options (Force Price A through J) enable you to assign one of the price levels to this sales type and so override the schedule.

Sale Auth (No Pre-Auth)

You can set each sales type to have either pre-authorized or immediately-settled credit authorization. If this box is checked, all credit transactions with this sales type will settle immediately, without pre-authorization.

Print Member Information

If checked, information about the member assigned to the current check will print on the guest check when this sales type is used.

Enforce Member

Prevents users from settling checks with this sales type if there is no member assigned to the transaction; brings users to the member screen after they select [Apply Payment], if there is no member assigned. The Member Screen will have a red 'Member Selection is Required!' message at the top of it.

Auto Order Item

If checked, the system will automatically add a specified product to every check opened with this sales type. For example, for orders with a Take Out sales type, you could program the system to automatically order a condiment package or promotional item. If you check this box, a [Select] button appears. Select the button and then choose the item to be automatically ordered.

Delivery Mode

Specifies how orders with this sales type are to be received by the customer.

- **Dine-In:** All orders with this sales type will be served to the customer, who will be dining on-location.
- **Delivery:** All orders with this sales type will be delivered to an address specified by the customer; these orders will show up on the Delivery Screen and drivers will be able to pick these orders for delivery.
- **Pickup:** All orders with this sales type will be picked up and taken elsewhere by the customer. They will show up on the pickup tab and drivers will not be able to access them.

Tax Exempt

The right-most part of the screen has a checkbox for each tax programmed on the system. You can exempt transactions with this sales type from a particular tax by unchecking the appropriate tax-exempt box.

Print Receipt Location

The printer channel that receipts for transactions with this sales type print on. Select the printer icon next to this field to change the channel.

[Load Image]

Enables you to load an image to represent this sales type on order screens.

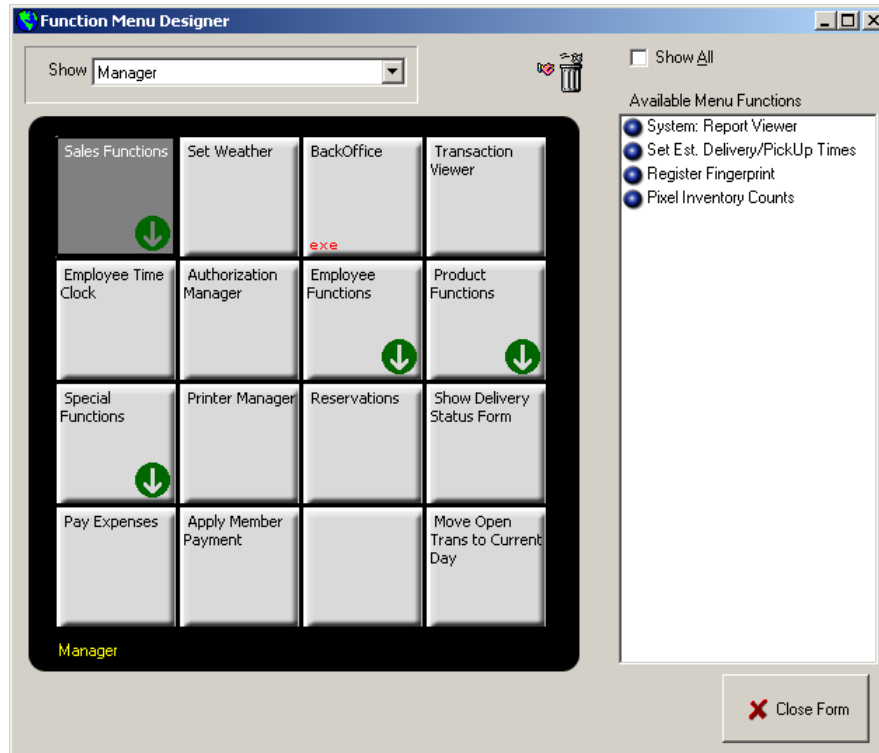
[Clear]

Removes the loaded image.

POS Functions Setup

Administrator / POS Functions Setup

This application enables you to modify the contents of the various function menus used at the front-end.



You can move the buttons around by clicking-and-dragging them. To remove a button, click-and-drag it to the trash can icon at the top of the screen. To add a function, select it from the "Available menu functions" list and drag it to an empty button space.

Show

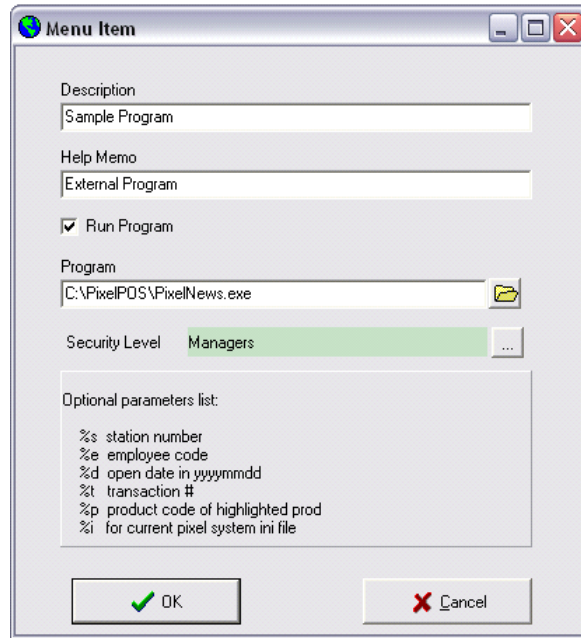
This field enables you to switch from one function menu to another. The example above shows the Manager Functions menu, but you can use this drop-down box to modify any other menu, such as the Employee Functions menu or Sales Functions menu. Buttons with a green down-arrow contain sub-menus, which can also be accessed by using the Show drop-down box. Buttons that have a red "exe" at the bottom are applications run from a separate executable program.

Show All

Checking this box lists all of the functions you can add to this particular menu, not just those that are unused. Functions that have a blue circle next to them are unused; those that have a red circle next to them are already on a menu.

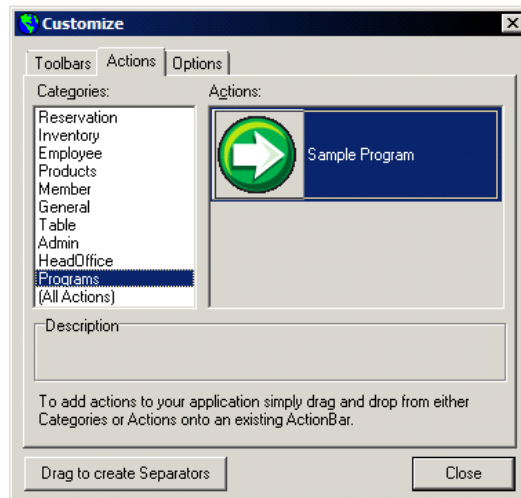
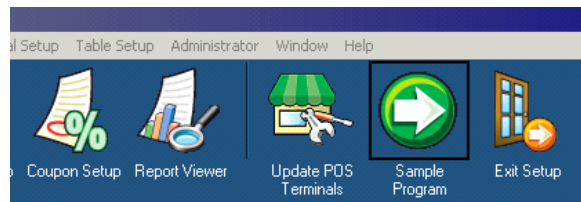
BackOffice

One of the selections in the [Show] field is called Back Office. Selecting this will present an empty grid from which you can right-click on a button to create a new button which links to an external application (see below).



Selecting [Run Program], you can browse and apply the executable program and apply a security level for running this function. Once completed and saved, right-click on the BackOffice task bar and the new entry will appear in the "Programs" category. Click-and-drag to apply it to the task bar.

A word of caution though, make sure you do not place it on the far right position (where Exit Setup appears). This may affect back office performance.



Payment Method Setup

Administrator / Payment Method Setup

This is where each payment method is configured. The first method (Cash) should always refer to the local base currency (that is, one for which the exchange rate is 1:1).

Description

Name of the payment method.

Is Currency

Indicates whether the payment method is currency or credit.

Exchange Rate

The value of one dollar of the currency in terms of the base currency. This is used for foreign currencies. For example, if the base currency is US Dollars, the exchange rate for a Canadian Dollar may be something like "0.95", whereas the exchange rate for a Euro may be more like "1.46".

of Decimals

Some national currencies do not use decimal places and some may use more than the default of two decimal places. This field enables you to stipulate how many decimal places this payment method uses.

Select

Each payment method must be set for one of the following Authorization Types.

- **No Authorization:** The payment method does not need any authorization. For example, Cash never requires authorization.
- **Member/VIP Auth.:** The payment method is authorized by being entered on a Member or VIP Card.
- **Credit Card Auth.:** The payment method is authorized as a Credit Card and needs to have a

card swiped and a signature given.

- **Front Desk Auth.:** The payment method needs authorization from the Front Desk (commonly needed, for example, in Hotels/Motels).
- **Debit Card:** The payment method is authorized as a Debit Card and needs to have a card swiped and pin number entered.
- **Custom:** The payment method needs custom written authorization.
- **Gift Card (third party):** The payment method needs authorization from a third-party gift card system.
- **External Authorization:** The payment method is authorized by another third-party device.

PixelPoint Authorization Manager is needed for all authorization types except 'No Authorization', 'Gift Card' and 'External Authorization'.

Min. Security Required

The job position with the smallest amount of security-clearance that can accept and process this type of payment.

% Emp Tip Surcharge

Normally the bank charges a transaction fee (surcharge) for each credit card transaction. The surcharge is a percentage of the total amount including the tip. Entering a value into this field enables you to deduct the tip portion of the surcharge from the server's charge-tip amount. For example, say the charge tip is \$10 and that the bank's surcharge fee on the tip is 3%. Entering "3" into this field ensures that the employee gets \$9.70 of the tip and that the remaining \$0.30 is kept by the establishment to cover the bank surcharge for processing that tip.

Payment Options

Options in this box enable you to further customize the payment method.

Sale Auth (No PreAuth)

If checked, charge transactions will be settled immediately, rather than being pre-authorized. No charge tipping is needed when charge transactions are not pre-authorized.

Disable Cash Drawer Opening

Prevents the cash drawer from opening when this payment method is tendered. This is usually applied to credit transactions in establishments where charge slips are placed in a slot underneath the drawer insert.

Allow Retip

Some credit card verifications systems are unable to process tips more than once. If working with such a system, you can prevent employees from applying the tip more than once by checking this box.

Force Tender Settlement

Checking this box requires totals for this payment method to be entered during the Tender Balance process.

Show Calculated Tender Amt

Determines whether the amount the system has calculated for this payment method is displayed during Tender Balance (and so 'Force Tender Settlement' must also be checked in order for this to apply). If unchecked, the system's calculations will not be visible; this is called a blind tender balance.

Is Bank Deposit Item (non-EFT)

Used to specify whether this payment method is money that you can deposit into a bank. Check this box if it is, uncheck it if it is not.

Ask For Cashback

Enables the user at the front-end to provide the customer with *cashback*, if the customer wants it. A message box appears when this payment method is applied on the front-end Order Screen, enabling users to choose whether cashback is performed or not. If unchecked, this message box does not appear, and users at the front-end cannot give cashback for any transaction using this payment method. Note that not all payment processors support cashback; check with PixelPoint Support for payment DLLs for certified processors.

Card Prefixes

The starting digits in this method of payment. Only enter values here if all card numbers for this payment method begin the same way. Having values entered here enables the system to recognize the card type by reading the first few numbers in the card. As examples, Visa® cards always start with a 4, and MasterCard® cards start with 50, 51, 52, 53, or 54. Internal member Pixel cards begin with 99 by default but can be changed using the *MemberSwipe* policy.

[Load Image]

Enables you to load an image to represent this payment method on finish forms.

[Clear]

Removes the loaded image.

Advanced Tab

Administrator / Payment Method Setup / Advanced

Accounting Code

A number you can use to represent this Payment Method when interfacing with accounting software.

Tip Accounting Code

A number that represents tips added with this Payment Method when interfacing with accounting software.

Custom DLL

If a custom DLL is needed for this Payment Method, you specify it here. Select [Browse] to locate the DLL. It is likely in the "\\PixelPOS\\DLLS" folder.

Cash Change Processing

Three options are available for change handling. The default (shown above) treats change in the normal fashion. Other options allow for the house to keep the change, and for remaining balances on gift cards to be returned in cash after the payment has been validated.

Print Customer Authorization Slip with Transaction Receipt

Prints an authorization slip along with the transaction receipt. Also available is an option to reprint the authorization slip with each transaction receipt reprint.

Min and Max Value Fields

The minimum and maximum values set here dictate in what amount gift cards may be issued/reloaded in by the Gift Card Wizard.

Always Print on Receipt

Checking this box sets receipts to include the amount due in this Payment Method. For example, if the establishment accepts a foreign currency, you may want receipts to include the amount due

in that currency (in addition to the local currency), and so you would check this box on that Payment Method's record.

Do Not Ask for Swipe

If checked, PixelPoint does not ask for a card swipe when this Payment Method is selected; instead, a keypad appears, enabling you to enter a number. This feature is designed for payment methods that work with third-party products that have an agent that prompts for the card swipe instead.

Do Not Ask for Expiry Date

If checked, PixelPoint does not ask for a card expiry date when this Payment Method is selected.

Ask for CVV on Manual Entry

If checked, a CVV key pad will appear in the POS after manually entering a credit card number (and expiration date if so configured) for credit card types that have this feature enabled. With this option enabled, CVV information will be sent to the payment processor along with the credit card number and expiration date. Note that some payment processors will not use CVV in their approval process.

Payment Denominations Tab

Administrator / Payment Method Setup / Payment Denominations

This tab enables you to specify any bills and coin that may be used with this method of payment. This technically applies to currencies only, but you can also use it to track vouchers or coupons of various denominations, if you have configured them as payment methods.

In the example below, Cash has been broken down into bill denominations ranging from \$5 to \$50. Smaller change has been grouped together under the general description of Coin. To create a denomination, select [Add].

CASH Is Active? X

Method of Payment | Advanced | Payment Denominations

CASH Denomination

Denomination: 50 ...

Description: Fifties

Cash Levels

PAR Level: 200

Re-Order: 200

Type

Bank Note

Coin

Has Denominations?

Buttons: Add, Set Inactive, Save, Cancel

Entered By

Number of items

Amount (Currency)

CASH Denomination

Denomination	Description	Type	IsActive
50	Fifties	Bank Note	Yes
20	Twenties	Bank Note	Yes
10	Tens	Bank Note	Yes
5	Fives	Bank Note	Yes
1	Ones	Bank Note	Yes
0.5	General Change	Coin	Yes

Buttons: Move Up, Move Dn

Methods of Payment Setup

Close Form

Has Denominations

Checking this box activates the other fields on the screen. This instructs the system to use denominations on cash out.

Denomination

The numeric value of the denomination.

Description

The written description or name of the denomination.

Type

Specifies whether the denomination is a paper bank note (bill) or coin.

PAR Level

The ideal amount of this denomination you want to bring your stock up to when you replenish it (like the 'Par Level' field on the Stocked Items Tab). For example, if the establishment has 5 tills, each with a starting float containing four \$20 bills, then you would want your par level for the \$20 denomination to be 20 (being 4 bills x 5 tills).

Re-Order

The lowest amount of this denomination you want to have before you replenish your stock; the amount which, when the establishment falls below it, indicates that it is time to get more.

Entered By

The 'Par Level' and 'Re-Order' values can be taken as a 'Number of items' or as a total "Amount". 'Number of items' refers to the quantity of actual bills or coins, whereas 'Amount (Currency)' refers to the currency value of all of the bills added together. In the example shown in the image above, "20" in the 'Par Level' field represents twenty \$20 bills, since the 'Number of items' option is selected. If you changed 'Entered By' to 'Amount (Currency)', then the "20" would represent an accumulated total value of \$20 (being one \$20 bill). The equivalent 'Amount (Currency)' value to 20 'Number of items' for the \$20 denomination would be 400 (that is, 20 items x 20 dollars each).

[Set Inactive]

Sets the denomination as inactive. If an inactive denomination is selected on this screen, this button's label is [Set Active] and selecting it changes the denomination's status back to active.

[Save]

Saves the programming of the selected denomination.

[Cancel]

Abandons any unsaved changes.

[Move Up] / [Move Dn]

Enable you to set the order that the denominations appear in.

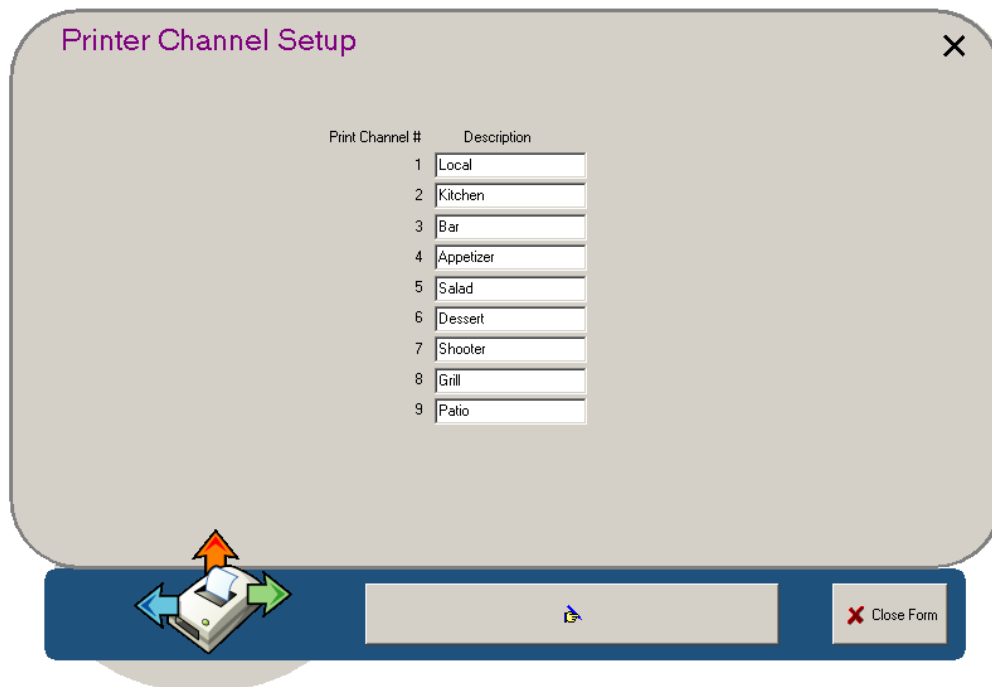
Setup for payment denominations is also accessible through Cash Management, which you can access by selecting *Manager / Payment Denominations* from the pull-down menu.

For more information, see "Cash Management".

Printer Channel Setup

Administrator / Printer Channel Setup

This screen enables you to create and modify the system's Printer Channels. Before creating Printer Channels, make sure you have read "Determining Printer Channels". The first printer channel must always be "Local". The reason for this is that Advanced Option printing uses the local printer channel and defaults to the first printer channel (See "Printer Ports Tab"). You do not need to use all 9 print channels. Use only those that you need.



Printer Code Setup

Administrator / Printer Code Setup

This screen enables you to set Printer Codes for each type of printer that you may be using. The system already comes with several different printer types programmed with their default settings and codes.

You can leave the printer settings at the manufacturer's specifications or you can customize the codes to better suit your requirements. You can locate many of these codes either within the printer's manual or the manufacturer's web site.

Note: Printer codes must be numbers separated by commas.

Print Description: The printer's name or description.

Printer Start Job Code: Tells the printer to start a print job.

Cut Code if Applicable: Tells the printer to cut the paper after printing.

Open Drawer #X: Sends signals through the printer to cash drawers, telling one of them to open. You can attach up to 3 cash drawers per station.

Normal Print: Codes that generate normal-sized text.

Turn Red Print On/Off: Codes that activate and deactivate printing text in red (for printers with black/red ink ribbons).

Turn Wide Print On/Off: Codes that activate and deactivate wide-text printing (such as title lines and remote printing).

Prefix on Modifiers: Codes that indent lines for modifiers.

End Job: Codes that indicate when a print job has completed.

Print Barcode: Applies a printed barcode of the transaction number (not available on all models of printers).

Print Logo: The print string of an image saved within the printer that is to be used as the logo on receipts. The printer must have the ability to retain a graphic image in order to use this function. See "Receipt Setup" for more information about printing logos.

of Char/Normal: The maximum number of normal-sized characters that can be printed on a single line.

of Char/Wide Mode: The maximum number of wide-sized characters that can be printed on a single line.

Lines Between Jobs: The number of blank lines the printer should put between print jobs.

Network Printer Setup

Administrator / Network Printer Setup

This is where you program the system (network) printers. You must program a network printer into PixelPoint for every physical printer on the system. For example, if there are five printers attached to the POS system, you must have five printers programmed into PixelPoint.

Note: Do not edit or remove the 'No Printer' record. It is necessary for deactivating print settings and making changes to the printing system.

Network Printer Setup has four tabs:

- General Tab
- Print Filter
- Sort Order Tab
- Custom Chit Tab

This section concludes with a subsection about printing using printers programmed through Windows®. It is called "Windows Printing".

General Tab

Administrator / Network Printer Setup / General

This tab contains basic information about the printer, such as its name, type and how it is connected to the system.

The screenshot shows a software window titled "Bar2" with a "General" tab selected. The window contains the following fields and options:

- Network Printer Name:** Bar2
- Printer Description:** Bar Printer
- Printer Type:** Epson PD300
- Connect to Station #:** 2
- on Port:** COM1
- Timeout in Seconds:** 45
- Auto Redirect Printer to:** Local1
- Auto Cancel Redirect
- Broadcast Redirect Message
- Broadcast Error Message
- Consolidate on Orders

At the bottom of the window, there are navigation buttons (back, forward, home, refresh, etc.) and a "Close Form" button. An illustration of two network printers is shown in the bottom left corner.

Network Printer Name

Each network printer should be given a unique name. The name should describe its primary function plus the station it is tied into. If a printer is being used for both local printing and remote printing, the remote printing it does would be its primary function. For example, if the printer is used to generate bar orders, its primary function would be Bar. If wired into Station 2, the name should be Bar2.

Printer Description

The network printer name is sufficient for this in most cases, but you can change this description to better differentiate one printer from another. The description appears with the name when assigning printers to station printer channels (See Station Setup's "Printer Ports Tab").

Printer Type

The type of printer being set up. The list of available types is generated from the records defined in "Printer Code Setup". If your printer is not listed, you can create a record for it through the Printer Code Setup screen.

Connect to Station

The station number the printer is physically connected to.

On Port

The port on the station that the printer is connected to. The drop-down box displays all possible ports.

Timeout in Seconds

How much time (in seconds) the system will wait for the printer to respond to a print command before displaying an error message. Serial port printers should be set for about 40 seconds and parallel port printers for about 15 seconds.

Consolidate On Orders

If checked, any remote prints this printer prints will have a consolidated items section (provided there are items that have been programmed for print consolidation). See "Print Consolidation" for more information about print consolidation.

Auto Redirect Print to

The printer that orders sent to this printer should be redirected to if this printer goes down.

Auto Cancel Redirect

If checked, the system will automatically cancel the redirection when the printer comes back on-line.

Broadcast Redirect Message

If checked, PixelPoint will automatically broadcast a message to all stations whenever a printer goes down and the system starts to redirect print jobs sent to it.

Broadcast Error Message

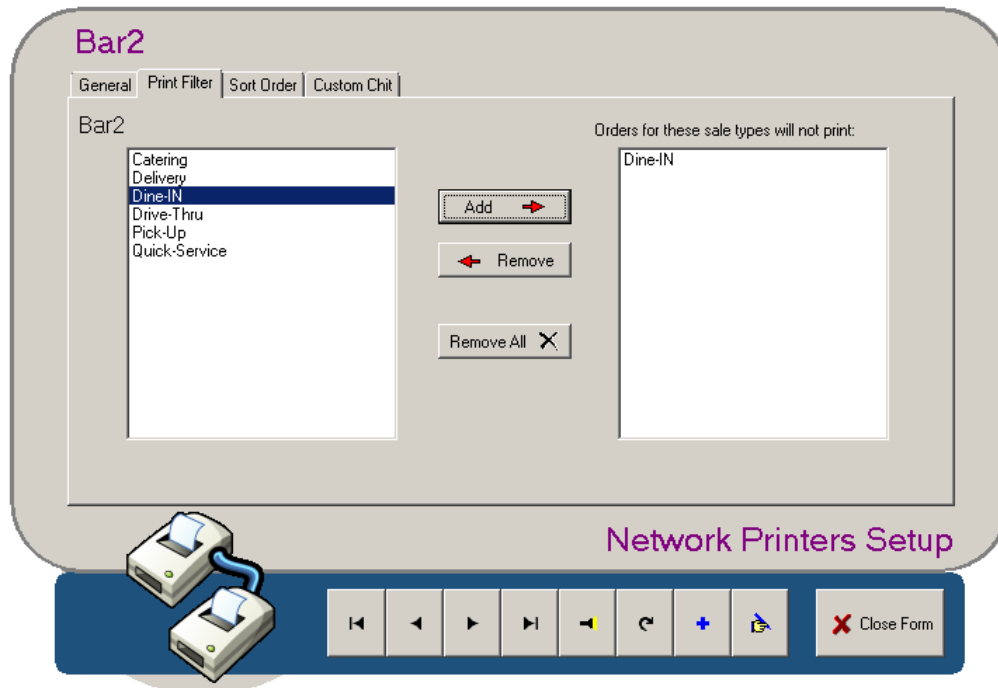
If checked, PixelPoint will automatically broadcast a message to all stations when a printer has an error.

Print Filter Tab

Administrator / Network Printer Setup / Print Filter

This tab is used to filter remote prints by sales type. It is used in situations where you want a printer to only generate orders with certain sale types.

For example, say you have two printers in the kitchen. One is for Dine-in orders and one is for Take-out orders. You could program the station to print to both printers. Then go to the Print Filter tab for each printer and identify which orders you want to be filtered out. The Dine-In printer would filter out Take-Out orders. The Take-Out printer would filter out Dine-In orders.



The window on the left displays all of the sales types programmed into PixelPoint. Select the sales type you want to filter out and then select [Add]. This moves it to the window on the right, which contains a list of all those sales types that will not print. [Remove] moves the filtered sales type back into the allowable list, setting the printer to print orders with that sales type. [Remove All] moves all sales types to the left window, setting the printer to print all orders.

Sort Order Tab

Administrator / Network Printer Setup / Sort Order

This tab enables you to program remote prints; content on remote prints can be grouped and sorted by one of four orders. If there is nothing in the 'Sort Order' window, the remote print will show items in the order they were entered.

The screenshot shows the 'Sort Order' tab in the 'Network Printers Setup' dialog for 'Bar2'. The 'Sort Order' list contains 'Course' and 'Seating'. The 'Product Print Priority' list contains 'Product Print Priority' and 'Report Category Print Priority'. The 'Split Course' section has four radio button options: 'Do not split', 'Use dividing line', 'Use separate job', and 'Separate job for each item'. The dialog includes navigation buttons and a 'Close Form' button at the bottom.

Course

If course sorting has been applied within Product Setup (See "Product Setup Tab"), this option groups and sorts your remote prints in order of courses. That is, appetizers will print first and will be followed by main course items, which will then be followed by desserts.

Seating

If you have seating positions programmed on the system, this option groups and sorts your remote prints by seat number. For example, Seat 1's order will print first, Seat 2's order will print next, and so on.

Report Category Printing Priority

This sorts your remote prints by the report categories of the various items. For example, all pasta dishes would be grouped together, as would beef dishes, chicken dishes, desserts, and so on. You can determine the order in which report categories print by assigning each report category a printing priority number in Report Category Setup.

Product Printing Priority

You can define your own order of printing by using Print Priority (specified within Product Setup (See "Product Setup Tab")). For example, you may want all combos to be printed first, single burgers to be printed next, and so on. After you have specified the print priority number for each product, select this option here in Network Printers Setup to have remote prints print in order of priority.

Note: You can combine sort orders. The first one selected (showing at the top of the Sort Order list) is the primary order. However, you can have secondary sorts under that. For example, you could sort by Course as well as Seating Position. In this case, the kitchen print would show each course and within each course section would be orders grouped for each seat.

Split Options Section

This section, at the bottom of the screen, becomes active when there is at least one sort order in the 'Sort Order' window. It always applies to the primary (first on the list) sort order. For example, if Course is the primary sort order, the window will be labeled 'Split Course', and the option selected will apply between each course. If Seat is the primary sort order, the window will be labeled 'Split Seat' and the option selected will apply between each seat. The four options are:

Do Not Split

No splitting will separate primary orders. The contents of the remote print will not be divided—the appropriate primary order titles will print together.

Use Dividing Line

A line will print between each primary order. For example, the remote print would present Seat 1, followed by its contents. Then a line would print, and then the remote print would present Seat 2, followed by its contents.

Use Separate Job

Each part of the primary order criteria will be on a completely separate print. For example, an order slip would print for Seat 1, then an order slip would print for Seat 2, and so on.

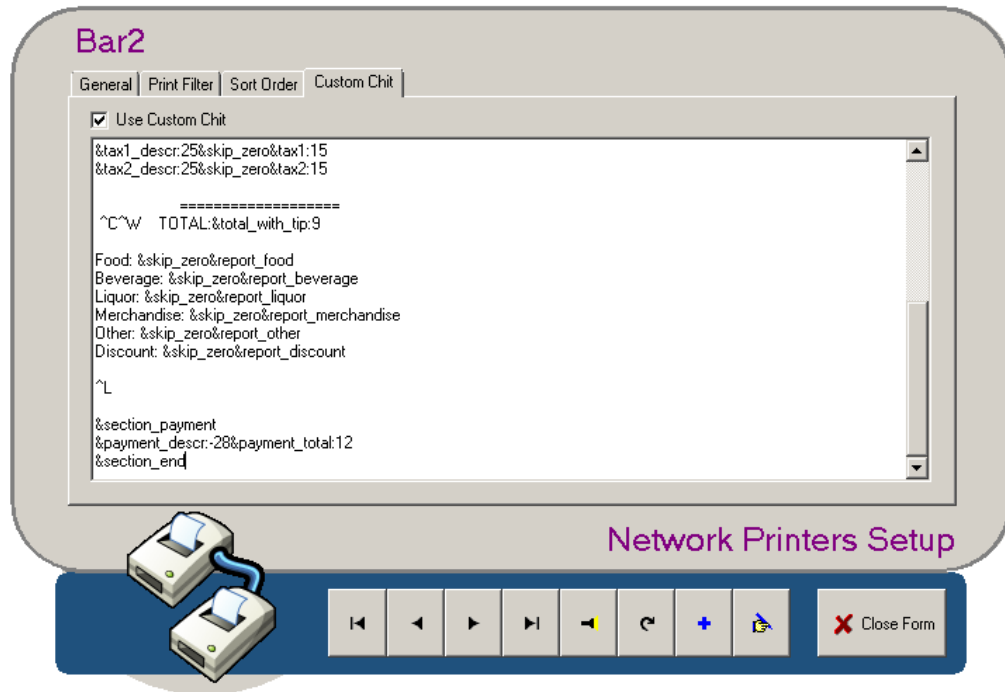
Separate Job For Each Item

Every ordered item will have its own separate print. For example, an order slip for the Chicken Soup at Seat 1 would print, then an order slip for the Salad at Seat 2 would print and so on. This is often used in situations where order contents are handed to a variety of staff to prepare.

Custom Chit Tab

Administrator / Network Printer Setup / Custom Chit

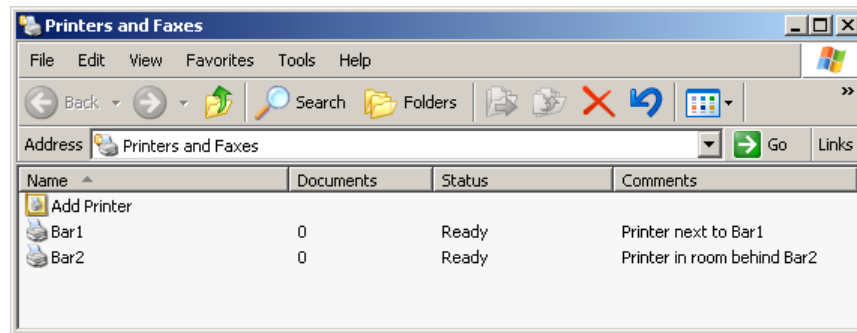
This tab enables you to program a custom order chit for this network printer to use.



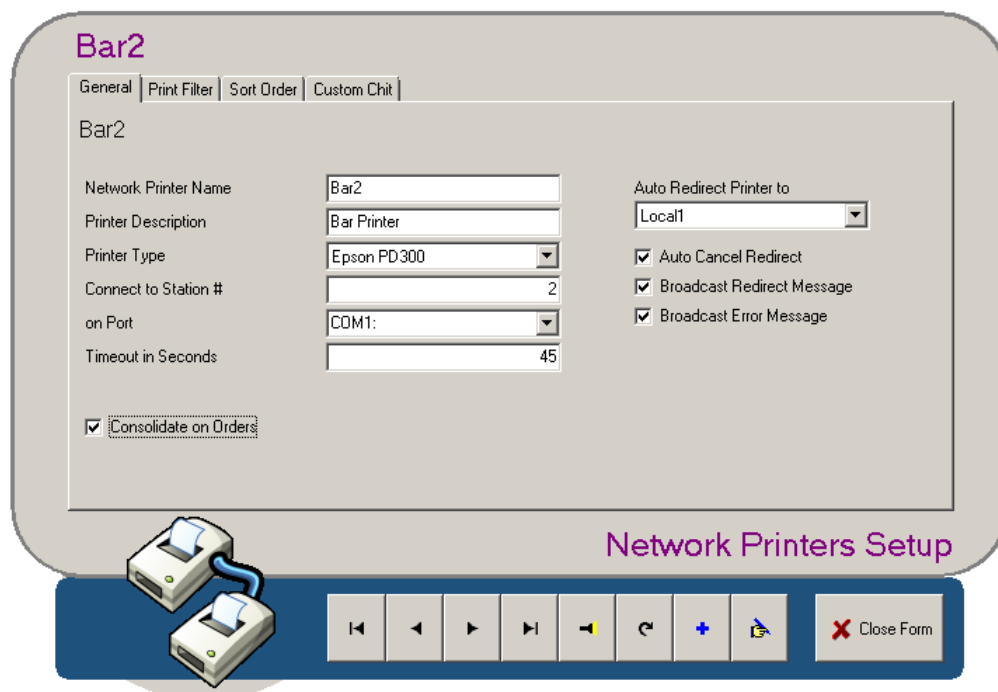
To program a custom order chit for the network printer, enable 'Use Custom Chit' and type the formatting for the chit into the text box. See the PixelPoint POS Installation Guide for detailed information about how to program and write custom chits.

Windows Printing

PixelPoint works in conjunction with Windows® network printing and USB printing. PixelPoint looks to the list of Windows printers before accepting settings assigned within Network Printer Setup; if there is a printer plugged in by USB, and which matches the name of a printer programmed in Network Printers Setup, PixelPoint will use the Windows printer. If that Windows printer is removed or renamed, PixelPoint will then use the settings defined within Network Printers Setup.



To set this up, program the printer as you normally would (following other sections in this guide). The one thing that is different for programming this printer is that you must program it for an unused port. Assigning the printer to the station is still important, since the routing of print jobs is still managed through PixelPoint.

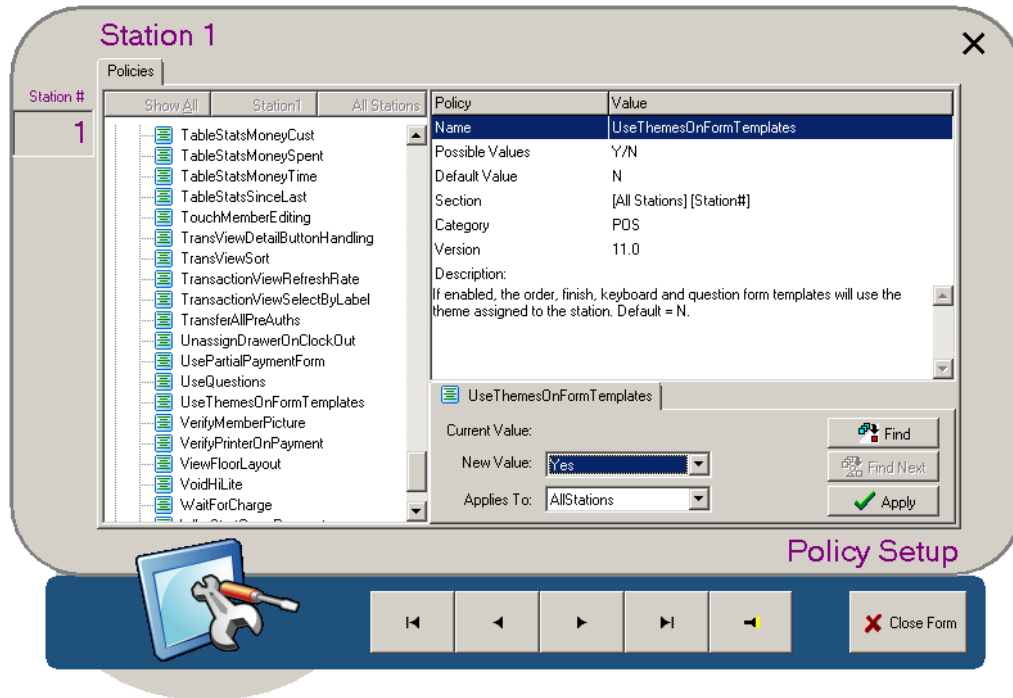


Note: Setting up printers in this way is recommended for local receipt printers only. Also, it should only be used when circumstances prevent direct port printing.

Policy Setup

Administrator / Policy Setup

This menu option displays a setup screen that enables you to modify all of the major Pixel32 options without having to leave the program and modify the "Pixel32.ini" file itself. Each option in Policy Setup has preset values and a description explaining what it does.



Selecting one of the folder icons in the left window pane expands the application category to display all of its associated INI command options. Highlighting a command displays that command's options, description and value fields in the right part of the screen. You can change the current value setting by using the 'New Value' drop-down box, and you can specify whether you want this new value to apply to all stations or just the current station's record by selecting from the 'Applies To' drop-down box.

Form Designer

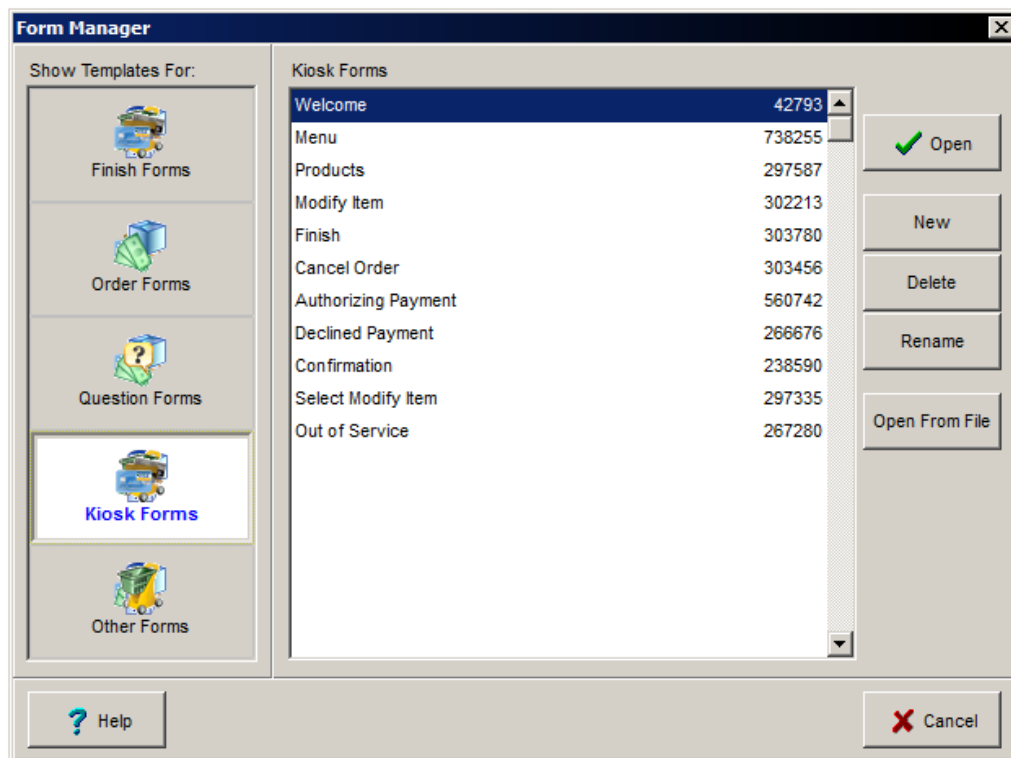
Administrator / Form Designer

Form Designer is an extremely powerful design tool that enables the programmer to create and modify custom Finish screens, Order screens, Forced Question screens, Kiosk screens and other screens, such as customer display screens for dual-screen station terminals. Form Designer differs from Order Templates (used before v9.0) in that it applies to forms other than just the order template. It is significantly more versatile in the functionality it can provide and is much more graphic-oriented as well.

Given Form Designer's versatility and high functionality, this part of the guide is complex and has many sections of its own. It is organized as follows:

- Form Overview
- Using Form Designer
- Glossary of Menu Icons
- Glossary of Component Toolbar Icons
- Glossary of Component Inspector Fields
- Glossary of Function Types
- Glossary of Label Types

When you select *Form Designer* from the Administrator menu, the system displays the following screen, which lists all of the different forms currently in the system. They are displayed by category—Finish Form, Order Form, Question Form, Kiosk and Other. Selecting a template title and then selecting [Open] displays the Form Designer screen with that template loaded.

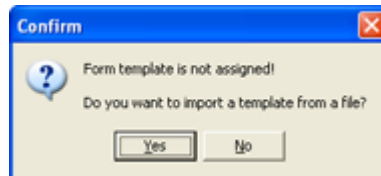


Creating New Templates

Begin by selecting the template panel for the type of template you want to create. This is

important because when you save the template it is assigned an extension, and you want to have the appropriate extension assigned. The file will be assigned a "fin" extension if you select Finish Form, an "ORD" extension if you select Order Form, "QST" if you select Question Form, "KIK" if you select Kiosk, and "OTH" if you select Other.

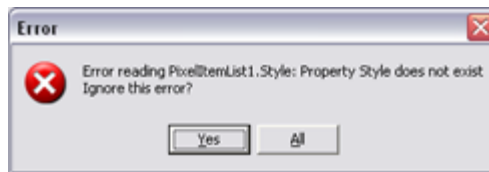
Now select [New]. A window asking for a template title displays. Type in a name and select [OK]. The new title will be added to the list of templates. At this point, the form record has been created but no file (template) has been attached to it. Select the new title and click [Open]. A message like the one below displays.



Select [Yes]. A window displays, showing all files with an extension matching the form type you selected (.fin, .ord, .qst, .kik, .oth). If the template was created on another computer and then copied to the local hard drive, this is how you would apply it. After you select the file, click [OK] to open it. The Form Designer screen will display with the template loaded.

Loading External Templates

If the template was last saved in an earlier version of the program, there may be settings (properties) that are not on the local system; this results in an error message.



If this should occur, select [Yes] or [All] to continue loading—the form template will keep all original components. Make sure that you re-save the form; this prevents the error messages from displaying when the form is opened again.

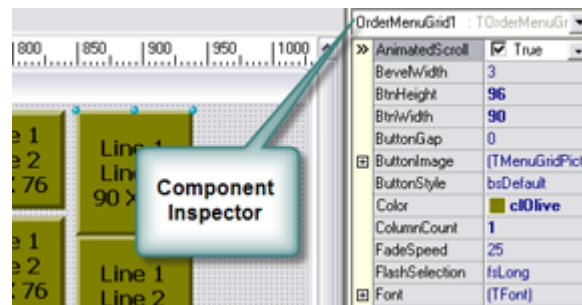
Rather than creating the form name and then applying a file, you can also select a form panel and then click [Open From File]. This displays the file browser, enabling you to select a template file.

Form Overview

The Form Designer screen has three basic sections. The first is the Component Toolbar. This contains icons for each component that can be applied or edited on the form.

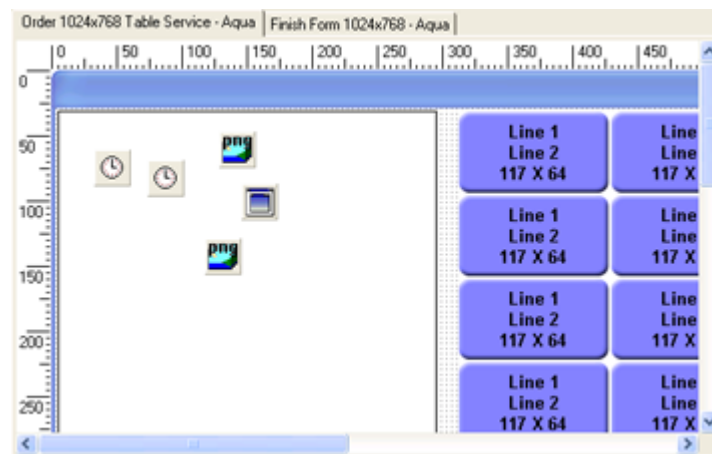


The second section is the Component Inspector. This is a window containing the settings of the selected screen component. The contents of the Component Inspector vary with the selected component.



Each field displayed in the Component Inspector has to do with an element of the component. For example, the "BtnWidth" field contains the setting that determines the width of the buttons in the element. Changing this setting's value alters the width of all associated buttons.

The third section of the Form Designer screen is the Form Display. This contains the actual components as they appear on the given form. Everything here — the grids, buttons, etc. — is considered a component. When you select any one of them, the contents of the Component Inspector change to display all of the configuration settings associated with that item.

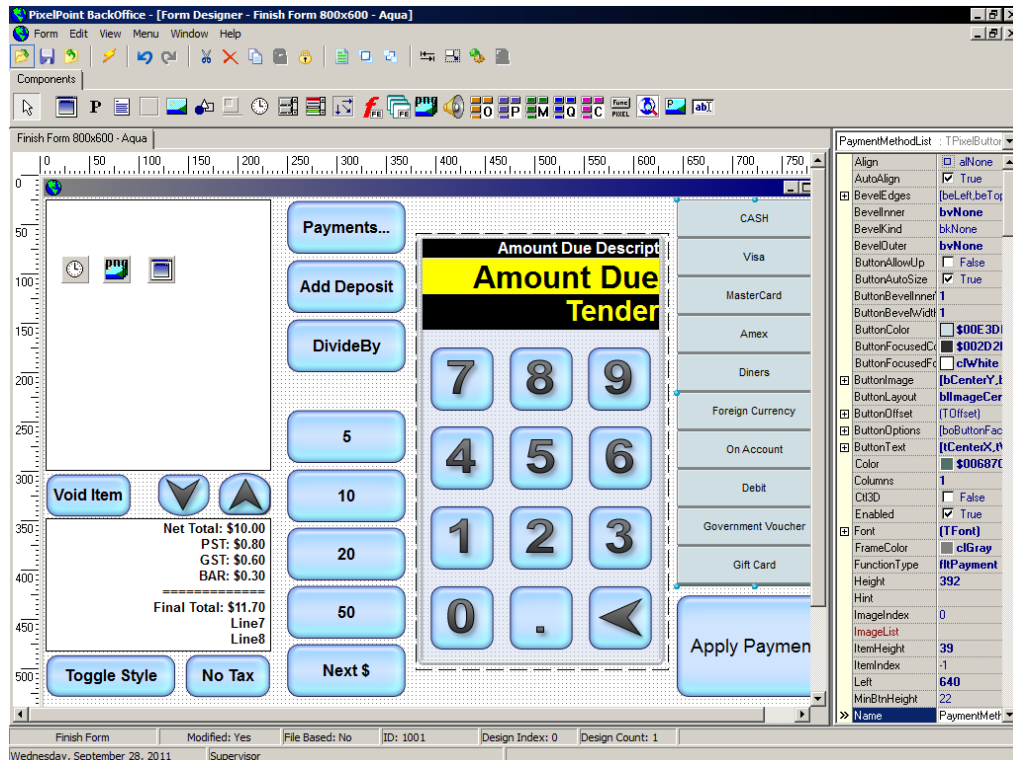


An overview of each of the main kinds of forms you can design in Form Designer is given in the sub-sections below. They are:

- Finish Forms
- Order Forms
- Question Forms
- Kiosk Forms
- Other Forms

Finish Forms

Finish Forms are used as front-end Finish screens. Form Designer can handle many Finish Forms, so you can assign different Finish Forms to individual stations.



This screen can be completely rearranged to suit your needs. For example, the quick-close buttons (including [Next \$] (which rounds the tendered amount up to the next full dollar value)) can be reprogrammed to any value. The payment method buttons can be adjusted in size and color and can include an image of that tender. You can add or remove function buttons like [Void Item], [No Tax], [Divide By] and [Toggle Style] (which is the Sales Type button). The dotted gray background can be programmed with any solid color, a gradient transition from one color to another, or a graphic image. The icons that appear in the item list are part of the display and will not appear on the front-end. See the Glossary of Component Toolbar Icons for an explanation of each one.

The Finish Form is applied in Station Setup.

Station 1

Station # 1

Station Options | Printer Ports | Fonts | Advanced | Receipt Setup Is Active?

Description: Station 1 Auto Logout in Seconds: 0


This station uses the following:

Menu: Default Menu	Alternate Order Form: Use Default
Using Order Form: sd	
Finish Forms: Finish Form 1024x768 - Aqua	Customer Display: None Selected
Question Forms: Use Default	
Theme Form: Use Default	Keyboard Form: Use Default
Floor File: C:\PixelPOS\Demo 4 Section 1024.FLR	Floor Zoom % (1-1000): 100

Always Print Receipt on Close
 Station Has Magnetic Card Reader Attached
 Print Type of Sale on Orders

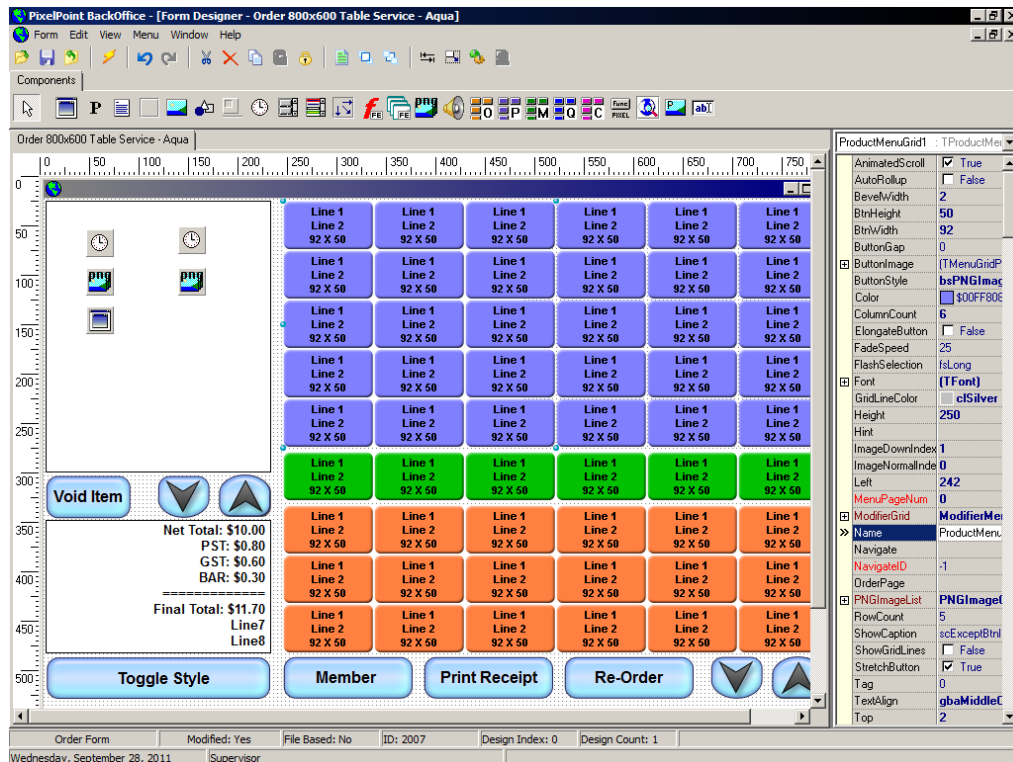
Default Sales Type: Dine-IN
Revenue Center: Default Revenue Center

Stations Setup



Order Forms

Order Forms are used as front-end Order screens. Form Designer can handle many Finish Forms, so you can assign different Order Forms to individual stations.



The default forms have the three order grids (Product, Modifier Page and Order Page) along with the white area on the left (known as the Item List), the panel containing "Net Total" and "Final Total", and several function buttons.

You can change both the appearance and function of any of these components. The number of rows and columns contained in any grid can be changed easily, as can the buttons' color, size, font and appearance. Additional function buttons can be added to the template and the existing ones can be reprogrammed to perform different functions. The dotted gray background can be programmed with any solid color, a gradient transition from one color to another, or a graphic image. The icons that appear in the item list are part of the display and will not appear on the front-end. See the Glossary of Component Toolbar Icons for an explanation of each one.


To apply an order form to a menu, simply specify it in Multi Menu Setup.

Multiple Menu Name Setup ☑ Is Active? ✕

Menu Name Description

Order Form Template

Revenue Center

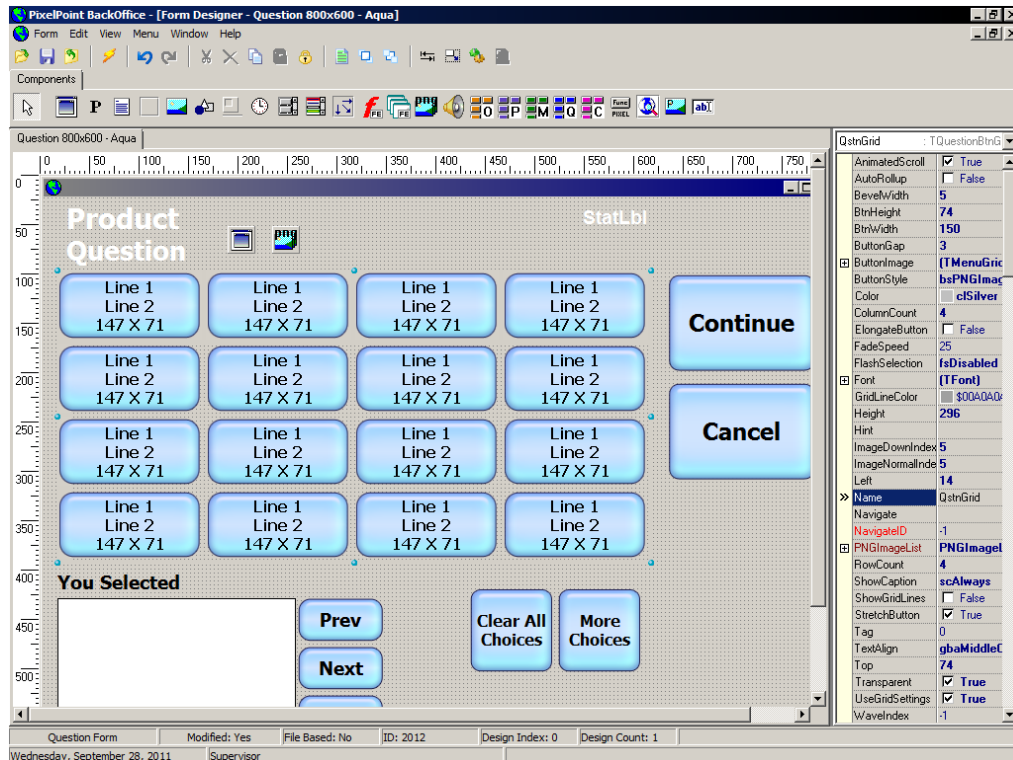


⏪ ⏴ ⏵ ⏩ ⏴ ↺ + 📄

✕ Close Form

Question Forms

Question Forms are used as front-end Forced Question screens. Form Designer can handle many Question Forms, so you can assign different Question Forms to individual stations.



When forced questions display, they can be presented on a form screen designed specifically for them. The possible answers are displayed in the Question Grid (shown as three rows of gray buttons in the image above). As you select answers to the forced question, they display in the Answer Box located in the lower left area of the screen. The white window on the right is the Item List, which contains the list of ordered items on the check.

Though the number of rows, columns and button sizes can be adjusted within the Question Grid, you may still need to have more answers than can fit on the screen at one time. The default Question form has function buttons for displaying more choices and toggling back and forth between them.

The dotted gray background can be programmed with any solid color, a gradient transition from one color to another, or a graphic image. The two icons that appear at the top of the form are part of the display and will not appear on the front-end. See the Glossary of Component Toolbar Icons for an explanation of each one.

The Question Form is applied on the Station Options Tab in Station Setup. Note that if "Question Forms" is set to "Use Default", forced questions will display as programmed within conventional BackOffice programming (without the aid of Form Designer).

Station 1

Station # 1

Station Options | Printer Ports | Fonts | Advanced | Receipt Setup | Is Active?

Description: Station 1 Auto Logout in Seconds: 0


This station uses the following:

Menu	Default Menu	Alternate Order Form	Use Default
Using Order Form: Order 1024x768 Table Service - Aqua			
Finish Forms	Finish Form 1024x768 - Aqua	Customer Display	None Selected
Question Forms	Use Default	Keyboard Form	Use Default
Theme Form	Use Default	Floor File	C:\PixelPOS\Demo 4 Section 1024.FLR
		Floor Zoom % (1-1000)	100

Always Print Receipt on Close
 Station Has Magnetic Card Reader Attached
 Print Type of Sale on Orders

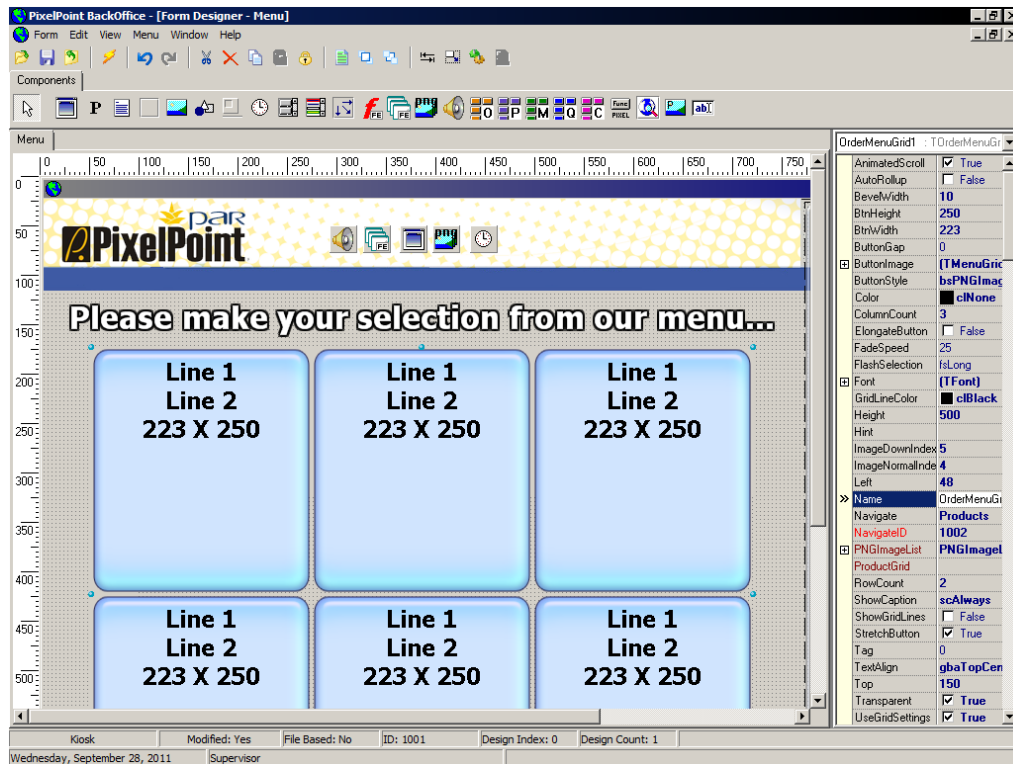
Default Sales Type: Dine-IN
Revenue Center: Default Revenue Center

Stations Setup



Kiosk Forms

A kiosk is a self-service point-of-sale station. Since the customer is also the person using the POS system, the screens must be designed to easily navigate the user through the ordering process without any training.



Designing a kiosk system is considerably different from designing a conventional POS ordering system in that every possible screen must be carefully designed and linked to associated screens. For example, a kiosk may need separate screens for order pages, products, modifiers and forced questions. These must have user-friendly graphics and possibly verbal instruction (in the form of sound files) to help guide the customer through the order-taking process.

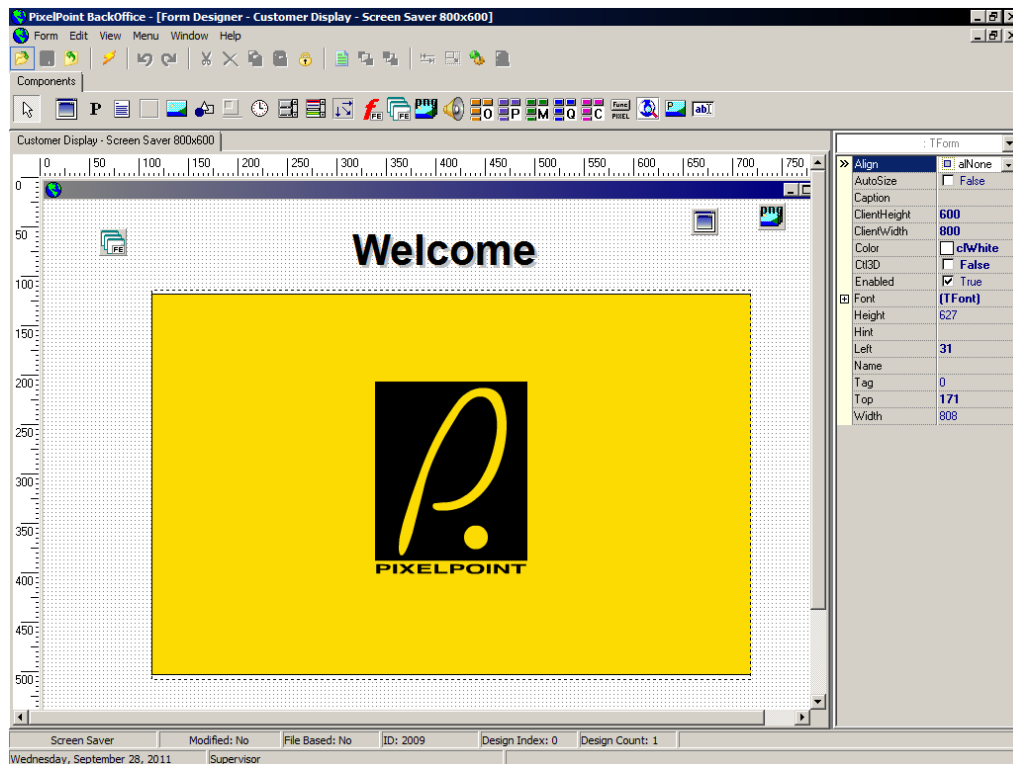
For more information about Kiosk forms and about programming kiosks, see the PixelPoint POS Installation Guide.

Other Forms

Other Forms include all forms other than Finish, Order, Question and Kiosk forms.

Customer Displays and Screen Savers

The default forms under Other are used specifically on dual-display terminals; these forms are Customer Displays and Screen Savers.

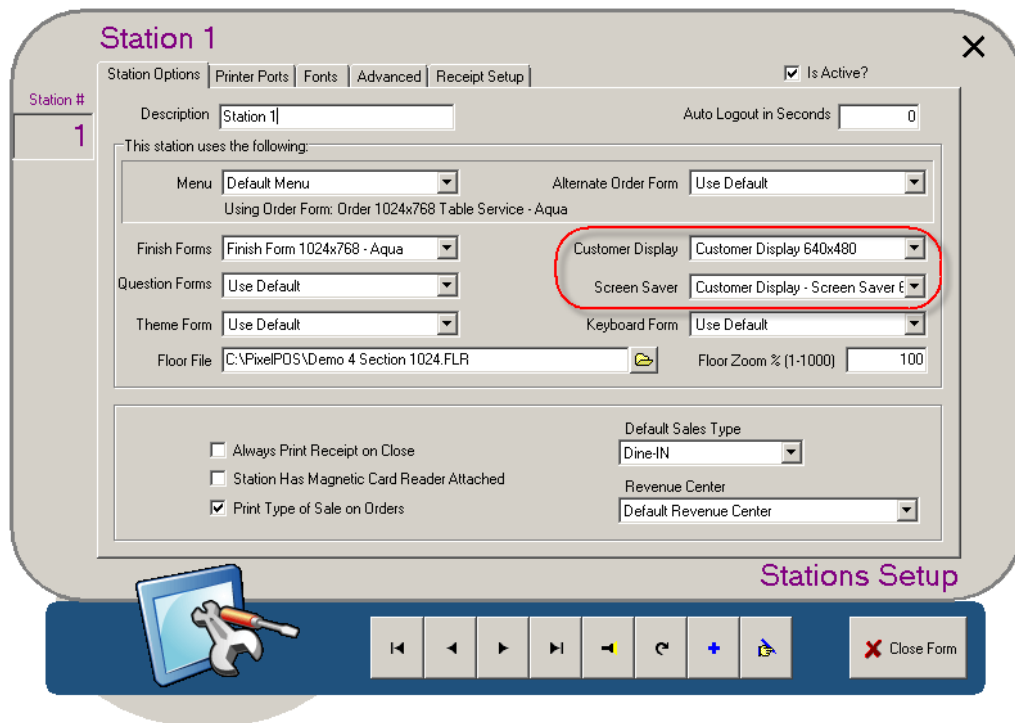


The Customer Display form shows the customer the contents of their transaction. Along with the list of ordered items, this form could include an image of the selected item and a description of how it is made. It should also include the Amount Due field, to show the customer the current check total. As an added touch, the Customer Display screen could include a flash video showing the company logo or a company commercial.

This display can be programmed to change to a Screen Saver when not in a transaction. The Screen Saver form can have generic information such as a flash video or an Internet browser displaying news, weather, or sports information.

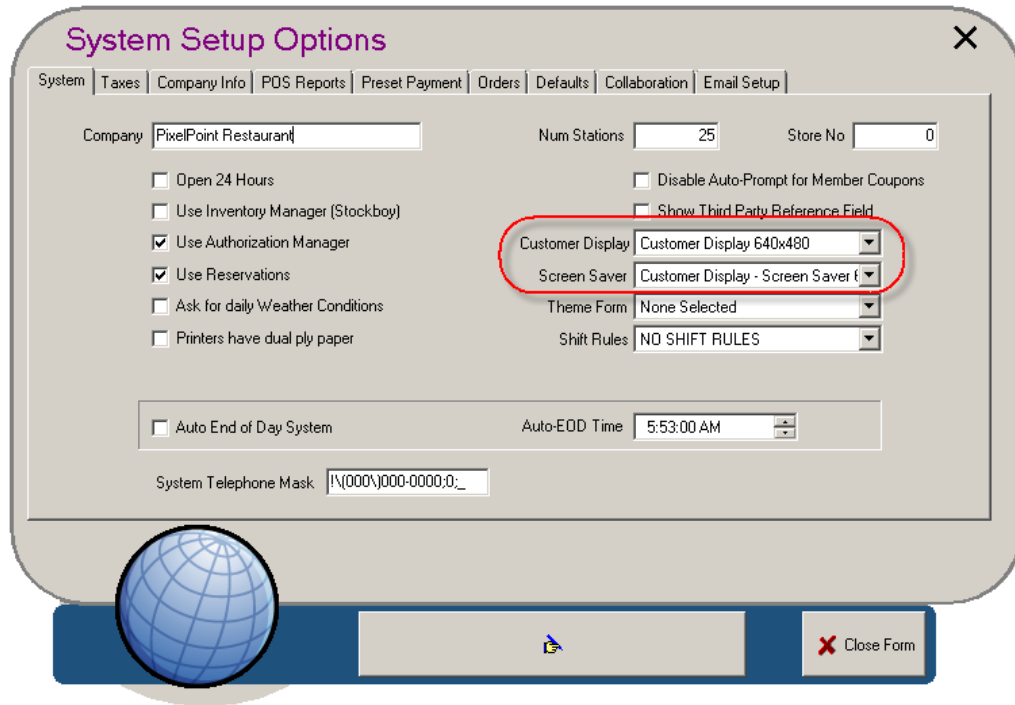


The Customer Display and Screen Saver screens for individual stations are programmed on **Station Setup's** Station Options Tab.



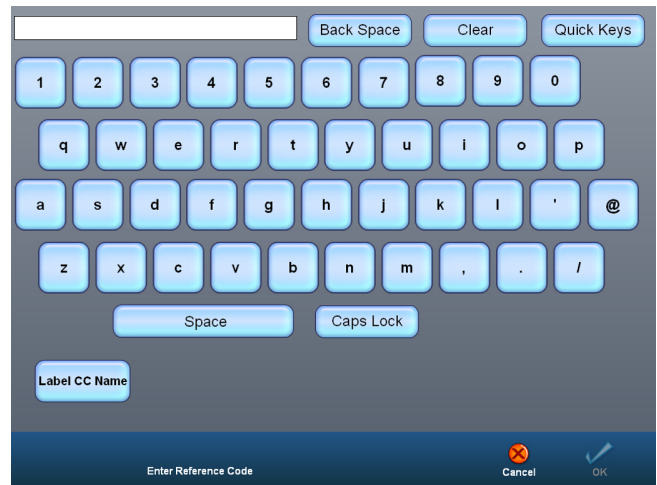
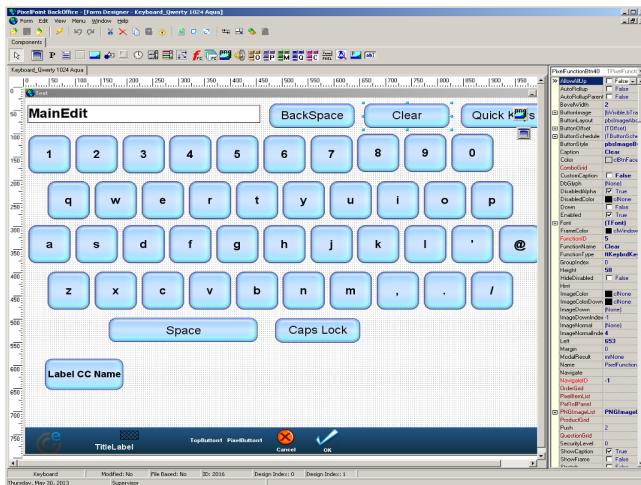
The 'Screen Saver' field displays if a "Customer Display" is assigned. Note that these screens only apply to dual-screen stations. They will also display on PCs that have multiple monitors, however.

These screens can also be programmed for all stations on System Setup's System Tab. Screens applied to individual stations in Station Setup override the screens applied here.



Keyboard Forms

Keyboard forms act like computer keyboards and enable users to input text using the touch screen. These forms are customizable, just like other front-end screens. You can add function buttons to them if you like. One feature that is especially useful for Keyboard forms is the Lookup function. This function enables users to select a single button and enter a whole word as text, instead of having to 'type' each letter of the word one at a time. For example, you could program a "Cities" Lookup button that contains a list of the most common cities serviced by the establishment. When a user wants to type in the name of a city, they just need to select the appropriate city from the list of cities, instead of having to type the whole name out using the touch-screen keyboard keys.



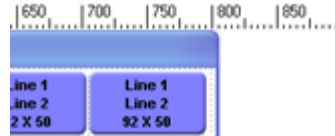
Using Form Designer

This section explains how to use Form Designer to design the many different kinds of forms discussed in earlier sections. It discusses things like how to create different function buttons, roll panels and images, and has sections on how to enhance each of these in order to make full use of Form Designer's capabilities. This section is organized as follows:

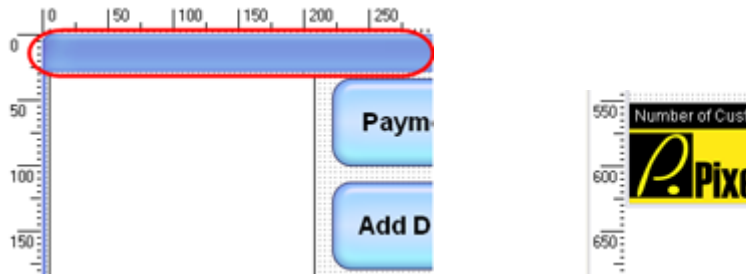
- Form Dimensions
- Defining Background
- Function Buttons
- Enhancing A Function Button
- Order Grids
- Enhancing A Grid
- Roll Panels
- Enhancing A Roll Panel
- Images
- Enhancing An Image
- Button Lists
- Enhancing A Button List
- Item Lists
- Enhancing An Item List
- Flash Images
- Product Information
- Internet Browser
- Enhancing An Internet Browser

Form Dimensions

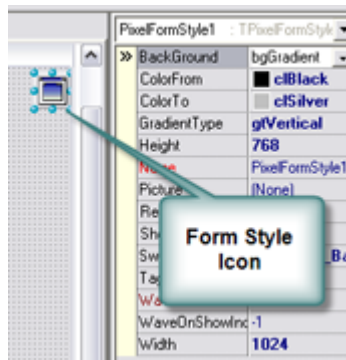
When adapting a form template, make sure that its dimensions match the resolution used on the stations. In the example below, the template is set for an 800x600 resolution.



The horizontal dimension matches up exactly with the screen or monitor width, because the form occupies that entire area (in the example above, the form goes right to 800 pixels). The vertical dimension, however, must take into account the form title bar (see below on the left). This means that the form template takes up more pixels on the vertical dimension, making it appear larger than 600 (see below on the right).

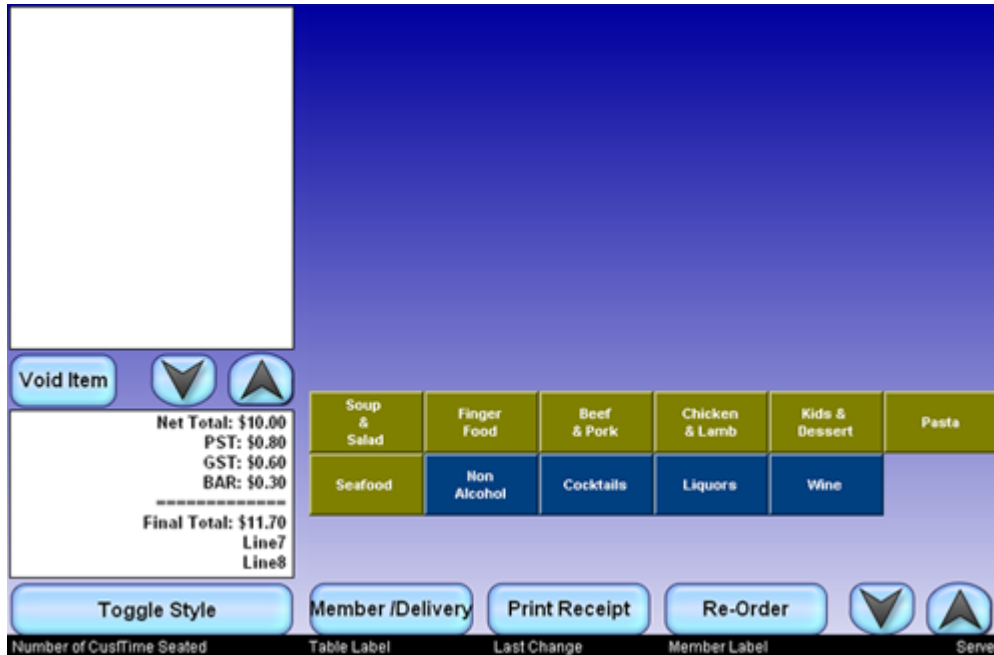


The best way to make sure the form has the proper dimensions is to select the Form Style icon. This presents the form "Height" and "Width" fields in the Component Inspector. Set these to the dimensions of the screen. It will take the Windows® title bar into account.

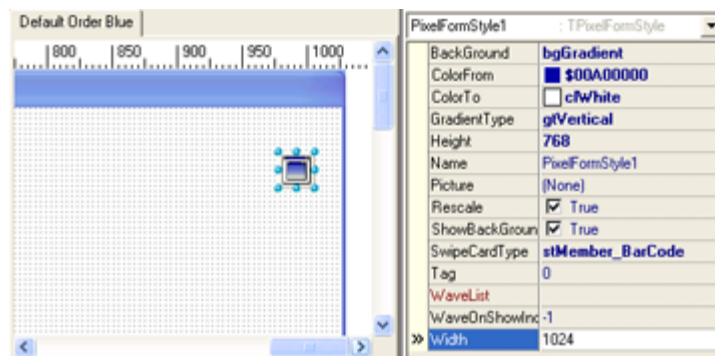


Defining Background

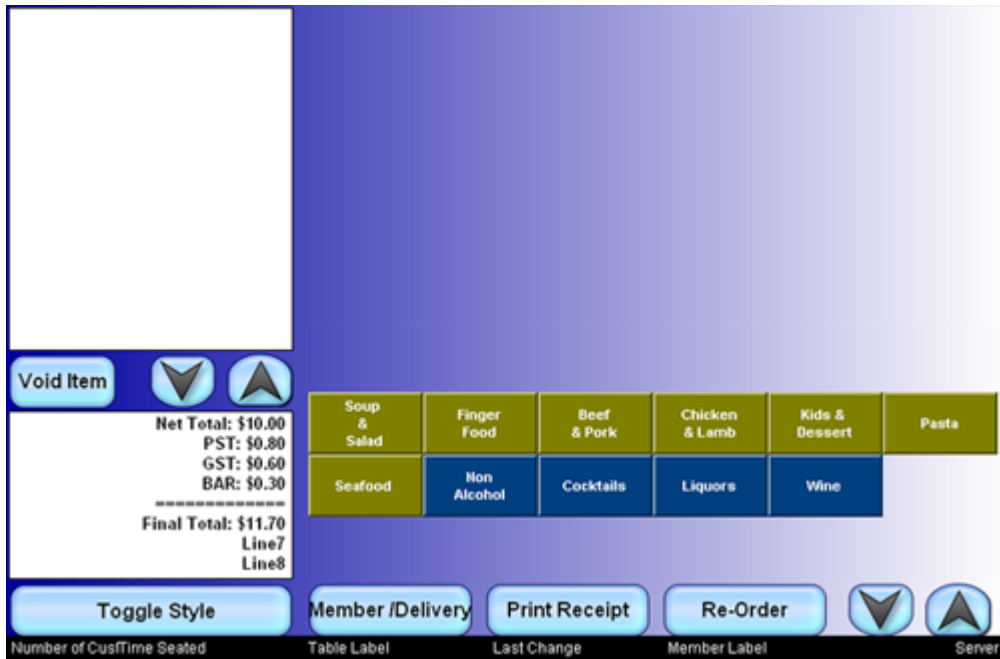
The background of any form can be set to a solid color, a gradient, or a graphic image. The following shows how to change the background's appearance. By default, the background is set as a vertical transition from blue to white.



To change this, select the **[Form Style]** icon on the Component Toolbar and place it on the Form Display. Then select the icon in the Form Display; this shows the Form Style settings in the Component Inspector.

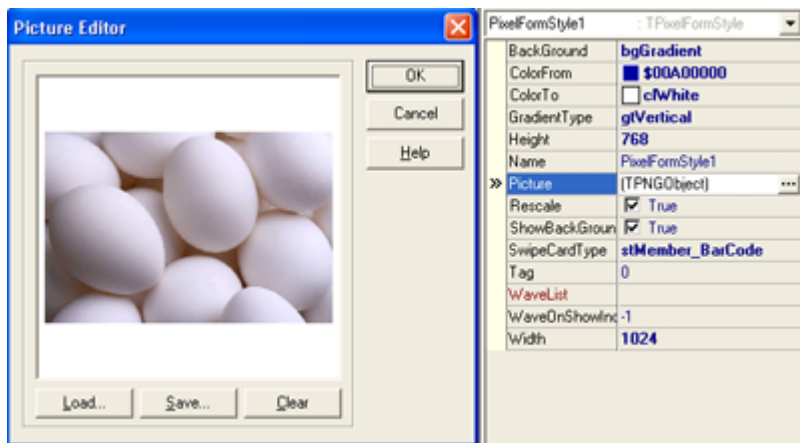


The settings indicate that the background is a gradient going from blue to white. Select the fields 'ColorFrom' and 'ColorTo' to change the transition colors.

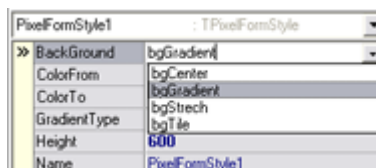


'GradientType' determines the direction of the color transition; it can be set to Vertical or Horizontal. The above image is set to "gtHorizontal"; it changes from left to right.

'Picture' applies a JPG image as background wallpaper.



You can use the setting in 'BackGround' to Center, Stretch or Tile the background picture.



The image below shows the "bgTile" setting.



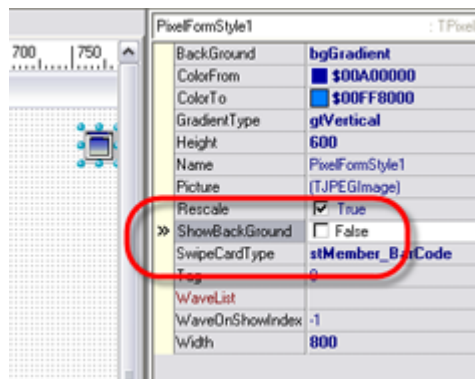
The image below shows the "bgCenter" setting.



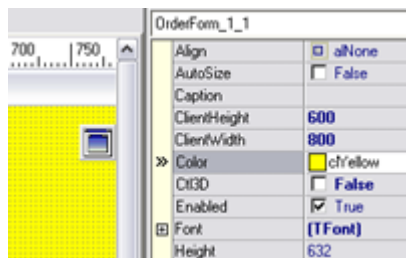
The image below shows the "bgStretch" setting.



If the value of 'ShowBackGround' is "False", neither a gradient nor a picture will be visible at the front-end (whether they are programmed or not), resulting in a blank, white background.



If you want another solid color as the background, make sure that 'ShowBackGround' is set to "False" and then click on the background in the Form Display to change the Component Inspector settings. Select "Color" to change the background from white to any other color.



In this example, it has been changed to Yellow.

Void Item [Down Arrow] [Up Arrow]

Net Total: \$10.00
PST: \$0.80
GST: \$0.60
BAR: \$0.30

Final Total: \$11.70
Line7
Line8

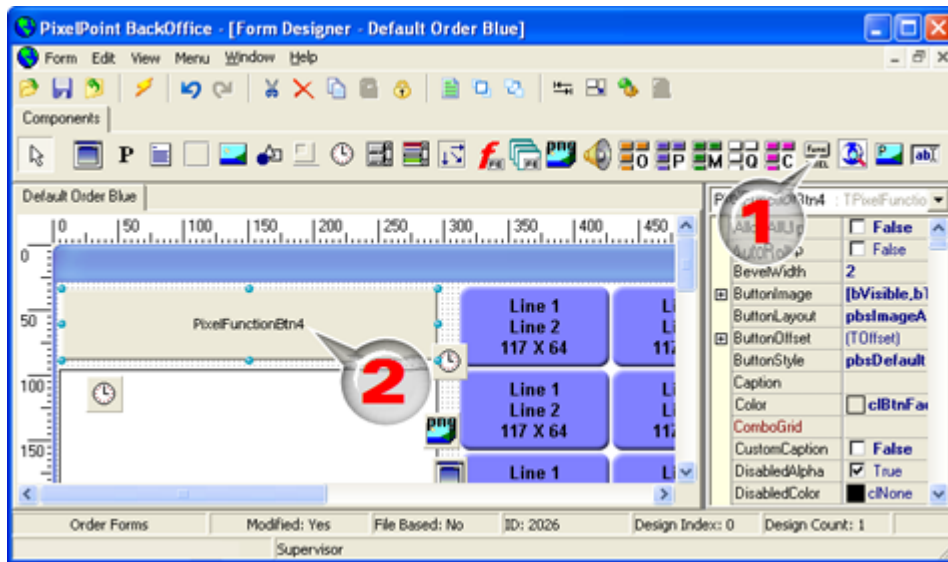
Soup & Salad	Finger Food	Beef & Pork	Chicken & Lamb	Kids & Dessert	Pasta
Seafood	Non Alcohol	Cocktails	Liquors	Wine	

Toggle Style **Member /Delivery** **Print Receipt** **Re-Order** [Down Arrow] [Up Arrow]

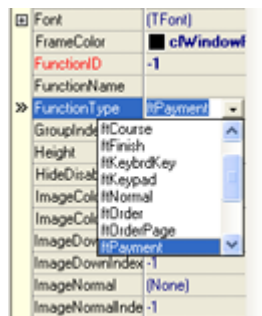
Number of CustTime Seated Table Label Last Change Member Label Server

Function Buttons

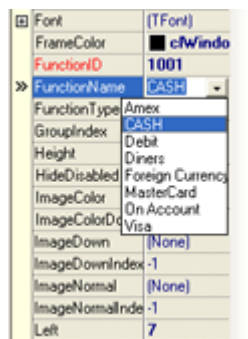
To create a function button, start by selecting the [Function] component button from the Component Toolbar.



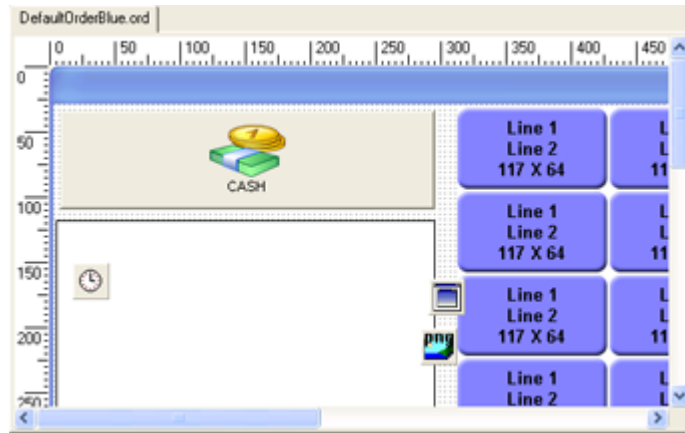
Click-and-drag on the screen to create a generic button. The contents of the Component Inspector window will change to the settings for the function button.



Select the 'FunctionType' field and click on the drop-down box. In this example, the payment function "ftPayment" was chosen. Now select the 'FunctionName' field.



When you select the drop-down box, the field options will all be methods of payment. This is because of the "ftPayment" Function Type selected above. Select which payment method you want this button to be for. In this example, "CASH" has been selected; this automatically changes the caption on the button and displays the Cash icon, as seen in the image.

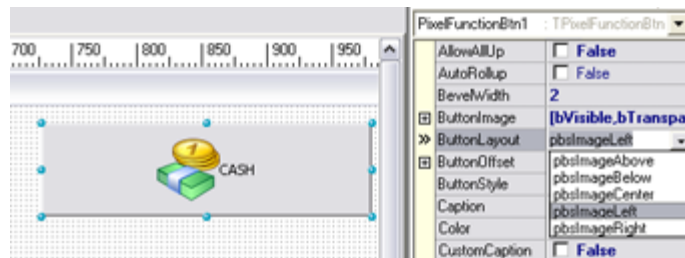


Enhancing A Function Button

You can change a function button in many ways. This section shows how some of the Component Inspector settings can change a function button's appearance.

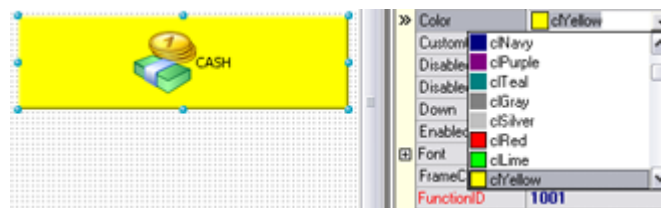
Button Layout

Changes the position of the image in relation to the button's text. For example, "pbsImageLeft" puts the image to the left of the text.



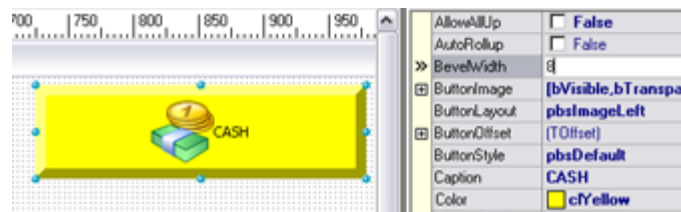
Color

Changes the color of the button. For example, "cYellow" colors the button yellow.



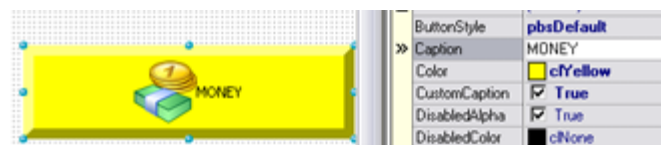
BevelWidth

Enhances the button's bevel, giving it an appearance of three dimensions. For example, increasing the 'BevelWidth' of "2" in the image above to "8" gives the image below.



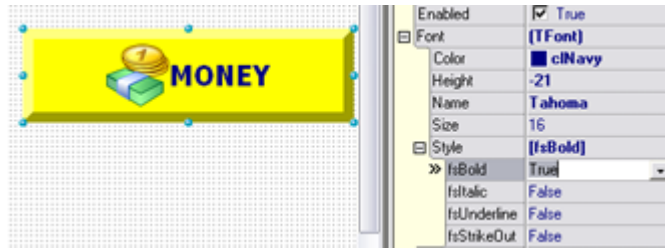
Caption

Changes the default text. For example, you could change the default word "CASH" to "MONEY". You must also set 'CustomCaption' to "True" in order for this to work.



Font

Contains numerous sub-settings to do with text lettering. (Click on the plus sign icon next to the field name to expand the sub-settings.) For example, the text in the image below was made by changing 'Color' to Navy Blue, increasing 'Size' to "16" and enabling "fsBold" within "Style".



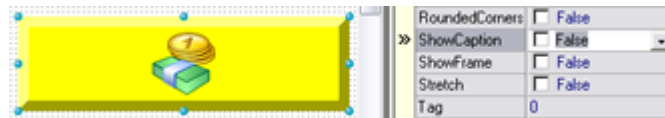
Push

Determines how depressed the button looks when it is selected. Below, the image on the left has a setting of "2" while the one on the right has a setting of "12".



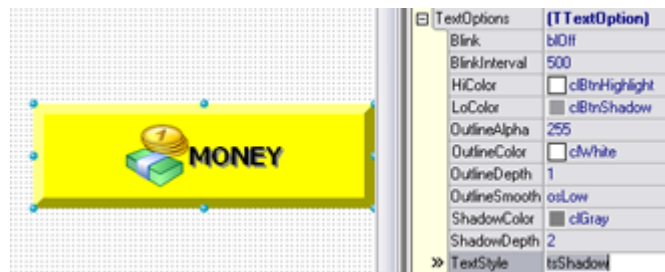
Show Caption

Applies or removes caption text from the button.



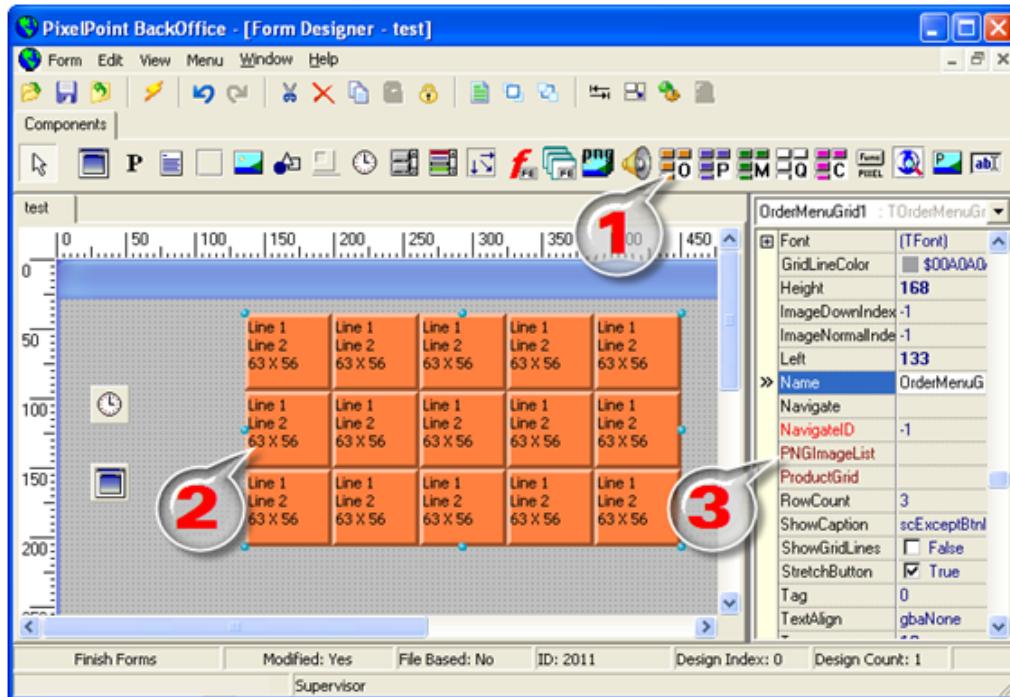
Text Options

Contains numerous sub-settings. (Click on the plus sign icon next to the field name to expand the sub-settings.) For example, applying 'TextStyle' with the value 'tsShadow' makes the text appear with shadows.



Order Grids

The Component Toolbar has icons for four different grids. They are (in order from left to right) [Order Page], [Product], [Modifier Page], [Question] and [Combo].

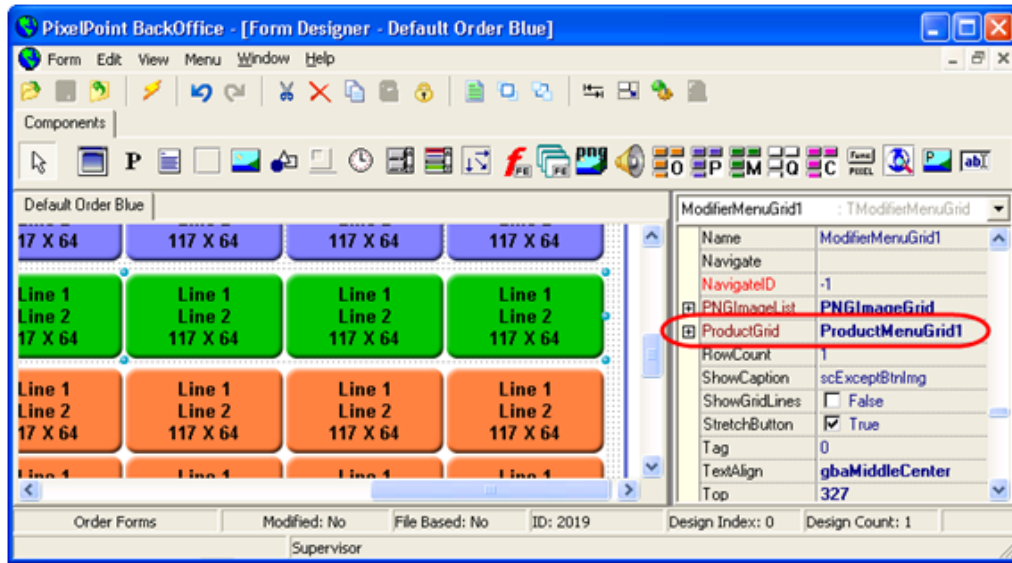


To create a grid, select one of the four icons from the Component Toolbar (1). Now click-and-drag where you want the grid to be (2). The contents of the Component Inspector will change to settings that control the grid (3). Repeat these steps for any other grids you want to have on the form. Once you have created all of your grids, you need to associate them with each other.

Select the order page grid. Now select 'ProductGrid' in the Component Inspector and choose the product grid that will be associated with that order page grid. This way, when a user selects an order page at the front-end, the contents of the product grid change accordingly.

Next, select the product grid. Now select 'ModifierGrid' in the Component Inspector and choose the modifier grid that will be associated with that product grid. This way, when a user selects a product at the front-end, the contents of the modifier grid change accordingly.

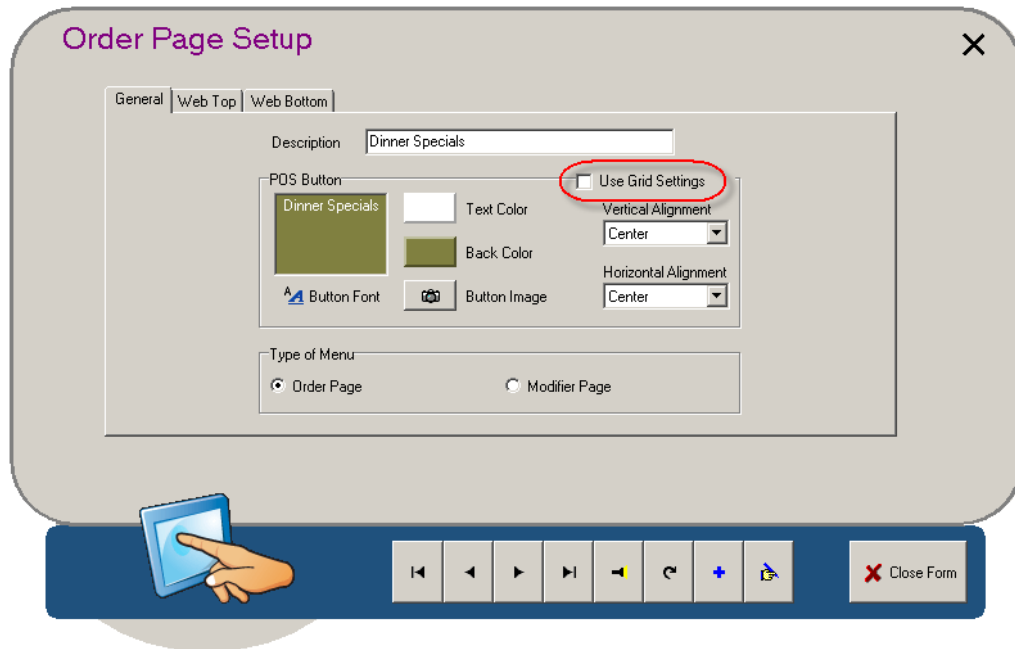
Finally, select the modifier grid. Select 'ProductGrid' in the Component Inspector and choose the product grid that will be associated with that modifier grid. This way, when a user selects a modifier page at the front-end, the contents of the product grid change accordingly.



Enhancing A Grid

You can change a grid in many ways. This section shows how some of the Component Inspector fields can change a grid's appearance. This section uses an order page grid as an example, but the fields discussed here affect all kinds of grids in the same way.

To ensure that the Order Page buttons use the settings defined in Form Designer, make sure that "Use Grid Settings" is checked in Order Page Setup. This overrides any alignment, color and font settings defined for that order page button in Order Page Setup. For product grids, you would instead make sure that this box is checked on Product Setup's Product Setup Tab.

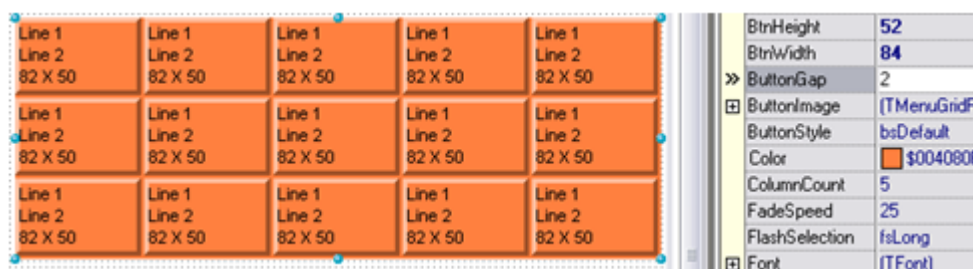


Say, for example, that the image below represents how your Order Page appears at the front-end.



Button Gap

Places a space between each button in the grid. For example, changing this setting to "2" causes the grid to appear as in the front-end image below.





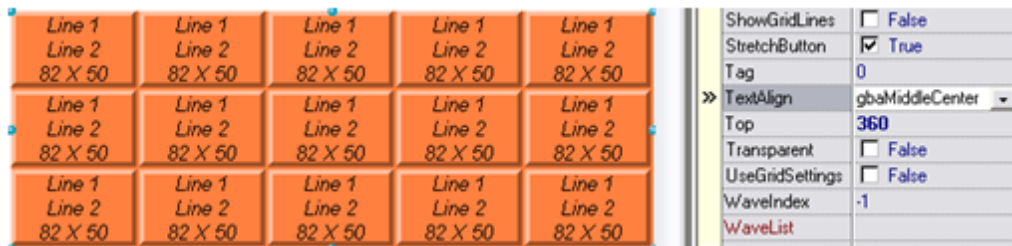
Font

Contains a number of sub-settings that determine the font face, size and style of lettering applied to the button text. For example, changing the value of "fsItalic" (in "Style") to "True" causes the text to be italicized, as in the front-end image below.



Text Align

Sets the alignment of the text on all buttons in the grid. For example, to center text both horizontally and vertically, select "gbaMiddleCenter".



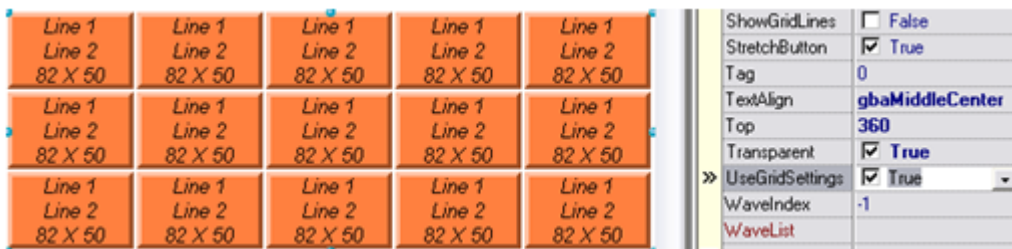
Transparent

Setting this to "True" removes the background color of the grid, showing only active buttons.



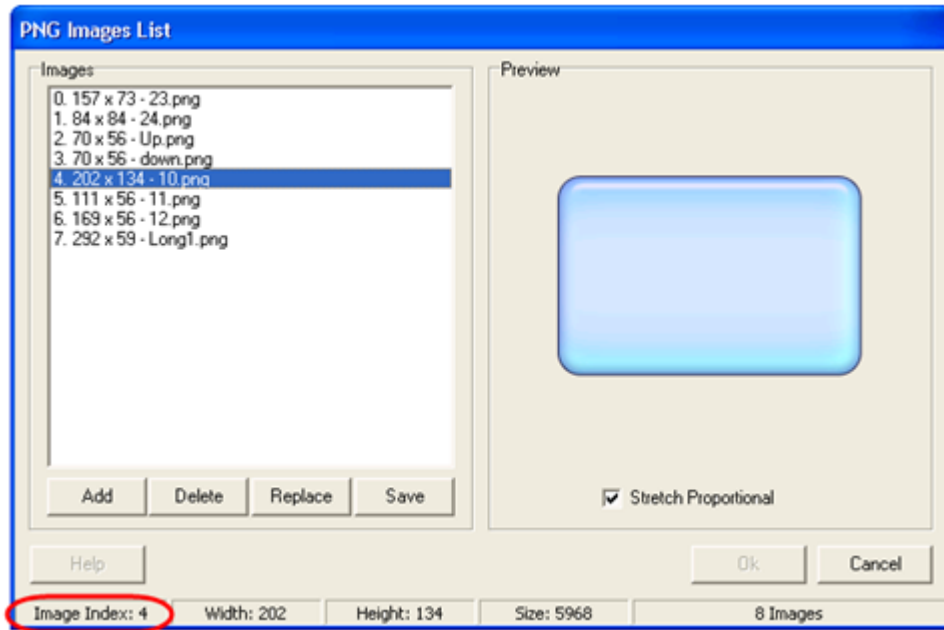
UseGridSettings

Activates all settings applied in the Component Inspector.



To change the buttons to graphic images, select the [PNG Image List] icon on the Component Toolbar (See the "Glossary of Component Toolbar Icons"). Apply the icon to the form display area. Double-click this icon and add the button images (in PNG format) by selecting files on your local hard drive. You can create your own button images using any drawing program that saves files in a PNG format.





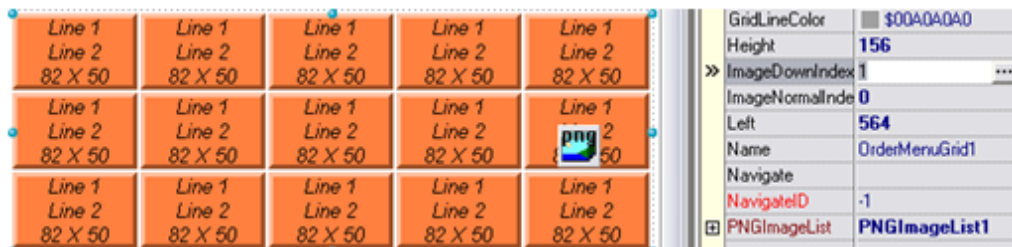
Note the index number associated with each image in the list.

ImageDownIndex

The index number for the image list file that is used when the button is pressed.

ImageNormalIndex

The index number for the image list file that is normally used for the button.

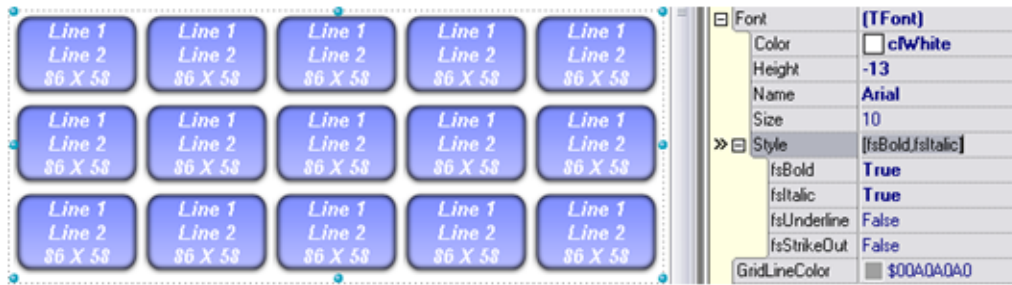


ButtonStyle

Applies the image selections to the buttons.

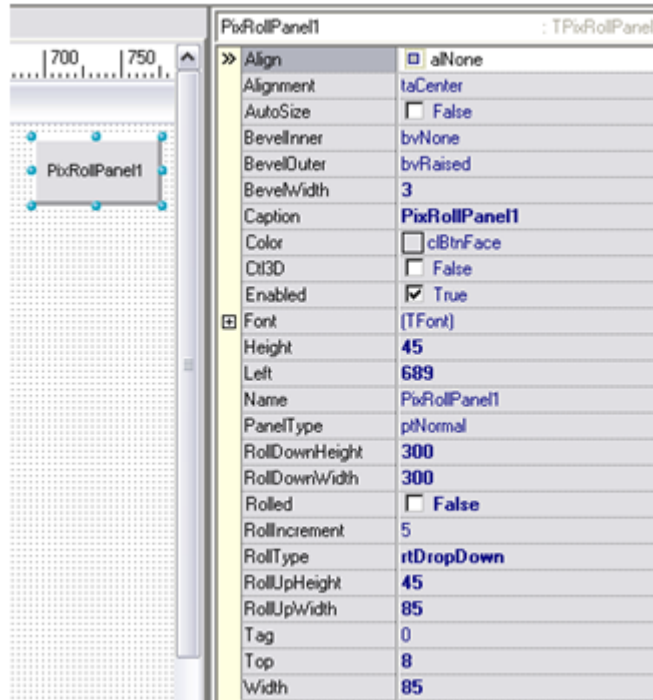


A few more minor changes to the font color and grid size make the buttons appear as below; they are now finished. In the preview of the order screen below, [Seafood] has been pressed, and so shows the image defined in the "ImageDownIndex" field.



Roll Panels

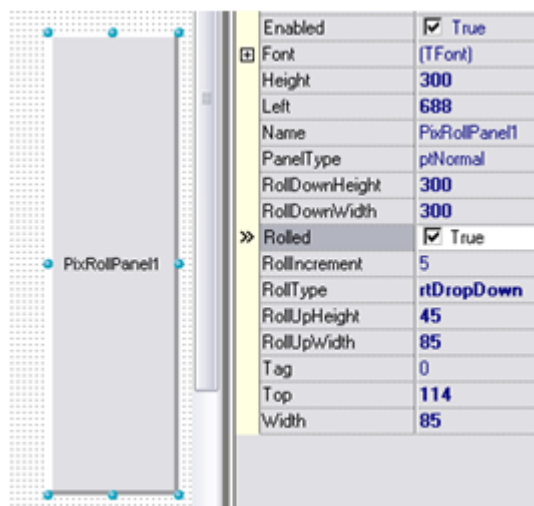
A roll panel is a panel that rolls out or expands to reveal buttons within it. Anything from images to function buttons to order grids can be placed in a roll panel, thus enabling you to make optimal use of every bit of space on a display screen.



To create a roll panel, begin by selecting the roll panel icon on the Component Toolbar. If you then click on the Form Display, Form Designer will create a roll panel. Use the blue handles to resize it. The Component Inspector will display the settings for the panel.

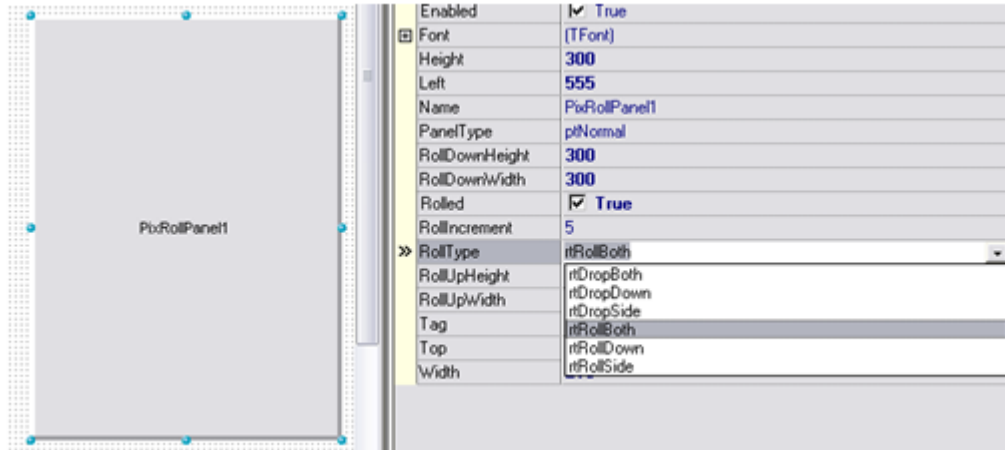
Rolled

Can be set to "True" (rolled out) or "False" (rolled up).

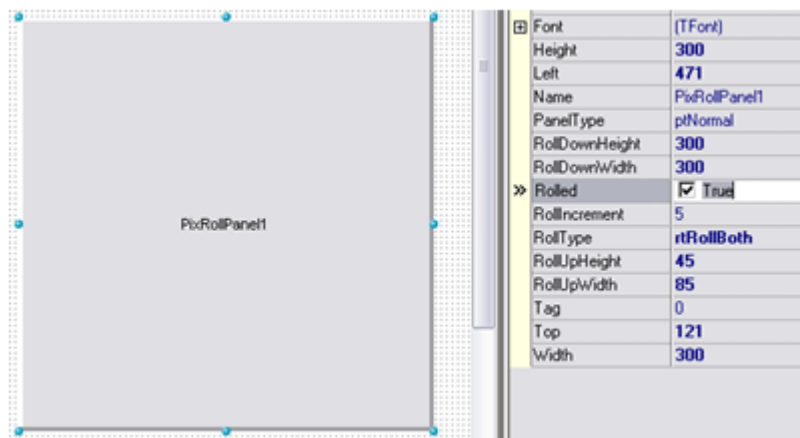
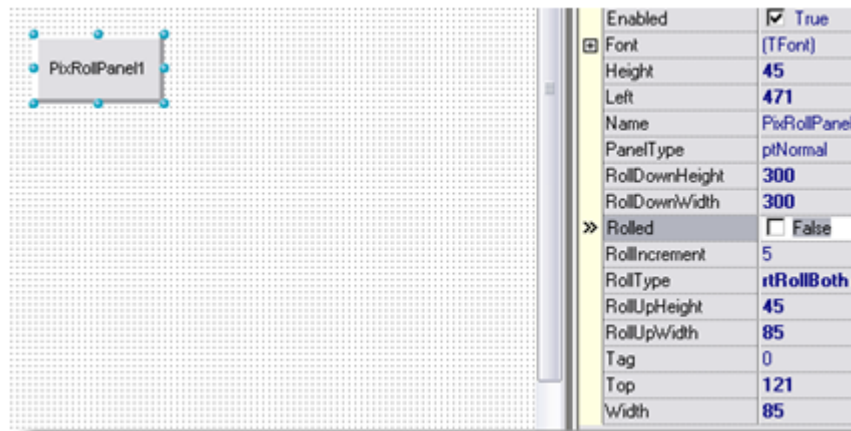


Roll Type

Enables you to set the nature of the roll out. Drop settings instantly expand the panel, whereas Roll settings show a transition from rolled up to rolled out.

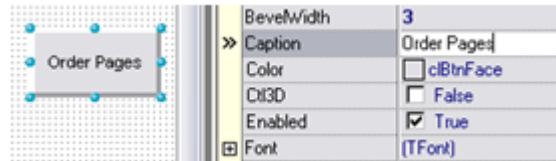


Use the 'Rolled' field to roll the panel up again. Place the rolled up panel in the desired position then roll it out again. Adjust the panel to the desired size, making sure it fits on the screen in both a rolled up and a rolled down position.

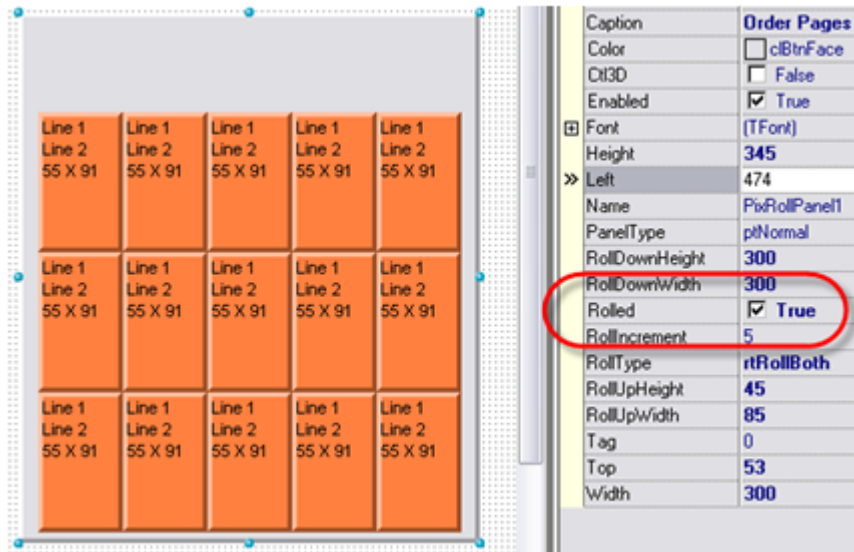


Caption

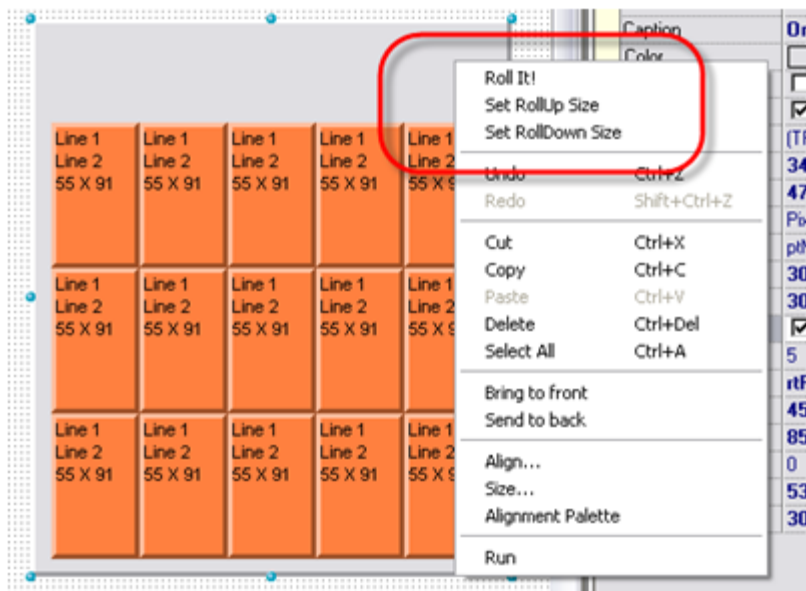
Enables you to change the name of the panel. Remember that this panel functions as a button, so give it an appropriate label.



Unroll the panel and place something on it. For example, you could put the order page grid there.



You may need to reposition the contents and adjust the panel size to get the effect you want. Leave some room at the top to keep it clear of content when rolled up. The caption should be the only thing displaying when the panel is rolled up. Right-click the panel to set the roll-up and roll-down sizes. You can also use *Roll It!* to toggle between the rolled up and rolled out views.

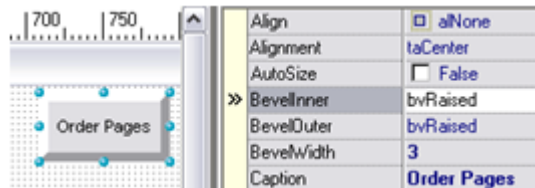


Enhancing A Roll Panel

The following shows how some of the Component Inspector fields can affect a roll panel's appearance and function.

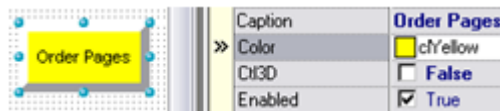
BevelInner

Enhances the appearance of the rolled up panel, giving it the appearance of a three dimensional button.



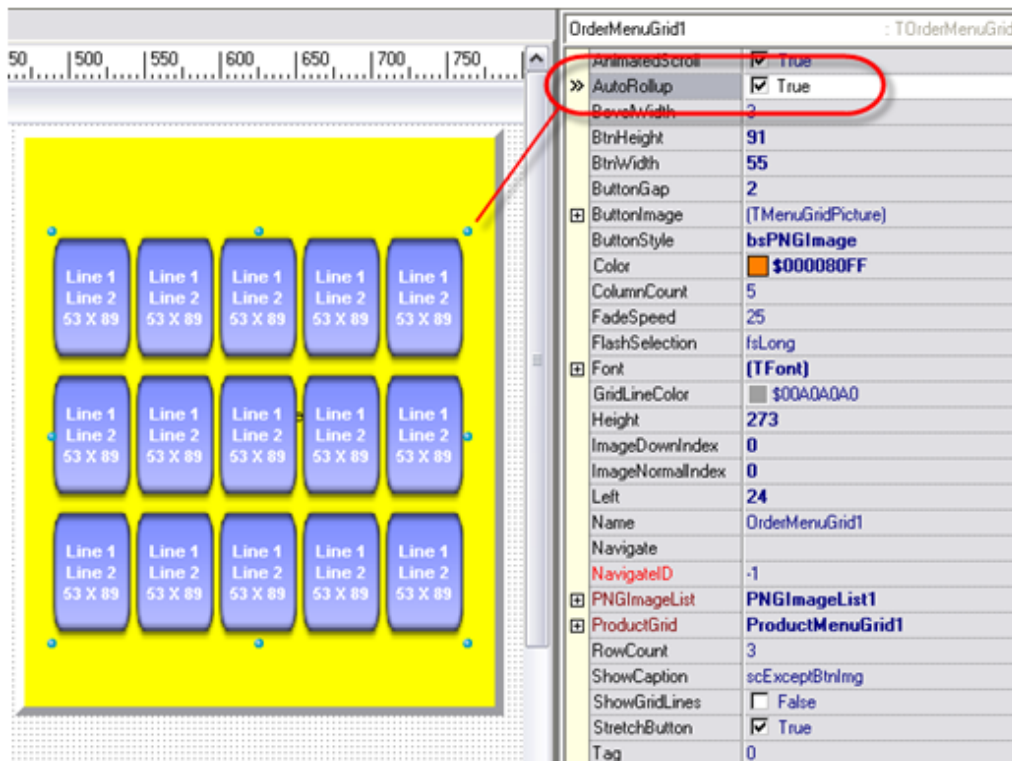
Color

Changes the button's color.

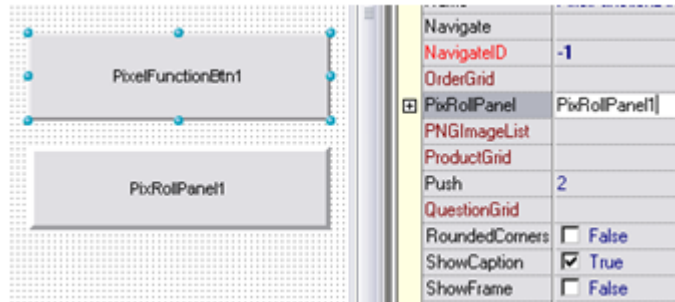


AutoRollup

Automatically rolls up the panel when a button on it is selected. Note, however, that this setting must be programmed for the content in the panel (like the Order Page grid in the example below), not in the settings for the panel itself.



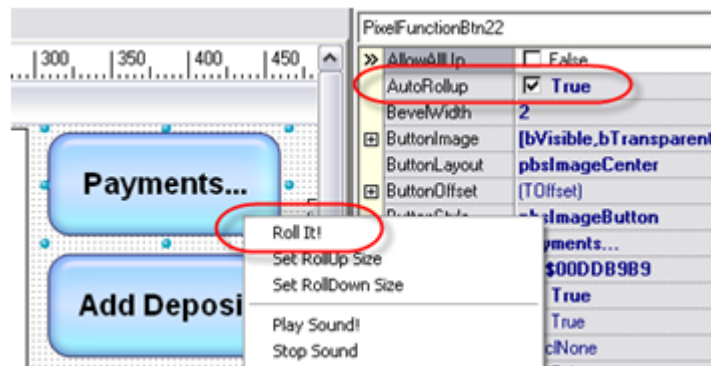
A roll panel can also be associated with a function button so it will roll out when that button is selected. When striving for continuity of appearance, this is a better method than using the roll panel by itself.



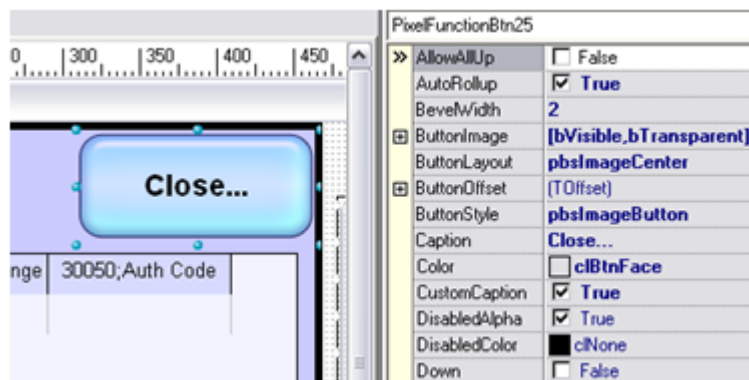
To set this up, create the function button and the roll panel. Within the function button settings, set 'PixRollPanel' to the name of the roll panel to be affected, and set 'AutoRollUp' to "Yes".

When run, the function button will roll the associated roll panel down. It is critical that 'AutoRollUp' be activated, since this is the panel's only way of rolling up. The panel will now roll up when something is selected within it.

You can test the function by selecting the [Run] icon in the Component Toolbar or simply by right-clicking the function button and selecting Roll It!.



If, however, you want the panel to remain open after selecting something, you need to have a separate button that you can use when you do want to close it. Create another function button inside the rolled out panel. Set 'AutoRollUp' to "Yes" and label it something like "Close". This will ensure that the panel has a means of closing on demand.

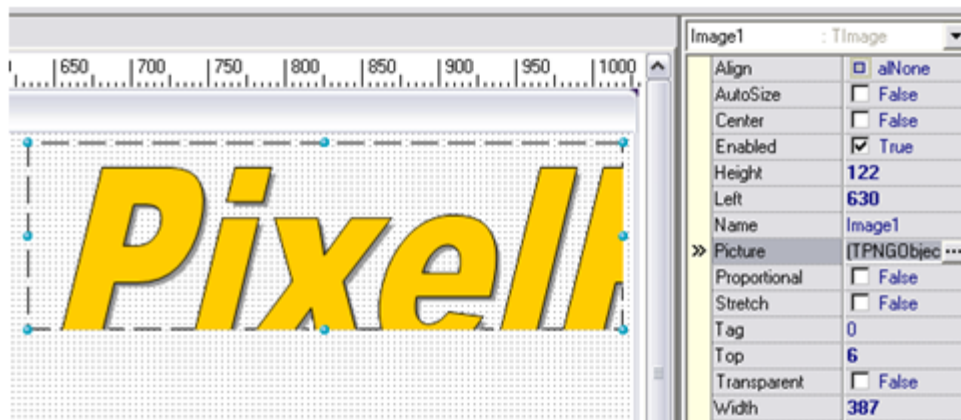


In this example, the function button [Payments...] opens a roll panel. On that panel, [Close...] enables the user to close the roll panel on demand.

Images

The most commonly used non-button image is perhaps your establishment's logo, though the use of non-button images is certainly not limited to that. To apply an image to a form, select the [Image] icon in the Component Toolbar.

Note: Form Designer uses PNG (Portable Network Graphic) images.



Click-and-drag on the Form Display where you want the image to be; an outlined window appears where you selected.

Picture

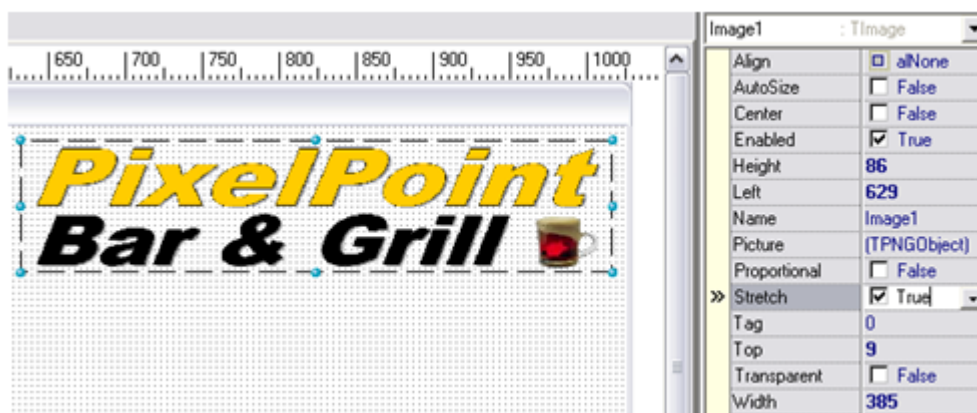
Loads the image to be applied. When first loaded, the image is presented in its original size, regardless of the size of the image window. Notice that in the example image above the picture is too large for the window; the rest of the word "PixelPoint" is cut off.

AutoSize

Resizes the window to match the dimensions of the image.

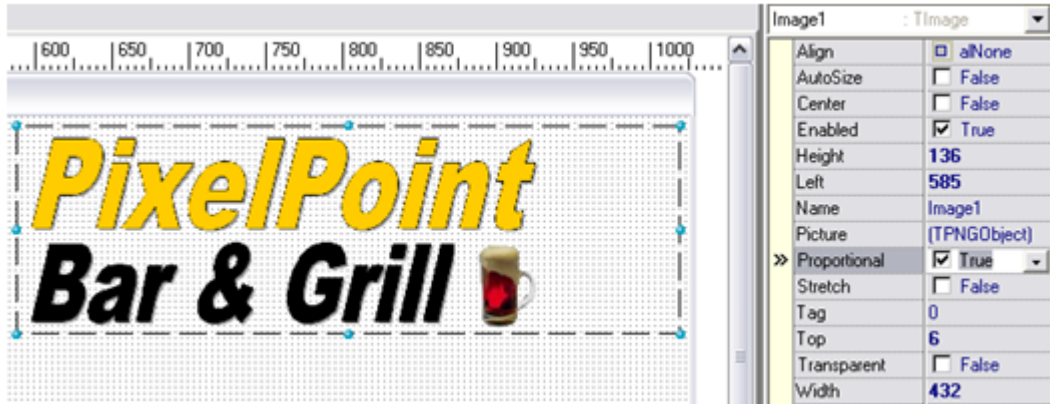
Stretch

Resizes the image to match the dimensions of the window. This fills the window completely, but may distort the image in doing so.



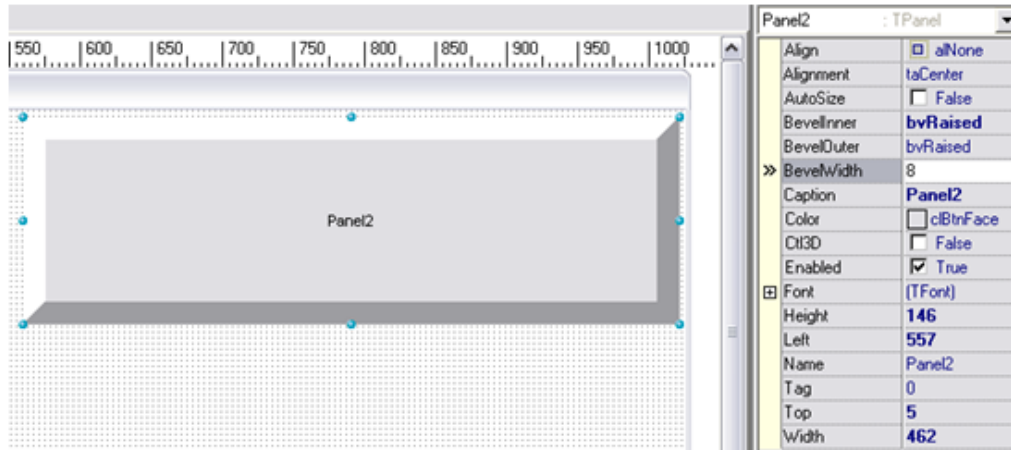
Proportional

Resizes the image to match the dimensions of the window, but maintains the image's aspect ratio.



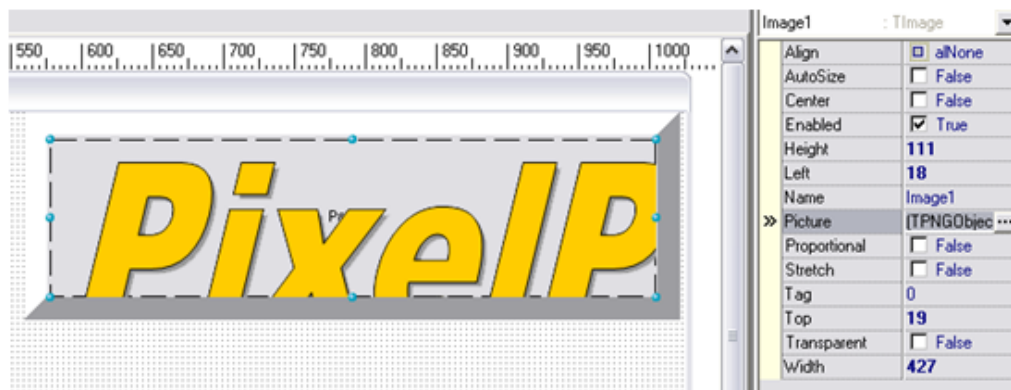
Enhancing An Image

Combining components can result in an enhanced display. This section discusses how to combine a panel and an image, and discusses Component Inspector settings used in enhancing images generally.

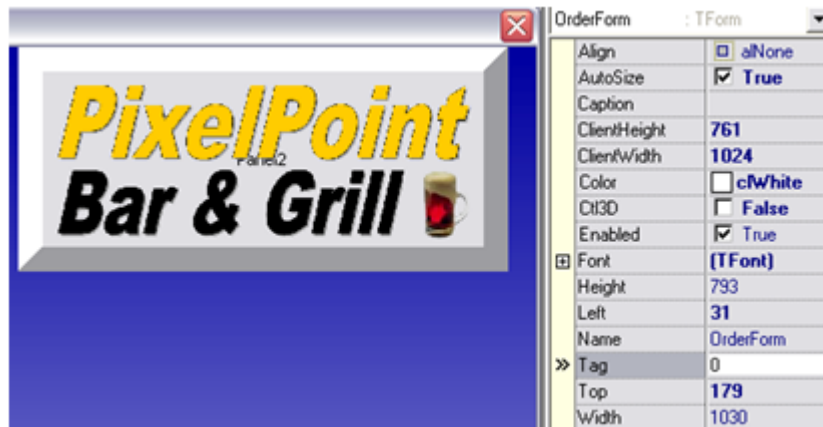


In the image above, the Component Inspector shows that the panel has 'BevelOuter' and 'BevelInner' both set to "bvRaised". In addition, 'BevelWidth' has been set to "8", making the bevel thick and giving the panel the appearance of three dimensions.

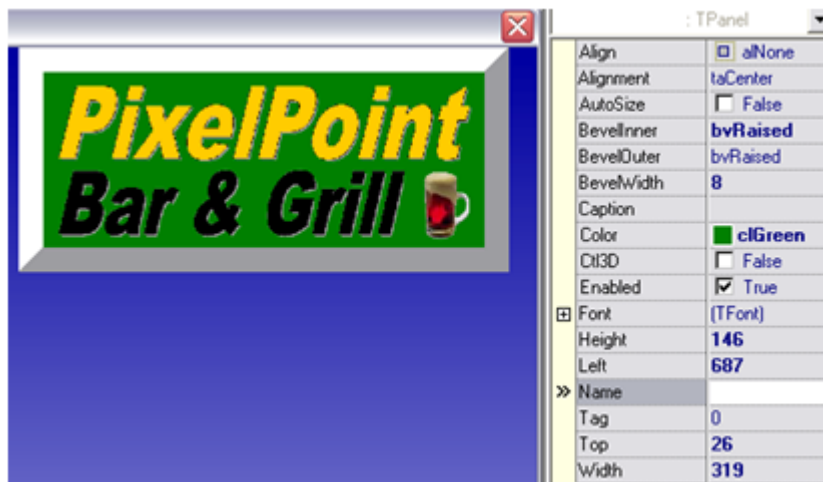
Make a panel and give it a bevel. Now place an image on it. Select the panel again and set 'AutoSize' to "True". This resizes any component placed on the panel. In this case, it should resize your image to fit on the panel. Note that it incorporates the bevel—the image does not cover any of the edges you gave the panel.



Make further adjustments to the size of the image as you see fit—you may want to set 'Proportional' or 'Stretch' to "True". Select the [Run] icon on the Component Toolbar to see how it will look at the front-end. The image below shows how an example appears on the Run screen.



Make sure you remove the contents of 'Name' before finishing the form (note how you can see the label in the image above). You can make other changes now too. For example, you could change 'Color' to change the panel's color.



Button Lists

A button list is a group of associated buttons that are combined into a single component. This makes them much easier to manage, in that any changes applied to one button will apply to all of the buttons in the list. To create a button list, begin by selecting the [Button List] icon on the Component Toolbar (See the "Glossary of Component Toolbar Icons"). Click-and-drag on the Form Display to create the list window.



Function Type

Determines the type of list. "fltPayment" populates the list with method of payment buttons. "fltSalesType" populates it with sales type buttons. When you select either of these, the buttons will be sized to fit the window as best as possible. You may want to resize the window for a better fit.

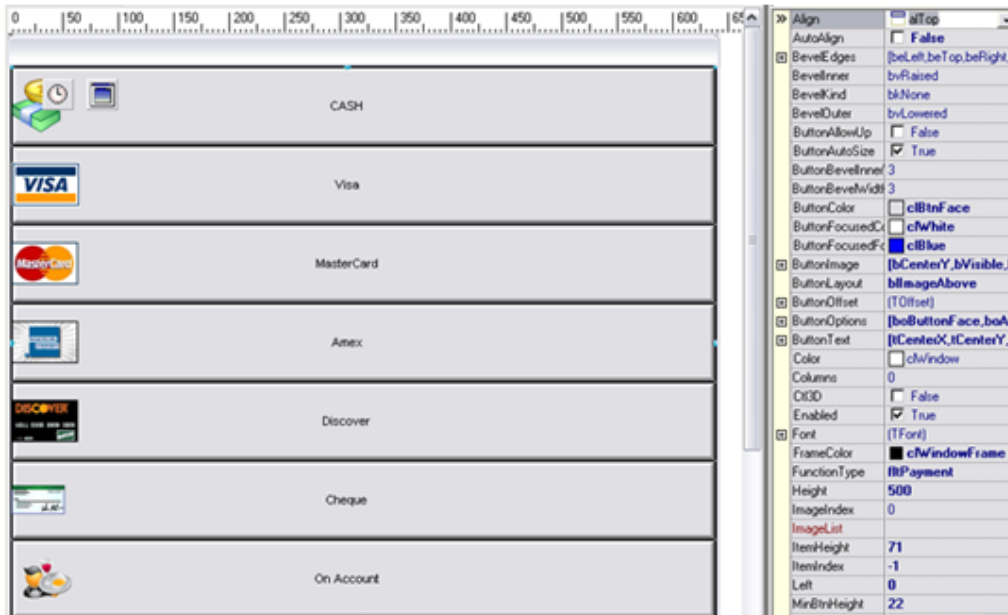


Enhancing A Button List

Changing many other Component Inspector fields affects the way a button list looks and works. Some of these are discussed below.

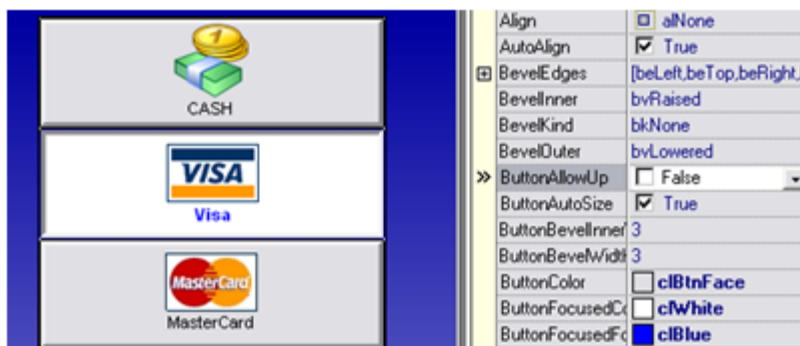
Align

Positions and resizes the button list to a specified area of the form. In the image below, the button list is assigned to the top of the screen; Form Designer has resized the list to occupy the entire top of the form.



ButtonAllowUp

Determines how the button reacts when pressed. If set to "False", the button remains depressed. If set to "True", the button pops back up after being selected.

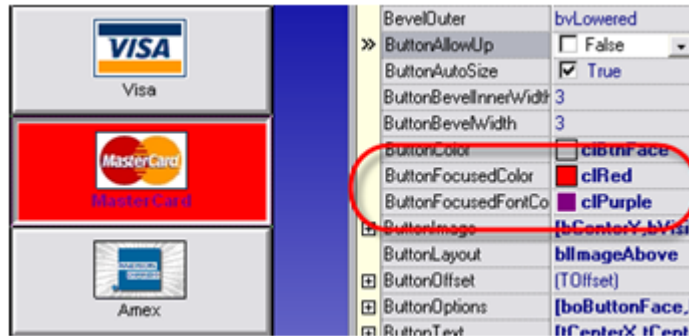


ButtonFocusedColor

Sets the color the button is when pressed. The default is "cIWhite". In the image below, it has been changed to "cIRed".

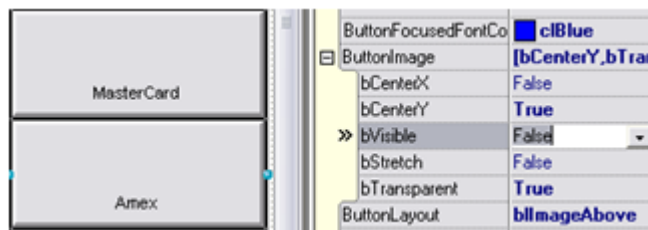
ButtonFocusedFontColor

Sets the color of the font when the button is pressed. The default is "cIBlue". In the image below, it has been changed to "cIPurple".



ButtonImage

Determines whether the button image is visible or not. Setting "bVisible" to "False" removes the image from view.

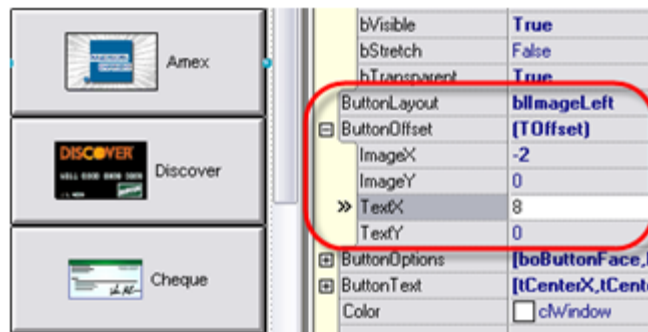


ButtonLayout

Sets the location of the image with respect to the text.

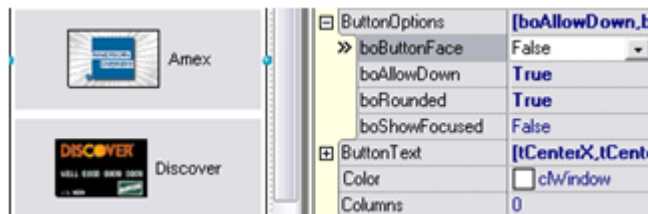
ButtonOffset

Enables detailed positioning of both text and image with respect to the center of the button.



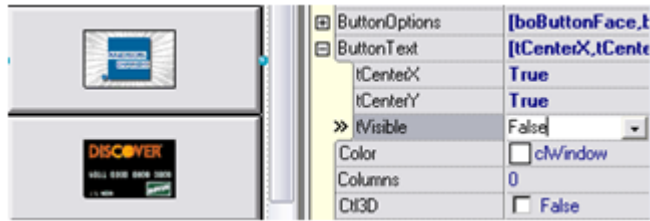
ButtonOptions

Contains general button settings. For example, setting "boButtonFace" to "False" removes the bevel and border.



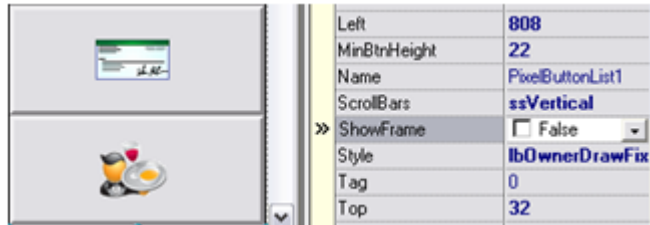
ButtonText

Contains basic text settings for the button's text. For example, setting "tVisible" to "False" removes the text from the button.



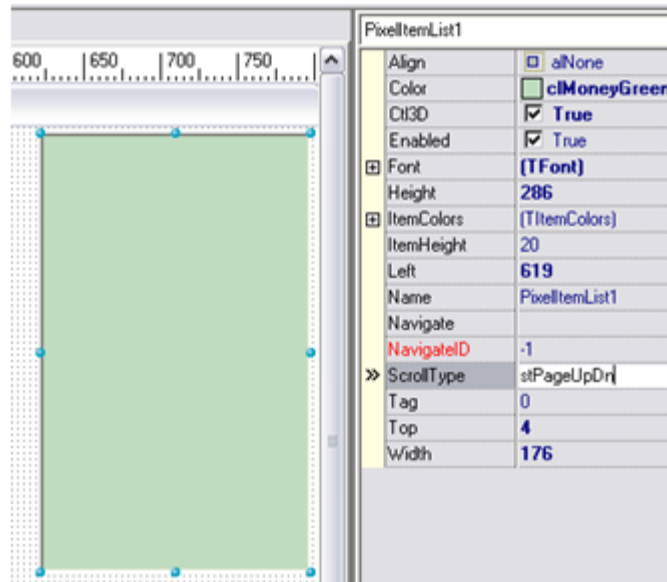
ShowFrame

Draws framing lines around the buttons and list. Setting this to "False" removes the black framing lines around each button.



Item Lists

The item list is the window containing the list of ordered items; it shows the contents of the current check. This is the one component that could realistically appear on every form. To add the item list to a form, select the [Item List] icon on the Component Toolbar (See the "Glossary of Component Toolbar Icons"). Click and drag on the area where you want it to display.



Color

Changes the color of the item list. The default is White.

CtI3D

Applies a beveled edge, giving the window a three dimensional appearance.

ScrollType

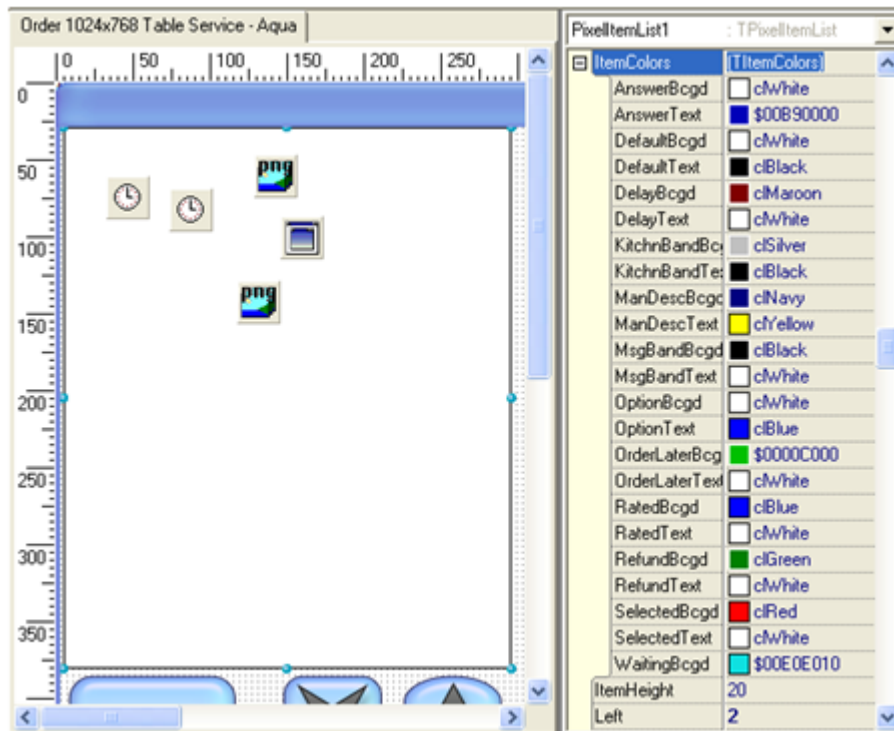
When the list of items exceeds the length of the display window, you need to be able to scroll up or down to see the rest of the check's contents. Function buttons can be applied to manage this (See "Enhancing An Item List"). This setting determines whether the function buttons scroll item-by-item or page-by-page.

Enhancing An Item List

In addition to discussing how changing Component Inspector fields affects the way an item list looks and works, this section also discusses how to program scroll buttons for an item list.

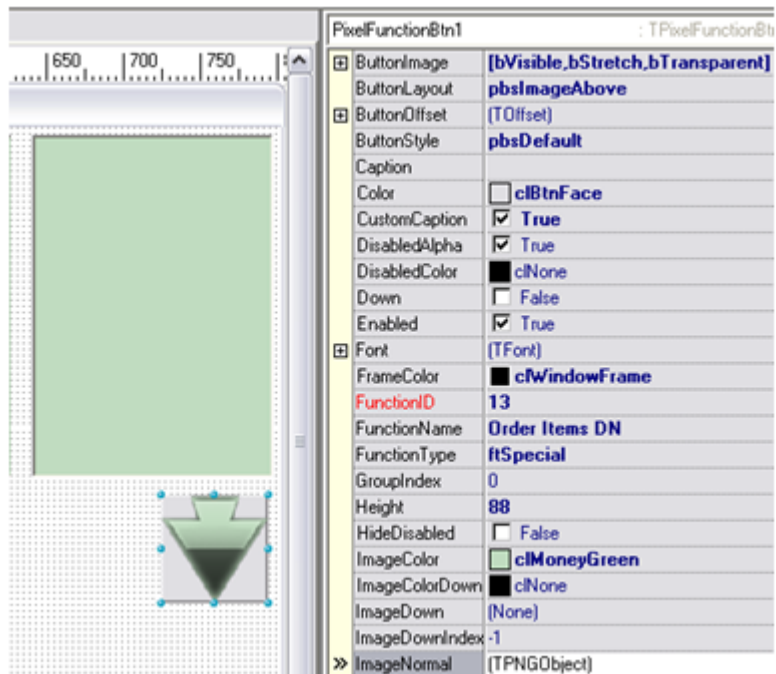
ItemColors

Adjusts the color scheme for the item list, so you can design it to suit any POS appearance. The fields (shown in this example) represent the color settings for every possible application within the Item List. See the "Glossary of Component Inspector Fields" for full information about each of the sub-settings included here.



Scroll Buttons

Scroll buttons enable the user to navigate up and down the list of items in the Item List when the number of ordered items exceeds the length of the Item List window. The remainder of this section explains how to apply a scroll button.



To create a scroll button, select the [Function Button] icon on the Component Toolbar (See the "Glossary of Component Toolbar Icons"). Then click and drag on the Form Display to create the button. Create two scroll buttons—one for scrolling up and one for scrolling down. Some of the component inspector fields discussed below must be set to a particular value in order for the scroll buttons to work. Other fields discussed below affect things such as the buttons' appearance and can be set optionally.

It is a good idea to program one of the buttons (up or down) and then copy-and-paste to create the second button. The only setting you need to change for the second button, then, is the 'FunctionName' field.

Function Type

Set to "Special". This makes the appropriate selections appear in 'FunctionName'.

Function Name

Determines what kind of button this is—in this case, it determines whether the button scrolls up or scrolls down. After you copy-and-paste the button, change this field for one of the buttons to the other value.

Button Image

Contains settings for the button image. If you want an image for the button, make sure "bVisible" and "bStretch" are set to "True". If you do not want an image for the button, make sure "bVisible" is set to "False".

Caption

Displays text on the button. You can remove the text simply by deleting it in this field.

Color

The color of the button.

Image Color

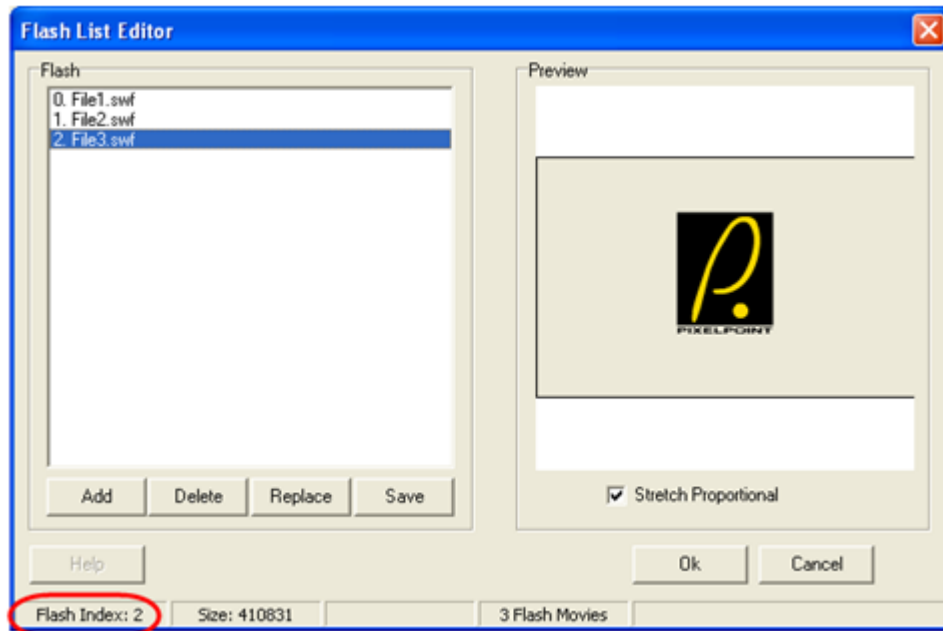
The color of the image.

Image Normal

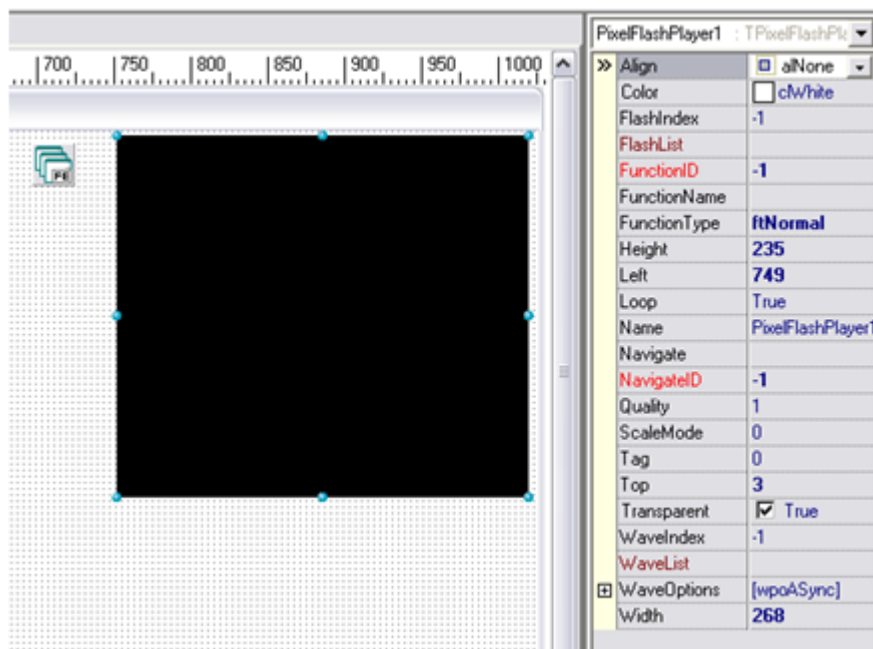
Specifies a graphic image for the button.

Flash Images

You can add flash images to any form you want. To add one, select the FlashList icon on the Component Toolbar (See the "Glossary of Component Toolbar Icons"). Double-click the icon on the Form Display or select "Flashes" from the Component Inspector with the component selected. Use the Flash List Editor to add all of the flash files you want to have on the POS. These files must be Shockwave Flash files, with an .swf file extension. As you add files to the list, they are given an index number.

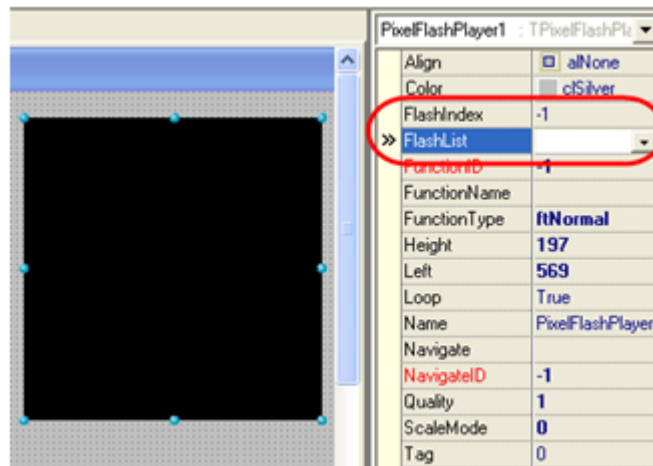


With the Flash List complete, select the PixelFlashPlayer icon on the Component Toolbar (See the "Glossary of Component Toolbar Icons"). Click-and-drag on the Form Display to create the area where you want the flash image to play.



The Component Inspector will change to have the settings for that flash image. Select the

"FlashList" field and use the drop-down box to load the flash list you just created.



Input the specific flash image's "Flash Index" number (listed in the Flash List Editor (see above)) into the Component Inspector's "FlashIndex" field.

Note: The settings of 'FunctionType', 'FunctionName' and 'Navigate' can all be applied to a flash image. You can therefore use Flash images just like a function button.

Product Information

If you have How To Make information and/or an attached image programmed for your products (See "Product Setup Advanced Tab"), you can include these on Form Designer forms. This section explains how to do this.

Including Images

Select the [Function Button] icon on the Component Toolbar (See the "Glossary of Component Toolbar Icons"). Click and drag across the area where you want the image to appear. Program the Component Inspector as follows:

- 'ButtonImage' – set 'Proportional' to "True".
- 'FunctionType' – set to "Special".
- 'FunctionName' – set to "Product Image".

Including Product Information

Select the Pixel Memo icon on the Component Toolbar. Click and drag across the area where you want the information to display. Program the Component Inspector as follows:

- 'FunctionType' – set to "Special".
- 'FunctionName' – set to "Product Info".



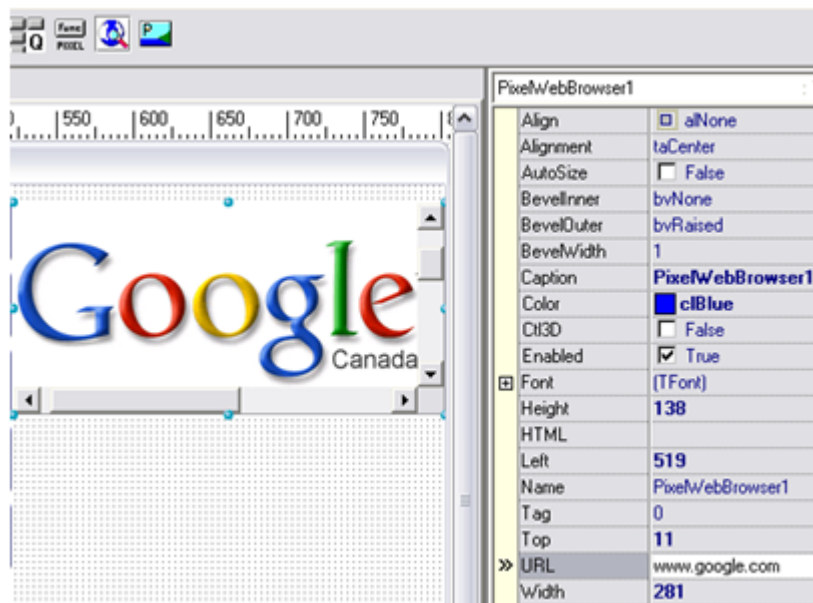
You can set and change additional Component Inspector settings, but setting those discussed above gives the essential result.

Note: In the absence of How To Make information, the system will use the image applied to the button.

Internet Browser

Browser windows can be added to any form so that people can view web pages from the Internet. This makes it possible to show both information on an Intranet to staff and information on the Internet to customers.

Proceed with caution. This Form Designer element is literally a web browser, which means that links can be followed. Be very careful in determining what you choose to display and do what you can to make sure there are no unwanted links; test out your forms yourself before applying them. Also, beware that Internet browsers can eat up system resources; they are displaying live content. Use Internet windows sparingly and make sure that both the hardware and the Internet connection's bandwidth are sufficient for their application.



The simplest way to add an Internet window to a form is to select the [Internet Browser] icon on the Component Toolbar (See the "Glossary of Component Toolbar Icons"). Then click-and-drag across the area on the Form Display where you want the browser to be. Select 'URL' in the Component Inspector and input the web address of the page or content you want to display.

The window will load the content into the Form Display (as seen in the image above). Note that if the web page's content is larger than the window you created (as will normally be the case with any full web page), then the window will have scroll bars to compensate for the difference in size. Only when the window is larger than the size of the page or content will the scroll bars disappear.

Moving and resizing the browser area is done a little differently than moving or resizing other components, since the entirety of the component represents the web page. To access the sizing tabs, you must click-and-drag over an area that includes, and is larger than, the browser component. Another way of achieving this is applying 'BevelOuter' to the window and increasing the bevel's thickness ('BevelWidth'). Then select the bevel to grab the window for movement and resizing.

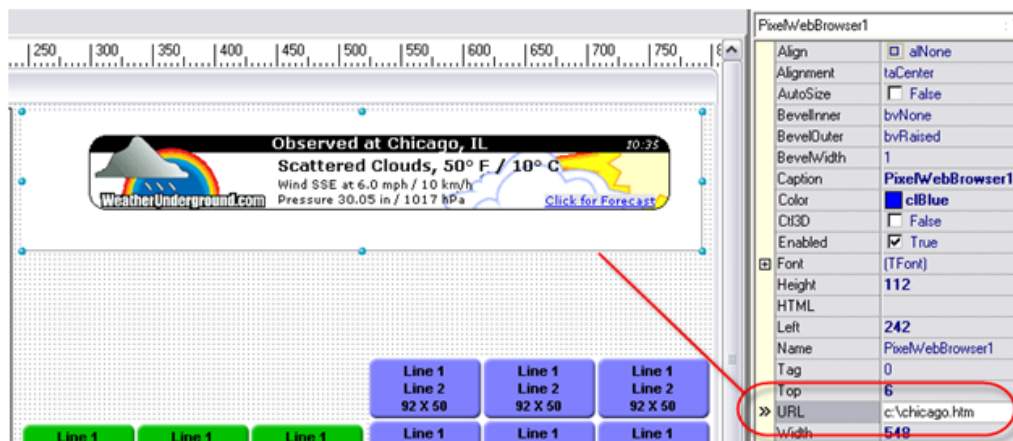
Enhancing An Internet Browser

One of the best uses of Form Designer's web browser is applying a web sticker. A web sticker is a small banner that connects with a website to display information like the weather, or banner advertising.

Note: The following examples are used for educational purposes only. PAR PixelPoint does not endorse any third-party websites, applications or services.



The image above shows an HTML sticker from a website providing weather information. Websites with such stickers available for free typically provide HTML source code that you can copy into an HTML file in order to use yourself.



To apply a web sticker in Form Designer, save the HTML source code with an HTML extension on the hard drive. Enter the file path and name in the Component Inspector's "URL" field (See the image above). Form Designer will connect to the Internet and apply the sticker to the form. Modifying the HTML code may change the way the sticker appears and functions; you can edit it if you know how to.

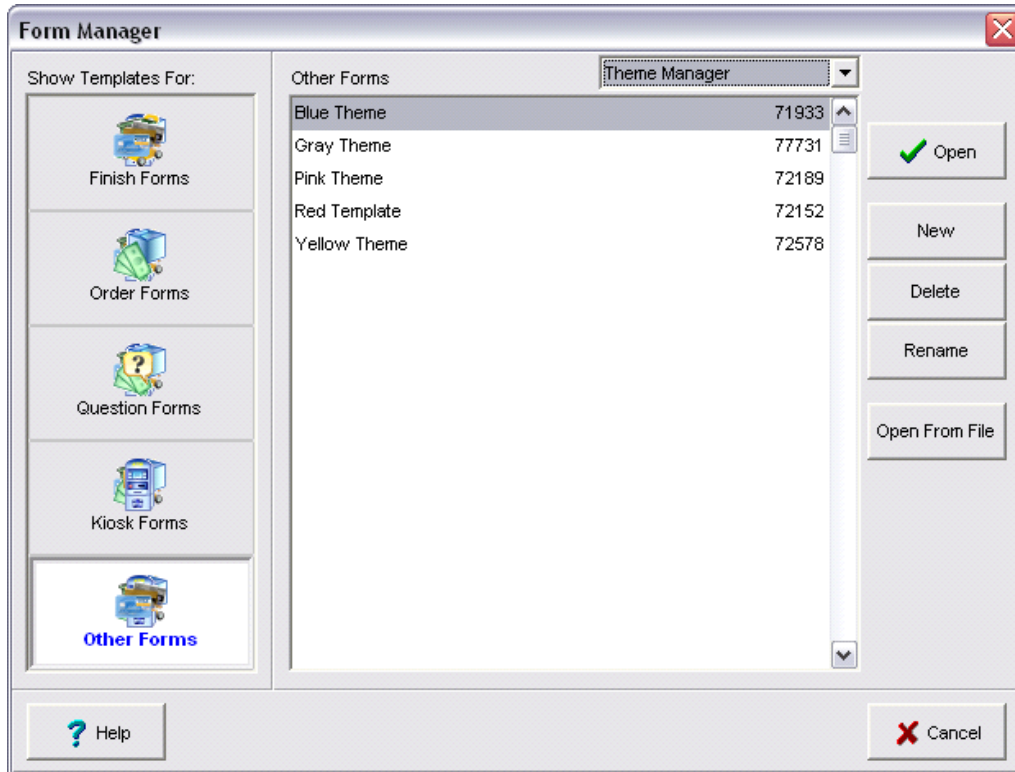
If the HTML code is relatively short, you can copy it directly into the Component Inspector's "HTML" field, rather than using an HTML file and the "URL" field.

The web browser function is not limited to just web stickers. Anything you can display on a web page can be displayed on a form screen. One constructive use of this is displaying a web cam that is set to stream to a local web page; you can apply the web cam content to the "URL" field. Using this functionality, a drive-thru display screen can contain a camera window, giving the order taker a live image of the customer placing the order. Another possible application is to have a web cam in the kitchen, enabling the order taker to monitor the progress of customer orders.

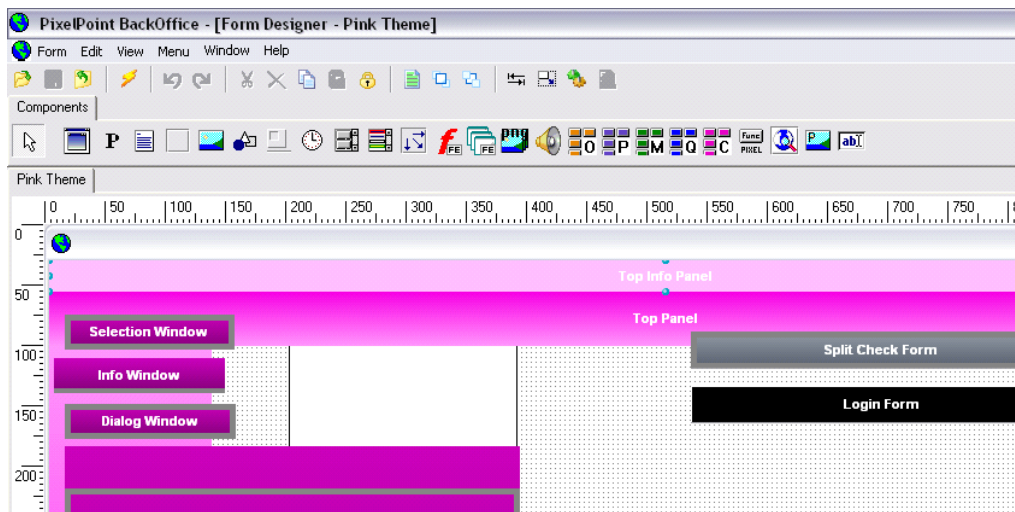
The possible uses of web browsers are many and varied, but no matter what you use them for, it is important to ensure that the system has enough power and speed for them to function properly.

Themes

You can change the color scheme of PixelPoint as well as the contents of the blue task bar at the bottom of the order screen.



Located in Form Manager is a filter located within the [Other] selection called Themes. There are several color schemes available. Create a new theme and the system will prompt you to import one of the default themes of Yellow, Blue, Gray, Pink, Green or Red.



Theme templates consist of the various components that go into the various screens such as display panels, information windows the numeric keypad and the task bar that displays across the bottom of the Table Layout, Order and Finish screens. You will notice however, that you can now program the contents of task bar by applying new functions to the [TopButton#] buttons.



Having saved the theme, you can then apply it globally (under System Setup) or by station (under Station Setup). Shown below are samples of the various themes provided.



















Moving Buttons in Form Designer

Buttons normally located in the blue bar along the bottom of the POS can be relocated anywhere in a form using Form Designer. These buttons are:

- **Coupons:** Retrieves the list of applicable coupons.
- **Finish:** Retrieves the Finish screen.
- **Functions:** Retrieves the sales functions menu.
- **Gift Card:** Retrieves the Gift Card Wizard.
- **Split:** Retrieves the split check screen and automatically creates the first split.
- **Save/Get:** Saves the check and toggles to Get Check to retrieve a check.
- **Leave:** Leaves the check.

Glossary of Menu Icons

This is a glossary of all of the icons on the Form Designer menu toolbar.

- | | | |
|---|----------------------------|---|
|  | Open | Opens the Form Manager window, enabling you to select another template. |
|  | Save | Saves the current template. This icon is inactive if you have not made any changes since opening the form or since saving the form. |
|  | Close | Closes the current form. |
|  | Run | Generates a screen representation of the form as it would appear at the front-end. Click the X in the top-right corner of the display to close it. |
|  | Cut | Removes the selected component from the form but saves it in memory for pasting elsewhere. "Ctrl + X" also does this. |
|  | Delete | Removes the selected component from the form. |
|  | Copy | Copies the selected component into memory for pasting elsewhere. "Ctrl + C" also does this. |
|  | Paste | Pastes the component currently in memory. "Ctrl + V" also does this. |
|  | Lock | Locks the positions of the buttons and components. |
|  | Select All | Selects all components on the template. "Ctrl + A" also does this. |
|  | Bring To Front | Moves the selected component to the top layer, closest to view, placing it in front of anything else occupying that same spot. |
|  | Send To Back | Moves the selected component to the bottom layer, farthest from view, placing it behind anything else occupying that same spot. |
|  | Align | Presents a window for aligning the selected component. It contains two columns—one for horizontal alignment and one for vertical alignment. |
|  | Size | Presents a window for determining text size on the selected component. It contains two columns—one for width and one for height. |
|  | Designer Options | Presents a window for setting options for working within Form Designer. Settings include grid settings, component grab color and "Show invisible components". |
|  | Component Inspector | Displays the component inspector window. |

Glossary of Component Toolbar Icons

This is a glossary of all of the icons on the Component Toolbar.



Pointer Enables you to select any component on the screen.



Form Style Used to make changes to things like the screen background, form dimensions, and settings that apply to the form as a whole.



Label Enables you to place a label panel on the screen. With it selected, click-and-drag on the screen to create the label. Change the 'Caption' field in the Component Inspector to replace the label's text. Change the function type, name and ID to turn it into a function.



Memo Places a memo window on the screen (for example, the area that displays the subtotal, taxes and final total on the Finish screen). You can change the 'FunctionType' and 'FunctionName' fields to use this memo window to display functions such as Sales Total or Product Information.



Panel Places a display panel on the screen. It serves well as a background for other components such as grids and labels. Moving the panel also moves all components contained within it.



Image Places a graphic image on the screen. Click-and-drag on the screen to specify where you want the image to be. Use the "Picture" field in the Component Inspector to load the image you want.



Shape Places a shape object such as a circle or square on the screen. The Component Inspector settings determine the shape and its appearance.



Bevel Creates a beveled panel. Bevels give an item a three dimensional appearance. Raised bevels appear to push out from the screen, whereas lowered bevels appear as indentations.



Timer Enables a timer to perform an automated action. Component Inspector settings specify its function and determine the length of time it waits. Note: Most kiosk forms should have a timer.
















Button List Adds a list of buttons for sales types or methods of payment. The 'FunctionType' field in the Component Inspector determines which list it presents.



Item List Displays a window showing the contents of the check.



Roll Panel Same as a plain panel, except this present its contents in a roll-down format. The button appears small until it is selected. It then expands (rolls out) to show all contents.

-  Flash Player Adds a flash image to the form.
-  Flash List Stores the list of available flash items. Apply this icon to the form display area, then open the "Flash List Editor" (double-click on the icon) to add flash images.
-  PNG Image List Stores the list of available PNG images. Double-click this icon on the Form Display to modify the list of images.
-  Wave List Stores the list of available wave files. Apply this icon to the form display area, then open the "Wave List Editor" (double-click on the icon) to add sound files.
-  Order Menu Grid Adds an order page grid to the form.
-  Product Menu Grid Adds a product grid to the form.
-  Modifier Menu Grid Adds a modifier page grid to the form.
-  Question Button Grid Adds a question grid to the form. It contains a list of commonly asked forced questions. This only functions within a question form.
-  Combo Menu Grid Adds a combo item grid to the form.
-  Function Button Places a function button on the screen. The 'FunctionType' and 'FunctionName' fields in the Component Inspector determine which function the button serves.
-  Web Browser Adds a web browser window to the screen.
-  Pixel Image A combination of Image and PNG Image List; contains inspector settings for both.
-  Mask Edit Adds a field that can take 'keyboard' input. Works in conjunction with components that have a "ftKeybrdKey" 'FunctionType'; used primarily in creating Keyboard forms. See the "Glossary of Function Types" for more information.

Glossary of Component Inspector Fields

This is a glossary of the fields in the Component Inspector. Which of these fields are visible at a given time depends on what component is selected; some of these fields only apply to a particular kind of component.

AllowAllUp: Applies to button programming, when used in a group. If set to "True", all buttons in the group will be unpressed (will be up) by default. If set to "False", at least one button in the group must be selected (pressed). You can determine which button is selected by default by setting the value of its 'Down' setting to "True". The rest of the buttons in the group will be set to "False".

Align: Applies to components that are not buttons, such as the item list, a label or a panel. Determines where on the form the selected component is situated. By default, it is set to "alCustom" (align custom) or "alNone" (align none). Changing the value to a defined position (such as "alTop") resizes the component to fill that entire area of the screen. Note that this field is different than the *Align* option on the right-click menu, which applies to text-positioning and not component position.

AnimatedScroll: Applies to grid components (order page, product, etc.). If the grid contains more items than can fit on one screen at the same time, the remaining items are not visible. When viewing the hidden items, the screen normally just changes to show the next group of items. Enabling this setting changes that to make it look like the grid itself has scrolled down to them.

AutoRollup: Applies to the Rollout function. Setting this to "True" automatically rolls up the expanded window when a user makes a selection.

AutoSize: Applies to labels and image components. Setting this to "True" expands or contracts the label or image to its default size. If this field is set to "False", you can determine the size of the image.

BevelEdges: A bevel is a border applied to the edge of a button to give it the appearance of height. This setting applies to buttons in certain grids (such as method of payment). It is a compilation of the sub-settings listed below.

- **beLeft:** Enables/disables the appearance of the bevel on the left side.
- **beTop:** Enables/disables the appearance of the bevel on the top.
- **beRight:** Enables/disables the appearance of the bevel on the right side.
- **beBottom:** Enables/disables the appearance of the bevel on the bottom.

BevelInner: There are two parts to a bevel (inner and outer). This determines whether the inner portion of the bevel will be raised, lowered or invisible (no inner bevel). Also see 'BevelOuter'.

BevelKind: Modifies the appearance of the bevel. Influences how sharply the bevel stands out. When used in combination with 'BevelWidth' and the cut of the bevel (specified by 'BevelInner' and 'BevelOuter'), it can create a flat, soft or tile effect.

BevelOuter: Determines whether the outer portion of the bevel will be raised, lowered or invisible (no outer bevel).

BevelWidth: Determines how wide or thick the bevel is—the greater the width, the higher the button appears.

BtnHeight: Applies to grid components. Adjusts the height of all buttons in the grid. The height of the overall grid also changes as the height of the individual buttons is adjusted. This setting is measured in pixels and can also be set by clicking-and-dragging the boundaries of the grid.

BtnWidth: Same as 'BtnHeight', except it applies to width instead of height.

ButtonColor: Determines the buttons' color.

ButtonFocusedColor: Determines the color of the button's top (not including the bevel) when it is depressed.

ButtonFocusedFontColor: Determines the button's font color when it is depressed.

ButtonGap: Determines the amount of space between buttons in grid components. Measured in pixels.

ButtonImage: Contains settings for the image on the button. The sub-settings are listed below.

- **bVisible:** Determines whether the image is visible or not.
- **bStretch:** Stretches the graphic image to match the size of the button.
- **bProportional:** As the button changes in size (vertically and/or horizontally), setting this to "True" alters the dimensions of the graphic image, making it proportional to the button.
- **bTransparent:** Makes the button image transparent.
- **OriginX:** Applies to buttons in a grid. Sets the horizontal offset of the text.
- **OriginY:** Applies to buttons in a grid. Sets the vertical offset of the text.
- **Proportional:** See "bProportional".
- **ShowImage:** Shows the graphic image on the button.
- **Stretch:** See "bStretch".
- **Transparent:** See "bTransparent".

ButtonLayout: Determines where on the button an image is placed (if there is an image at all). It can be placed at the top, bottom, left, right or center of the button.

ButtonOffset

- **ImageX:** Determines the horizontal offset of the button image.
- **ImageY:** Determines the vertical offset of the button image.
- **TextX:** Determines the horizontal offset of the button text.
- **TextY:** Determines the vertical offset of the button text.

ButtonStyle: Determines whether or not to apply the button under the graphic image.

Caption: The text that appears on the component.

Center: Centers the text or image.

Color: The color of the component. For example, in a grid, this is the color of the grid background, not the buttons on it.

ColumnCount: Applies to grids. Determines the number of columns of buttons the grid contains.

CustomCaption: Overrides the default caption.

DisabledAlpha: Shows the button as transparent, if it is disabled.

DisabledColor: Determines the color of the item when it is disabled.

Down: Determines whether a button is shown, by default, as down (pressed). If set to "True", the image in 'ImageDown' displays.

Enabled: Enables/disables the component. If "False" (disabled), the component will be grayed out.

FadeSpeed: Determines the rate at which one grid disappears and the next grid appears, when the screen changes from one grid to another (when, for example, switching between order pages).

FlashSelection: Defines the length of the flash when a component is selected (when, for example, selecting an item from a product grid).

Font: Contains sub-settings affecting text font.

- **Color:** The text's color.
- **Height:** The text's height (changes when "Size" is changed).
- **Name:** The text's font face.
- **Size:** The text letters' size (changes when "Height" is changed).
- **Style:** Contains sub-settings affecting the text's style.
 - **fsBold:** Bolds the text.
 - **fsItalic:** Italicizes the text.
 - **fsUnderline:** Underlines the text.
 - **fsStrikeOut:** Strikes or crosses out the text.

FrameColor: The color of the frame around the component. 'ShowFrame' must be set as "True" for this color to display.

FunctionID: The index number automatically applied to the selected function. The value you specify in 'FunctionName' determines the value of this field.

FunctionName: The kind of function this component performs.

FunctionType: The type of function. This determines the options available in 'FunctionName'.

GroupIndex: Identifies components as part of a group. All components with the same value in this field are treated as belonging to the same group.

Height: Determines the component's height (in pixels). Clicking-and-dragging the component's edges also changes this setting.

HideDisabled: Hides the button, if it is disabled.

ImageColor: Blends a specified color into the selected image.

ImageDown: The image used for the button when it is selected (when it is pressed).

ImageDownIndex: The index number identifying the image specified in 'ImageDown'. This field is automatically filled.

ImageNormal: The image used for the button when it is not selected (when it is unpressed).

ImageNormalIndex: The index number identifying the image specified in 'ImageNormal'. This field is automatically filled.

Interval: The number of milliseconds a timer waits before executing its programmed function. "1000" = 1 second.

ItemColors: Applies to Item List (TPixelItemList) components. Contains sub-settings affecting the colors of the line items in the component. Each item in the list below represents two sub-settings in Form Designer; each one has a "Bcgd" and a "Text" field (For example, "Answer", below, has 'AnswerBcgd' and 'AnswerText' fields).

"Bcgd" fields control the background color of an item and "Text" fields control the font color of the text on the item.

- **Answer:** Answers to Forced Questions.
- **Default:** Default colors for items (including ordering products) that do not get colors from the other fields here.
- **Delay:** Items with a 'Delay Print Command' product type.
- **KitchnBand:** Items with a 'Kitchen Command' product type.
- **ManDesc:** Items with a 'Manual Keyboard' product type.
- **MsgBand:** Items with a 'Seating Position' product type.
- **Option:** Items with an 'Option' (e.g. *Hold*) product type.
- **OrderLater:** Items with feature code "4" (Order Later).
- **Rated:** Items with a 'Rated/Hour Product' product type.
- **Refund:** Voided items.
- **Selected:** The currently selected item.
- **WaitingBcgd:** The background color for unsent/unfired items. Note that there is no 'WaitingText' field; unsent items use the font color of whatever item type they are. This background color, however, overrides others; items use their own background color when they are sent.
(See "Product Types" for information about the product types mentioned here.)

ItemHeight: Applies to Item List (TPixelItemList) components. The height of each line item on the Item List.

Left: Determines the screen location of the left side of a component. Clicking-and-dragging the item also changes this setting.

Margin: Specifies the left/right margins of the component text. Setting this to zero will maximize the margins.

Name: This field is automatically filled when the component is created. This name is also displayed at the top of the Component Inspector.

Navigate: Applies to kiosks. Specifies the form the user is taken to when this button is selected or when the timer completes its 'Interval' period.

NavigateID: The index number identifying the form specified in 'Navigate'. This field is automatically filled with a value based on the value of 'Navigate'.

NavigateOnFail: Applies to timers based on an automated action. Specifies the form the user is taken to if the automated action fails (if a payment authorization request is declined, for example).

NavigateOnFailID: The index number identifying the form specified in 'NavigateOnFail'. This field is automatically filled with a value based on the value of 'NavigateOnFail'.

OrderGrid: Applies to function buttons; used for linking function buttons to order grids. The order page grid selected here displays when this function button is pressed. Related order page grid sub-settings appear in the Component Inspector when this field is given a value.

Picture: Applies to images. Specifies the graphic image applied to a component.

PixRollPanel: Applies to function buttons; used for linking function buttons to roll panels. The roll panel programmed here will roll out or up when this function button is pressed.

PNGImageList: Contains sub-settings related to the application of an image to the component. The List contains available PNG images.

- **PngImages:** The name of the selected PNG image being applied. The available images vary

based on the selected image list.

- **Tag:** Not currently used.

ProductGrid: Applies to function buttons; used for linking function buttons to product grids. The product grid selected here displays when this function button is pressed. Related product grid sub-settings appear in the Component Inspector when this field is given a value.

Proportional: Makes the image proportional to the dimensions of the component. The image may be stretched or compressed if this is set to "False".

Push: The distance a button moves when it is pressed. The default is 2 pixels.

QuestionGrid: Applies to function buttons; used for linking function buttons to question grids. A question grid contains the list of possible answers to a forced question.

RowCount: Applies to grids. Determines the number of rows of buttons a grid contains.

RoundedCorners: Rounds the corners of buttons in a Button List.

SecurityLevel: Sets the minimum security level a user must have in order to use the function button without a Security Override prompt appearing.

ShowCaption: Determines whether the contents of the Caption field are displayed or not.

ShowFrame: Shows the frame of the component.

ShowCourse: Shows the course for each item in the Order Receipt Window (the PixelItemList component).

- **dcNone:** Displays no course indicator. Default.
- **dcText:** Displays the course letter in square brackets ([A], for example).
- **dcUseTableDrawing:** Displays the course in the same way that the *TableCourseIndicator* policy is set to display it on tables.

SlideShow: Cycles through an image list, or the images in a specified folder, to create a slideshow.

Stretch: Stretches the image to match the dimensions of the control.

StretchButton: Enables the stretching of a button.

SwipeCardType: Sets what kind of data the form reads. Set for the form's TPixelFormStyle component.

- **stBarcode:** Reads barcode data and adds the product to the check.
- **stCreditCard:** Reads credit card data.
- **stLabelCCName:** Labels the transaction with the name on a swiped credit card.
- **stMemberBarcode:** Reads both member cards and barcodes.
- **stMemberCard:** Reads member card data and applies the member to the transaction.
- **stNone:** Reads no data.

Tag: Used for language. Represents an index number from the Language table in the database. It is used for components that are not static (the button used for applying the selected method of payment, for example).

TextAlign: The alignment of text on the control.

TextStyle: The style of text, such as raised or recessed.

Top: The amount of distance from the top of the form to the component. If this component is contained within another component (such as a panel), this setting will refer to the top of that parent component.

Transparent: Determines whether the component background is transparent or not.

WaveIndex: The index number of the wave file in the 'WaveList' that this component is associated with.

WaveList: Applies to buttons, forms and flash items. Enables you to store a list of applicable wave files.

WaveOptions: Contains sub-settings affecting how a wave file functions.

- **wpoASync:** Plays the wave automatically.
- **wpoSync:** Plays the wave when the component is selected.
- **wpoNoDefault:** Assigns default wave settings.
- **wpoLoop:** Continuously replays the wave file.
- **wpoNoStop:** Does not stop any currently playing sound.

Width: The width of the component.

Glossary of Function Types

This is a glossary of the options that can be applied to function buttons' 'FunctionType' field, and the corresponding 'FunctionName' settings in the Component Inspector. All 'FunctionType' values for function buttons begin with the prefix "ft".

Action

Action buttons are only used in kiosk environments. They will not function with non-kiosk forms.

- **Cancel Order:** Cancels the current transaction and follows the setting defined in 'Navigate'.
- **Exit:** Exits from the current form to the Windows desktop. This is used when designing and testing the kiosk but should be removed before going live.
- **Finalize Order:** Prepares the order for navigation to the Finish form.
- **Go Back:** Returns to the previous form, regardless of what that form is.
- **Go Forward:** Currently not used.
- **New Order:** Creates a new transaction. This is critical on the Welcome form.
- **Revise Order:** Currently not used.
- **Save Order:** Saves the current check, enabling the kiosk user to pay by cash at the front counter. Used on the Finish form.

Coupon

A list of all coupons programmed into the POS. This function does not have any corresponding entries in 'FunctionName'.

Course

Creates buttons for setting the course. Changes the 'FunctionName' field to contain a list of all the courses programmed into the system.

Finish

- **Divide By:** Enables you to divide the check total to help customers share payment of the check equally.
- **No Tax:** Removes tax from the order.
- **Quantity:** Applies the quantity function otherwise seen as the [@1] button at the bottom of the order screen.
- **Void Item:** Removes the item selected on the Item List from the check.

Keyboard Keys

Used in creating Keyboard forms, or for placing Keyboard function keys on any other form (for creating Lookups, for example).

- **BackSpace:** Backspace key, for deleting one character at a time.
- **Caps Lock:** Changes all of the keys from lowercase to uppercase letters.
- **Clear:** Deletes all 'typed' content from the text field.
- **Keys:** Creates a key for adding characters to the text field. The text that is added when this key is pressed is whatever is in this component's 'Caption' field. So, for example, to create a key that will add a "b" to the text field, put "b" in the 'Caption' field. Or, to create a key that will add, say, "Orlando" to the text field, put "Orlando" in the 'Caption' field.
- **Space:** Space key, to emulate the Space bar.

Keypad

- **0-9:** Numeric values.
- **00:** Single button abbreviation for cents (¢).
- **Clear:** Clears the last selected keypad value.

Normal

Used when creating a function button that relies on the settings in other Component Inspector fields. This function does not have any corresponding entries in 'FunctionName'.

Order

Many of these order functions are on the Functions menu.

- **Balance Inquiry:** Checks the current member's credit balance.
- **Charge Gratuity:** Asks you to enter a gratuity amount (%).
- **Close Cash:** Closes the transaction to Cash, assuming exact change.
- **Create Splits by Seating:** Splits the check by seating position.
- **Detailed Order Info:** Displays detailed information about the order.
- **Easy-Add New Item:** Adds a new product to the Order Screen.
- **Fire Order:** Sends off the next part of the order to the kitchen. If the system is set up for course-based orders, this will display a list of the courses and ask the user to select one to fire off.
- **Get From Tab:** Similar to [Get Check] except that it applies to Member transactions only. In addition, the person who saved the check is able to Cash Out with the check still open. This function works in conjunction with [Save To Tab].
- **Hold Order:** Holds the entire order, enabling users to leave the check without sending any items, and either come back to make changes to it, or else simply send the whole order later. When a user selects this function button, no items are sent and the user is logged out.
- **How To Make Item:** Displays How To Make information.
- **Label:** Creates a check label.
- **Label CC Name:** Labels the transaction with the name stored on a swiped credit card.
- **Member/Delivery:** Brings up the Member window.
- **New Items:** Moves items to another table.
- **Move Table:** Moves the check to another table or joins it with another table's check.
- **PLU Lookup:** Retrieves a product by its reference (price look up) number.
- **Post Inv Usage:** Posts manual adjustments to inventory levels.
- **Preset Quantity:** A quantity button with a pre-defined value.
- **Print Receipt:** Prints the check and receipt.
- **Question Substitution:** Retrieves and modifies the answers given to a forced question for an ordered item.
- **Quick Unclose:** Retrieves a list of closed quick order checks, so you can unclosed one.
- **Re-Order:** Reorders previously ordered items.
- **Return Exchange Item:** Permits the returning of a sold item.
- **Save to Tab:** Similar to [Save Check] except that it applies to Member transactions only and the person who saved the check is able to Cash Out with the check still open. Works in conjunction with [Get From Tab].
- **Seat Number:** Applies a seating position to the check. Starts at 1 and increments each time it is selected.
- **Send Order:** Sends the order off to the kitchen (or wherever) without exiting the check.
- **Set # Of Customers:** Changes the number of customers at the current table.
- **Size Down:** Down sizes the selected item.
- **Size Up:** Up sizes the selected item.
- **Stop All Timers:** Stops all rated items at the current table.
- **Transfer Check:** Transfers the check to another employee.
- **Void Entire Check:** Voids all ordered items on the entire check.

OrderPage

Changes the 'FunctionName' field to list all of the order page buttons and modifier page buttons programmed into the POS. Used to program a button to represent a specific order or modifier page.

Payment

Changes the 'FunctionName' field to list all of the methods of payment programmed into the POS. Used to program a button to represent a specific method of payment.

PresetPayment

Changes the 'FunctionName' field to list all of the preset payment buttons programmed into the POS. Used to program a button to represent one of those preset values.

Product

Changes the 'FunctionName' field to list all of the products programmed into the POS. Used to program a button to represent a specific product. It can represent any type of product, including Kitchen Commands and Delay Print Commands.

SalesType

Changes the 'FunctionName' field to list all of the sale types programmed into the POS. Used to program a button to represent a specific sales type.

- **Popup List Style:** Displays a pop-up menu showing all of the sales types at once, enabling users to choose one of them to change the order's sales type to.
- **Toggle Style:** Changes the order's sales type.

ShiftKey

Changes the 'FunctionName' field to list shift key levels. Used to program a button to represent a shift level. You can then change the 'Caption' field to label the function button something that best describes the kind of product that shift key level is programmed for. For example, your first shift products level may represent "Small" sized beverages. To work this into your Order form, you could design a button using this function type ("ftShiftKey") and the function name "ShiftKey1", and you could then change the value of the caption field to "Small". For further information, see the Shift Products section in the PixelPoint POS Installation Guide.

Special

- **Add Deposit:** Applies a deposit payment to an open transaction.
- **Apply Payment:** Applies the selected method of payment to close the check.
- **Apply Points:** Applies points redemption to the transaction.
- **Combo DN:** Scrolls down the Combo grid. It must be associated with the grid.
- **Combo It:** Interacts with a Combo grid component; becomes active when a combo is recognized. Displays an associated roll panel (with the combo grid component on it, for example) when selected. This can save a lot of space on the order screen by essentially reducing the size of the combo grid to just a button (until you select the button).
- **Combo Scroll:** Scrolls up and down the Combo grid. It must be associated with the grid.
- **Combo UP:** Scrolls up the Combo grid. It must be associated with the grid.
- **Menu DN:** Scrolls down the Order Page grid. It must be associated with the grid.
- **Menu Scroll:** Scrolls up and down the Order Page grid. It must be associated with the grid.
- **Menu UP:** Scrolls up the Order Page grid. It must be associated with the grid.
- **Numeric Keypad:** Presents the numeric keypad for input.
- **Order Items DN:** Scrolls down the list of items contained in the Item List.
- **Order Items UP:** Scrolls up the list of items contained in the Item List.
- **Payment Qty:** Prompts for the quantity of the payment method being used. For example, 10 vouchers, each worth \$1.58.
- **Product Image:** Displays the How To Make image for the selected product.
- **Products DN:** Scrolls down the Product grid. It must be associated with the grid.
- **Products Scroll:** Scrolls up and down the Product grid. It must be associated with the grid.
- **Products UP:** Scrolls up the Product grid. It must be associated with the grid.

- **Question DN:** Scrolls down the Question grid. It must be associated with the grid.
- **Question Scroll:** Scrolls up and down the Question grid. It must be associated with the grid.
- **Question UP:** Scrolls up the Question grid. It must be associated with the grid.
- **Void Payment:** Voids a payment that has been applied to the check.

Glossary of Label Types

This is a glossary of options you can apply to label components' 'FunctionType' field, and the corresponding 'FunctionName' settings in the Component Inspector. All 'FunctionType' values for labels begin with the prefix "It".

Normal

Used when creating a function button that relies on the settings in other Component Inspector fields. This function does not have any corresponding entries in 'FunctionName'.

Special

- **Amount Due:** The yellow bar showing the amount owing on the Finish form.
- **Amount Due Description:** The text above the Amount Due bar, reading 'Amount Due'.
- **Last Change:** The amount of change given out for the last order. Displayed on the Order form.
- **Last Order:** The amount of the last order. Displayed on the Order form.
- **Member Label:** The name of the member associated with the check. Displayed on the Order form.
- **Member Points:** The member's current points balance.
- **Net Total:** The amount owing before taxes and discounts. Displayed on the Kiosk Products form.
- **Number Of Customers:** The number of customers. Displayed on the Order form.
- **Order Number:** The transaction number. Displayed on the Kiosk Products form.
- **Order Page:** The title of the last order page selected.
- **Order Time:** A timer that starts when the first item on the bill is ordered; shows the amount of time since the order was started.
- **Product:** The name of the selected item. Displayed on the Question form.
- **Question:** The forced question being asked. Displayed on the Question form.
- **Sale Type:** The applied sales type.
- **Server:** The name of the server who owns the check. Displayed on the Order form.
- **Table Label:** The label applied to the check. Displayed on the Order form.
- **Table Number:** The table number of the current order. Displayed on the Order form.
- **Tender:** The amount tendered. Displayed on the Finish form.
- **Time Seated:** The time the customer was seated. Displayed on the Order form.
- **Transaction Number:** Entire transaction number.
- **Transaction Points:** Points earned this check.
- **Transaction Tax:** Sum of all applied taxes.
- **Transaction Total:** The amount due. Displayed on the Kiosk Finish form.

Window Menu

This menu contains only one option (Show Active Records Only). However, it is a very important option. It controls whether the system displays all of the records in the database, or only those set as 'Active' (See "Active And Inactive Records").

By default, this option is enabled and has a checkmark beside it, meaning that the system will only show active records. Selecting this option when it is checked disables the option and tells the system to display all records, including those set as inactive. Selecting this option when the option is disabled enables it again.

Help

This menu contains options generally designed to assist you with your use of the system. It has options that open PixelPoint help files, bring you to a page containing information about PixelPoint news, and give you information about your particular system. Because most of these options point you to resources outside of the system itself, they do not require extensive explanation—each one is briefly explained below.

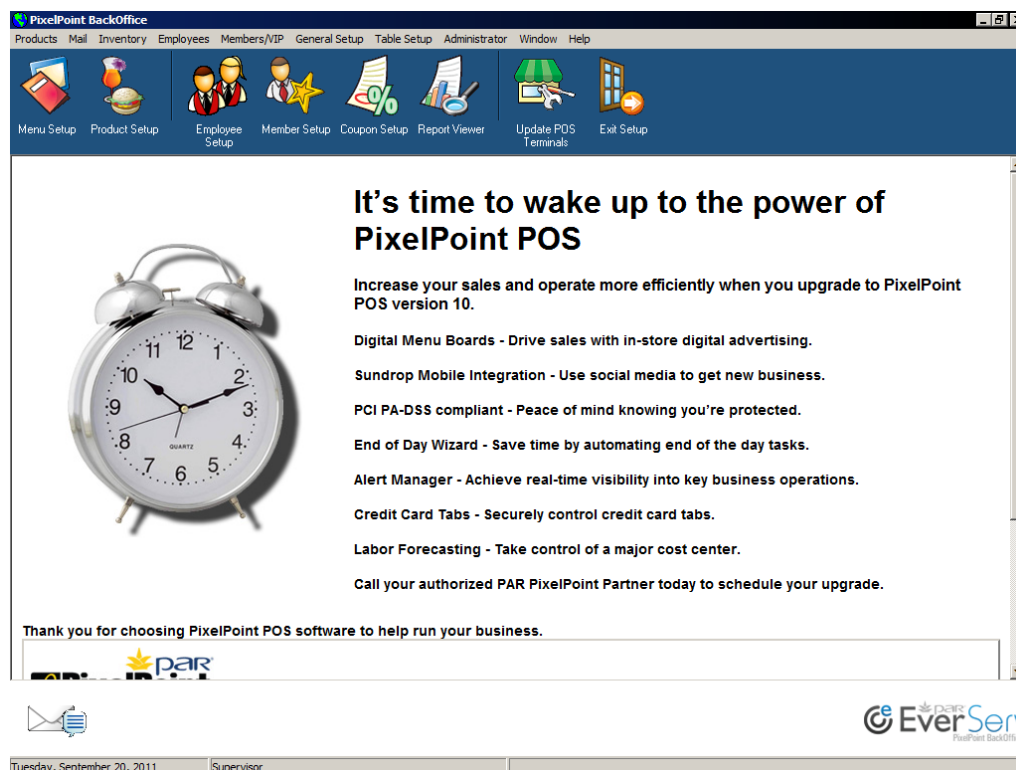
System Setup: Opens the PixelPoint BackOffice User's Guide.

Admin and Install: Opens the PixelPoint POS Installation Guide.

POS User Guide: Opens the PixelPoint POS User's Guide.

Getting Started: Opens the Order of Programming section of the PixelPoint BackOffice User's Guide (See here).

PixelPoint News: Opens a webpage with information about recent PixelPoint updates, news, and interesting features. You must be connected to the Internet for this to work.



Update POS Terminals: Starts the process of updating all of the stations on the system with the latest updates to PixelPoint POS. Upgrade icense codes for updates to be installed.

About: Displays a screen with information about your version of PixelPoint BackOffice, including its build number. Support technicians usually need this information in order to help you with system problems.

Overview

This chapter discusses how to go about programming the system to perform some of the advanced functions PixelPoint POS can be programmed to perform. These functions usually involve programming in several different parts of BackOffice.

You should make sure you are familiar with the information in the System Concepts chapter of the PixelPoint BackOffice User's Guide. The information contained in this current chapter is pertinent to different parts of the Order of Programming section; this chapter details parts of each of the steps discussed there.

The contents of this chapter are:

- Deposits
- Size Up and Size Down
- Shift Products
- Hold and Fire
- Inventory
- Kiosks
- Till Management
- Print Emulator

Deposits

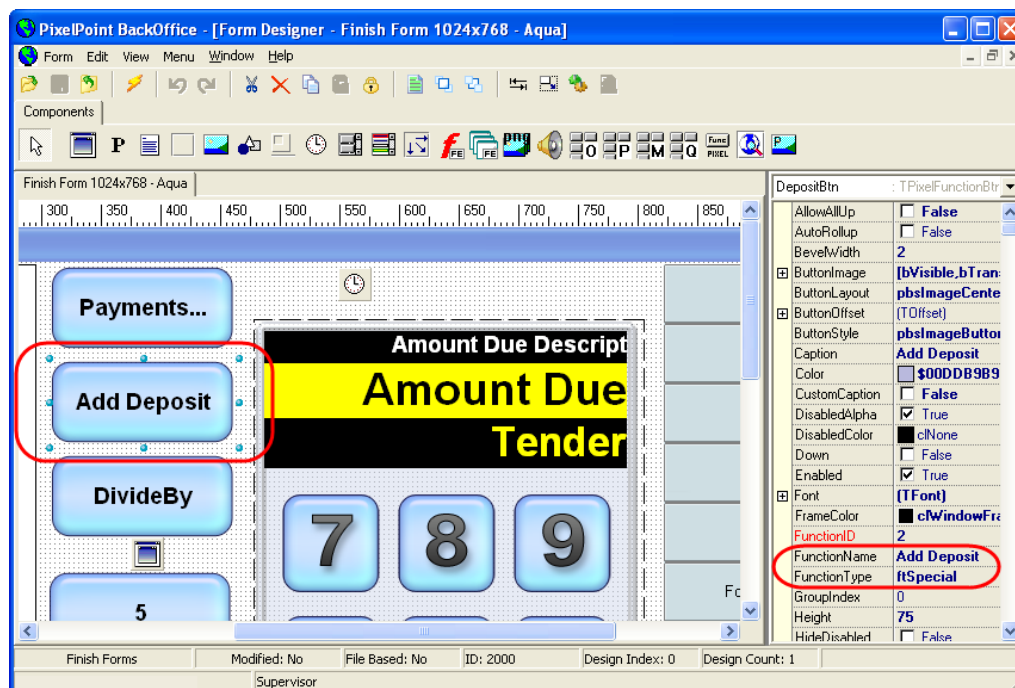
This section explains how to set up the Add Deposit function so users at the front-end have the ability to take a deposit from a guest at the beginning of the guest's visit and then apply the deposit when closing out the transaction.

In order for this function to work, the establishment's Finish form(s) must have an [Add Deposit] button and certain policies must be set. This section is therefore split into two parts, Form Designer and Policy Setup, explaining each of these.

Form Designer

The default Finish template provided by PixelPoint already has an [Add Deposit] button on it (see the image below). This button will automatically appear on front-end Finish screens when the Add Deposit function is enabled in Policy Setup (see below).

However, you may be using custom finish forms. In this case, you must add [Add Deposit] to your finish forms, unless you simply modified the default templates and kept the button. If your current forms do not have the button, you can easily copy the button from the default templates and then place it on any of your custom templates. The picture below shows the button on the default templates and the component inspector fields that control it.



You can also create the button yourself, instead of copying it. See the Form Designer section in the PixelPoint BackOffice User's Guide for detailed information about creating different kinds of buttons. To create [Add Deposit] specifically, follow the steps below:

1. Open BackOffice.
2. Select *Form Designer* from the Administrator pull-down menu.
3. Select the name of the template in the Finish Forms category or select [Open From File] and browse for the form file.
4. Select the [TPixelFunctionBtn] icon on the component toolbar.
5. Click where you want the button to be in the form display area.

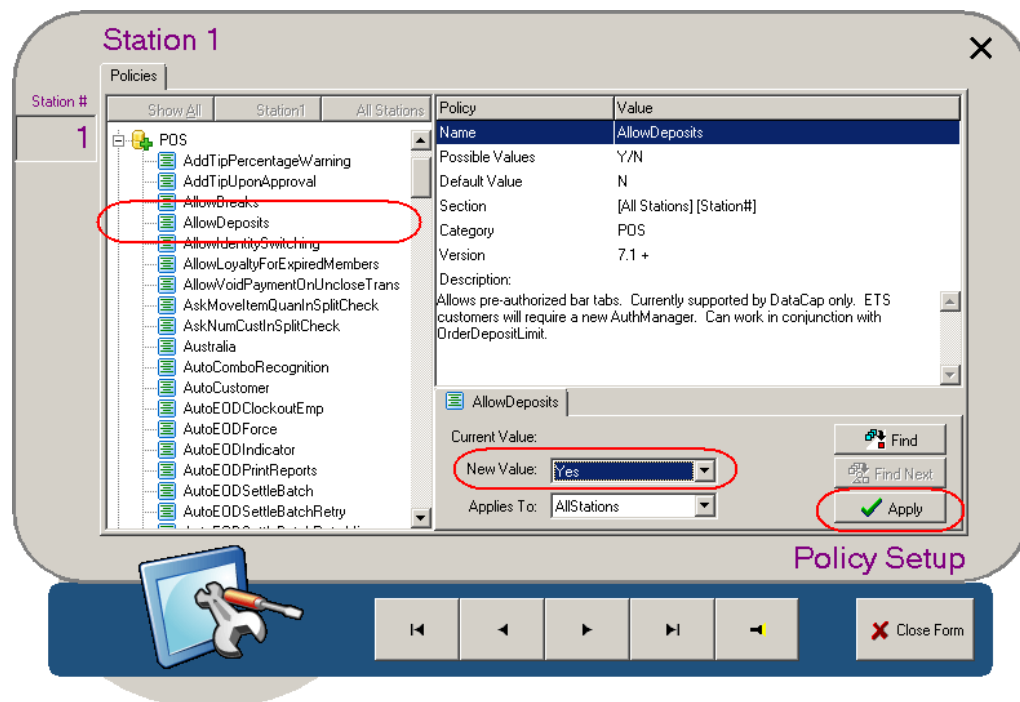
6. Change the 'FunctionType' to "ftSpecial" (using the drop-down list in the component inspector).
7. Change the 'FunctionName' to "Add Deposit" (using the drop-down list in the component inspector).
8. Resize and position the button as you like and apply any other Form Designer settings you want (such as background colors and images).
9. Save the form.

Policy Setup

The [Add Deposit] button discussed above will not be visible at the front-end unless the function is enabled in Policy Setup. There will simply be a blank space where the button is on the template.

To Enable Add Deposit:

1. Select *Policy Setup* from the Administrator pull-down menu.
2. Open the 'POS' folder on the left of the screen.
3. Select the 'AllowDeposits' policy.
4. Change the 'New Value' to "Yes".
5. Select which station(s) this applies to by using the 'Applies To:' field.
6. Apply the changes by clicking [Apply].



Now, when you update the POS terminals and go into the front-end, you will see [Add Deposit] on the finish form (as long as you are using a form with that button on the template).

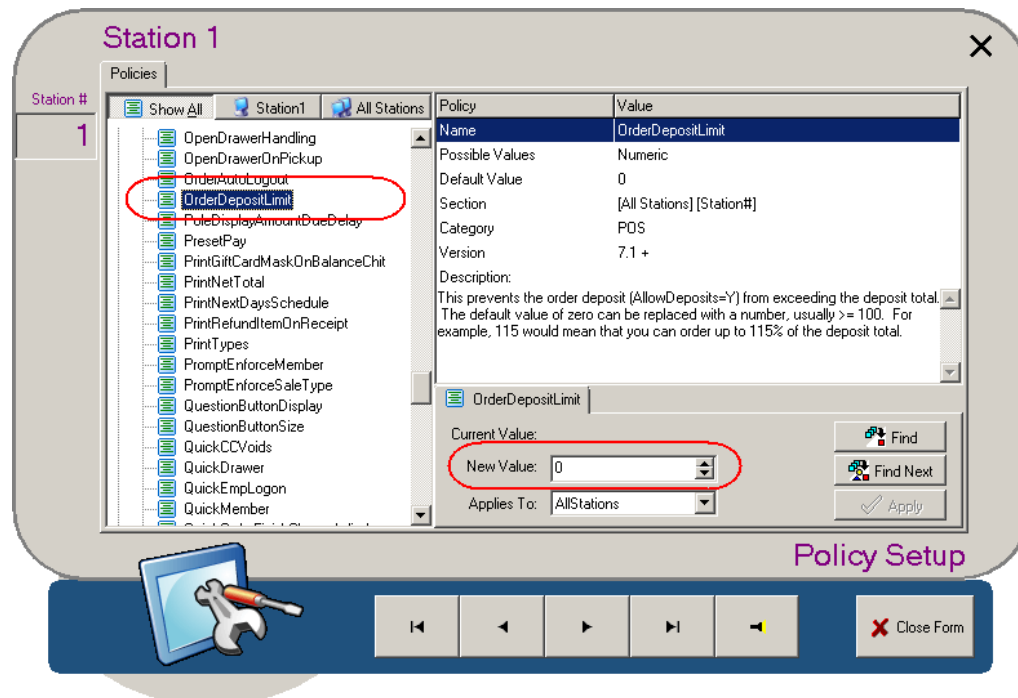
Order Deposit Limit

Using policies, you can also limit the total amount orders can be for when a deposit has been made. This limit is relative to the deposit amount.

To Set the Deposit Order Limit:

1. Select the 'OrderDepositLimit' policy (in the 'POS' policy folder in Policy Setup).
2. Enter the maximum percent an order can be for in the 'New Value:' field.
 - A value of "0" means there is no limit.
3. Select [Apply].

For example, if you set the order deposit limit value to "100", then a customer can order up to 100% of their deposit. If they place a \$50.00 deposit, they can order up to \$50.00 worth of items. If the deposit limit value is "150" and they place a \$50.00 deposit, they can order up to \$75.00 worth of items (the additional \$25.00 would have to be paid for separately, however).

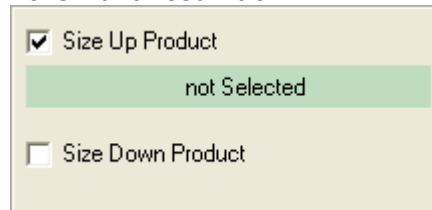


Size Up and Size Down

This section takes you through how to program size-up and size-down. These functions are often used in Quick Service, in establishments that have many products with multiple sizes. Another way of programming multiple-sized products that you may want to consider is using Shift Products (See "Shift Products Tab" for more information).

In this size-up/size-down example, the establishment has three sizes of pizza: small, medium, large. The price for each is \$5, \$7 and \$9 respectively.

1. Program each product (small pizza, medium pizza and large pizzas) with its price.
2. Go to Product Setup for the "Medium Pizza".
3. Select 'Size Up Product' on the Advanced Tab.



The image shows a software interface for product setup. It features two checkboxes: 'Size Up Product' which is checked, and 'Size Down Product' which is unchecked. Below the 'Size Up Product' checkbox is a green horizontal bar with the text 'not Selected' centered on it.

4. Click on the bar that displays (labeled "not Selected"). A window showing a list of all ordering products displays.
5. Choose "Large Pizza". The bar under 'Size Up Product' will now display "Large Pizza".
6. Select 'Size Down Product'.
7. Click on the bar that displays (labeled "not Selected"). A window showing a list of all ordering products displays.
8. Choose "Small Pizza".
9. Save the product record.
 - By programming the Size Up option for the Medium Pizza as the "Large Pizza", you also program the Size Down option for the Large Pizza as the "Medium Pizza". That is, you do not need to go into the Large Pizza product record and program it for Size Down, since you did this on the Medium Pizza's record.
 - The same goes for the Size Up option for the Small Pizza. By selecting "Small Pizza" as the Size Down option for the Medium Pizza, you also set the Small Pizza's Size Up function for Medium Pizza.
10. On the order form, create two custom function buttons: [Size Up] and [Size Down] (unless the order template you are using already has these buttons).
11. Save the order form.

Note: If the modifiers (pizza toppings in this case) also come in different sizes and prices, apply size up/down for each of these items as well. Upon sizing the master item, the modifiers will automatically-size up/down as well.

Now, with this programmed, when you order a small pizza (\$5) and select [Size Up] the small pizza changes to a medium pizza (\$7). If you select [Size Up] again, the medium pizza changes to a large pizza (\$9). When you select [Size Down] now, the large pizza changes back to a medium pizza (\$7), and when you select [Size Down] again the medium pizza changes back to a small pizza (\$5).

Note that you can extend this product chain beyond three items. For example, you can program Size Up on the Large Pizza to link with an Extra-Large Pizza.

Shift Products

This section explains how to program your system to use Shift Products.

Having shift product buttons on the Order Screen enables you to fit many more products onto one menu page, since you only need one button for each product, no matter how many sizes it comes in. This prevents users from having to scroll through pages and pages of buttons, since you will not have separate small medium and large buttons for each product they can order.

Not all products are normally programmed to use shift products, because not all products come in multiple sizes or varieties. Products like drinks are perfectly suited to this feature, however, since each kind of drink can usually be ordered in small, medium or large sizes (some establishments have additional sizes too). Products like pizzas are well suited to this feature as well, since you can get the same kind of pizza in different sizes as well.

Enabling Shift Keys in Policy Setup

To set up shift products, first enable the *UseProductShiftsKeys* policy in Policy Setup.

Configuring Ordering Products

This section uses example ordering products to illustrate how you would go about setting up your products to work with a shift product set up. You should have your ordering products configured such that each individual size or type of item has its own product record and each is set up with its appropriate price.

For example, if you have three different sizes of a particular drink (Coke, for example), you may have products labeled, "Coke SM", "Coke MD" and "Coke LG". You must also have a regular unshifted product ("Coke") that is the default product for this group.

This is the basis of a shift product set up. You need to have records for each size of each product as well as a record for a default or unshifted product. The idea is that all of these products will be linked to one button on the menu; this section explains how they get linked. So, if your ordering products are set up in this way, then follow the steps below for each of the product groups you want to use your shift product buttons:

1. Open the default product's record ("Coke" in this example).
2. Select the Shift Products Tab.
3. Enter "Coke SM" into the "Shift 1" field.
 - You can use the drop-down box to get a list of products, or you can use the search button ([...]) to search for it.
4. Enter "Coke MD" into the "Shift 2" field.
5. Enter "Coke LG" into the "Shift 3" field.

The "Coke" product now has three different products it can be shifted to, if there are appropriate shift buttons on the Order form.

Creating Shift Buttons

There are two ways you can create shift buttons, depending on where on the Order Screen you want them to be. They can either be in the menu product grid or you can have them as individual function buttons.

If you want your shift buttons to be available through the product grid, you need to create product records for them and then add them to a menu page. If you want to have them as function buttons, you must add them to the Order Screen template in Form Designer. Steps for doing both are given below; follow the instructions in the appropriate section.

Product Grid

Shift button products are products with a feature code from "901" to "910"; they can have any product type, but must have one of these feature codes. Each feature code corresponds to one of the rows on the Shift Products tab (Feature code 904, for example, corresponds to 'Shift 4'). Shift button products should be set to have a price of \$0.00, since each ordering product is priced individually.

Create a product record for each of your shift buttons; to program the example above, for instance, create three shift button products to fit with the different sizes of drinks. Follow the steps below.

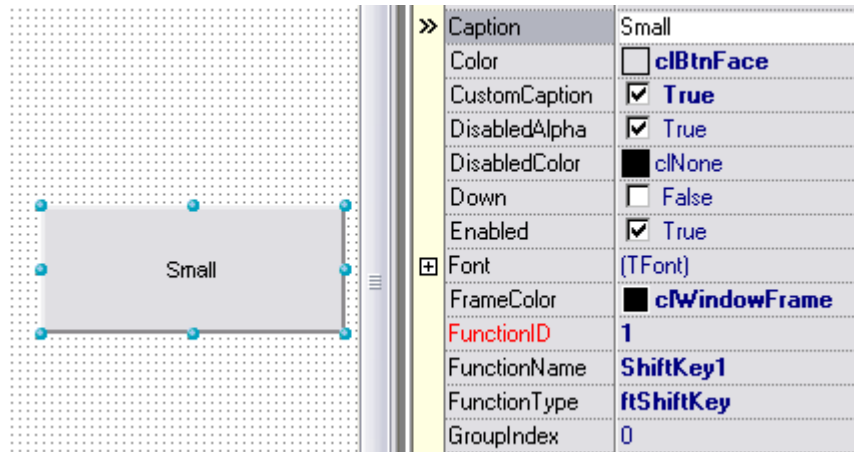
1. Open Product Setup.
2. Create a new product record by selecting [+].
3. Name the product after the size or type of product (For example, your first shift button may be "Small").
4. Set the price to \$0.00.
5. Set the product's 'Feature Code' field (on the Advanced Tab) to a value between "901" and "910".
 - Your first shift button should use "901" and each shift button after that should use a consecutive feature code (Your second shift button should use "902", etc.).
6. Repeat steps 2 to 5 for each shift button product you want to create, increasing the feature code value by one each time you repeat.
7. Open Menu Setup.
8. Add the newly created shift button products to the appropriate menu page(s).

You can then use these shift button products for all of your menu items. For example, you can set up all of your other kinds of drinks without going through the steps in this subsection again. You already have the shift button product records created, so you just need to specify the shifted products on the Shift Products Tab for the other default products.

Form Designer

If you do not want your size buttons to be in the product grid, but rather appear as buttons outside of the grid, then you must add them to the Order screen templates in Form Designer by creating function buttons keyed to each shift function. This section explains how to do this.

Following the example above, we will create three shift products buttons ([Small], [Medium] and [Large]). First, open your Order form in Form Designer and create a Function Button for the first shift ([Small]). Now set the Component Inspector settings given below.



- **'FunctionType':** "ftShiftKey"
- **'FunctionName':** "ShiftKey1" (1 representing the first shift level)
- **'Caption':** "Small"

Right-click on the button and use *Copy* and *Paste* to create the other two buttons. Change their 'FunctionName' to "ShiftKey2" and "ShiftKey3" respectively, and label them accordingly (in this example they would be "Medium" and "Large").



Hold and Fire

This section explains how you would program a system to use a Hold and Fire method of sending orders to remote printers.

There are two main kinds of Hold and Fire systems. One involves servers manually inserting hold commands into the order, so they specify what items get held at what points. The other system is based upon the courses each item is a part of and enables servers to fire off each course individually without having to worry about inserting hold commands.

Note: Receipts cannot be printed if there is a Hold and Fire item on the order. The system checks for these items and will not print the receipt if it finds one. In addition, Hold and Fire does not work with rated items. The system will automatically remove any Hold and Fire feature it finds when you order a rated product.

To Program Manual Hold and Fire

Add the default "Hold and Fire" product to your menu (or add a custom-created hold and fire product - See below).

To Create a Hold and Fire Command Product:

1. Create a new product record.
2. Call it "Hold and Fire" or something similar.
3. Set it to have a 'Delay Print Command' product type.
4. Enter "3" in the 'Feature Code' field on the Advanced tab.

To Program Course-based Hold and Fire:

1. Create a 'Kitchen Command' product for each course you want to use in your hold and fire.
 - Label each product after the course name ("Appetizers", for example).
 - Make sure the 'Course' field is set to the appropriate course for this kitchen command.

It is recommended that you also create a "Drinks" line band. However, you should not assign this product a course.
2. Program a menu page (or menu pages) to have all of these course kitchen commands.
 - You could also program the system so that every check starts with these course bands already on it, so users do not have to add them themselves. You would simply set the kitchen commands to be automatically added to each check at the start of the transaction. To do this, use the Auto Order Item feature codes (101-104) (See "Feature Codes"). If you are going to this, make sure you include a line band for drinks.
3. Create a Form Designer Order Form that has a [Fire Order] function button (a "TPixelFunctionBtn" component with an "ftOrder" 'FunctionType' and a "Fire Order" 'FunctionName').

You can change the default colors of the course bands in Form Designer by assigning different values to the 'KitchnBandBcgd' and 'KitchnBandText' properties (in the 'ItemColors' settings folder) of the Item List Window (the PixelItemList component).

Inventory

There are 3 levels of inventory you can apply to PixelPoint.

Inventory Without StockBoy

StockBoy is an add-on agent that comes with a PixelPoint Professional License. However, you can apply limited inventory without it. In this "Inventory without StockBoy" solution, you apply recipes to products. As the product is ordered, PixelPoint records the use of the attached recipe items. Following are the steps to set up this method in BackOffice:

1. Create Stock Items (Select Stocked Items from the Inventory pull-down menu). When doing this, enter in the price for a package of the item. This is a general (fixed) price that you set to establish a cost per unit.
2. Create Recipes (Select the Recipe tab in Product Setup (from the Products pull-down menu)). When programming each product, apply the necessary stock items to the recipe tab, indicating the required quantity. The total recipe price (referred to as the product cost) will then be calculated from this.

This is a very popular inventory solution, for several reasons. (1) No data entry is needed beyond initial programming, (2) it provides enough information to manage basic inventory without getting complicated and (3) it can be easily upgraded to a StockBoy system.

Inventory With StockBoy

StockBoy functions in the background and enables you to manage perpetual inventory by monitoring stock levels. As a product is ordered, its recipe items are depleted from their respective stock levels. The system will flag you when levels get low. You can then replenish those stock levels by creating purchase orders for suppliers. When an order comes in, you close off the purchase order, which automatically adds the inventory in the shipment to the current stock levels.

Cost per unit, by default, is calculated based on a weighted average of past prices (rather than a single manually-entered price); the value is averaged between multiple orders. For example, say that last week your order of 100 cabbages cost \$40 and this week it cost \$60. The value of your inventory is the average of the two: $(40+60)/2 = 50$. So the value is \$50. Dividing this by number of units, the system establishes that your cost per unit of cabbage is \$0.50 (\$50/100 heads). For the sake of simplicity, we are assuming that a head of cabbage represents 1 unit. In reality it would likely be based on weight. Note that you can also change settings to program cost per unit to be based on the price from the last order. See the Inventory Costing Configuration section below for details.

To implement Inventory with StockBoy:

1. Go into Administrator / System Setup in BackOffice. Check the "Use Inventory Manager (StockBoy)" box on the main tab.
2. Create an agent shortcut in the Windows Startup folder to "PixelStockManager.exe" and run it. A box icon displays in the system tray.
3. Create suppliers (by selecting Supplier Setup on the Inventory pull-down menu in BackOffice).
4. (Optional) Create warehouses (by selecting Warehouse Setup on the same menu).
5. Create stock items (in Stocked Items). You can use any stock items created without StockBoy.

6. Create recipes. Again, you can use any recipes already created (without StockBoy).
7. Select Inventory Manager on the Inventory pull-down menu.
8. Do a physical count of the warehouse and then select [Physical Counts] on the StockBoy toolbar. PixelPoint includes a stock take report for assisting you with the physical count; print it and use it to perform your physical count. With this record, enter the stock levels into Inventory Manager. This gives your inventory starting values. Recipe values and cost per units will be updated as this is done.

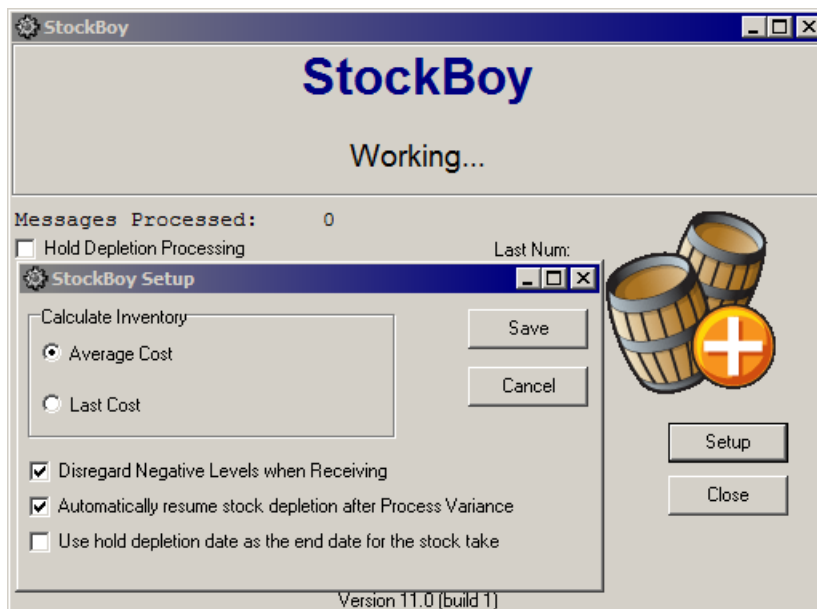
When completed, you will have a digital warehouse containing stock items with inventory levels. Ordering items at the front-end will now deplete these levels. You can use Inventory Manager to monitor these levels, generate purchase orders and then integrate received orders into your stock levels.

Third-Party Interface

Generally speaking, StockBoy is a basic inventory system that addresses the needs of most establishments. If however, you have a client with inventory needs beyond what StockBoy can provide, there is a third inventory option. PixelPoint can interface to third-party inventory systems, including some of the leading inventory systems in the world (such as FoodTrak™), to provide a complete POS/Inventory solution.

Inventory Costing Configuration

Inventory costing can be done by average cost or last cost. To change this setting, maximize StockBoy and select [Setup]. A secondary window will display enabling you to choose either "Average Cost" or "Last Cost". By default it is set to "Average Cost".



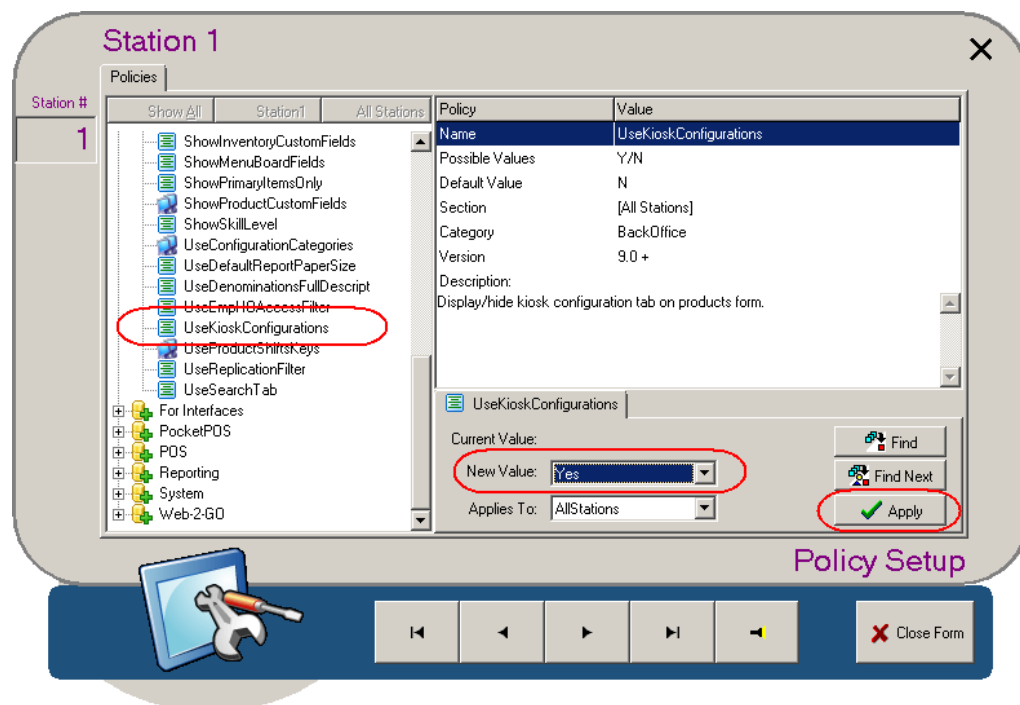
Average cost values your inventory based on weighted average, taking into account what you have paid on your various orders and the quantities of each of them. Last cost values your inventory based on the last order applied to inventory.

Overview

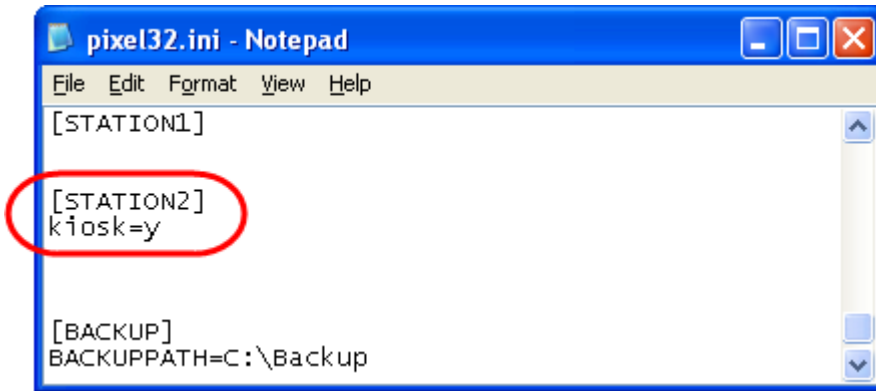
This section provides information on programming a kiosk. It covers each kind of screen a kiosk may use and provides examples. The following topics follow:

- Programming a Kiosk
- Welcome Form
- Menu Form
- Cancel Form
- Product Form
- Modify Item Form
- Finish Form
- Modify Select Item Form
- Authorizing Payment Form
- Confirmation Form
- Declined Payment
- Out Of Service Form
- Exiting and Restarting a Kiosk

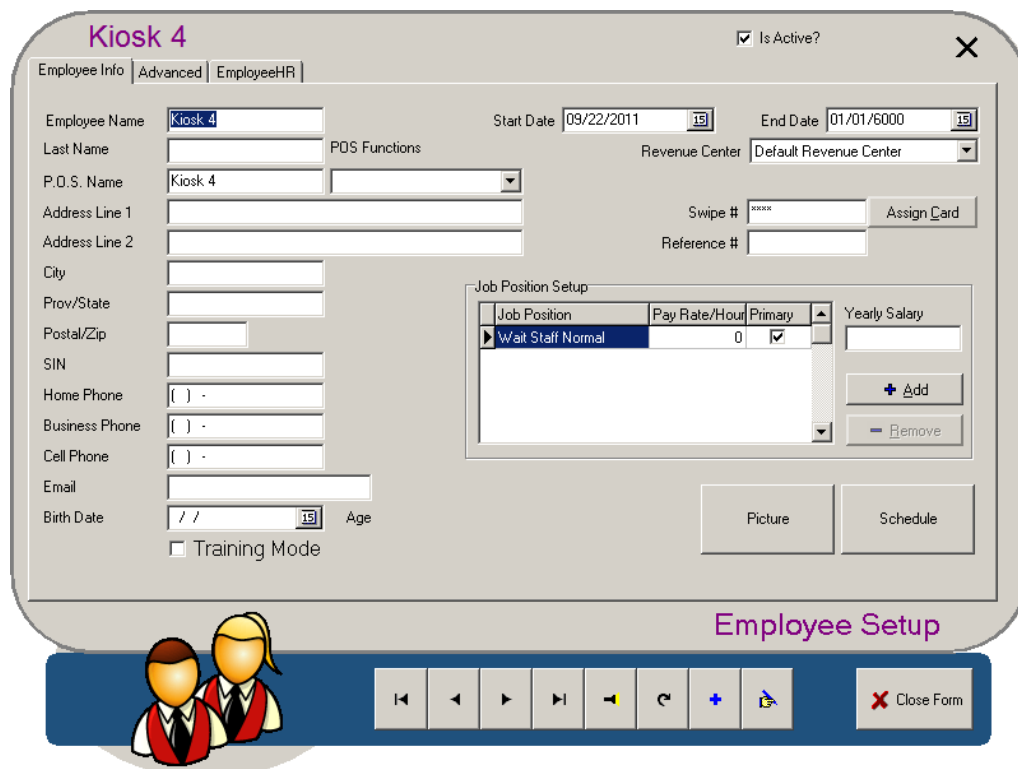
The Kiosk application requires separate licensing. Make sure that License Manager has been updated for Kiosk. The policy for Kiosk must also be enabled. Go into *Policy Setup* on the Administrator menu, and change the setting for "UseKioskConfigurations" from "No" to "Yes".



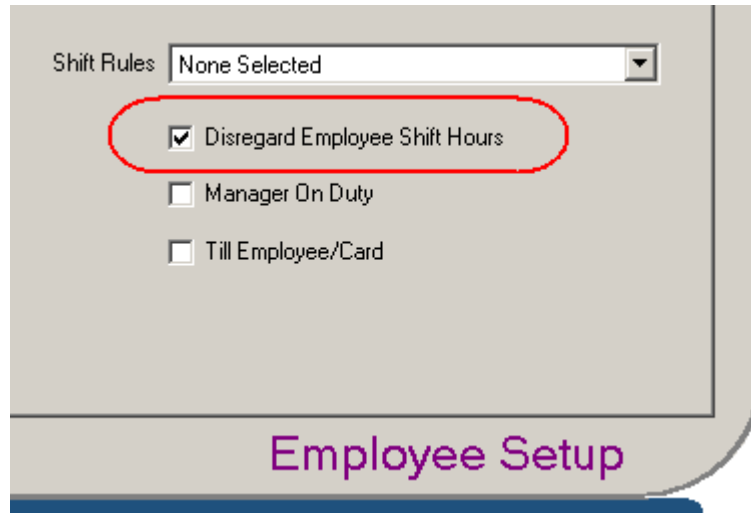
Next, modify "Pixel32.ini" by adding "Kiosk=Y" to the sections of those stations that will be designated as kiosk stations.



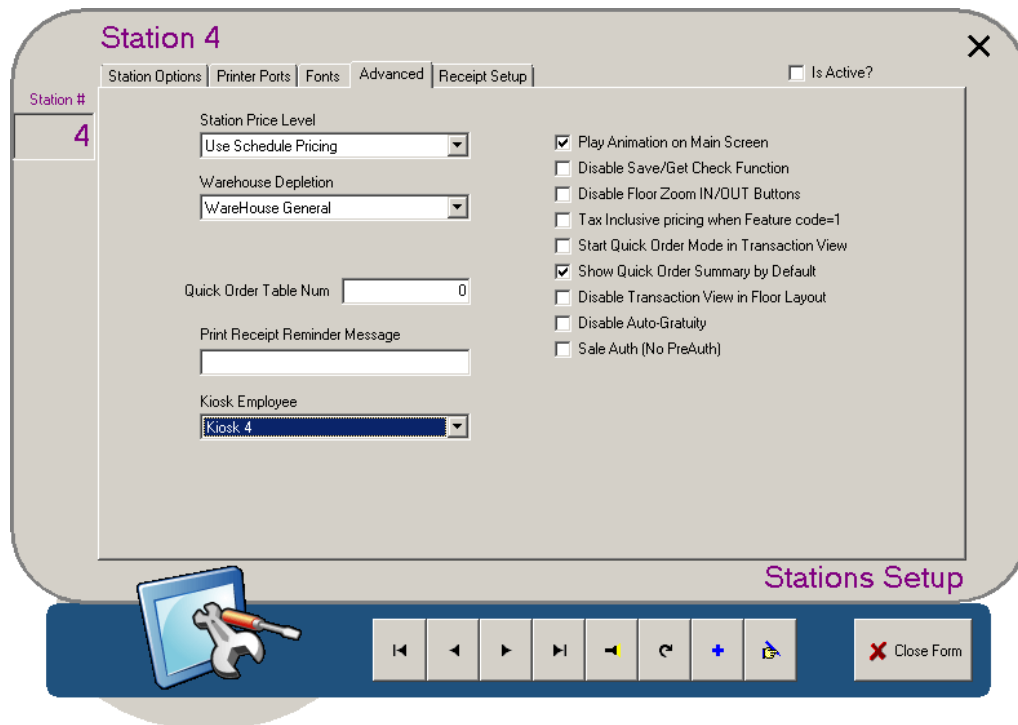
Kiosk stations need a kiosk employee to be logged in so that ordering can take place. To do this, create an employee record for each kiosk station. Set the job position to "Wait Staff Normal".



If Shift Rules are also being used at the site, make sure you go to the Advanced Tab in Employee Setup and check the box [Disregard Employee Shift Hours]. This will prevent the kiosk employee from being flagged for breaks and overtime.

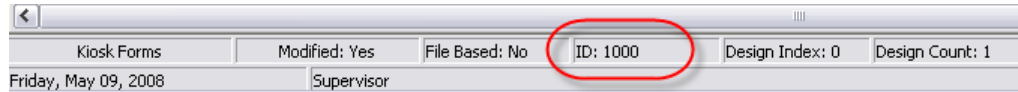


Having created the employees, go into *Station Setup* (on the Administrator menu) and assign a kiosk employee to each station designated as a kiosk. The field for this is "Kiosk Employee"; it is found on the Advanced Tab. By assigning an employee record to this field, the station will automatically log in on start up with that employee. Logging in and out is not needed for kiosk stations if this is set up.



Programming a Kiosk

Form Designer includes default forms for all of the essential screens needed in most kiosk applications.



Load the default Welcome form and note the ID number at the bottom of the form. When a kiosk starts, it automatically loads the form with the lowest ID number (by default this is "1000", the number hardcoded into the default Welcome form (as seen in the image above)). All default forms have an ID in the 1000 range. All forms created, modified or saved outside of these forms will be given a higher ID number.

This can be a problem when creating a new Welcome form; before going live with the kiosk, you need to make sure your Welcome Form has the lowest ID number. To do this, first load the default form (the Welcome form with the ID number "1000"). Now select *Import From File* from the *Form* pull-down menu. Then select and load your custom form. Form Designer will overwrite the existing form with your new content while maintaining the original ID number.

The default forms needed for a kiosk are as follows:

- **Welcome:** Used to start a check.
- **Menu:** Contains order pages.
- **Products:** Contains order items.
- **Finish:** Settles the check.
- **Cancel Order:** Cancels the current check.
- **Decline Payment:** Notifies customers about declined authorization.
- **Confirmation:** Confirms authorization.
- **Out of Service:** Sets the kiosk as inactive.
- **Authorizing Payment:** Displays during credit authorization.
- **Modify Item:** Modifies the selected item.
- **Select Modify Item:** Modifies, voids and substitutes a selected item.

Welcome Form

The Welcome form is what displays on an active kiosk when there is no check or order open. It is the default screen upon logging in.



This screen needs to give customers a way to place an order. You could have a defined order button, or you could simply have the entire screen act as one by having a transparent full-screen button. Regardless of how it is applied, the button on this page must contain the following settings with the following values:

Order

- **Component:** Function Button or Flash Movie.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "New Order".
- **'Navigate':** Set to "Menu".

The 'FunctionName' "New Order" starts a check when a user selects the component. "Menu" navigates the user to the Menu Form. It is very important that "New Order" be applied here; screen functions on subsequent forms will not work if a check has not been opened first.

Timer

- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Service Check".
- **'Navigate':** Set to "Out Of Service".

Menu Form

The Menu form contains the Order Menu Grid, which shows the order pages. If you have programmed images for order pages in *Order Page Setup*, they can be used on this form.



Order Page Grid

- **Component:** Order Menu Grid.
- **'Navigate':** Set to "Products".

Cancel

- **Component:** Function Button.
- **'FunctionType':** Set to "ftNormal".
- **'Navigate':** Set to "Cancel Order".

Timer

- **Component:** Timer.
- **'FunctionType':** Set to "ftNormal".
- **'Interval':** Set to "10000" (or another reasonable setting).
- **'Navigate':** Set to "Cancel Order".

Item List

- **Component:** Item List.
- **'Navigate':** Set to "Modify Select Item".

Pay Now

- **Component:** Function Button or Flash.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Finish Order".

Cancel Form

The Cancel form confirms whether the customer wants to cancel the current transaction.



This form should contain a button that cancels the order and another button that continues ordering. Critical settings and values for these buttons are as follows:

Cancel

- **Component:** Function Button.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Cancel Order".
- **'Navigate':** Set to "Welcome".

Continue

- **Component:** Function Button.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Go Back".

The "Go Back" setting navigates back to the previous form.

Timer

- **Component:** Timer.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Cancel Order".
- **'Interval':** Set to "10000" (or another reasonable setting).
- **'Navigate':** Set to "Welcome".

Product Form

The Product form contains the products associated with the order page the customer selected on the Menu Form (See page ____).



Pictures help to sell an item. When creating this screen, consider including an image of the product and information about it. In the example shown above, product image and product information have been applied to the screen. The product image can also be applied to the product buttons.

It is also important to anticipate functions that the user may need if they are placing a large order. For example, in the image above, the arrow buttons above the Total field will scroll up and down the item list. You could also add arrow buttons on the left, for example, that would scroll through the product grid when there are more products available than fit on the screen. These scroll buttons can appear as icons, images or ordinary buttons. Critical settings for some key components on this screen are as follows:

Product Grid

- **Component:** Product Grid.
- **'Navigate':** Set to "Menu".

Pay Now

- **Component:** Function Button or Flash.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Finish Order".

Item List

- **Component:** Item List.
- **'Navigate':** Set to "Modify Select Item".

Item List Navigation

- **Component:** Function Button.
- **'FunctionType':** Set to "ftSpecial".
- **'FunctionName':** Set to "Order Items Up" and "Order Items Dn".

How To Make Information (optional)

- **Component:** Memo.
- **'FunctionType':** Set to "ftSpecial".
- **'FunctionName':** Set to "Product Info".

Product Scroll (optional)

- **Component:** Function Button.
- **'FunctionType':** Set to "ftSpecial".
- **'FunctionName':** Set to "Products Up" or "Products Dn".

Timer

- **Component:** Timer.
- **'FunctionType':** Set to "ftNormal".
- **'Interval':** Set to "10000" (or another reasonable setting).
- **'Navigate':** Set to "Cancel Order".

Modify Item Form

The Modify Item form contains modifiers related to a selected product. Access to this form can be through the Modify Select Item Form (See page ____) or directly from Item List navigation (although the first is recommended).

The main components of this screen are the modifier grid and the product grid. Make sure they are associated with each other. Remember that the modifier order pages associated with this form are programmed in *Product Setup*, on the Kiosk Forms Tab. If modifiers have not been applied on the Kiosk Forms tab, there will be no modifiers on this form. Critical settings for some key components on this screen are as follows:

Modifier Page Grid

- **Component:** Modifier Menu Grid.
- **'Navigate':** "Products".

Product Grid

- **Component:** Product Menu Grid.
- **'Modifier Grid':** Set to "ModifierMenuGrid1".

Go Back

- **Component:** Function Button.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Go Back".

Item List

- **Component:** Item List.
- **'Navigate':** Set to "Modify Select Item".

Cancel Order

- **Component:** Function Button.
- **'FunctionType':** Set to "ftNormal".
- **'Navigate':** Set to "Cancel Order".

Main Menu

- **Component:** Function Button.
- **'FunctionType':** Set to "ftNormal".
- **'Navigate':** Set to "Menu".

Pay Now

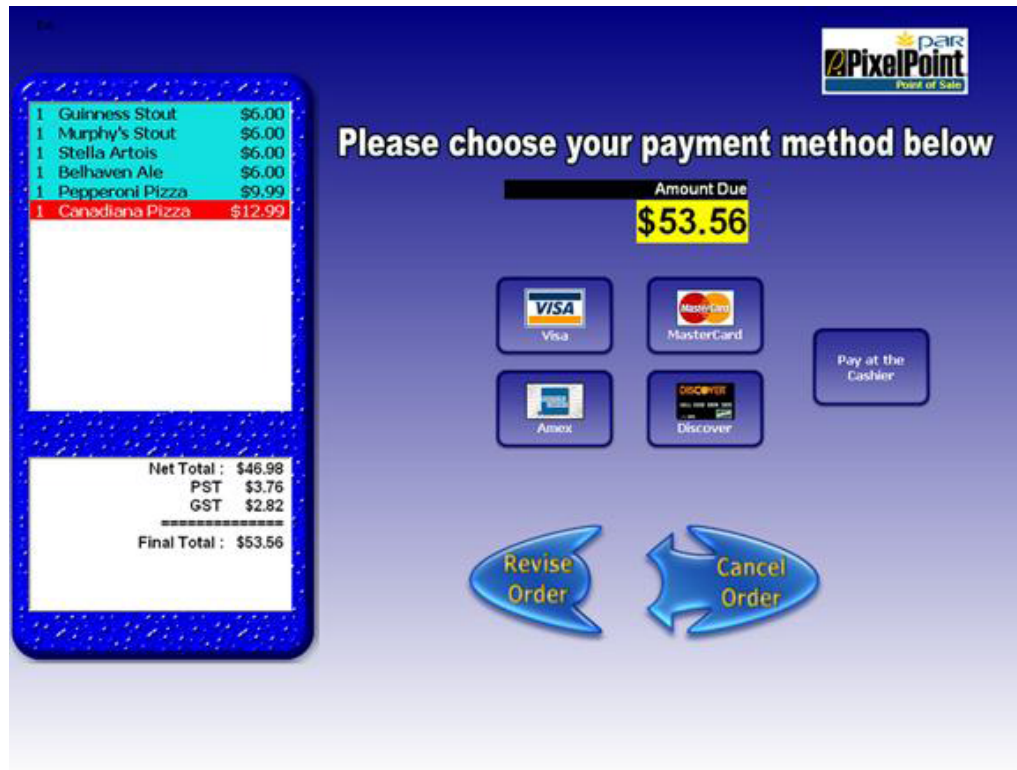
- **Component:** Function Button or Flash.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Finish Order".

Timer

- **Component:** Timer.
- **'FunctionType':** Set to "ftNormal".
- **'Interval':** Set to "10000" (or another reasonable setting).
- **'Navigate':** Set to "Cancel Order".

Finish Form

Unlike on a conventional POS finish screen, activity on the kiosk finish screen should be restricted to payment only. Printing of the guest check should be automatic and check splitting should not be permitted. Make sure, however, that this form has a window for displaying split tendering (it will not appear unless a partial payment has been applied, however).



You can design the payment buttons either as an Item List or as individual function buttons (in which case you can decide which ones are applied and how each one appears). Integrated credit authorization is required for credit payments on a kiosk. Note that in the image above there is also a [Pay At The Cashier] option for cash transactions. This is not programmed as a Cash method of payment function button, but as [Save Check], thus enabling the cashier to retrieve the check at the sales counter. As with all screens, make sure that this screen gives customers the ability to return to the check ([Revise Order]) and to cancel the check ([Cancel Order]). Critical settings for some key components on this screen are as follows:

Payment Buttons

- **Component:** Function Button (or Button List).
- **'FunctionType':** Set to "ftPayment".
- **'FunctionName':** Method of payment.
- **'Navigate':** Set to "Authorizing Payment".

Revise Order

- **Component:** Function Button.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Go Back".

Cancel Order

- **Component:** Function Button.
- **'FunctionType':** Set to "ftNormal".

- **'Navigate'**: Set to "Cancel Order".

Timer

- **Component**: Timer.
- **'FunctionType'**: Set to "ftNormal".
- **'Interval'**: Set to "10000" (or another reasonable setting).
- **'Navigate'**: Set to "Cancel Order".

Modify Select Item Form

The Modify Select Item form enables the user to pick an ordered item and apply a modifier to it, remove (void) it, or substitute it for another item.

You selected to modify: Pretzels

Select from the options below!

Modify Modify and/or add extras to the item

Remove Remove the item from your order

Substitute Change the item with another

Touch Item to Modify

1 Calzone	\$3.89
1 with Pepperoni	
1 Pretzels	\$0.80
1 Diet Dew Bottle	\$1.25
1 Pepsi Bottle	\$1.25

Total: **\$7.77**

Pay Now

Go Back Cancel Order Main Menu

It is recommended that you set Item List navigation to this form before navigating to the Modify Item Form (See page ____). You can have users navigate to the Modify Item form through this form by designing a [Modify] function button like the one discussed below (and shown in the image above). Critical settings for some key components on this screen are as follows:

Modify

- **Component:** Function Button.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Go Forward".
- **'Navigate':** Set to "Modify Item".

Remove

- **Component:** Function Button.
- **'FunctionType':** Set to "ftFinish".
- **'FunctionName':** Set to "Void Item".
- **'Navigate':** Set to "Go Back".

Substitution

- **Component:** Function Button.
- **'FunctionType':** Set to "ftOrder".
- **'FunctionName':** Set to "Question Substitution".
- **'Navigate':** Set to "Go Back".

Go Back

- **Component:** Function Button.

- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Go Back".

Cancel Order

- **Component:** Function Button.
- **'FunctionType':** Set to "ftNormal".
- **'Navigate':** Set to "Cancel Order".

Main Menu

- **Component:** Function Button.
- **'FunctionType':** Set to "ftNormal".
- **'Navigate':** Set to "Menu".

Pay Now

- **Component:** Function Button or Flash.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Finish Order".

Timer

- **Component:** Timer.
- **'FunctionType':** Set to "ftNormal".
- **'Interval':** Set to "10000" (or another reasonable setting).
- **'Navigate':** Set to "Cancel Order".

Pretzels (Item List Item)

This component is labeled "Pretzels" because that is the selected product name in the example form shown above. This refers to items on the Item List.

- **Component:** Label.
- **'FunctionType':** Set to "ftSpecial".
- **'FunctionName':** Set to "Product".
- **'Transparent':** Set to "True".

Authorizing Payment Form

The Authorizing Payment form displays when a credit method of payment has been applied on the Finish Form (See page 209). The Authorizing Payment form serves two functions. First, it gives the customer something to look at while waiting for credit approval. Second, it removes any buttons from the screen, thus ensuring that the user cannot do anything to disrupt the approval process.



The only function applied to this screen is the Timer. Critical settings and values for this component are as follows:

Timer

- **Component:** "Timer".
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "Process Payment Authorization".
- **'Interval':** Set to "10000" (or another reasonable setting).
- **'Navigate':** "Confirmation".
- **"NavigateOnFail":** Set to "Declined Payment".

The function "Process Payment Auth" checks every 10 seconds (as defined in 'Interval') for a payment authorization. If the authorization is approved, the timer executes the 'Navigate' setting. If the authorization is declined, the timer executes the "NavigateOnFail" setting.

Confirmation Form

The Confirmation form automatically displays when payment is approved. By the time this screen is displayed, the transaction is considered closed by the POS system.



The one critical component of this screen is the order number. Critical settings and values for this field are as follows:

Confirmation Number

- **Component:** Label.
- **'FunctionType':** Set to "ftSpecial".
- **'FunctionName':** Set to "Order Number".

Timer

- **Component:** Timer.
- **'FunctionType':** Set to "ftNormal".
- **'Interval':** Set to "10000" (or another reasonable setting).
- **'Navigate':** Set to "Welcome".

This screen will display the transaction number for 10 seconds (as defined in 'Interval') before automatically navigating to the Welcome Form.

Declined Form

This form displays if a credit authorization request is declined.



Critical settings and values for components on this screen are as follows:

Revise Order

- **Component:** Function Button.
- **'FunctionType':** Set to "ftNormal".
- **'Navigate':** Set to "Finish".

Cancel Order

- **Component:** Function Button.
- **'FunctionType':** Set to "ftNormal".
- **'Navigate':** Set to "Cancel Order".

Timer

- **Component:** Timer.
- **'FunctionType':** Set to "ftNormal".
- **'Interval':** Set to "10000" (or another reasonable setting).
- **'Navigate':** Set to "Cancel Order".

"Cancel Order" navigates to the Cancel Form. "Try Again" navigates back to the Finish Form.

Out of Service Form

This form prevents customers from using the kiosk simply by having no buttons for navigating anywhere else. It is a good idea, however, to have some information about the kiosk's status and perhaps about when it will be back in service.



This screen is activated remotely from a non-kiosk station. The Employee Time Clock's [Break] button changes to [Set Out Of Service] when you select a kiosk employee. Selecting [Set Out Of Service] puts the kiosk employee on break and navigates the kiosk station to the Out Of Service form. Cashing out and Clocking out the kiosk employee will not affect the Out Of Service display; the kiosk station will remain on this screen until the Kiosk Employee is clocked in or is taken off break.

The screenshot displays the PixelPoint BackOffice interface. On the left, a list of employees is shown under the heading "Employees Not Working". On the right, a table titled "Currently Working Employees" shows the following data:

Name	Start Work	Status
Kiosk 4	6/25/2008 12:08:50 PM	In Service
Supervisor	5/28/2008 3:33:45 PM	Clocked In

A yellow dialog box with a question mark icon is overlaid on the screen, asking: "Place Kiosk Employee Out of Service?". Below the text are two buttons: "Yes" and "No".

At the bottom of the interface, there is a yellow bar with several buttons: "Print Time Ticket", "? Help", "Refresh View", "Shift Rules", "Employee Settings", "Clock IN Employee", "Clock Out Employee", "Set Out of Service", "Cash Out", "Change Times", and "Leave". The "Set Out of Service" button is circled in red.

Critical settings and values for the timer on this form are as follows:

Timer

- **Component:** Timer.
- **'FunctionType':** Set to "ftAction".
- **'FunctionName':** Set to "In Service Check".
- **'Interval':** Set to "5000" (or another reasonable setting).
- **'Navigate':** Set to "Welcome".

Exiting and Restarting a Kiosk

When designing a kiosk, you can apply an [Exit] function button to any form so programmers can easily exit the application. However, this button should be removed from all forms before the kiosk goes live.

To exit from a Kiosk when it is live, swipe into the unit from the Welcome Form (See page 202). This navigates the station to the PixelPoint POS Login screen. A second swipe logs you into the POS. From there, exit and/or shut down the station by going into *Manager Functions / Special Functions / Exit POS Software* or *Shutdown System*.

To resume kiosk operations, swipe the Kiosk employee swipe card when on the Login screen. Restarting the kiosk unit automatically logs in the Kiosk Employee.

Glossary

A

Agent: A program that runs on its own and operates in the background. Examples of agent programs are Authorization Manager (CreditCheck) and Inventory Manager (StockBoy).

All at once: An option that presents multiple questions on the screen at the same time, instead of one at a time.

Ask at once: Another term for All At Once.

Authorization Manager: PixelPoint's credit authorization program; an add-on module that enables you to process credit transactions directly through the POS system.

B

Back-end: That part of the system that is not exposed to customers and does not deal with them directly. The back-end is behind closed doors. In the software, back-end operations are usually restricted to managers and have a direct effect on the front-end part of the software.

Bar Service: A type of hospitality service that involves pouring, making and serving drinks to customers.

Barcode: A printed horizontal strip of vertical bars used for identifying products. The codes, which represent numerical data, are read by a barcode reader and interpreted as the equivalent of a manually entered number.

Biometrics: Methods for uniquely identifying people based on some feature or trait they alone have. Currently in the hospitality industry this usually means fingerprint scanning, but can also refer to things like iris recognition/scanning.

Blind tender balance: A tender balance in which the totals the system has calculated are not visible to the user.

Buffet: A type of dining in which large quantities of food are placed on a long table and the guests serve themselves. Buffets usually allow the guests to return for more food as often as they like.

Bump-bar: A hardware device used to indicate that orders have been filled and to remove them from a VDS (Video Display System).

Bussing: A job position with duties that generally involve helping servers. Bussers are usually responsible for clearing and setting the tables.

Bussing command: A message that prints to a remote printer and is intended for bussing staff, so they know what needs to be done at what table. It has no price and does not print on receipts. E.g.: [Clear Table].

C

Call display: A feature that enables you to identify the person calling on the phone.

Cash Out: A function that collects and summarizes all of an employee's sales data. Typically, employees who work with money during their shift need to cash out before they can end their shift.

Cashback: A feature where a customer asks that a specified amount of money be added to a transaction total, with the understanding that the customer will pay with an EFT payment method and will be given back cash equal to that specified amount added to the total.

Cashier: An employee whose duty it is to settle checks and help customers pay for their orders.

Cashier Service: A type of Table Service that has at least one employee whose duty it is to settle checks and help customers pay for their orders (this employee is called a cashier).

CCVS: An acronym for Credit Card Verification System.

Charge: A credit transaction.

Charge slip: A printout for a charge transaction that gives information about the card being used and the transaction being performed, and has a blank space for the customer to write down a tip amount and/or the final total. Charge slips (except for customer copies printed on single-ply paper) also include a line for the customer to sign to authorize the withdrawal of funds from the card.

Charge tip: A tip added to a check that is paid for by credit card or debit card.

Check: A printout detailing the customer's order and how much he or she owes the establishment for it.

Chit: A slip that prints at a remote printer, usually in the kitchen, summarizing the items on the order, in order to give staff a heads-up and time to prepare the items. Aka 'order chit' or 'kitchen chit'.

COD: An acronym for Cash On Delivery, which refers to paying for orders at the time when they are delivered. Traditionally this was always done by using cash.

Combo: A specific combination of products that are offered, as a single unit, at a discounted price.

Comp: To give something free or complimentary.

Consolidation: Combining similar items into a summary format.

Coupon: A printed form entitling the customer to a specific discount or incentive program.

Cover charge: An admission fee.

Cover charge (product type): An admission ticket. Represents payment for entry to certain establishments and venues. When this item is ordered, it generates and prints a ticket slip, which is then given to the customer. E.g., buying a ticket to see a movie.

CreditCheck: PixelPoint's credit authorization program; an add-on module that enables you to process credit transactions directly through the POS system.

D

Data: Information contained within a database record.

Database: An organized body of related information. Comprises database tables, which contain database records. A database can be thought of as a computer filing cabinet, which contains drawers (database tables) and file folders (database records).

Database record: A single row of data in a database table. It usually has multiple columns, with each cell of the row giving a different kind of information about the one entity. For example, the record for 'John Smith' would contain data pertaining to that one person, but there would be a cell for his name, address, phone number, etc. A database record can be thought of as a filing folder in one of the drawers of a computer filing cabinet.

Database table: A file comprised of related database records, such as all employees, taxes or products. A database table can be thought of as a drawer inside a computer filing cabinet. This drawer itself contains file folders (database records).

Delay print command: A command that pauses remote printing. Used when you want to delay the printing of certain items to the kitchen. For example, when placing an order, you select the appetizers, select [Delay] (which for example, is set to delay 10 minutes), then select the entrees. In the kitchen, an order will print containing just the appetizers. Ten minutes later, another order will print containing the entrees.

Delivery driver: An employee who takes delivery orders to the addresses given by the customers who placed them.

Delivery order: An order the customer wants to be brought to his or her own address, or another specified address.

Delivery Service: A type of hospitality service in which customers call in orders or place them on-line and request that the establishment bring them to a specified address.

Department: A group of job positions performing a similar role or working in a similar area, such as the Kitchen.

Deposit: An amount of money a guest gives the establishment at the start of the transaction (before they order anything). In terms of Cash Management, a deposit is when money is taken out of a safe and transported to the bank.

DLL: An acronym for Dynamic Link Library, a kind of file known as an "Application Extension". It can be thought of a plug-in for a program; it contains code used by the program for small functions. It is much easier to modify or change a DLL for a program than a large part of the core programming of the software itself.

Driver: An employee whose duty it is to transport products from one place to another. Drivers are often delivery drivers, in the hospitality industry.

E

EFT: An acronym for Electronic Funds Transfer, a method of moving money that is usually done over the internet, without physically moving anything.

End of Day: The process of tallying the day's sales and time clock information, reporting the totals and resetting the system for use the next day.

F

Float: Money put in a till at the beginning of a shift, used so change can be given to the first customers.

Forced question: A question that forces you to apply a modifier (or several modifiers) to the product being ordered. For example, in order to place an order for a steak, you are usually asked how it should be cooked (well-done, medium, rare, etc.).

Front-end: That part of the system, and operations using it, that deals directly with customers, at the actual point-of-sale. The front-end of the establishment is that part out on the floor. This is also known as the front-of-house. This part of the system is where stations are located and used.

G

Gift card: A magnetic swipe card with pre-purchased funds on it. The balance can be replenished at any time.

Gratuity: A tip with a set amount, usually used with large parties.

H

Happy hour: A designated time when bar prices are reduced to encourage sales.

Hardware: The part(s) of your system that you can physically touch. The computers, the printers, the cabling are hardware. See Software for related information.

Hold & Fire: A method of ordering in which the server controls when certain courses print in the kitchen.

Hold order: A function that pauses the whole order and lets you log out in order to confirm details with a customer and to do so while also letting other servers use the station.

Host: An employee who seats customers, takes reservations, and does other tasks to manage the tables at the establishment. A female employee with this position is often called a hostess.

Hostess Service: A type of Table Service that has at least one employee whose duty it is to seat customers, take reservations, and generally manage the tables on the floor (this employee is called a host or hostess).

House account: A type of house credit in which a member is given a set amount of funds they can use for ordering at the establishment, and which they do not need to pay at the end of their visit, but are instead billed for on a monthly basis (or on some other regular schedule). To use these funds, the member requests that checks be settled "On Account".

House credit: Credit given to a customer by the establishment. There are two forms of house credit, both of which can be applied to a member record. They are gift cards and house accounts.

I

Incentive program: A program where prizes are awarded to members to encourage them to continue their patronage. Incentive programs usually involve accumulating points through purchases. For example, if a member collects 100 points, they may be awarded a discount or promotional item.

Inherit: To automatically receive settings from a preceding function or element.

Interface: Something designed to act as the connection between two independent systems, allowing them to share or exchange information. Also used a verb, with the meaning "to communicate or exchange information".

Intranet: A group of computers that are networked together, and which access the internet via a single through-point. Intranets can be thought of as localized versions of the internet, with the common connection point to the bigger network (the internet) providing added security to the intranet computers. An intranet site is a website that usually requires a username and password to access and contains things like company-related bulletins, documentation and schedules.

Inventory Manager: PixelPoint's inventory management system; an add-on module that enables you to monitor and control your inventory with great detail and precision.

IP Address: Internet Protocol address. Each networked device has a unique IP address that identifies it and enables other devices to communicate with it.

J

Job position: The role that an employee is paid to fill, such as waiter, busser, dishwasher, chef.

K

Kitchen chit: See 'Chit'.

Kitchen command: A message that prints to a remote printer and so gives information to employees in another location. It has no price and does not print on the receipt.

L

Label: A name given to a check in order to identify it more easily than it could be if using the transaction number. Customers' names are most commonly used as labels.

LDS: An acronym for Liquor Dispensing System, an automated system for bars that controls and monitors liquor pouring.

License Manager: PixelPoint's program for managing authorization of the software and its add-on components. License Manager must be running in order for the PixelPoint system to work.

Local printing: Printing done on the printer next to the station.

M

Manual keyboard product: A product type that enables you to type in a name or description, creating a kind of custom product type that does not have a price. Often used for sending messages to certain locations in an establishment, since "ordering" this product sends what is typed in to a remote printer. E.g.: [Message To Chef].

Member group: A group of people with member accounts at the establishment and who share some characteristic that distinguishes them from other members. This characteristic can be anything, but is commonly things like age, sex, income level, etc.

Merchandise: Retail items. They are selected using a bar code scanner rather than on a touch screen. When you scan the bar code on a merchandise item, it gets added to the check. E.g.: [Large Polo Shirt].

Minimum charge: A product that adjusts its price to ensure that the check total meets a minimum allowable amount. The price decreases as the total amount of the check increases, and will appear on the receipt until the minimum allowable amount is reached (i.e., until the "price" of the minimum charge reaches \$0).

Modifier: An item or description that modifies an ordering product, telling those making and preparing the product exactly what the customer wants. "No cheese", "Extra tomato", "Medium Rare" and "On the side" are common examples of modifiers.

Modify price: A special price level that applies when an ordering product is used as an option. For example, say a Salad is regularly \$4, but if you order the Steak Dinner, you can add that Salad for \$1. \$1 is the salad's modify price. This pricing level is applied through the use of a forced question.

Multiple tendering: Settling a check by using more than one method of payment. E.g., putting half of the total on a credit card and using a gift card for the rest of it.

N

Nested Recipe: See 'Sub-recipe'.

NSF: An acronym for Non-Sufficient Funds, an error message returned in settling charge transactions, indicating that the customer does not have enough money in that particular account for the payment to be pre-authorized.

O

Octet: A part of an IP address, separated from other octets by a period. Each IP address consists of four octets.

Open architecture: Describes software that can work on different brands of hardware. The opposite of this is 'Proprietary', which means that it only works on a specific brand of products.

Option: A product modifier that enables customers to customize the product they have ordered. For example, salads usually have an option for salad dressing, in that customers choose what kind they want. Options may or may not carry a price.

Order chit: See 'Chit'.

Order number: The number of the order. Numbering orders gives each one a unique ID that can be used for a number of things in the POS.

Order taker: An employee who enters delivery and pickup orders into the system.

Ordering product: Any item that is listed on an establishment's menu. Every ordering product has a price and is printed on a receipt. E.g.: [Ham Sandwich].

Over: An amount of money by which a reported total is greater than what the system has calculated it should be.

P

Pay-in: Money put into a till or safe from something other than regular sales transactions.

Pay-out: Money taken out of a till or safe for something outside of regular sales transactions.

PDA: An acronym for Personal Digital Assistant, a hand-held computer device.

Pick up: A withdrawal of money from a till when it is overly full. Money is usually moved to a safe to make more room.

Pickup Service: A type of hospitality service in which customers call in orders or place them on-line, and then go to the establishment to pick them up and then bring them elsewhere.

PIN pad: Hardware with a numeric keyboard used for entering PINs or other security information for charge transactions.

Ping: A system command that lets you verify that a particular IP address exists and can accept requests. For example, "ping 10.10.10.10" will send a ping signal across the network to the PC with the IP address of 10.10.10.10 and verify that it is present on the network and received that signal.

PLU: An acronym for Price Look Up, which is a method of ordering in which items are assigned a number. Upon entering the number, the corresponding item is added to the check. These numbers themselves are PLUs.

PO: An acronym for Purchase Order (see below).

POSSERVER: The default name given to the server computer that holds the PixelPoint software and database.

Pre-authorized: An adjective describing that state in the processing of credit cards in which the bank has authorized an eventual transaction in the amount of the check total (plus an allowance for tips), but no funds have yet been transferred, and will not be transferred until the final amount (including the tip) is determined and the establishment sends it through to be settled.

Pre-void: A cancellation of an item that has not been sent to the kitchen or bar. Pre-voids are often used to correct immediate mistakes.

Price level: A set price for a product or group of products; products and report categories can have multiple price levels, and each one may be higher or lower than others. They can be set to change from one price level to another based on a particular schedule, or on other criteria.

Printer channel: A figurative channel or lane of traffic that orders of a specific type take to get to their printing destination(s). Systems generally have a printer channel for each kind of printing destination, and the channels are named after these destinations. "Local", "Kitchen" and "Bar" are examples of printer channel names.

Product: A menu item, usually. However, products can also be things like rentals, minimum charges and commands. 13 different types of products can be programmed into PixelPoint.

Punch index: A reference number for an individual employee shift.

Purchase order: A record of a request to buy or order something.

Q

Quick Service: A type of hospitality service where customers place, get and pay for orders at stations at the beginning of their stay at the establishment. Orders may be "to go", in which case customers take their orders out of the establishment, or, if there is a seating area, they may be "for here", in which case customers take their orders and sit down but are not waited on by anyone.

R

Rated product: A rental; a kind of product with a price that increases as time passes. E.g.: [Pool Table].

Receipt: A printout detailing the customer's order and how he or she paid the establishment for it. A receipt is almost the same as a check, except it includes the method of payment(s) used.

Recipe item: Food products that are not purchased by themselves, but which are components of items that are ordered, such as a hamburger, or a buffet lunch. Recipe items are used to post raw inventory usage. The [Post Inv Usage] function presents a list of all recipe item products, and someone, such as a chef, selects the items and quantities that were used.

Reference number: A number printed on charge slips so tips can be applied to the right transaction after the charge slip has been signed and picked up.

Remote print: A piece of paper printed on a printer not next to the station.

Remote printing: Printing done on a printer that is not next to the station.

Rental: An item that is rented for a period of time, and the price of which increases the longer the item is rented.

Report category: A group of similar products. For example, soups, salads, pizzas, etc.

Report Viewer: PixelPoint's reporting tool. Creates reports using Crystal Reports.

Reservation: An arrangement, or a record of an arrangement, for a customer (or customers) to dine or stay at the establishment at a set time or date; usually involves the holding of a table or room for the said customer(s), to ensure that there will be space at the reserved time.

S

Sales type: The way an item is sold; for example, some orders are to be delivered, others are sold on-site.

Seating: A system for keeping track of what items were ordered by each seat at a table. This makes for easy splitting of checks, so each customer can pay for only what he or she ordered.

Seating position: An order marker allowing you to separate one person's order from another's on the same check. A seating position product has no price and does not show up on the receipt.

Sent: Sent to the bar or kitchen, etc., to be prepared.

Shift: The time an employee works within a given day. Also refers to a range of days when discussing employee scheduling.

Short: An amount of money by which a reported total is smaller than what the system has calculated it should be.

Software: Those parts of your system that you cannot physically touch. The PixelPoint program, your data and the Windows operating system are all software. See 'Hardware' for related information.

Split: To divide a check between customers so each has their own check. You can split individual products too, so that each customer pays for their share of it. You can also split tenders, in that you can use one method of payment for part of the total and other methods of payment for the remainder.

Split check: A check on a table that has multiple checks on it; each of these checks has been split from the table's original check. When customers request to have "separate checks", you do this by splitting the check into several smaller checks.

Split modifier: A modifier, or part of a modifier, that has been split into several smaller portions. For example, for a half-and-half pizza, each modifier (a topping) is split into two.

Split tendering: Settling a check by using more than one method of payment. E.g., putting half of the total on a credit card and using a gift card for the rest of it.

SQL Database Engine: The utility program that manages the flow of information to and from the system database. It must be running in order for the PixelPoint system to work. SQL is an acronym for Structured Query Language, and is a computer language for querying and modifying data and managing databases; PixelPoint POS is entirely SQL-based.

StaffTime: PixelPoint's employee scheduling program; an add-on module that enables you to create and modify employee shifts, forecast labor needs and costs, and take advantage of many other scheduling features.

Station: A touch-screen terminal or other computer used to place orders, settle checks, and perform other front-end operations.

Station 1: The master station. It is the first station you start up at the beginning of the day. It is also the station you perform the End Of Day process on.

StockBoy: PixelPoint's inventory management system; an add-on module that enables you to monitor and control your inventory with great detail and precision.

Sub-recipe: A recipe inside of a stock item. For example, you may have a stock item called potato salad which is included in several meal products. The recipe for potato salad has its own ingredients, however, and so this recipe is a sub-recipe.

Summary group: A group of similar report categories. For example, all report categories referring to food items are grouped into a Food summary group.

System interface: A configuration of the software, designed for a particular kind of service mode or job position. Every POS user has a specified system interface, and this determines what screen is displayed when the user logs in, as well as what functions are available to him/her.

T

Tab card: A swipe card with a table number stored on it, enabling restaurants to access a particular transaction by swiping the card. Usually used in market style restaurants, in which each customer is given a tab card.

Table Service: A type of hospitality service where customers dine-in at the establishment and are waited upon by employees throughout their stay.

TableTime: PixelPoint's table management program; an add-on module that allows you to process reservations and manage guest seating directly through the POS system.

Take out order: An order of food the customer wishes to be packaged in order that it may be taken out of the establishment and eaten elsewhere.

TCP/IP: Transmission Control Protocol / Internet Protocol. The basic communications protocol of the Internet. It is also the communications protocol for the POS network.

Tender balance: The process of comparing the amount of money you should have received for orders to the amount of money you actually received. You balance the predicted amounts and the actual amounts for each method of payment.

Ticket number: A kind of product that also has a reference number associated with it. When you add a ticket number to the check, the system asks for the reference number and prints it on the receipt with the price and product name. Ticket numbers are often expensive items with serial numbers, such as boxes of cigars or bottles of vintage wine.

Till: A cash drawer insert.

Time Clock Manager: A module that makes changes to employees' time clocks. It can be used to modify clock-in or clock-out times, rates of pay or job positions.

Timer: A rental or rated item, such as a pool table or bowling lane, the price of which increases as time passes (hence 'timer').

U

UPC: An acronym for Universal Product Code, a barcode that identifies the product it is on. All barcode scanners can read the product's UPC and identify it accurately.

UPS: An acronym for Uninterruptible Power Supply. Refers to a backup battery power supply that keeps the PC running if the power goes out.

V

VAT: An acronym for Value Added Tax, a pricing system which includes applicable taxes in the listed prices.

Buttons

[+/- Job Position], 123
 [Acquire Image], 123
 [Add Alert Schedule], 219
 [As Selected], 147
 [Assign Card], 123
 [Auto PO], 104
 [Cancel PO], 104
 [Change Date], 231
 [Clear Message], 85
 [Copy From Company Info], 102
 [Copy Schedule], 147
 [Create Recipe Item], 95
 [Delete Shift], 147
 [Exit], 147
 [Input New Stock], 104
 [Load Image], 123
 [Load Schedule], 147
 [Make Info], 47
 [Modify Shift], 147
 [New PO], 104
 [Physical Counts], 104
 [Picture], 123
 Member Setup, 183
 [Print Emp Card], 123
 [Print], 147
 [Product], 195
 [Receive PO], 104
 [Recipe Setup], 104
 [Schedule],
 Config. Category Setup, 79
 Employee Setup, 123
 Report Category Setup, 64
 [Select Products], 195
 [Select Source], 123
 [Send], 85
 [Set Report Categories], 195
 [Show Employee], 147
 [Show Linked Inventory Items], 101
 [Stock Levels], 104
 [Stock Supplier Setup], 104
 [Till Close], 147
 [To Open], 147
 [Transfers], 104

A

Accessing,
 BackOffice, 19
Active And Inactive Records, 25
Active Surcharge, 47

Adding,
 a Member, 183
 a Product, 40
 an Employee, 123
 Batch Recipes, 114
 Spillage/Waste, 114

Administrator Menu, 234

Advanced Tab,
 Coupon Setup, 200
 Employee Setup, 127
 Job Positions, 136
 Payment Method Setup, 280
 Product Setup, 47
 Shift Rules, 166
 Station Setup, 264
 Stocked Items, 95

Alert Manager, 219

All At Once, 40

Ask At Once, 40

Auto,
 Combo Recognition, 37
 Gratuity, 246
 PO, 109
 Redirect Printer, 288

B

Background Image, 251

Background of Table Layout, 228

BackOffice,
 News Support, 366
 Starting, 19
 Toolbar, 19

Backup Now!, 217

Banner Message Setup, 214

Batch Recipe, 114

Billboard Message Setup, 213

Bussing,
 Commands, 35

C

Cancel PO, 109

Cash,
 Drawers, 26
 System Configuration, 26

Cash Management, 169

Changes in Programming, 21

Collaboration,
 Function, 168
 Tab, 251

Combos, 37

 Combo Items Tab, 57

Company,

Info Tab, 242

Setup, 180

Configuration Category Setup, 79**Configuration Setup, 79****Contests, 173**

Advanced Tab, 175

Coupon Setup, 195

Advanced Tab, 200

Course,

Network Printer Setup, 291

Prefixes, 246

Product Setup, 40

Sorting, 291

Cover Charges, 35**Credit,**

Limit, 183

Custom,

Fields, 130

Tab, 44

Custom Chit Tab, 293**Customer Displays, 306****Customizing Toolbars, 19****D****Dedicated Server, 26****Defaults Tab,**

System Setup, 249

Delay Print Commands, 35**Deleting Records, 25****Delivery Zone Setup, 191****Departments, 121**

Setup, 132

E**Email Tab, 253****Employee,**

Advanced Tab, 127

Concepts, 121

Contests, 173

Departments, 132

Employee Info Tab, 123

EmployeeHR Tab, 129

Forecast Setup, 162

Forecast Tab, 163

Info Tab, 123

Job Positions, 134

Order of Programming, 22

Performance Points, 133

Schedule Tab, 150

Scheduled Shift Times Tab, 153

Scheduler, 146

Security Levels, 138

Setup, 122, 157

Shift Type Setup, 156

Template Setup, 159

Template Tab, 161

Toolbar, 147

EmployeeHR Tab, 129**Employees Menu, 120****Exit Setup, 83****F****Feature Codes, 52****Filter by Sales Type, 290****Find PO!, 109****Fonts Tab, 263****Forced Questions, 72**

in Product Setup, 40

Forecast,

Setup, 162

Tab, 163

Form Designer, 296

Button Lists, 336

Component Inspector, 298

Component Toolbar, 298

Components, 309

Finish Forms, 299

Form Display, 298

Forms, 299

Function Buttons, 316

Function Types, 360

Glossary of, 360

Images, 332

Inspector Fields, 354

Kiosk Forms, 305

Label Types, 364

Menu Icons, 351

Order Forms, 301

Order Grids, 320

Other Forms, 306

Question Forms, 303

Roll Panels, 327

Toolbar Icons, 352

Future Orders, 246**G****General Setup, 194**

Order of Programming, 22

General Tab, 288**Gratuity, 246**

H**Help Menu, 366****History Tab, 188****Hold and Fire, 52****How To Make,**

Product Setup, 47

Stocked Items, 98

I**Initial Set Up,**

Order of Programming, 22

Input New Stock, 109**Interfaces, 127****Intranets, 251****Inventory, 88**

Manager, 104

Manager Menu, 107

Order of Programming, 118

Purchase Orders Menu, 109

Stock Menu, 114

Stocked Items, 91

Supplier Setup, 100

Warehouse Setup, 102

Without StockBoy, 89

J**Job Positions, 121**

Advanced Tab, 136

Setup, 134

K**Keyboard Forms, 306****Kiosk Forms Tab, 61****Kitchen Commands, 35****L****Liquor Weighing, 95****M****Mail, 84**

Response, 87

Send, 85

Manager Menu, 107**Manual Keyboard, 35****Mealtime Setup, 211****Member,**

Browser, 192

Concepts, 177

Group Setup, 178

History Tab, 188

Info Tab, 183

Member/VIP Menu, 176

Notes Tab, 186

Order History, 188

Search Tab, 182

Setup, 181

Ship To Tab, 185

Shipping Address, 185

Stats Tab, 187

Menu Setup, 76

Order of Programming, 22

Merchandise, 35**Minimum Charges, 35****Modes, 127****Modifiers, 35**

on Menus, 76

Modify Prices, 40**Multi Menu Setup, 75****N****Naming Printers, 29****Navigation Bar, 24****Network Printer Setup, 287****Network Printers Setup,**

Custom Chit Tab, 293

General Tab, 288

Print Filter Tab, 290

Sort Order Tab, 291

New PO, 109**Non-Dedicated Server, 26****Notes Tab, 186****O****Online Help, 19****Options, 35****Order of Programming, 22**

Inventory, 118

Order Page,

Setup, 62

Ordering,

Products, 35

Orders Tab, 246**Overview, 19****P****Pause Inventory Depletion, 107****Pay In or Out Reasons, 212****Payment,**

Payment,

- Advanced Tab, 280
- Denominations Tab, 282
- Methods Setup, 277
- P. Denominations Tab, 282

Performance Points, 133**Physical Counts, 114****Policy Setup, 295****POS Functions Setup, 275****POS Reports Tab, 243****Preset Payment Tab, 244****Print,**

- Consolidation, 32
- Filter, 290
- PO, 109

Printer,

- Channels, 30
- Code Setup, 285
- Concept, 30
- Determining, 31
- Ports Tab, 261
- Setup, 284
- System Configuration, 26

Printing Concepts, 28**Product, 33**

- Advanced Tab, 47
- Combo Items Tab, 57
- Concepts, 34
- Custom Tab, 44
- Kiosk Forms Tab, 61
- Order of Programming, 22
- Recipe Tab, 45
- Setup, 39
- Setup Tab, 40
- Shift Products Tab, 59
- Types, 35
- User Definable Tab, 60

Programming,

- Changes, 21
- Order, 22

Purchase Orders, 109**R****Rated Products, 35****Receipt,**

- in Station Setup, 270
- Setup, 207
- Sort Tab, 210

Receive PO, 109**Recipe Items, 35****Recipe Setup, 114****Recipe Tab, 45****Redirect Printer, 288****Refund Reasons, 82****Report,**

- Category Concept, 34
- Category Setup, 64

Reservations, 231**Revenue Center Setup, 272****Revise PO, 109****S****Sales Type,**

- Filter by, 290
- Setup, 273

Schedule, 146

- Setup, 157
- Tab, 150

Scheduled Shift Times,

- Employee Scheduler, 153

Screen Savers, 306**Search Tab, 182****Seating Positions, 35****Sections, 222****Security Level Setup, 138****Security Levels,**

- Definitions, 140

Send Mail, 85**Server Configurations, 26****Service Modes, 127****Shift,**

- Assignment, 167
- Products Tab, 59
- Rules, 164
- Types, 156

Ship To Tab, 185**Shipping Addresses, 185****Size Up/Down, 47****Sort By,**

- Course, 291
- Product Printing Priority, 291
- Report Category Printing Priority, 291
- Seat, 291

Sort Order Tab, 291**Sort Tab, 210****Spillage,**

- Adding to inventory, 114

Standalone Server, 26**Starting BackOffice, 19****Station,**

- Advanced Tab, 264
- Depletion, 103

Station,

- Fonts Tab, 263
- Options, 258
- Printer Ports Tab, 261
- Receipt Setup Tab, 270
- Setup, 257
- Station Options Tab, 258

Stats Tab, 187**Stock,**

- Depletion, 95
- Levels, 114
- Menu, 114

Stock Item Setup, 114**Stock Supplier Setup, 114****Stocked Items, 91**

- Advanced Tab, 95
- How To Make Tab, 98
- Stocked Items Tab, 92
- Sub-Recipe Tab, 97
- User Definable Tab, 99

Sub-Recipe Tab, 97**Summary Group,**

- Concept, 34
- Setup, 66

Supplier Setup, 100

- Advanced Tab, 101

Surcharge, 47**System,**

- Collaboration Tab, 251
- Company Info Tab, 242
- Concepts, 18
- Configurations, 26
- Defaults Tab, 249
- Email Tab, 253
- Interfaces, 127
- Log, 216
- Orders Tab, 246
- Setup, 235
- SystemTab, 236
- Tab, 236
- Taxes, 239

T**Table,**

- Background, 228
- Drawing, 230
- Layout, 224, 228
- Reservations, 231
- Sections, 222, 227
- Settings, 223
- Setup, 221, 224

Table Settings, 223

Tagging Tables, 229

Toolbar, 225

Tag Menu, 76**Tagging,**

- Products, 76
- Tables, 229

Tax Setup, 239**Template,**

- Setup, 159
- Tab, 161

Ticket Numbers, 35**Time Clock Manager, 144****Toolbar,**

- BackOffice, 19
- Employee Scheduler, 147
- Table Layout Setup, 225

Transfers, 114**U****USB Printers, 294****User Definable Tab, 130****V****VAT Environment, 239****View Response Mail, 87****VIP Menu, 176****W****Warehouse Setup, 102****Waste,**

- Adding to inventory, 114

Weather Conditions, 215**Window Menu, 365****Windows Printing, 294**