

EverServ<sup>®</sup> PixelPoint<sup>®</sup>

# POS Version 12

User's Guide

## Publication Details

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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

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Thank you for using PixelPoint POS.

This guide contains information about front-end operations that have to do with both service staff and management. Part I (Employee Functions) addresses all features, functions and operations that general users would experience in different types of establishments. Part II (Manager Functions) addresses all front-end functions that only a manager would have a need to know.

The table of contents and the index will be of great help to you in locating the information you are looking for. 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.

With all of the many different ways systems can be configured, you may find a screen or process within your system that is different from what is described in this guide. Front-end operations not included in this guide can be found in other guides posted on the PAR Partner Center.

If you need further assistance, please consult your ParTech Dealer. They will be more than happy to assist you with your system needs. For further information on PixelPoint POS and the various add-on modules, visit [www.pixelpointpos.com](http://www.pixelpointpos.com).

## 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<sup>®</sup> Hospitality Management System set the standard in guest-centric property management systems. We are now revolutionizing the industry with the ATRIO<sup>™</sup> hospitality technology platform. ATRIO is moving hospitality to "The Cloud", a new user experience and to a new business paradigm. We also offer SpaSoft<sup>®</sup>, a dynamic activities management/scheduling software solution, specifically designed to meet the unique needs of resorts, day spas, medi-spas and health clubs.

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## 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.



## **Employee Functions**

This section addresses all features and functions that have to do with general employee operations, including the majority of front-end operations. It begins with information that is applicable to all employees.

The first chapter ("Screen Overviews") gives overviews of the screens most frequently seen during use of PixelPoint POS. The second chapter ("Time and Attendance") contains information about how all employees use the system to record the time they spend at the establishment.

## Screen Overviews

This chapter provides overviews of some of the main screens you may see during your use of PixelPoint POS, in order to help you familiarize yourself with the way the software looks. The screens included here generally apply to most types of operations. For screens that mainly apply to your specific type of establishment, see "Orders", or the appropriate chapter of "Service Modes". Screens discussed in this section are:

- Login Screen
- Your Settings Screen
- Billboard Screen
- Table Screen
- Transaction View Screen
- Your Trans Screen
- Keyboard Screen

## Login Screen

This screen appears when PixelPoint POS first starts up. The PAR logo and PixelPoint logo shown in the image below appear for 10 seconds, followed by the JPG images "LOGIN01" and "BOTTOM01" which are located in the "\\PixelPOS\\Images\\Login" folder. "LOGIN01" covers approximately 80% of the login screen from the top left corner down and across. "BOTTOM01" runs along the bottom of the screen from the bottom left up until the station number label.



You can add your own graphic images and banners. Either replace Login01 and Bottom01 with new JPG or PNG images, or add additional ones. After the initial hard-coded images display for 10 seconds, Login01 and Bottom01 will display for 10 seconds, followed by Login02 and Bottom02 if they exist, and so on. The cycle will start over when all images have been shown.

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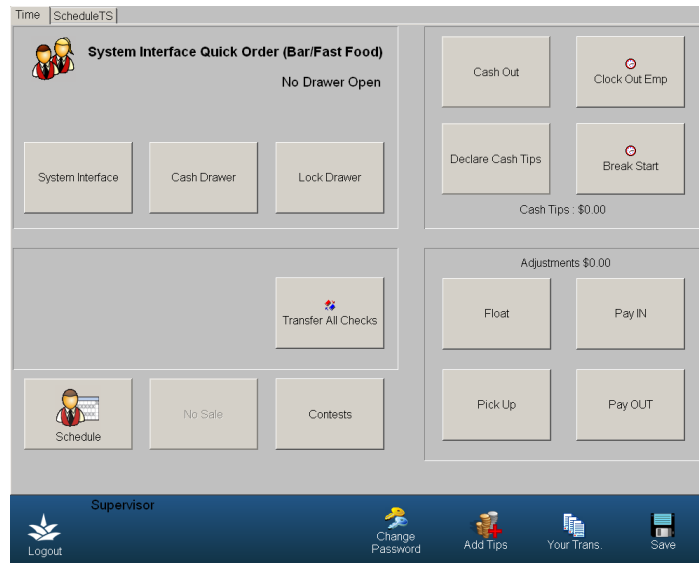
**Tip:** The *DelayAd* policy in Policy Setup defines the number of seconds a single login image displays for. By default, the images will cycle every 10 seconds. You can change this by changing the value of this policy (from the default "10").

**Tip:** To return this screen from any other screen, use the keyboard command sequence CTRL +ALT+L.

See "Logging In and Out" for information regarding logging in on this screen.

## Your Settings Screen

The Your Settings screen provides access to all shift-operations functions. A brief overview is provided below; applicable sections provide additional information.



## System Interfaces

Your general use of the system is determined by the system interface you select. You are assigned a default system interface, but if you have management authorization you can change it if you wish (by pressing the [System Interface] button on this screen). If you change this setting, you will need to log out and then back in, in order for the selected interface to take effect.

- **Restaurant Seating:** This is for users such as waiters and waitresses. The Table Layout Screen displays when you log in, so you can select a table to open a check.
- **Quick Order:** This is for users such as Quick Service order takers, cashiers and bartenders. A blank check or the Transaction View Screen displays when you log into the system. You do not interact with tables in this mode.
- **Host/Hostess:** This is for hosts and hostesses. The Table Layout Screen displays when you log in, so you can select a table to open a check. In addition, there is a [Reservations] button in the bottom-right corner; this button displays the table management screen, enabling you to manage reservations and table seating. See "Host(ess) Screen" for more information.
- **Driver:** This is for delivery drivers. The Driver screen displays when you log in, so you can pick delivery orders and process delivery runs. See "Driver Screen" for more information.
- **Delivery Mode:** This is for delivery (and take out) order takers. The Order Taker Screen displays when you log in, so you can process delivery and take out orders. See "Order Taker Screen" for more information.
- **Clock In/Out Only:** This is for Time & Attendance users, which is a group of job positions (usually including bussers, kitchen staff, etc.) that only need access to the Your Settings screen. From this screen you can apply cash tips, cash out, clock out, and check your schedule. See "Time and Attendance Only Users" for more information.

---

**Tip:** It is possible to change the function of the System button at the bottom of the screen in Quick Order mode. Normally it is used to switch from Quick Order mode to the Table Layout screen. With the *DisableTableLayoutScreen* policy enabled, the Table Layout screen is replaced with a configurable Quick Menu.

---

## Your Settings Screen Buttons

**Cash Drawer:** In PixelPoint POS, you can have up to three cash drawers at each station. This button assigns you to a certain drawer number and gives you access to that number drawer at each station. So, for example, if you are assigned to Drawer #2, you can access the second drawer on every station (excepting those stations where the cash drawer is locked (something which [Lock Drawer] and [Unlock Drawer] control)).

**Lock Drawer / Unlock Drawer:** [Lock Drawer] restricts access of a cash drawer to a specific station. Say you are assigned to Drawer #2 and that you are on Station #3. Instead of everyone assigned to Drawer #2 being able to access the second cash drawer at the station, pressing [Lock Drawer] would restrict access so that no other server can use it.

When the cash drawer is locked, the button is labeled [Unlock Drawer]. Selecting it releases the locked drawer.

**Print Report:** Enables management to print reports about your use of the system.

**Transfer All Checks:** Enables you to transfer all of your open checks to another employee. It is commonly used during a shift change, when one server takes over another server's tables. This function typically needs management authorization. Also see "Employee Functions".

**Schedule:** Brings you to the Schedule Time Sheet, which enables you to look at your schedule for the next two weeks and to request time off. (See "Your Schedule".)

**Contests:** Brings you to the Employee Contests screen, which contains information about the contests you are a part of. (See "Contests".)

**Cash Out:** Starts the Cash Out function, in which the system calculates and reports your sales and time clock information. See "Cashing Out" for more information.

**Clock Out Emp:** Starts the Clock Out function, in which the system stops your time clock and logs you out of the system. See "Clocking Out" for more information.

**Declare Cash Tips:** Your establishment may want you to report your cash tips when you cash out. To report them, you select this button and enter the amount. The "Cash Tips" field above this button will reflect the amount you have entered. See "Cashing Out" for more information.

**Break Start:** You must tell the system when you start a break; you do this by selecting this button. [Break Start] pauses your time clock and logs you out. See "Breaks" for more information.

---

## Adjustments

**Float:** The system may automatically prompt you to declare your *float* amount when you clock in, or it may automatically assume you are starting with a pre-specified amount. If it does neither of these, then you must declare the float yourself. To do so, use this button.

**Pay IN:** Used to declare an amount of money put into the till outside of regular order transactions. (See "Pay In".)

**Pay OUT:** Used to declare an amount of money taken out of the till for reasons other than giving customers change. (See "Pay Out".)

**Pick Up:** Used to record the withdrawal of cash from the till, for safekeeping elsewhere in the establishment. This button prints a slip that the manager needs to sign. Keep this signed slip in the drawer to account for the missing money when you do your cash out. (See "Pick Ups".)

---

## Toolbar Icons

**Logout:** Logs you out of the system.

**Change Password:** Allows the employee to change their access code.

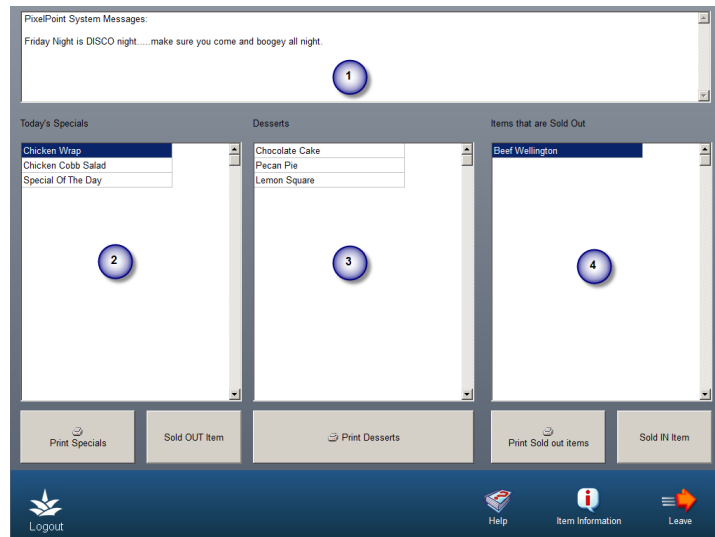
**Add Tips:** Displays the Apply Charge Tips window. PixelPoint's Authorization Manager module is required for this function to work. (See "Tips".)

**Your Trans:** Brings you to the Your Trans Screen, which enables you to work with your transactions without modifying the contents of the orders. From here you can view and unclose any of your transactions and also print a receipt for any of them. (See "Your Trans Screen".)

**Save:** Saves your settings and closes the screen, returning you to your default screen.

## Billboard Screen

The Billboard Screen provides you with pertinent order information that may change from one day to the next.




---

### Billboard Screen Layout

#### 1. Billboard Message Box

Contains messages that management wants staff to see.

#### 2. Today's Specials

Displays all items that have been flagged as daily specials. If your specials change from day to day or week to week, this is an excellent place to see what the current specials are.

#### 3. Desserts

Displays the current desserts your establishment offers. If your dessert list changes sometimes, you can look at the current list here.

#### 4. Items That Are Sold Out

Lists all of the products that have been marked as sold out (and so are unavailable for order). See "Product Functions" for more details about Sold Out items.

---

### Billboard Screen Buttons

**Print Specials:** Generates and prints a hard copy list of the specials and their prices.

**Sold OUT Item:** Sets an item (be it a special or dessert) as sold out. Select the item from either the Today's Specials or Dessert list and then select this button. Also see "Product Functions".

**Print Desserts:** Generates a hard copy of the desserts and their prices.

**Print Sold out items:** Prints a list of unavailable (that is, sold out) items and their prices. You can carry this with you as a reminder.

**Sold IN Item:** Enables you to reset any sold out item as being available for sale again. Select the item from the Items That Are Sold Out list and then select this button. Also see "Product Functions".

---

## Toolbar Icons

**Logout:** Logs you out of the system.

**Help:** Opens PixelPoint help.

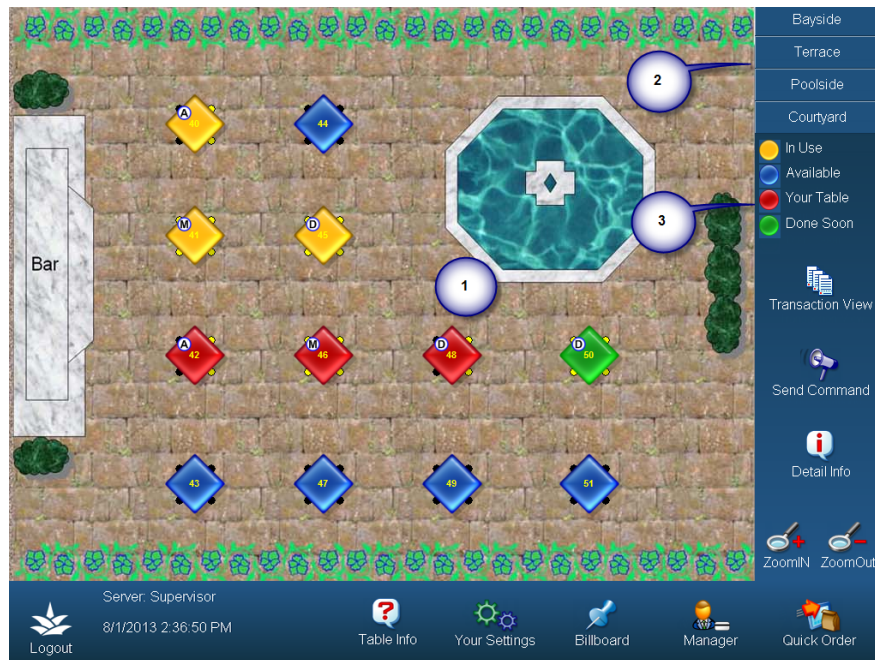
**Item Information:** Displays detailed information about a product; triggers the How To Make function (See here).

**Leave:** Exits the screen, returning you to your system interface's default screen.



## Table Layout Screen

The Table Layout screen is a graphic representation of the dining area of the establishment. You use it to access your customer checks and employee-related functions. The backdrop of the floor layout can be customized using an image of your choice. Changing the backdrop does not affect the saved FLR file that stores the table setup information, nor does it affect objects created using Table Layout Setup.



To apply a custom graphic backdrop to your Table Layout screen, copy the desired JPG image into the PixelPOS folder, and rename it "FloorLayout.jpg". The system will automatically use an image that follows this naming convention and has the JPG file extension. Make sure that the image matches the screen resolution of the stations. For example, if the stations are set to 800x600, use an image that is also sized to 800x600.

If you are working with multiple dining sections and want to have a different image for each section, merge or stitch the images together in "FloorLayout.jpg" so you have a single larger image. For example, a JPG file with 2 backdrops could be 1600x600 (one 800x600 image next to another 800x600 image).

With the backdrop image applied, simply position the tables in Table Layout Setup so they suit the image.

---

**Note:** If you want to have different floor layout files for different stations, you can do this by editing the *FloorBackGround* policy in Policy Setup. Alternatively, you can add the line "FloorBackGround=filename.jpg" (where "filename.jpg" is the name of the JPG file you want to use) to "Pixel32.ini", under the appropriate station's section.

---

## Table Layout Screen Layout

### 1. Floor Display Area

Lists the dining sections at your establishment; the establishment may have several (such as smoking, non-smoking, patio, etc..) To change the floor display area (1) to show another dining section, touch the name of the dining section in this window.

### 2. Dining Section Window

Lists the dining sections at your establishment; the establishment may have several (such as smoking, non-smoking, patio, etc..). To change the floor display area (1) to show another dining section, touch the name of the dining section in this window.

### 3. Table Legend

Explains what each table color code represents. Yellow tables are being looked after by another server (and are likely inaccessible to you). Blue tables are available; no server is currently working on them. Red tables are ones currently in your care (and are likely inaccessible to other servers). Green tables are ones that the guest check has been printed for, and so are ones that should be vacant soon.

Information about all of the other table statuses, appearances and icons can be found by selecting [Table Info] and then [Legend]. (See "Table Info Toolbar".)

---

## Toolbar Icons

**Logout:** Logs you out of the system. Just to the right of this button is a display that indicates the current user, date and time.

**Table Info:** Displays a group of functions that give you detailed information about the tables included on the floor layout. (See "Table Info Toolbar".)

**Your Settings:** Takes you to the Your Settings screen, which enables you to access all shift-operations functions (like cashing out, clocking out and going on breaks) (See "Your Settings Screen".)

**Billboard:** Takes you to the Billboard screen, which enables you to view quick information about daily specials, desserts, sold out items and other things employees should know about. (See "Billboard Screen".)

**Manager:** Takes you to the Manager Functions menu. All functions in here need management-level security access. (See "Manager Functions Menu".)

**Quick Order:** Takes you into a quick order check. When you leave this check, the system returns you to regular Table Service operations. This button is intended for one-time quick orders only. If you regularly place quick orders, it is recommended that you change your system interface to Quick Service mode. (See "Quick Orders".)

**Transaction View / Seating View:** Switches between views. [Transaction View] enables you to view checks as individual transactions; also enables you to view 'saved' checks, which are quick order checks that are still open (bar tabs, for example). You can return to Table Layout view from the Transaction View screen by selecting the [Seating View] button. See "Transaction View Screen" for more information about this button and its function.

**Send Command:** Enables you to initiate bussing commands. When you select this button, the system prompts you for a table number. When you enter a table number, a list of bussing commands displays. Upon selecting one, the bussing command will print in the kitchen (or

wherever the establishment has set bussing commands to be printed). (See "Bussing".)

**Detail Info:** Gives detailed information and statistics about a particular table after you select it. (See "Detail Info".)

**ZoomIn & ZoomOut:** Enable you to adjust the scale of the floor display, making individual tables bigger or smaller, and thus fitting more or fewer tables on the screen. This is useful if switching from a small dining area to one covering a large area (such as a banquet room). If the floor display does not appear as desired, press [Zoom Out] until the screen returns to its default scale. These buttons can be disabled and may not appear on your screen.

## Detail Info

Clicking on a table after clicking on [Detail Info] brings up an information box showing that table's location on the layout and listing information such as the number of customers, the value of the check, the amount of time since the last order, and other details, as seen in the image below.

**Table: 14**

**Transaction Info**

Transaction #: 2153  
Transaction Info: 10/7/2009 11:16 AM [ 50 min ]  
Last Order: 10/7/2009 11:16 AM [ 1 min ]  
Course: Dessert

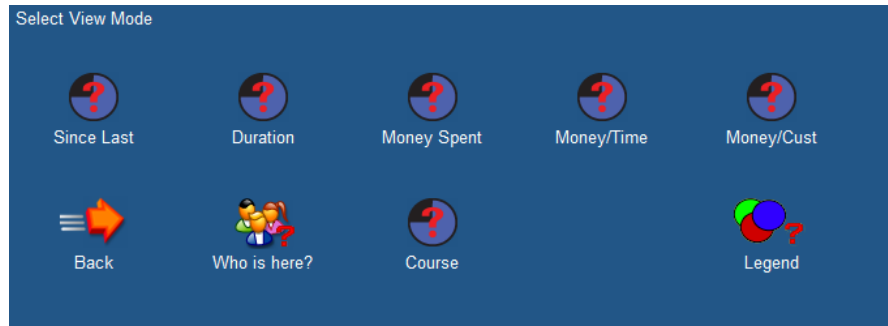
Final Total  
**\$60.59**

Number of checks:	1
Number of customers:	1
Table seating capacity:	4
Is it my table?	Yes
Status:	Open

Use Back

## Table Info Toolbar

The Table Info toolbar enables you to access a number of functions that give you graphic information about what is happening at the tables on the floor.



Clicking on one of the five pie chart icons in the first row turns the graphic for each of the open tables into a pie chart, giving you a visual way to compare tables.

---

### Pie Chart Icons

**Since Last:** Displays a graph showing how long it has been since an item was ordered for one of the customers at the table. Tables with a larger amount of gray have gone longer without ordering something.

**Duration:** Displays a graph showing how long tables have been seated. Tables with a larger amount of gray have been seated longer.

**Money Spent:** Displays a graph showing the relative values of the check on each table. Tables with a larger amount of gray have ordered more in terms of cost.

**Money/Time:** Shows a percent graph displaying the ratio of how much money has been spent at the table to how long customers at the table have been seated. Tables with a larger amount of gray have spent more money in less time.

**Money/Cust:** Shows a percent graph displaying the ratio of how much money has been spent to how many customers are seated at the table. Individual guests at tables with a larger amount of gray have spent more money.

**Who is here?:** Enables you to view who is seated at open tables. You can look up this information by table number or member name; you can also look at just your own tables or other servers' tables. This function is often used in conjunction with the Host/Hostess operation mode to locate where a reservation has been seated (See "Host(ess) Screen"). See below for a screenshot of the Who is Here screen.

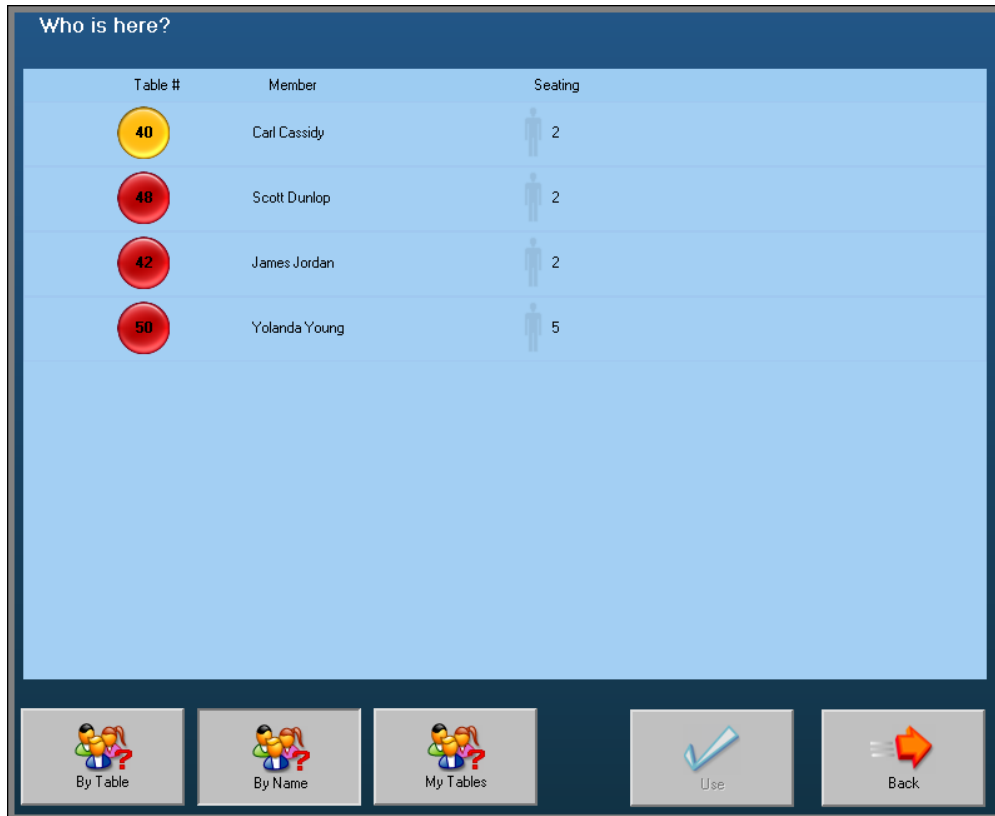
**Course:** Shows which course each table last ordered (For example, Appetizer, Main Course, Dessert). Displays the full course name across each table.

**Reservations:** This icon is present if your establishment uses Reservations. Shows which tables have reservations booked on them and when the next one for each table is scheduled for. Tables with more color have a reservation due sooner. The number of minutes that have passed since the scheduled time for past due reservations are given in parentheses.

**Legend:** Displays a full table legend, showing and explaining all of the different ways tables may look on the Table Layout Screen. See "Table Legend".

## Who is here?

As explained above, selecting [Who is here?] brings up a list of all of the members and named reservations who are currently seated on the floor. The screen appears as follows.



The screenshot shows a screen titled "Who is here?" with a table of seated members. The table has three columns: "Table #", "Member", and "Seating". The "Table #" column contains colored circles with numbers: a yellow circle for 40, and red circles for 48, 42, and 50. The "Member" column lists the names: Carl Cassidy, Scott Dunlop, James Jordan, and Yolanda Young. The "Seating" column shows a person icon and a number: 2 for the first three members and 5 for Yolanda Young. At the bottom of the screen are five buttons: "By Table", "By Name", "My Tables", "Use", and "Back".

Table #	Member	Seating
40	Carl Cassidy	2
48	Scott Dunlop	2
42	James Jordan	2
50	Yolanda Young	5

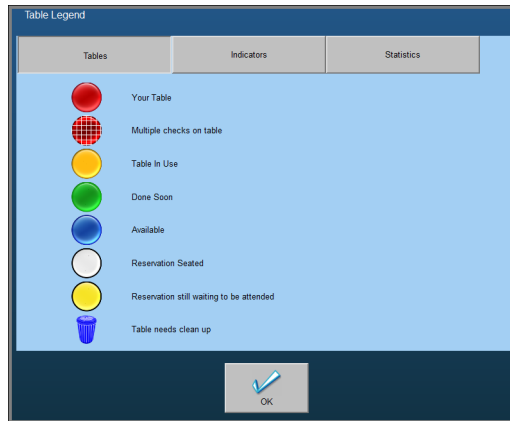
You can sort this list by table number, by member name or isolate tables that are being managed by you (identified as the red tables.) The purpose of this screen is to assist management with customer service by identifying by name, members seated at the various tables.

It also serves hosts by identifying where a reservation has been seated. For example: Jane has placed a reservation in her name. She arrives first and is seated at Table 4. Her friend Sue arrives later but the host does not know which table to her to because the reservation is gone once someone claims it. Using this function, the host can see that Sue's name (used for the reservation) appears at Table 4.

## Table Legend

Selecting [Table Legend] on the Table Info Toolbar displays the Table Layout screen legend. This screen is a key explaining the many ways tables may appear on the Table Layout Screen.

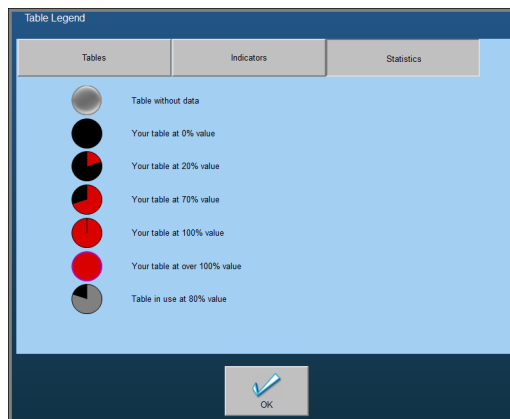
There are three parts to the Table Legend. The first screen that displays is the Tables tab, which shows the most common ways tables will display, including the different colors they may have.



The indicators tab explains the circular icons that can appear on the tables themselves, depending on how your system is configured.



If you switch to the Statistics tab, the following screen displays, showing you how to read the pie chart graphs that display with many of the Table Info functions.



## Transaction View Mode

This mode of operation is commonly used by bartenders and drive-thru personnel. Quick Service modes can be programmed to default to either this screen or a blank check, so that when you log in, the system takes you directly to the Transaction View screen.

In addition to being the default screen for these modes, the Transaction View screen is accessible in Table Service by selecting [Transaction View] from the Table Layout Screen.

Table #	Transaction	Total	Since Order
#42	James Jordan	\$8.38	10 min
#46	2017	\$44.36	30 min
#48	Scott Dunlop	\$18.84	19 min
#50	Yolanda Your	\$33.25	10 min

Server: Supervisor  
4/26/2013 3:54:19 PM  
Last Refresh: 4/26/2013 3:54:13 PM

Logout   Table Info   Your Settings   Billboard   Manager   Quick Order

This screen shows all of the open/saved checks on the right and the contents of the selected check in the window on the left. If you have applied a label to the Quick Service check, using the Label function (See here), the Transaction field in the right window will display the check's label.

If you wish to retrieve the selected saved check, select [Use Check]. If you wish to create a new check, select [New Check]. Selecting either of these buttons brings you to the Order Screen. When you close or save the check, the system returns you to the Transaction View screen. As noted above, [New Check] does not appear when you access this screen when in Table Service mode.

---

## Toolbar Icons

**Logout:** Logs you out of the system.

**Seating View:** Represents the current view mode. Selecting this will change the screen back to the seating layout screen containing the table layout and this icon will change back to [Transaction View].



## Your Trans Screen

### Your Settings / Your Trans

This screen enables you to see and work with your transactions all on one screen. You can view and unclose any of your transactions and you can also print a receipt for any of them.

Trans #	# of Customers	Table #	Net Total	Final Total	Who Served	Who Finished
2002	2	43	\$9.47	\$10.25	Supervisor	Supervisor
2003	1	30001	\$11.94	\$12.95	Supervisor	Supervisor
2001	1	30001	\$3.98	\$4.30	Supervisor	Supervisor

**Totals**

- Total Cust: 4
- # of Tran: 3
- Gross Sales: \$27.50

**Transaction Filter Window (1)**

- Member/Deliveries
- Rated
- Revenue Centres
- Internet Orders
- Table Statistics
- Future Orders

**Transaction Summary Area (2)**

**Open/Closed Buttons (3)**

- Show Open Transactions
- Show Closed Transactions
- Show Closed by Date Range

**Transaction Detail Window (4)**

**Control Area (5)**

- Print Receipt
- Print Receipt by #
- View by #
- Unclose by #
- All Types
- Member /Delivery
- Page Up
- Page Down
- Help

**Bottom Bar**

- Logout
- Transaction Viewer
- View
- Un-Close
- Select Employee
- Show All Employees
- Leave

## Transaction Screen Layout

### 1. Transaction Filter Window

Enables you to restrict the transactions that are listed to ones that meet certain criteria (rather than seeing them all). For example, if you only want to see delivery transactions, you can select Member/Deliveries, and the system will filter out all other transactions from the Transaction Detail Window (4).

### 2. Transaction Summary Area

Displays a summary of the transactions in the Transaction Detail Window (4). It shows the total number of customers, total number of transactions and total gross (final total) sales.

### 3. Open/Closed Buttons

Switch the transactions listed in the Transaction Detail Window (4) to either open transactions (those that have not been completely processed yet) or closed transactions (those that have been fully settled).

### 4. Transaction Detail Window

Lists transactions and displays detailed information about each one. This display changes depending on what filter you select in the Transaction Filter Window (1) and depending on whether you view open or closed transactions. You can sort the transactions by clicking on any of the column titles. Touch the column's title bar once to sort in descending order and touch it again to sort in ascending order.

## 5. Transaction Buttons

The Transaction Screen buttons shown in the image above are each described below in "Transaction Screen Buttons".

---

### Transaction Screen Buttons

**Print Receipt:** Prints (or re-prints) the receipt for whichever check is highlighted in the Transaction Detail Window.

**Print Receipt By #:** Prints a receipt for a transaction that you specify by entering its transaction number. Depending on your system programming, this button may display its own menu. This menu enables you to print all receipts for a transaction number, open date or date range you specify.

**View By #:** Displays information about a check that you specify by entering its transaction number. The new window shows the contents of the order and the totals on the check. If the transaction is not yet settled, you can select [Use Check] to open the check.

**Unclose By #:** Uncloses a check that you specify by entering its transaction number.

**All Types:** Enables you to filter transactions based on sales type. This button displays a list of sales types (as well as the option "All Types") when it is selected, prompting you to select one of them. So, say you only want to see Dine-In transactions; you can restrict the list in the Transaction Detail Window by selecting "Dine-In" from the list of sales types.

**Member/Delivery:** Retrieves a check that you specify by selecting the member that was applied to it. The check must have a member applied to it for this search to work.

**Help:** Opens PixelPoint help.

---

### Toolbar Icons

**Logout:** Logs you out of the system.

**View:** Displays content and price information for the highlighted transaction. This button is the same as [View By #], except that it shows information for the highlighted check—it does not ask you for a transaction number.

**Un-Close:** Uncloses the highlighted transaction.

**Select Employee:** Enables you to filter transactions for a specific employee. Functional only in the Manager's version, the Transaction Viewer function (See here).

**Show All Employees:** Displays transactions for all employees. Functional only in the Manager's version, the Transaction Viewer function (See here).

**Leave:** Exits the screen and returns you to the Your Settings Screen.

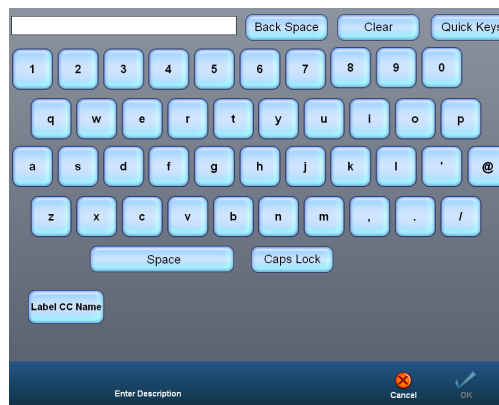
## Keyboard Screen

This screen enables you to 'type' text using your touch screen. There are buttons for each of the keys you may need for entering things like member names and addresses.

If you are in a region that does not typically use the QWERTY layout for keyboards, your screen should instead appear with the keys in an order you are accustomed to (such as AZERTY, for example).



If your system is set up to use a non-default keyboard screen, it may look something a little more like that below. Keyboard screens can be programmed with other function buttons on them, to make it easier for you to enter in the information you need.



For example, the screen shown here has a [Label CC Name] function button that prompts you to swipe a credit card and then automatically inputs the full name stored on the credit card, so you do not need to type in the name at all.

This screen also has a [Lookups] function button. This button may work in any one of several ways. It will usually be programmed to display a list of buttons for commonly-used words at your establishment; what kind of words are listed depends on your establishment.

Your management can have this programmed any way they like. You may have several lookup buttons — like one for the cities your establishment serves and one for common driving instruction words (like "Left", "Right", and the four cardinal directions.)

## Time and Attendance

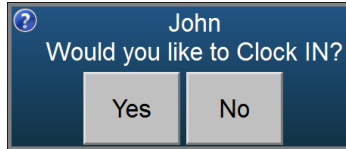
This chapter covers everything you need to know about using PixelPoint POS's built-in time clock to record the amount of time, and the way you spend that time, at your establishment.

The time clock is usually applied to all employees, including those who do not use the system for any other function (like kitchen staff.) Topics in this section are:

- Clocking In
- Logging In and Out
- Breaks
- Clocking Out
- Clock In Out Authorization
- Time and Attendance Only Users
- Your Schedule
- Contests
- Internal Mail

## Clocking In

Clocking in is what you do at the beginning of every shift in order to tell the system that you have started working.



### To Clock In:

1. From a station's login screen, swipe your employee access card through the station's magnetic card reader.
  - Employees without a card may clock in by touching the [Manual Login] button located in the top right corner of the login screen (if available). Doing so presents a keypad display. Enter your access code and press [OK].
  - If you are set up with multiple job positions (for example, you might be able to clock in as a server or as a bartender), the system displays each job position and asks you to select one for this shift.
2. Press [Yes] when the system asks you to confirm that you wish to clock in. [No] will simply return you to the login screen.
  - The system may prompt for a manager to authorize your clock in. Ask your manager to swipe their card to authorize it.

Upon clocking in, the system also logs you in (unless you are set for clock in and out only) and brings you to the default screen for your system interface. See "Your Settings Screen" for more information.

## Logging In and Out

You must be logged in to have access to the system. The frequency you need to log in depends on your establishment and your job position; you may need to log in only once during your shift, or you may need to log in many times.

If you are the only one who uses the station during your shift (as may be the case if you are a cashier or bartender), then there may be no need to log in and out every time you use the system. You can remain logged in for the entire duration of your shift. However, if the station is going to be left unattended for any period of time, you should log out to ensure proper security.

Logging in can be done one of two ways; you can log in using an employee swipe card or you can enter a manual access code. The process is the same as Clocking In. Once you have logged in, the system will take you to your designated screen (determined by your operational mode). This may be a Table Layout screen, a quick order check or another kind of screen (See "Your Settings Screen").



Each employee has their own unique access code (be it using a swipe card or manual entry number). The system uses this to track who is doing what on the system. It also uses this to determine what screens, functions and tables should be made available to you.

When you are finished using the system, you must log out before leaving the station. This will return the station to the login screen so the next person can log in and access their own screens and functions. Not logging out may result in you being responsible for the next user's guest checks.

### To Log In:

1. From the station's login screen, swipe your employee card through the magnetic card reader.
  - If you are not using an employee swipe card, select [Manual Login] in the top right corner of the screen. Enter your manual access code and press [OK].

The system logs you into the point-of-sale system and brings you to the default screen for your system interface. See "Your Settings Screen" for more information.

**To Log Out:**

1. Select the logout button in the bottom left corner of the screen.
  - The system may need you to complete transactions before logging out. Close the open check(s) in order to log out.



The system returns you to the login screen.

## Breaks

When you go on a break, your time clock will pause. Log back in to resume the time clock.

### To Start Your Break:

1. From the Table Layout screen, select [Your Settings].
2. Select [Break Start].

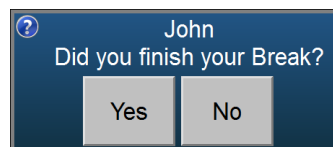


3. Select [Yes] or [No] when the system asks you if this is a Meal Break (depending on what kind of break you are taking).
  - A window may appear asking for management authorization. If so, a manager will have to swipe their card to authorize the break.

The system logs you out and pauses the time clock.

### To End Your Break:

1. Log in.
2. Select [Yes] when the system asks if you finished your break.



The system logs you in and starts the time clock again.



## Clocking Out

At the end of your shift, you clock out. This stops the time clock and tells the system that you are no longer working.

```
=====
Shift Report
Supervisor
=====
Type      Start Time      End Time Hours
Shift    4/10/2009 1:58:50 PM
         4/10/2009 8:08:06 PM 6.15
=====
Total Hours 6.15
```

### To Clock Out:

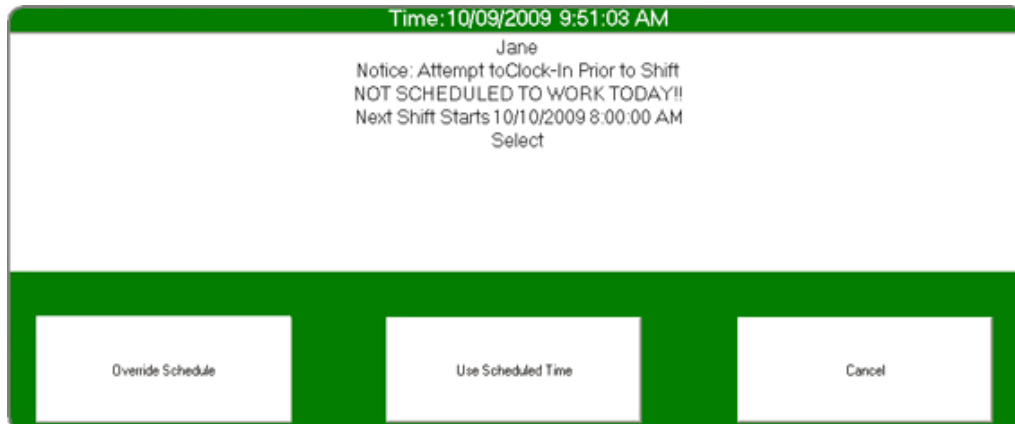
1. Select [Your Settings].
2. Select [Clock Out Emp].
  - The system may prompt for a manager to authorize you clocking out.
  - The system may need you to cash out first. If so, it will display a notification box. Cash out and then clock out. See "Cashing Out" for more information about what to do in this situation.

When you clock out, the system prints a time slip indicating start time, end time and total hours worked. It then returns you to the login screen.

## Clock In/Out Authorization

If using PixelPoint's Employee Scheduler module, you may find some restriction as to when you can and cannot clock in and out. Your establishment can dictate how long before and after your scheduled time you may clock in and out. If you attempt to clock in/out beyond this allowable grace period, the system will prevent you from doing so.

If you do attempt to clock in or out beyond this time window, the system notifies you of this and presents you with three options.



**Override Schedule:** Clocks you in or out of the POS system. In the event it is essential that you clock out beyond the scheduled time, you would use this button to override your schedule. You may need management authorization to do this.

**Use Scheduled Time:** Clocks you in or out of the POS system, but shows on your time clock that you clocked out as per the scheduled time. This does not credit you with any additional time.

**Cancel:** Does not clock you in or out; returns you to the previous screen.

## Time & Attendance Only Users

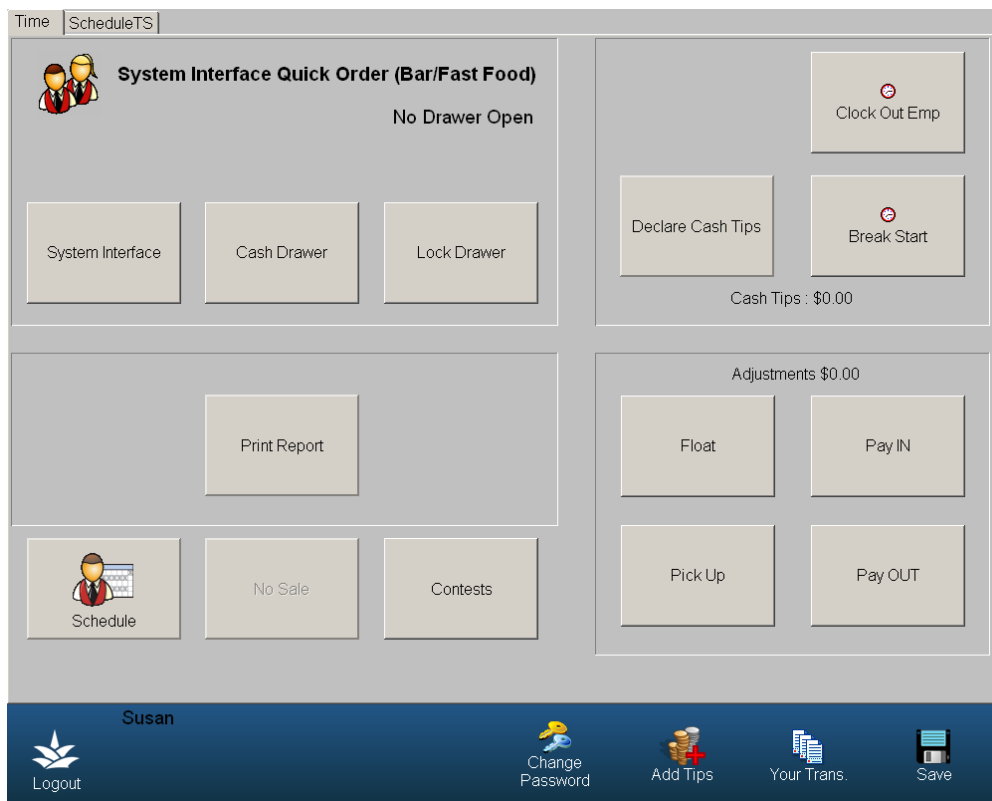
PixelPoint POS's time clock function can be used by all staff, including those not designated as POS users (such as kitchen and clean up staff). If you only need access to the system for clocking in and out, you will still have the ability to do some other related tasks on the POS.

### Clocking In

When you clock in, the system immediately returns you to the log in screen.

### Your Settings Screen Functions

The next time you log in (that is, after having clocked in), you will be taken to the Your Settings screen. Though not as comprehensive as the Your Settings screen for other POS users, this screen nevertheless enables you to use numerous functions. See "Your Settings Screen" for information about these functions.



## Your Schedule

### Your Settings / Schedule

If the establishment is using PixelPoint's Employee Scheduler, you can view your schedule, print it and request time off all through this one screen.

Time	ScheduleTS	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
September 18			September 19 9:00 AM to 5:00 PM Shift - Wait Staff Managers	September 20 9:00 AM to 5:00 PM Shift - Wait Staff Managers	September 21 9:00 AM to 5:00 PM Shift - Wait Staff Managers	September 22 9:00 AM to 5:00 PM Shift - Wait Staff Managers	September 23 9:00 AM to 5:00 PM Shift - Wait Staff Managers	September 24
September 25			September 26 9:00 AM to 5:00 PM Time off	September 27 9:00 AM to 5:00 PM Shift - Wait Staff Managers	September 28 9:00 AM to 5:00 PM Shift - Wait Staff Managers	September 29 9:00 AM to 5:00 PM Shift - Wait Staff Managers	September 30 9:00 AM to 5:00 PM Shift - Wait Staff Managers	October 1
October 2			October 3 9:00 AM to 5:00 PM Shift - Wait Staff Managers	October 4 9:00 AM to 5:00 PM Shift - Wait Staff Managers	October 5 9:00 AM to 5:00 PM Vacation	October 6 9:00 AM to 5:00 PM Shift - Wait Staff Managers	October 7 9:00 AM to 5:00 PM Shift - Wait Staff Managers	October 8

Employee Settings      Print Next 14 Day(s) Schedule      Request Time Off

Susan

Logout      Change Password      Add Tips      Your Trans.      Save

### [Employee Settings]

Returns you to the Your Settings Screen.

### [Training Mode]

Turns training mode off or on. This requires management authorization. (See "Training Mode".)

### [Print Next 2 Weeks Schedule]

Prints your scheduled shifts for the next two weeks. These are set up by the person using the Employee Scheduler.

### [Request Time Off]

Starts the process of submitting a request for time off. These requests are completed using the screen below, on which you select the day and indicate the time you wish off.

**Select a date**

Tuesday, August 06, 2013 12:00:00 AM

← Year
↓ Month
August, 2013
↑ Month
→ Year

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

↑ + 1 h

↑ + 30 min

↑ + 15 min

↑ + 5 min

☀ AM

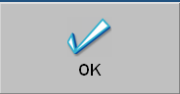
↓ - 1 h

↓ - 30 min


↓ - 15 min

↓ - 5 min

🌙 PM



OK



Cancel

### To Request Time Off:

1. Select the day from the request calendar on the Schedule screen.
2. The time when you want your time off to begin is displayed under the calendar. Use the buttons below it to change the hour and minutes.
3. Select [OK].
4. A window display asks if you want the whole day off.
  - If you choose [No] you will then be able to enter the end time.
5. A confirmation window shows the requested time off you entered.
6. Your schedule calendar displays the request (note the highlighted days in the first image above).
  - The scheduler will now be able to see the request in the scheduler program and can determine whether to grant it or not.

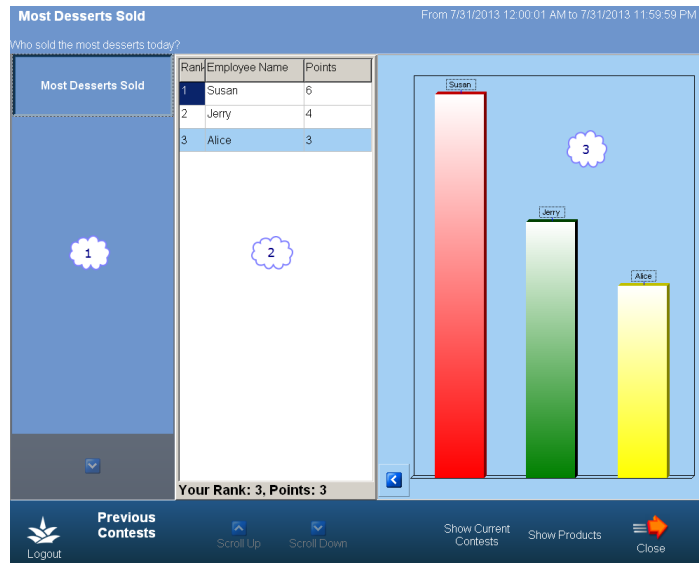
---

**Note:** This information is also available to staff who only use the time clock function.

## Contests

### Your Settings / Contests

Your establishment may have contests or competitions set up where you can get bonuses and rewards for things like selling specific products or certain kinds of products. The Contests Screen enables you to see the contests happening at your location.



### Contests Screen Layout

#### 1. Contest List

The contests that are currently happening at your location and that you are a part of. This list changes if you select [Show Previous Contests]. See the button descriptions below for more information.

#### 2. Contest Details

The current statistics for the selected contest. When the screen first loads, it shows the employees involved in the first current contest (in the list on the left). It shows the ranking of the employees, their names and the number of points each one has. This set up changes if you select [Show Products]. See the button descriptions below for more information.

#### 3. Graphic Display

A graph, showing the current results of the contest. This graph will change as you sell more products, reflecting your success in the competition.

### Contests Screen Buttons

**Show Previous Contests:** Displays contests that have ended. If you select this, the button label will change to [Show Current Contests], which will enable you to switch back to showing the contests that are happening now.

**Show Products:** Lists products that have been sold in the competition so far and the amount of points each product has given. If you select this, the button label will change to [Show Employees] and enable you to switch back to showing the employees.

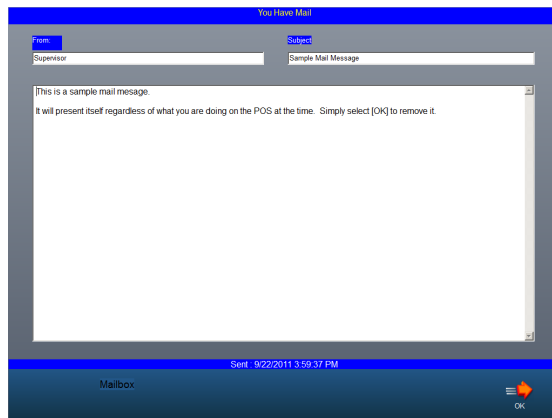
**Close:** Closes this screen.

## Internal Mail

PixelPoint POS has an internal mail function that is controlled by management in BackOffice. A mail message can be sent to everyone, to all employees in a specific job position, or to an individual person. There are three types of messages you can receive:

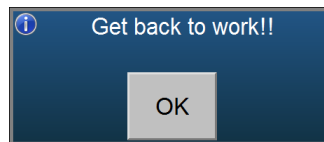
### Mail Message

This type of message is used for long messages that contain substantial and detailed information.



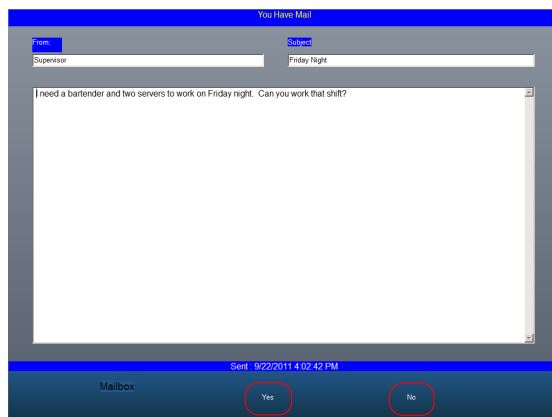
### Broadcast Message

This type of message can be used to deliver short, one- or two-line, messages.



### Response Mail

This type of message is used whenever management would like to ask the recipient(s) a question and receive a yes or no answer.



Ensure you select a "yes" or "no" answer for this type of mail.

## Till Functions

This section is about money management within PixelPoint POS. It covers subjects like how (and why) money is put in and taken out of cash drawers before, during, and after shifts. The contents are:

- Overview
- Floats
- Pick Ups
- Pay In
- Pay Out
- Cashing Out
- Cash Out Report
- Tender Balancing
- Till Assignment



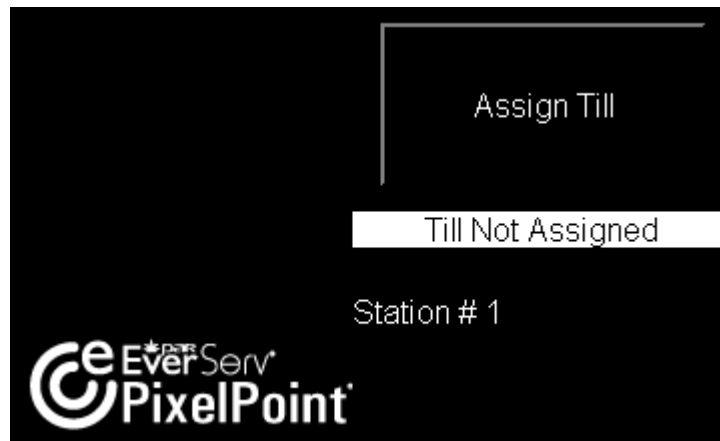
## Overview

In establishments where employees frequently change stations or registers, or where several people need access to the same cash drawer, till functionality may help. The default rule of accountability in PixelPoint is that the person who closes the check is the person responsible for the cash (or credit slip). When this rule will not work, use till assignment to keep track of money.

---

**Note:** Till management must first be set up in BackOffice before it can be used by the POS. To set it up, enable the *EmployeeTills* policy in Policy Setup, create an employee record in Employee Setup for each till (with a till-type name such as "Till 1" or "Till 2"), assign a swipe card to each employee, and make sure that each cash insert is given one of the cards. Finally, ensure that the card always stays with the insert and not with the employee using it.

When till assignment is enabled and properly configured, an [Assign Till] button and white "Till Not Assigned" bar will appear in the corner of the Login Screen. To sign into the till, select this button and swipe the associated till card. The till gets cashed out at the end of the shift and a Cash Out Report gets printed for this till.



## Floats

A float is the amount of money you start with at the beginning of your shift. The purpose of this money is to enable you to provide change to customers.

PixelPoint is capable of automatically prompting you to enter your float amount upon clocking in. It is also capable of assuming a fixed float amount upon clocking in.

If neither of these options is programmed, the process for conducting a float declaration is as below.

### To Declare a Float:

1. Select [Your Settings].
2. Select [Float].
3. Enter the amount of the float on the numeric keypad that displays.
4. Select [OK]. A confirmation window displays: You entered \_\_\_. Is this correct?
5. Select [Yes] to continue. Select [No] to return to the keypad, if you want to change the amount.
6. The system prints a float slip providing all necessary information. It needs a manager's signature for validation. Place this in the till to verify your initial float.
  - The total balance on the float slip includes any adjustments done before the float declaration.

The system returns you to the Your Settings screen and the adjustments box now displays the value of the float you entered.

If it displayed a value before the float, that value will change to a new balance, taking the float into account. See "Your Settings Screen" for a screenshot.

## Pick Ups

A pickup is when your till becomes too full with cash and a manager takes some of it to put in the office safe. The pickup function is used to account for this removal of cash. (This may also be referred to as "skimming" or "bleeding".)

### To Conduct a Pickup:

1. Select [Your Settings].
2. Select [Pickup].
3. Enter the amount of the Pick Up on the numeric keypad that displays.
4. Select [OK]. A confirmation window displays: You entered \_\_\_ is this correct?
5. Select [Yes] to continue. Select [No] to return to the keypad, if you want to change the amount.
6. The system prints a pickup slip providing all necessary information. It needs a manager's signature for validation. Place this in the till to explain the lack of money.
  - The total balance on the pickup slip includes any adjustments done before the pickup declaration.

The system returns you to the Your Settings screen and the adjustments box now displays the value of the pickup you entered.

If it displayed a value before the pickup, that value will change to a new balance, taking the pickup into account. See "Your Settings Screen" for a screenshot.

## Pay In

A pay-in occurs when you put money into your till without associating it with a sale. An example of a pay-in is when someone owes money to the establishment and has come to pay it off.

### To Conduct a Pay-in:

1. Select [Your Settings].
2. Select [Pay IN].
3. Enter the amount of the Pay In on the numeric keypad that displays.
4. Select [OK]. A confirmation window displays: *You entered \_\_. Is this correct?*
5. Select [Yes] to continue. Select [No] to return to the keypad, if you want to change the amount.
6. Select the best pay-in reason from the list in the window that displays.
7. Type a brief description about this pay-in on the keyboard that displays.
8. Select [OK].
9. The system prints a pay-in slip providing all necessary information. It needs a manager's signature for validation. Place this in the till to explain the extra money.
  - The total balance on the pay-in slip includes any adjustments done before the pay-in declaration.

The system returns you to the Your Settings screen and the adjustments box now displays the value of the pay-in you entered. If it displayed a value before the pay-in, that value will change to a new balance, taking the pay-in into account. See "Your Settings Screen" for a screenshot.

## Pay Out

A pay-out occurs when you take money from your till without associating it to a sale. An example of a pay-out would be paying someone for cleaning or providing emergency supplies.

### To Conduct a Pay-out:

1. Select [Your Settings].
2. Select [Pay OUT].
3. Enter the amount of the pay-out on the numeric keypad that displays.
4. Select [OK]. A confirmation window displays: You entered \_\_\_. Is this correct?
5. Select [Yes] to continue. Select [No] to return to the keypad, if you want to change the amount.
6. Select the best pay-out reason from the list in the window that displays.
7. Type a brief description about this pay-out on the keyboard that displays.
8. Select [OK].
9. The system prints a pay-out slip providing all necessary information. It needs a manager's signature for validation. Place this in the till to explain the lack of money.
  - The total balance on the pay-out slip includes any adjustments done before the pay-out declaration.

The system returns you to the Your Settings screen and the adjustments box now displays the value of the pay-out you entered. If it displayed a value before the pay-out, that value will change to a new balance, taking the pay-out into account. See "Your Settings Screen" for a screenshot.

## Cashing Out

At the end of the shift, employees who have been closing checks may have to cash out before clocking out. In order to cash out, all of your checks must be either closed or transferred to another server.

Cashing out collects and summarizes all sales data and generates an Employee Cash Out report. This report identifies transaction information, such as the total, the method of payment used and the tip received.

If till assignment has been set up, and you have shared a till with coworkers during your shift, you do not need to cash out. However, someone needs to cash out the till. See "Till Assignment" for more information.

### To Cash Out:

1. Select [Your Settings] from the Table Layout screen.
2. Select [Cash Out].
  - A tender balance screen may display, asking you to enter how much you have in your drawer for each method of payment. If this happens, you will need to balance your till. The cash out process in this situation is described in full in "Tender Balancing".
  - The system may request that a manager authorize you to do a cash out.
  - A window may appear stating '*Employee Has Open Tables, Will Not Close.*' This means you have tables still open that you must either close or transfer to another server.
  - A window may appear stating '*Employee Has Open Charges.*' This means you still need to add a tip to some of your charge transactions. Apply all tips then attempt to cash out again. (See "Tips".)
  - You may be prompted to declare cash tips.
3. A display window will appear asking whether you wish a detailed report or not. [No] generates a summarized version of the report. [Yes] generates the same report but with more detailed information. Press one or the other.
4. Present the report to management. At this point, you can also Clock Out.

The person who closes the check is responsible for the money collected (regardless of who started the check). Cashing out does not end your shift, and so it is possible to cash out more than once during a single shift.

## Cash Out Report

The Employee Cash Out report provides information about your activities during your shift. This includes time clock information, sales information, money collected and tip information. Listed below is a detailed breakdown of the report's contents.

```

PixelPoint Demo Restaurant
=== CASH-OUT SUMMARY ===
Supervisor
Punch Index: 2024
Printed: 4/10/2009 1:46:33 PM
Shift Type      Start      End
Shift           3:54PM    1:46PM
Hours Worked:   1365.87
Hours Scheduled: 0.00
Difference:     1365.87
=====
Product :
Bar[37.0]:     195.85
Food[190.0]:  1304.94
Product Total: 1500.79
Coupons :
Special Discount[2]: -7.06
Coupons Total: -7.06
Refunds :
Kitchen Complaint[1.00]: -7.95
Refunds Total: -7.95
=====
Number of Customers: 66
Number of Transactions: 28
Net Total (no Tax): 1493.73
Average Number of Customers: 2.36
Average Transaction Value: 53.35
Average Value per Customer: 22.63
Avg Sales per Employee-Hour: 1.09
Declared Tips: 0.00

```

---

### Cash Out Report Layout

#### 1. Time clock activity

Each shift is given a unique index number called a *punch index*. Under this is a breakdown of shift work. It shows when you clocked in, when you cashed out, and when your breaks were. It calculates your total hours worked and compares that to your scheduled time (if applicable.)

#### 2. Sales activity

The Product section shows item sales by *summary group* (for example Food, Bar and Beverage). The number in square brackets shows the quantity sold and the number on the right shows the monetary amount sold. Under the summary groups are similar displays for coupons, refunds and returns.

#### 3. Transaction activity

Shows overall statistics about transactions performed during the shift. If cash tip declaration is applicable, it will show up at the bottom of this section. It is placed here to avoid confusion with *charge tips*, which are applied to summary calculations at the bottom of the report.

#### 4. Sales, by method of payment

Shows transactions that used each method of payment, how much was tendered for each transaction, how much tip was applied, and the final total.

---

**Note:** Cash tips are change. If cash tips are reported, they will be found in the previous section.

```

=====
Visa
Trans#  Tender   Tip   Total
 2098   12.28   0.00  12.28
 2099   33.92   0.00  33.92
 2100   30.52   0.00  30.52
 2101   23.82   1.18  25.00
 2106   14.65   5.35  20.00
 2114   74.62   0.00  74.62
 2118   100.04  0.00  100.04
 2119   20.07   1.00  21.07
 2120   62.30   2.00  64.30
 2121   98.78   3.00  101.78
 2122   28.22   1.00  29.22
Total[11]  499.22  13.53  512.75
POS Tendered
Till Adjustments
Tip (Charge Card)
  Visa
Till PayIn/Out(-)
  Magazines

=====
POS Calculated      512.75
Employee Declared    0.00
Over/Short(-)      -512.75
=====
    
```



**5. Adjustments**

- **Till Adjustments** — Floats and pick-ups.
- **Tip (Charge Card)** — A breakdown of all charge tips that are owed to you.
- **Till PayIn/Out** — All pay-ins and pay-outs.

**6. POS Calculated**

The grand total for this method of payment. If you did a tender balance before cashing out, the numbers you declared during the tender balance are represented as Employee Declared. If there is a discrepancy between POS Calculated and Employee Declared, the difference shows as Over/Short.

```

=====
Summary
Cash (Base Currency)      1134.08
Adjustments                -19.09
Cash (with Adjustments)   1114.99
Charge (no Tip)           844.59
Charge Tip                 19.09
Charge (with Tip)         863.68
Tendered (no Tip)        1976.67
Tendered (with Tip)      1997.76

----- End of Report -----
    
```



**7. Summary of results**

- Cash (Base Currency) = Sum of cash POS tendered + Pay-ins – Payouts
- Adjustments = Till adjustments + Pay-ins – Payouts
- Cash (with Adjustments) = Cash + Adjustments
- Charge (no Tip) = Sum of charges POS tendered - Charge tips
- Charge Tip = Sum of charge tips
- Charge (with Tip) = Charge (no Tip) + Charge tip
- Tendered (no tip) = Sum of POS tendered + Pay-ins – Payouts – Charge tips
- Tendered (with Tip) = Sum of POS tendered + Pay-ins – Payouts



## Tender Balancing

Tender balancing is when you compare the amount of money you should have received for orders to the amount of money you actually received for orders. Ideally the two amounts will be the same, but there are often differences. The process of tender balancing is a little different depending on whether you do it at the end of the day or at the end of your own shift.

Pay Methods	Amount	Calculated	Over/Short
CASH	191.00	190.27	0.73
MASTERCARD	200.00	201.28	-1.28
AMEX	0		

0

7 8 9  
4 2 6  
1 2 3  
0 . +/-

Add  
Clear  
Enter

Cancel  
OK

Total Charge Tip = \$13.00  
Surcharge on Tip = \$0.00  
Total Floats = \$200.00  
Total Pickups = \$60.00  
Total PayIns = \$0.00  
Total PayOuts = \$8.60

The image above is a screenshot of the Tender Balance window. Its main components are:

### 1. Methods of Payment Window

Displays each method of payment you have to enter totals for.

### 2. Numeric Keypad

Used for entering totals or each tender.

### 3. Adjustments Window

Shows what the system has calculated for charge tips and adjustments. All of this information is reported in your cash out report.

### 4. Control Buttons

Used to assist with keypad entry. You can use the [Add] button to enter credit slips one-by-one rather than have to add them up then enter the final number.

---

## End of Shift

Let us say it is the end of your shift, and when you cash out, the system presents you with a Tender Balance screen, which asks you to enter totals for records of payment into the system. This is the beginning of the Tender balance process. Count the cash, credit card receipts and other records of payment in your till, and enter these totals.

PixelPoint POS then compares those totals to what it calculates you should have. If your numbers match the system's, you have a balanced till. If any numbers do not match, they are counted as

an over if you have more than the system calculates, or a short if you have less.

**To Balance your Till:**

1. Count the money in your till at the end of your shift.
2. Select [Your Settings].
3. Select [Cash Out].
4. Select [Yes] or [No] when the system asks if you want a detailed report.
5. Enter your total for the highlighted method of payment, using the numeric keypad, when the Tender Balance screen displays.
  - You can use [Add] to calculate the totals as you type them in, rather than adding up all of the numbers before entering them in. This is particularly useful when adding up credit card slips.
  - Select [Clear] if you make a mistake when entering the number.
6. Select [Enter] to accept the total.
7. Select [+/-] once if the amount is negative and twice if it is positive.
8. The system compares the total you entered to what it calculates you should have.
  - Any difference in the numbers will be shown as an over or a short (meaning that your balance is over or under what it should be).
  - The "Calculated" column may not be visible. This is called a blind tender balance. The establishment determines whether this column is shown or not.
9. Move from one method of payment to the next by using the arrow keys located on the right.
  - You can re-enter totals simply by highlighting the method of payment and entering another number.
10. When you have finished entering the totals for every method of payment, select [OK] to print the "Cash Out Report".

---

**Note:** [Transfer All Checks] and [Cash Out] will disappear from the Your Settings screen after Cashing Out because there are no checks to transfer and there is nothing to cash out.

---

**End of Day**

The Tender Balance function can be done as part of the End of Day routine rather than as an End of Shift process. If it is part of the End of Day routine, tender balancing is done by a manager.

**To access this function:**

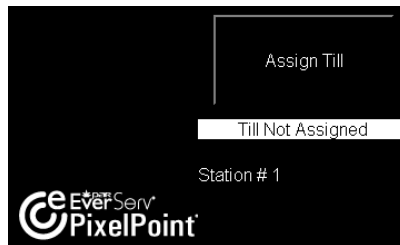
1. Select [Manager] (on the Floor Layout screen).
2. Select [Sales Functions].
3. Select [Tender Balance].
4. Follow the directions as stated in the End of Shift section ([Click here](#)). However, enter the sum totals from all employees' sales—not just yours.

## Till Assignment

PixelPoint's general rule for accountability is that the person who closes the check is the person responsible for the cash (or credit slip.)

This works in most cases, but not necessarily in all. For example, there are times when several people may need access to the same cash drawer or when a drawer insert has to move between different cash drawers or stations. In situations like these, till management may be needed.

**Tip:** To turn till management on, enable the *EmployeeTills* policy in BackOffice Policy Setup.



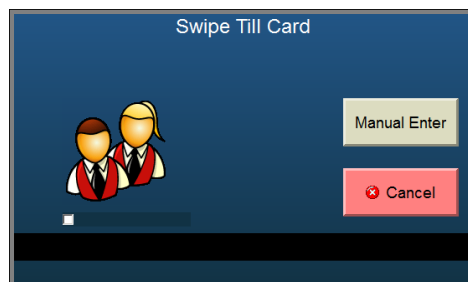
Once till management has been enabled, you will see the [Assign Till] button on the lower-right corner of the login screen. Below this is a white bar that displays the status on the till assignment.

Before signing into a station, you must first assign a till to it. A till is a cash drawer insert. Each insert is assigned its own swipe card. The till card should remain with the insert at all times. It is only needed when assigning and unassigning the till to a station.

Upon assigning the till to the station, you will see the message 'Till Not Assigned' change to display the name of the assigned till (such as Till #2). From this point on, any employee who signs into that station will have their sales allocated to Till #2. At the time of cash out, sales will show up in the till's cash out report and not the employee's cash out report. This is because the employee's cash out report will not correspond to what is actually in the till, if more than one employee was using that till.

### To assign a till:

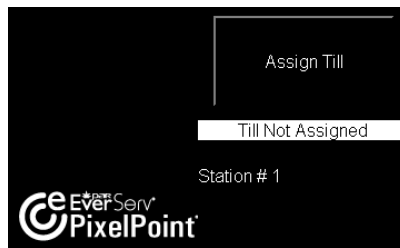
1. Select [Assign Till] (on the right of the login screen).
2. Swipe the till card. The system returns to the login screen and displays the till name in the white bar.
3. Log in as you normally would. Place the swipe card in the cash drawer.



The *EnforceTillEmployeeCard* policy, when enabled, verifies that an employee card is a till card before assigning it to a till. It also offers the capability of enforcing till assignment. When enforced, employees will be unable to log in if the till is not yet assigned.

**To unassign a till:**

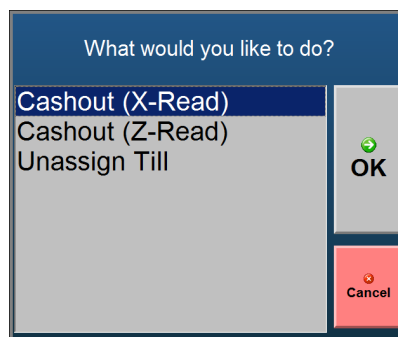
1. Select [Unassign Till] (on the right of the login screen (this only appears after a till has been assigned)).
2. Select [Yes] when the system asks you to confirm that you want to unassign the till.
3. Swipe the till card. The system returns to the login screen and displays the message 'Till Not Assigned' in the white bar.
4. Place the swipe card in the drawer insert and take the insert with you.

**Cashouts with a Till**

Since payments are allocated to the till (rather than the employees using it), individual servers do not have to Cash Out for themselves. However, someone must cash out the till.

**To Cash Out a Till:**

1. Select [Unassign Till] from the log in screen.
2. Select [Yes] when the system asks you to confirm that you want to unassign the till.
3. Choose one of the available options when the system prompts you to.
  - **Cashout (X-Read):** Cashes you out without unassigning the till.
  - **Cashout (Z-Read):** Unassigns the till, cashes you out and clocks you out.
  - **Unassign Till:** Unassigns the till so you can take the insert and re-assign it to another station. The station will not be usable until another till is assigned to it.



The Employee Cash Out report for the till includes a "Cashier Transactions" section. This section contains sales information for each employee who used the till (as seen in the image below.)

```

=====
Cashier Transactions:
Employee      Cash  Charge  Tips-SC
Scott         13.51  14.65   5.35
Tracy         35.53  65.13  13.55
  
```

To assign sales to the till rather than the employee, modify the *EmployeeTillOwnsSales* policy. All sales data will then be allocated to the till instead of individual employees.

# Orders

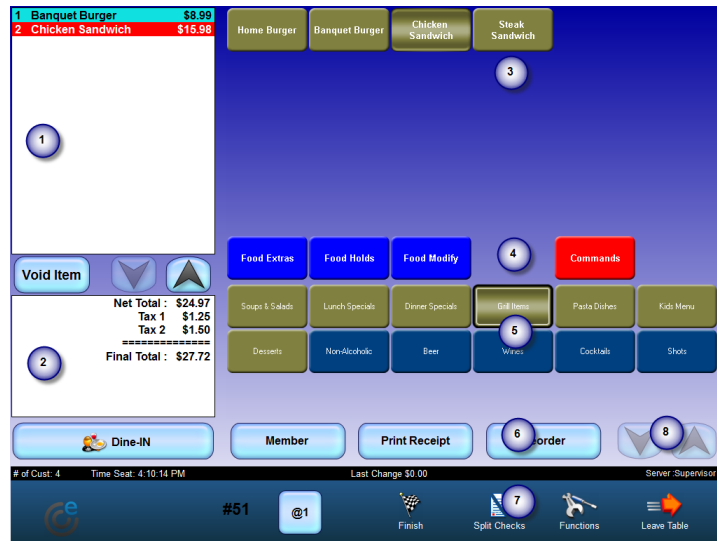
This section covers how to use the system to place orders. Topics include things like the Order Screen, how to settle a check, apply members, printing and much more.

Some topics in this chapter apply more to establishments with dine-in seating; for ordering aspects specific to other types of operations, see the appropriate section of "Service Modes". This chapter has the following sections:

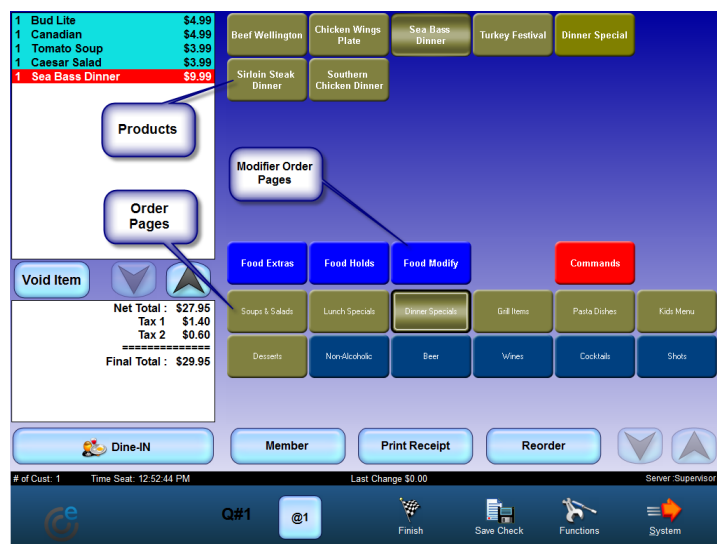
- Order Screen
- Finish Screen
- Settling A Check
- Forced Questions
- Shift Products
- Split Checks
- Tips
- Voids
- Deposits

## Order Screen

The Order Screen is displayed when you open a check (for Quick Service or Table Service). This screen is the focal point of your transaction. You place the order here and send it off to the kitchen, bar or other destination to be made. This screen also gives you access to the Finish Screen to accept payment.



Though the layout and content of your screen may be different from this example, the screen components and functions are still the same. Buttons are entirely customizable. They can appear as colored shapes with labels, they can appear as images, or they can appear with as any combination in between. These images are applied in Order Page Setup and Product Setup by selecting [Button Image] or within Form Designer. The appearance of the button can also be programmed (either as an individual button or all buttons in a grid) within Form Designer.



It is suggested that you place all order page images in the "\\PixelPOS\\Images\\OrderPages" folder and all product images in the "\\PixelPOS\\Images\\Products" folder. This principle also applies for any other images you may wish to apply such as Member and Employee pictures.

---

## Order Screen Layout

### 1. Item List

Shows the contents of the order. As items are selected from the Product Grid (3), they are added to this display along with their quantity and price. Items may appear in many different ways and colors, depending on how your system is configured. There are also different types of items that may display here. See "Item List Window" for detailed information about how items appear here.

### 2. Check Total Window

Shows the check's net total and total after taxes. These numbers change as priced items are ordered or voided.

### 3. Product Grid

Contains all ordering products (menu items, as well as modifier items and command items). When you select a product, it displays in the Item List section (1). For example, if you select [Small Milk], the Order Receipt Window will display 1 Small Milk and its price. Select [Small Milk] again and the quantity will change to 2. If you order any other product before selecting [Small Milk] a second time, the second milk will show on its own separate line, instead of the quantity changing to 2. Selecting a product here also causes the contents of the Modifier Grid (4) to change to display modifier pages appropriate to that product.

### 4. Modifier Grid

Contains the modifier pages. When you select a modifier page, the contents of the Product Grid (3) change to display modifier items appropriate to that button. For example, if you select [Food Holds], the Product Grid will display all hold modifiers that relate to food products. If the number of modifiers exceeds the number of buttons that can display on the screen, press the modify page button again to access the next group of modifier buttons. For example, say you select [Food Holds] and it shows the first 20 modifiers. To view the next 20 modifiers, you would select [Food Holds] again.

### 5. Order Page Grid

Contains order pages. When you select an order page, the contents of the Product Grid change to display ordering products appropriate to that button. For example, if you select [Salads], the Product Grid (3) will display salad products. Additional pages, if there are any, are accessed by using the arrow buttons (8).

### 6. Function Buttons

Used for accessing special functions directly from the Order Screen. There are many different function buttons you may have on your Order Screen, but the following are on the default Table Service template:

- **Void Item:** Removes the last ordered item, or a selected item, from the Order Receipt Window.
- **Sale Type:** (labeled [Dine-IN] in the image above) — Enables you to identify and/or change the type of sale to ensure the order is processed accordingly.
- **Member:** Retrieves the Member screen, so you can assign a member to the check.
- **Print Receipt:** Prints the receipt or guest check.
- **Re-Order:** Reorders previously ordered items; presents you with a list of ordered items, from which you select the items you wish to reorder.

### 7. Status Line

The status line is a black bar dividing the rest of the Order Screen from the blue toolbar). Starting on the left, the status line displays the number of customers applied to the table/check. Just to the right, it shows the seating time (when a table was opened), if in Table Service mode (See "Table Service"). If in Quick Service mode (See here), it displays the value of the previous order. Next, in the middle section, the status line displays the member name or the check label (if either

is applicable). It then displays the amount of change that was last owed to a customer. On the very right, it displays the name of the employee who is responsible for the check.

## 8. Arrow Buttons

Used for scrolling through the Order Page Grid. Pressing the down arrow scrolls down to the next set of order page button rows. You typically use these buttons for toggling between meal menus. For example, say the establishment has a breakfast menu displayed in the Order Page Grid. When lunch time comes, you press the down arrow and it displays the lunch menu. The new menu page will show on the Order Page Grid until you press one of the arrows to move up to the breakfast menu or down to the dinner menu. The system automatically returns you to the top level menu at the beginning of your next shift.

---

## Toolbar Icons

**Logout:** Logs you out of the system, returning the display back to the login screen. Just to the right is a display indicating the number of the table that this order is for. If in Quick Service mode, the number will be have a Q before it (indicating Quick Service).

**@1:** Shows quantity. Selecting this brings up a numeric keypad. Enter the number of items you wish to order and then press [OK]. The quantity button display will change to show that number; it reflects the quantity of the product that will be added to the order when you next select a product button. For example, if you chose 5, the button will display as [@5]. If you select [>9] before entering the desired quantity, you can apply fractional quantities, such as 0.5 or 12.75, or enter whole quantities that have two digits. The quantity button can be used for voids as well. See "Voids" for further details.

**Finish:** Takes you to the Finish Screen, where you apply discounts, coupons and settle the check. See "Finish Screen" for further information.

**Split Check:** Present in Table Service mode only. Takes you to the Split Checks screen, which will enable you to split the check between customers. See "Split Checks" for further information.

**Save Check / Get Check:** Present in Quick Service mode only. This button is either [Save Check] or [Get Check], depending on where you are within a transaction. If the check on the screen is blank, the button is [Get Check]. Selecting it retrieves saved checks. Once you order something, the button changes to [Save Check]. Selecting it saves the check for future retrieval. These two functions are typically used for applying Tabs in a Quick Service environment. They can be removed from the screen through advanced programming.

**Functions:** Takes you to the Functions Menu, from where you can apply a wide variety of functions to the check. See "Functions Menu" for further information.

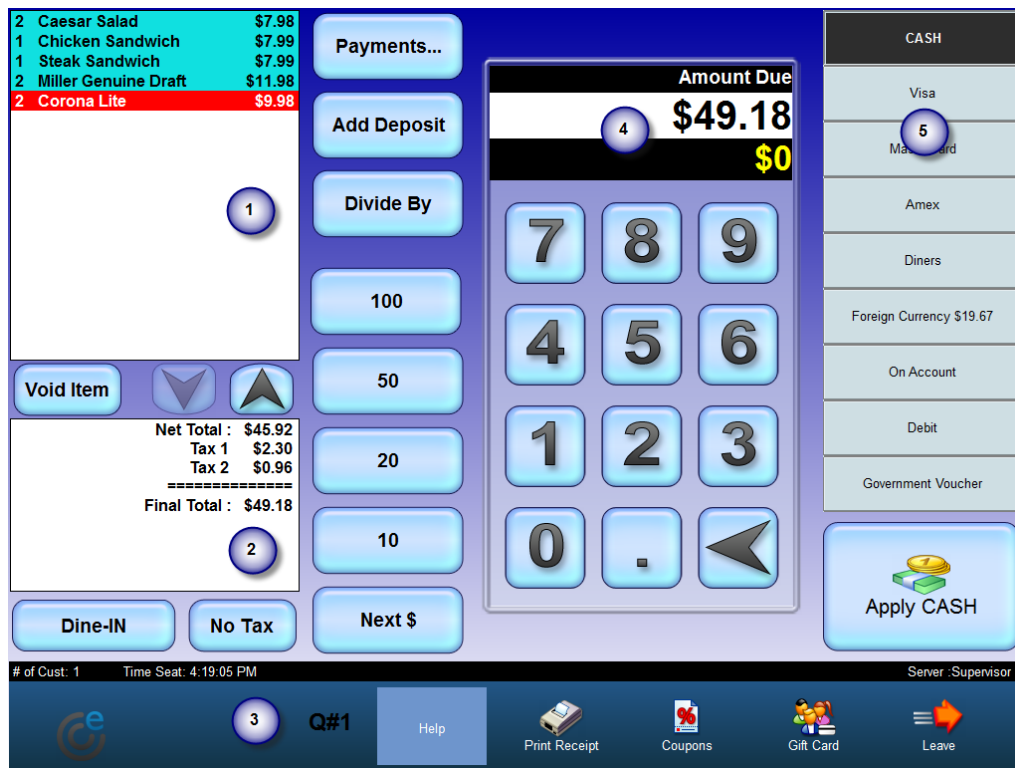
**Leave Table:** Present in Table Service mode only. Saves and exits the check and returns you to the Table Layout Screen.

**System:** Present in Quick Service mode only. Takes you to the Table Layout screen. It is equivalent to the [Leave] button in other service modes.



## Finish Screen

### Order Screen / Finish



### Finish Screen Layout

#### 1. Item List

Contains the items that were ordered, their quantities and prices. See Item List Window for detailed information about this screen component.

#### 2. Totals Window

Shows the net total, all applicable taxes and gratuities, and the final total of the check.

#### 3. Table Number

The number of the table being served. In Quick Service it shows as Q1.

#### 4. Amount Received

The amount received from the customer. Entered by using the keypad or quick tender buttons. The amount owed is also shown on the previous page in the amount received.

#### 5. Payment Options

A list of all of the methods of payment your establishment accepts.

### Function Buttons

**Void Item:** Removes an item from the check.

**Sales Type:** Enables you to identify and/or change the type of sale to ensure the order is processed accordingly. This button is labeled [Dine-IN] in the image above, and so this order is set for Dine-In.

**No Tax:** Removes tax from the check.

**Payments:** Displays a window giving details about the payments that have been made on the current check.

Payments	Amount	TIP	AuthCode
CASH	51	9	
Visa	35	0	
Visa	40	0	
MasterCard	50	0	

**Divide By:** Splits the check total, enabling you to inform customers what their individual share of it comes to, if more than one guest is paying for a single check.

**Quick Tender Buttons:** The buttons labeled [100], [50], etc. are quick tender buttons; each one represents a different amount of money received. Selecting one of these buttons puts the corresponding amount into the "Amount Received" area (#4 above). Say the total is \$37.39 and the customer gives you a \$50 bill. Rather than using the keypad to enter it, you can select [50] and the system will put in "50" for you.

**Next \$:** A preset payment button that assumes that the value of the customer's payment is equal to the total, rounded up to the next full dollar amount. If the total is \$28.76, selecting this button will assume a payment of \$29.

**Apply CASH:** The Payment Button. By default, it is labeled as [Apply Cash], but this label changes when you select a different method of payment from the Payment Options Window. Apply the payment by using this button after you have entered the Amount Received (4) on the numeric keypad, or by using quick tender buttons.

---

**Note:** Your template may not use these particular buttons; this section describes the default Table Service template.

---

## Toolbar Icons

**Help:** Provides on-line help.

**Print Receipt:** Prints the check. When selected after tendering, it will also print the receipt.

---

**Note:** The *ReprintXReceipt* policy can be used to limit the number of times that a receipt can be printed. The *ReprintWhatReceipt* policy controls whether the limit applies to closed transaction receipts, unclosed transaction receipts, or both.

**Coupons:** Displays all of the coupons and discounts which can be applied to the order.

**Gift Card:** Opens the Gift Card wizard, which enables you to sell gift cards. See "Settle To Gift Card" for more information.

**Leave:** Exits the screen, returning you to your system interface's default screen.

## Item List Window

This screen component shows the contents of the order. There is always one of these on the Order Screen and Finish Screen, but it can be used on other screens, too, such as on customer displays, if your establishment uses those.

As items are ordered, they are added to this display, along with their quantity and price. There are also different types of items that may display here. The various kinds of items can appear in different ways and with different colors, according to their status and type, as well as how your system is configured. This section explains the most common kinds of items and how they appear here in the Item List.

The currently selected item in the Item List displays with white text against a red background.

---

## Ordering Products and Modifiers

When items are added to the order, their lines, including those for modifiers, display with an aqua background by default. When they are sent to their remote printer(s), their background becomes white. You can tell which items on an order have already been sent to the kitchen or bar by the fact that they have a white background. If they have an aqua background, then the kitchen/bar has not seen them.

Drinks		
1	Lipton Ice Tea	\$1.59
1	Brio	\$1.59
A Appetizers		
1	A Calamari	\$6.99
1	A Bruschetta	\$4.99
M Main Courses		
1	M Fried Chicken Dinner	\$8.50
1	Garden Salad	
1	M Fried Chicken Dinner	\$8.50
1	Onion Rings	
D Desserts		
1	D Raspberry Cheesecake	\$7.99
1	D Tiramisu	\$7.99

Ordering products are printed in black text by default. Modifier line items are printed in blue text and the item descriptions are indented on their lines (compared to their ordering products).

---

## Kitchen Commands, Course Bands, and other items

Many other kinds of items are programmed to appear with different colors by default (Your establishment may have had these items programmed to appear with colors other than the default colors). Typically these other items are programmed to have a different color background and appear as highlighted bands on the Item list.

For example, the default color for items like Hold and Fire commands is maroon or dark red (and they have white text).

Hold and Fire

Course bands by default have a gray background with black text.

D Desserts

Other items may have different colors. For example, rated items usually have a blue background and refunded items have a green background.

### Course Prefixes

If your establishment's menu and business is organized around courses, your system can be configured to help you order and time them. In addition to the course bands discussed above, for example, the Item List can be configured in a number of ways to show what course each item is a part of. This helps you know what course the table is currently on, what the guests at the table have ordered for each of the courses, and what courses they have yet to order.

Each line item in the Item list can have a prefix or number showing the course for the item. The first image below shows the Item list without any prefixes or numbers. The images below show the Item list for the same order, with the system configured to show the course for each line item in different ways.

1 Brio	\$1.59
1 Gatorade	\$1.59
1 Calamari	\$6.99
1 Bruschetta	\$4.99
1 Fried Chicken Dinner	\$8.50
1 Garden Salad	
1 Fried Chicken Dinner	\$8.50
1 Onion Rings	
1 Raspberry Cheesecake	\$7.99
1 Tiramisu	\$7.99

1 Brio	\$1.59
1 Gatorade	\$1.59
1 Calamari[A]	\$6.99
1 Bruschetta[A]	\$4.99
1 Fried Chicken Dinner[M]	\$8.50
1 Garden Salad	
1 Fried Chicken Dinner[M]	\$8.50
1 Onion Rings	
1 Raspberry Cheesecake[D]	\$7.99
1 Tiramisu[D]	\$7.99

1 Brio	\$1.59
1 Gatorade	\$1.59
1 Calamari[1]	\$6.99
1 Bruschetta[1]	\$4.99
1 Fried Chicken Dinner[2]	\$8.50
1 Garden Salad	
1 Fried Chicken Dinner[2]	\$8.50
1 Onion Rings	
1 Raspberry Cheesecake[4]	\$7.99
1 Tiramisu[4]	\$7.99

1 Brio	\$1.59
1 Gatorade	\$1.59
1 A Calamari	\$6.99
1 A Bruschetta	\$4.99
1 M Fried Chicken Dinner	\$8.50
1 Garden Salad	
1 M Fried Chicken Dinner	\$8.50
1 Onion Rings	
1 D Raspberry Cheesecake	\$7.99
1 D Tiramisu	\$7.99

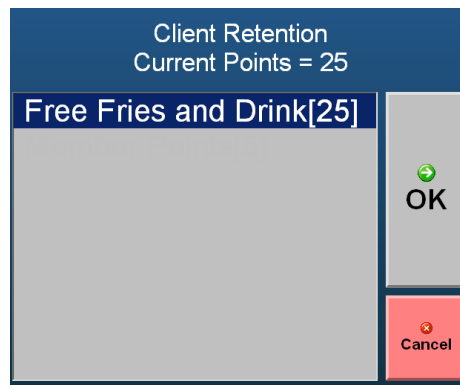
1 Brio	\$1.59
1 Gatorade	\$1.59
1 1 Calamari	\$6.99
1 1 Bruschetta	\$4.99
1 2 Fried Chicken Dinner	\$8.50
1 Garden Salad	
1 2 Fried Chicken Dinner	\$8.50
1 Onion Rings	
1 4 Raspberry Cheesecake	\$7.99
1 4 Tiramisu	\$7.99

## Settling A Check

After you present a table with the check(s) (in Table Service), or after entering a customer's order in Quick Service, it is time settle the check. No matter what method of payment the customer is using, the beginning of the process is the same:

1. Retrieve the check by selecting the table (by clicking on its icon), or by selecting [Get Check] (if in Quick Service). The order screen displays.
  - In many Quick Service establishments, the check may already be on the screen. In this case, simply do step 2.
2. Select [Finish].

This will bring you to the Finish Screen. If configured to do so, when a member has been applied to the check and they have enough points for a client retention offer, the Client Retention coupon window will appear on the Finish screen.



---

**Note:** The coupons shown above appear because they have the Client Points Coupon option selected in Coupon Setup.

**Tip:** To configure the Client Retention Coupons window to appear on the Finish screen, turn the *AllowPointsRedemptionInKiosk* policy on and make sure that *Disable Auto-Prompt for Member Coupons* is not enabled in BackOffice System Setup.

**Tip:** The *AllowCurrentTransactionPoints* policy can be used to prevent users from cashing in the points that they just earned from the current check towards a discount. The free fries and drink shown in the image above were earned entirely by the 25 points in the member's account prior to that transaction.

The remainder of this section discusses the various methods of payments that may be used in settling checks, and discusses what to do on the Finish Screen for each method of payment in order to complete the process of settling the order.

- Settle To Cash
- Settle To Debit
- Settle To Credit Card
- Settle To Member Account
- Settle To Gift Card
- Settle To Multiple Tenders

## Settle to Cash

Cash refers to your local currency. If your establishment accepts multiple denominations, they will have their own payment titles. See "Settle To Foreign Currency" (below) for more information.

### To Settle To Cash:

1. Use the keypad on the Finish Screen to type in the amount of cash given to you.
  - If you are given exact change, you do not need to enter the amount using the keypad. Simply proceed to step 2; the system will assume exact change.
2. Select the Payment button (which shows Cash by default). The total in the Amount Due Window changes to show change owing.
  - The cash drawer may open and a final receipt may print.
  - You may need management authorization here.
3. Select the Payment button or [Leave] to exit the Finish screen, or the logout button to log out.
  - Although it is settled after Step 2, the check will not be finalized until you complete Step 3.

### To Settle To Foreign Currency:

Select the desired currency from the Payment Options Window on the Finish Screen.

- Notice that the amount needed for that denomination is shown next to its title in the Payment Options Window.
1. Use the keypad to type in the amount (in that currency) given to you.
  2. Select the Payment button. The amount due will now show change owing in your establishment's base currency.
    - Notice that, in the same way as above, change owing for that denomination is shown next to its title in the Payment Options Window, but is also shown on the Payment button.
    - The cash drawer may open and a final receipt may print.
    - You may need management authorization for this step.
  3. Select the Payment button or [Leave] to exit the Finish screen, or the logout button to log out.
    - Although it is settled after Step 3, the check will not be finalized until you complete Step 4.

---

**Note:** Your establishment may be set up to accept one or more currencies from other countries. Each foreign currency will be listed separately in the Payment Options Window on the Finish Screen.

## Settle To Debit

Settlement to debit can be done with and without PixelPoint's credit authorization system (Authorization Manager). The process is a little different depending on how your establishment is set up. If you have PixelPoint Authorization Manager, proceed to the bottom part of this section (To Settle to Debit With Authorization Manager).

If you do not have PixelPoint Authorization Manager, then a separate debit system must manage the actual bank settlement of the transaction. Swipe, enter and settle the transaction through this system as per the manufacturer's instructions.

However, you still need to complete the transaction within PixelPoint POS. Follow the procedure below.

### To Settle to Debit Without Authorization Manager:

1. Use the keypad on the Finish Screen to type in the final amount approved through the debit machine. If the debit system enables you to apply a debit tip, over-tender the amount you enter; this amount must represent the final total including debit tip.
2. Select [Debit] from the Payment Options Window.
3. Select the Payment button. If you over-tender the transaction, the debit tip is displayed as change. This will be reflected in your Cash Out Report.
  - The cash drawer may open and a final receipt may print.
  - You may need management authorization for this.
4. Select the Payment button or [Leave] to exit the Finish screen, or the logout button to log out.

### To Settle to Debit With Authorization Manager:

1. Select [Debit] from the Payment Options Window on the Finish Screen.
2. Select the Payment button.
3. Swipe the debit card through the card reader when prompted.
  - You may need management authorization for this.
4. At this point, PixelPoint interfaces with the debit card system. Follow the debit system's prompts.
  - If approved, the debit receipt prints and the system closes the check.
  - If declined, the check remains open and the system waits for you to use another method of payment. Inform the customer and ask for another method of payment.



## Settle To Credit Card

As with settling transactions to debit (See "Settle To Debit"), settlement to a credit card can be done with and without PixelPoint's credit authorization system (Authorization Manager). The process is a little different depending on how your establishment is set up. If you have PixelPoint Authorization Manager, skip the next part and proceed to the one entitled "To Settle to Credit Card With Authorization Manager".

If you do not have PixelPoint Authorization Manager, then a separate credit system must manage the pre-authorization, application of charge tip and final settlement of the transaction. The first part of the process is to swipe, enter and settle the transaction through this system as per the manufacturer's instructions. Next, follow the steps below to record this information within PixelPoint POS and to finish settling the transaction.

### To Settle to Credit Card Without Authorization Manager:

1. Use the keypad on the Finish Screen to type in the amount that the customer has signed for on the credit slip (this is the bottom-line total including charge tip).
2. Select the desired credit payment from the Payment Options Window. The Payment button will automatically change to that method of payment.
3. Select the Payment button. If you have over-tendered the transaction, the charge tip is displayed as change. This will be reflected in your Cash Out Report.
  - The cash drawer may open and a final receipt may print.
  - You may need management authorization.
4. Select the Payment button or [Leave] to exit the Finish screen, or the Logout button to log out.

### To Settle to Credit Card With Authorization Manager:

1. Select the desired credit payment from the Payment Options Window on the Finish Screen.
2. Select the Payment button.
3. Swipe the credit card through the card reader when prompted.
  - You may need management authorization.
4. Once you swipe the card, the system brings you to the Table Layout screen or a blank check (depending on whether you are in Table Service or Quick Service) while it processes the charge.
  - If approved, the charge slip prints and the system closes the check.
  - If declined, the check remains open and the system waits for you to use another method of payment. Inform the customer and ask for a different method of payment.
5. The system prints two copies of the charge slip (separately on single-ply paper and together on dual-ply paper). Take the charge slip to the customer to be signed.
  - For more information about charge slips, and to see an example of what one looks like, see "Local Printing".
6. Retrieve your copy of the signed charge slip.
7. Apply the charge tip. (See "Tips".)

---

## Pre-Authorized Credit Void

Say you are using Authorization Manager and have closed a check to a credit card which you now want to undo. You must void the pre-authorization before retrieving the check for re-tendering. Manager authorization is required to do this.

**To Void a Credit Transaction:**

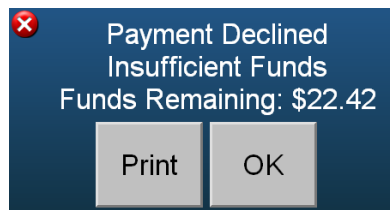
1. Select [Manager] from the Table Layout screen.
2. Select [Authorization Manager].
3. Select the transaction from the List Pre-Authorized display.
4. Select [Void].
5. Follow the prompts and select [Unclose]. This uncloses the transaction, enabling you to re-tender it.

## Settle To Member Account

Member accounts are member records with a credit limit has been granted by the establishment. Instead of billing the member for every order or transaction, the establishment bills him/her periodically, and the member makes payments toward the balance. Regardless of the member's balance, the member's account can still be used for collecting client retention points, which can be applied to member promotions. See "Members" and the "Member Screen" for more information about members.

### To Settle to Member Account:

1. Select [On Account] from the Payment Options on the Finish Screen.
2. Select the Payment button.
3. Swipe the member card through the station's card reader when prompted.
  - If there is no card, apply the member to the check by name or phone number using [Functions] and then [Member/Delivery]. You may also be able to use a custom function button on the order screen (if it has been set up for you).
  - You may need management authorization to do this.
4. Once you swipe the card, the system brings you to the Table Layout screen or a blank check (depending on whether you are in Table Service or Quick Service) while it processes the charge.
  - If approved, the charge slip prints and the system closes the check.
  - If declined, the check remains open and the system waits for you to use another method of payment. Inform the customer and ask for a different method of payment. Close the check using multiple tendering if you want to include the account's existing balance.



5. The system prints two copies of the charge slip (separately on single-ply paper and together on dual-ply paper). Take the charge slip to the customer to be signed.
6. Retrieve your copy of the signed charge slip.
7. Apply the charge tip. (See "Tips".)

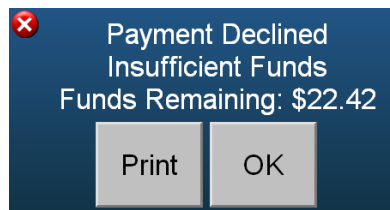
## Settle To Gift Card

Gift Cards are member accounts that have a pre-paid credit balance. This balance can be replenished to any amount at any time. Should it reach a zero balance, the card can still be used for collecting client retention points, which can be applied to member promotions.

In a situation where a customer wishes to use a gift card as partial payment, PixelPoint pre-authorizes up to the maximum amount allowable on the card. For example, say that Joe pays using a gift card. The total is \$100, but he only has \$80 in available funds. Rather than reject the entire payment, PixelPoint will accept the \$80 as partial payment, leaving the remaining \$20 outstanding for an alternate method of payment.

### To Settle to Gift Card:

1. Select [Gift Card] (or whatever your gift card payment method is called) from the Payment Options Window on the Finish screen.
2. Select the Payment button.
3. Swipe the gift card through the station's card reader when prompted.
  - You may need management authorization to do this.
4. Confirm the identity of the gift card.
5. Once you swipe the card, the system brings you to the Table Layout screen or a blank check (depending on whether you are in Table Service mode or Quick Service mode) while it processes the charge.
  - If approved, the charge slip prints and the system closes the check.
  - If declined, the check remains open and the system shows you a message indicating that the payment did not go through and displaying the allowable balance on the card. Inform the customer and ask for a different method of payment.



6. The system prints two copies of the charge slip (separately on single-ply paper and together on dual-ply paper). Take the charge slip to the customer to be signed.
7. Retrieve your copy of the signed charge slip.
8. Apply the charge tip. (See "Tips".)

## Settle To Multiple Tenders

Multiple tendering, also called split tendering, is when a transaction is closed to more than one method of payment. For example, say that the amount of a check is \$38.34. The customer gives you \$10 cash, asks that \$10 be put on Visa®, and that the remainder be put on MasterCard®. This transaction would be closed to three different methods of payment. When split tendering, always begin with the amount of cash given to you, and then apply the remaining methods of payment after that.

Your Finish Screen may use a form that shows all of the different tenders used to settle the transaction in a Payments window at the top (as shown below).

Payments	Amount	TIP	AuthCode
CASH	10	0	
Visa	10	0	Approved

### To Settle to Multiple Tenders:

1. Enter the amount of cash (in the above example, \$10) by using the keypad or quick tender buttons on the Finish screen.
2. Select the Payment button (it should show Cash). A blue window appears showing that you entered \$10 cash and the total owing changes, showing the amount that is still outstanding.
3. Enter the next amount (\$10 again, in this case).
  - If not using PixelPoint Authorization Manager, pre-authorize the credit card and have the customer sign the charge slip first. If the customer left a charge tip, over-tender the credit card portion. For example, if the customer left a \$5 tip, you would enter \$15.00 rather than \$10.00. The system will record that you are owed a \$5 charge tip.
4. Select the desired credit payment in the Payment Options Window.
5. Select the Payment button.
6. Give the charge slip to the customer to sign when it prints. Keep your copy.
7. Repeat steps 3-6 for the MasterCard®, except select MasterCard® from the Payment Options Window and enter whatever the remaining amount is (rather than the \$10 included in Step 3).
8. Apply the charge tip (if applicable).

---

## Partial Payment Screen

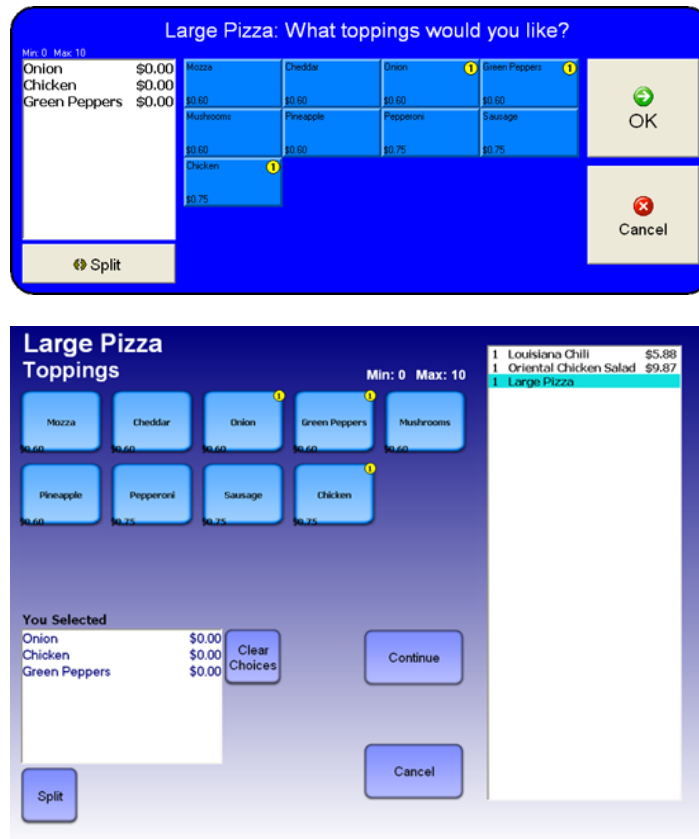
If configured to do so, the partial payment screen may appear when you are settling to multiple tenders. If the amount you tender, for example, is less than the whole total, this form may display. It will also display if you use [Divide By] to separate the total into parts. The partial payment screen enables you to adjust and modify the separate parts of the total and to tender each one.

Amount	\$15.90	Modify
Tip	\$0.00	Modify
<b>Total</b>	<b>\$15.90</b>	
<b>Tender</b>	<b>\$20.00</b>	Other
<b>Change</b>	<b>\$4.10</b>	
<div style="display: flex; justify-content: space-around;"> <span>100</span> <span>50</span> <span>20</span> <span>10</span> <span>5</span> </div>		
		<div style="display: flex; justify-content: space-around;"> <span>Cancel</span> <span>Apply CASH</span> </div>

This screen can also be programmed to display only when gratuity is included on the check.

## Forced Questions

A window may automatically pop up when you order an item, asking you to select some of the options on it. This is referred to as a Forced Question (or Forced Modifier). PixelPoint assists you by asking that you provide additional needed information when ordering this specific item. Forced Questions may appear differently, depending on how your system is setup. They may display in a window, or they may have their own screen (This screen can contain all sorts of different elements, such as the entire contents of the check, a product image, nutritional information, or other things). Below is a window version of a forced question, followed by the same forced question appearing on its own screen.



Whenever a menu offers "Your Choice Of...", this is usually a Forced Question, because it requires that the customer select from various options. Some common examples of Forced Questions are:

- Meat Temperature [rare, medium, well done]
- Salad Dressing [french, italian, ranch]
- Sauce [mild, medium, hot]
- Flavor [vanilla, chocolate, strawberry]

Forced Questions have different selection criteria. For example, they may enable you to select only one item, like in the examples listed above, or they may enable you to choose multiple options, such as with toppings for burgers, sandwiches or pizzas.

The image above shows a Forced Question that prompts you to select toppings for a pizza. This particular question enables you to select multiple toppings. You may also be able to select the same item more than once. Notice that in the upper left area it indicates that the minimum number of answers is "0" and the maximum number of answers is "10". This means that you do not have to have any toppings and you can have a maximum of 10 toppings.

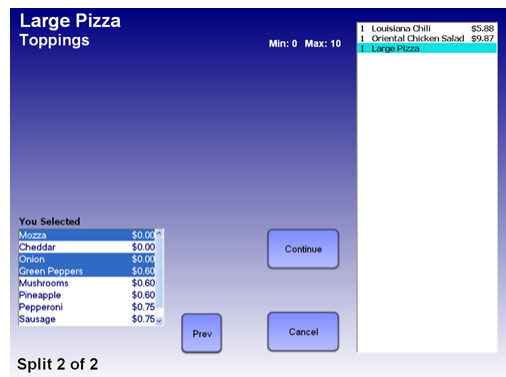
Forced Questions can be presented in two different formats—button or list—whether in a window or on a separate question screen. In the button format, each possible answer has its own button. Using this format, the question may enable you to select the same item more than once. In the list format, each possible answer is a line in a list of options. The list format works well when there are many items to choose from and you need to have them fit onto the screen in a way that it is easy to find the one you are looking for.



Both formats list the minimum and maximum number of choices, list the price associated with each option, in case there is an additional cost for choosing it, and enable you to split options (See "Split Modifiers" below). You can only select an option once with the list format, however.

## Split Modifiers

In the pizza toppings example, there is also a [Split] button, indicating that you can split the modifiers. When you select [Split], a keypad displays, prompting you to enter the number of splits. If you select "2", that would mean that the toppings for this pizza would be split in half (that is, each topping would be on half of the pizza, and you can select a different topping for the other half). If you choose "3", it would be split into thirds and so on. The maximum allowable splits is determined by the programming of the Forced Question.



Shown above is the same Forced Question as before, but using a split of two (the image is showing the second split of two, with different toppings selected). Each pizza topping on this split applies to only half of the pizza (and the quantity of each is halved). If the question was using a split of three, the portion of each topping would be one third of a full topping. There is no limit to the number of splits PixelPoint POS can handle, however there is a limit to the number of splits for each question; as mentioned, this limit is specified in the programming of the Forced Question.

If you order pizza toppings before pressing [Split], they will apply to the whole pizza, but will show up individually on each split (with a quantity of "0.50" (or "0.33" for a split of "3")). The system automatically carries over any modifiers already selected and distributes them across the splits. Any modifiers you select after you press [Split] will just apply to the current split.

**Note:** You cannot void a selection within a Forced Question without removing the item the

question is attached to. However, refunding can be item-specific once the master item has been sent to the kitchen or bar. This also means that when moving items between tables or split checks, all modifiers move with the master item. The product and its forced modifiers are treated as one combined unit.

## All At Once

In situations where ordering an item involves multiple questions, the questions may all be presented on the screen at the same time. For example, say you order a burger combo; it has several questions—what burger type, what toppings, what side item(s) and what flavor of beverage. Rather than display all of these one at a time, the system can display them all at once. This gives you flexibility in applying the answers and enables you to make changes on the fly before submitting the item and sending it off for processing.



**Note:** All At Once is not practical for handheld devices which cannot display many questions at once.

**Also Note:** Priced modifiers show up with the price included on the button display.

When your system uses All At Once and you are answering a question where customers can select a particular option more than once, you cannot clear your selections by pressing the button again (as this would simply order the option again). You can clear your answers to a single question by touching the question title on the left side of the screen.

## Break Button

If you use the Quantity button ([@1]) to order an item that has an All At Once question, the question window will have a break button in the bottom-left corner.

This button enables you to answer Forced Questions for each item separately—although a family may order two burger combos, for example, chances are they will not want the same drink or side for both; this button enables you to customize each one.

When you select the button, the bottom of the Forced Question window changes to display a number for each instance of the item being ordered (as in the image below). For example, if you place an order for three Burger Combos and select [Break], you would get the display below and you would select the [1] to answer the Forced Questions for the first Burger Combo, the [2] to answer them for the second, and the [3] to answer them for the third.





## Shift Products

Your Order Screen and menu may be set up to use shift products. If it is, you will likely have a shift product button for each size that your establishment offers products in.



To use the shift products programmed into your system, simply select the button for the size of the product being ordered and then select the type of product from the product grid.

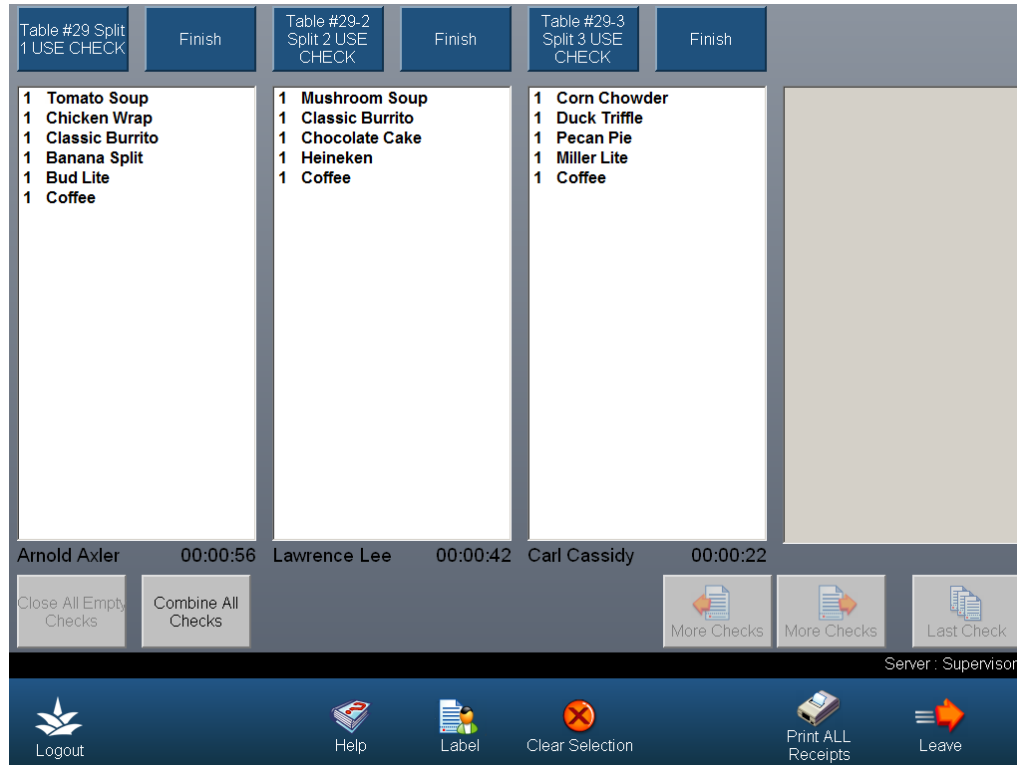
If a product is not available in a particular size, the system will alert you by displaying an alert message.

These shift buttons may also be in the product grid on the Order Screen, rather than appearing as function buttons. They are used in the same way, no matter where they are on the screen.

## Split Checks

### Order Screen / Split Checks

Say that the guests at a table ask for separate checks. Each guest wants to receive their own receipt and pay just for the items they ordered. You do this by splitting the check.



The large rectangular boxes in the image above represent splits. Click on a gray box to create a new split.

#### To Split a Check:

1. Select [Split Checks] from the Order Screen. The Split Checks screen displays with a split already created.
2. Select an item you want to move to a new split.
3. Touch the white area on a blank split. The item will be moved.
4. Repeat steps 2-3 until you have moved all of the necessary items.
  - If a product has modifiers, select the item and all attached modifiers will move with it.
  - If seats have been applied, select the seat and all attached products will move with it.
5. Select the blue title bar of any of the split windows to go into that split and use that check.

#### To Split an Item:

1. Select the item you wish to split.
2. Select [Split Items].
3. Select the splits (the white areas) you want to share the item with.
4. Select [Finish Splitting]. The quantity and price of the item will be split proportionally.

---

## Split Checks Buttons

**Close All Empty Checks:** Closes all blank splits.

**Split Items:** Appears when you select an item on a split check. You can use this to share an item between split checks.

**More Checks:** You can view up to four splits on the screen at one time. To view additional split boxes, select the [More Checks] button that points to the right. To scroll back to the splits you have already created, select the [More Checks] button that points to the left.

**Last Check:** Brings you to the end of the splits; this saves you from having to select the right [More Checks] button many times when you have a lot of open splits.

---

## Toolbar Icons

**Logout:** Logs you out of the system. Just to the right is a display that indicates the table number.

**Help:** Provides on-line help.

**Label:** Enables you to select a split by selecting its label on the list of splits that appears.

**Clear Selection:** Cancels the selection you just made.

**Functions:** Displays a menu that you can use to perform functions on the currently selected split. See the [Functions] section below for details about each function.

**Print All Receipts:** Enables you to print the receipts for all of the splits at once, rather than having to go into each split and print them separately.

**Leave:** Exits the screen, returning you to your system interface's default screen.

---

## Function Buttons

These icons display on a vertical toolbar when the [Functions] button on the main blue toolbar is selected. The [Functions] button only appears on the main toolbar after a split check is clicked on.

**Label:** Enables you to give the selected split a label (which also appears at the top of the Functions menu).

**Set # of Customers:** Adjusts the number of customers applied to this split.

**Select All:** Selects all items on the split, enabling you to move them all at once.

**Print Receipt:** Prints the receipt for this split.

**Cancel:** Closes the menu.

## Tips

### Your Settings / Add Tips

There are generally two different kinds of tips—charge tips and cash tips. Cash tips are those left for you at a table in cash form. Charge tips are tips added on to debit or credit transactions.

---

### Charge Tips

Customers can directly apply charge tips at the time of closing the check if they are using a *pin pad*. Otherwise, transactions must be followed up by entering the charge tip amount into the system.

Depending on your establishment, this task may be given to you or to your manager. In either case, you cannot cash out without doing this first. PixelPoint's Authorization Manager module is required for this function to work.

#### To add charge tips:

1. Select [Your Settings].
2. Select [Add Tips].
3. Select the transaction you want to add a tip to from the list on the left when the Add Tips window displays, or use [Search By Ref] to enter the reference number.

Reference #	Tender
2158	\$10.60
2159	\$2.15
2160	\$5.15
2161	\$2.55
2162	\$7.58
2163	\$5.94

Name	Supervisor
Reference #	2158
Type	Visa
Auth Code	
<b>Total</b>	<b>\$10.60</b>
<b>TIP:</b>	<b>0.00</b>
<b>Total (w/TIP)</b>	<b>\$10.60</b>

Buttons: Add Tip?, No Tip, Total (w/TIP), Search by Ref, Close

4. Select [Add Tip] and enter the amount of the tip.
  - If the customer provided a total including tip without calculating the actual amount of the tip, you can select [Total (w/TIP)] and enter that total. The system will then calculate the tip amount for you.
  - If the customer chose not to include a charge tip, select [No Tip] or enter a zero for tip.
5. Select [OK].

Though it is recommended that you process each charge tip at the earliest opportunity, you can process all of them just before cashing out.

---

**Tip:** The *AddTipUponApproval* policy can be used to show an [Add Tip Now?] button whenever an authorized payment is approved, or to take the user directly to the Add Tips screen.

---

## Tips Screen Buttons

**Add Tip:** Prompts you to enter the amount of charge tip to add to the transaction.

**No Tip:** Completes a pre-authorized payment that has no tip to be added.

**Total (w/TIP):** Used to enter a final total, if the customer has specified that, but has not calculated the amount of the tip. This button automatically calculates the amount of tip included in the Final Total.

**Search By Ref:** Displays a keypad, enabling you to enter the reference number of a transaction you want to apply a tip to. This is useful if the list of transactions on the left of the window is long and you want to find a specific check quickly.

**Close:** Closes the window.

---

## Cash Tips

Your establishment may or may not want you to declare your cash tips. If it does, you need to tell the system how much money customers gave you in tips.

### To declare cash tips:

1. Select [Your Settings].
2. Select [Declare Cash Tips].
3. Enter the amount of your cash tips when the numeric keypad displays.



The total you entered displays under the [Declare Cash Tips] button, and the tip declaration is included in your Employee Cash Out report.

---

## Tip Pooling

Some establishments prefer to pool their tips and share them out among employees. PixelPoint is capable of accommodating this as well. Here is what happens when an establishment pools tips:

1. Everyone combines their tips together.
2. Management adds them all up.
3. Management runs a report called "Employee Tip Summary" at the end of the day; this report asks for the total amount of tips.
4. The report breaks down the allocation of tips based on:
  - Job Position (For example, bartenders may get 25% of the tip pool and servers may get 30%).
  - Hours Worked (Say, for example, Sue worked the bar for eight hours and Fred worked

it for two. Sue would get 80% of the bartender portion).

## Voids

There are several ways you can void items through PixelPoint POS. They are each discussed below. The system is capable of tracking any kind of void.

### Pre-Void

Select [Void] to remove the last item on the check. If the item has not been sent yet (be it to a kitchen, bar or wherever), you do not need to do anything else. This is referred to as a pre-void because the void is done before the item is sent.

### Basic Void

When you void an item that has already been sent, the system prompts you to select a reason as to why the item is being voided. You may need management authorization to void already-sent items. Upon completing the void and leaving the check, the system sends the void to the designated remote printer, telling the preparation staff to abandon making the item.

### Selective Void

If you select an item on the check and then select [Void], the item you select (rather than the last item) will be voided. If you select a modifier and then select [Void], the system will tell you that you need to void the master item in order to void the modifier, and will ask you if you want to void the master item now. All other modifiers associated with the master item will be voided as well. Select [Yes] to void the master item and all modifiers associated with it. Select [No] to return to the check without voiding any items.

### Quantity Void

If you have ordered five coffees and want to remove one of them, select the line [5 Coffee] and then select [Void]. The quantity of coffees will be reduced to four. Every time you select [Void], one coffee will be voided. You can also use the quantity button to void items. Say you want to void three of the five coffees mentioned above. To do this:

1. Select the [5 Coffee] line on the Item List.
2. Select [@1].
3. Select [3]. [@1] changes to [@3].
4. Select [Void].
5. Select a reason.

The line description changes to [2 Coffee] (as in the image below).

1	Caesar Salad	\$3.95
1	Tea	\$1.25
1	Apple Pie	\$4.95
2	Coffee	\$2.50
3	*Coffee	(\$3.75)

---

**Note:** You cannot pre-void an item in a Forced Question without removing the item the question is attached to. However, voids can be item-specific once the master item has been sent to the kitchen or bar.

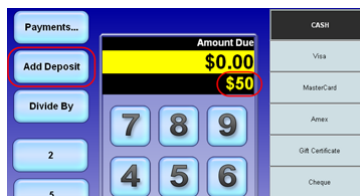
## Deposits

This section explains how you can add a deposit for a customer and apply that deposit when you close the transaction. Check with your manager to see if the Add Deposit function is enabled on your system; it must be in order for you to be able to take deposits.

### Adding a Deposit

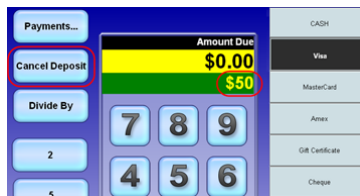
#### To add a deposit:

1. Open a table or quick order.
2. Select [Finish].
3. Enter the amount the customer wants to deposit.
4. Click [Add Deposit].

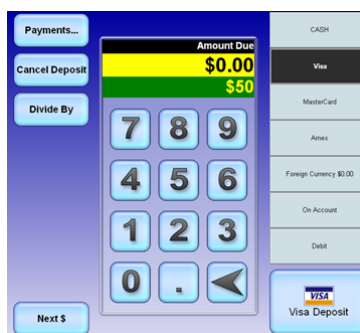


The deposit has been added to the transaction and [Add Deposit] changes to [Cancel Deposit], which you can use if, for example, you enter the deposit amount incorrectly.

5. Select the Payment Method (this example uses a credit card, although cash deposits are common as well).

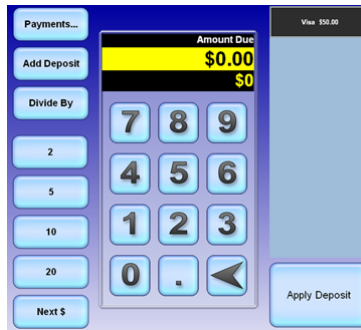


6. Select the deposit button at the bottom of the screen.



Once the payment is approved, it will be listed as the single payment method available. At this point you can leave the transaction and/or apply orders. A customer receipt will print to be signed.

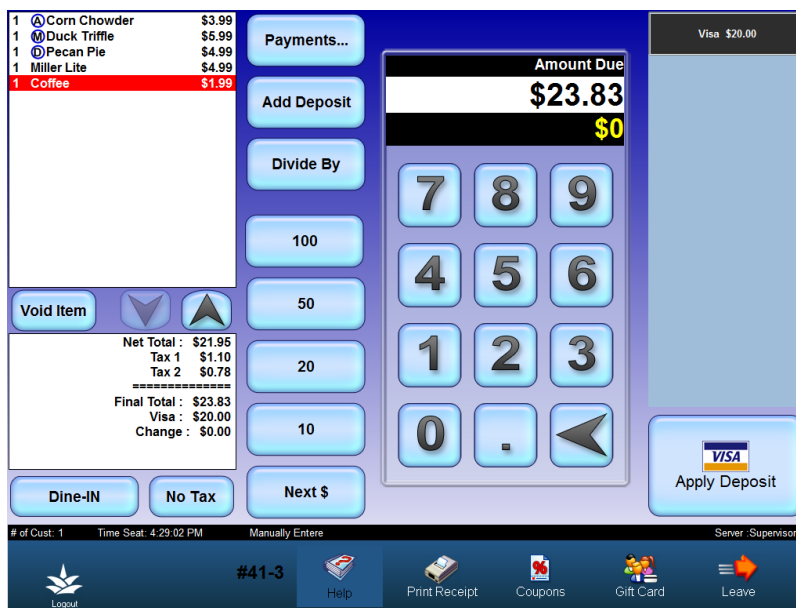




### Applying a Deposit

Deposits are applied like any payment method (See "Settling A Check" for information about how to apply payment methods in general). When you enter a check that has a deposit added, the deposit is listed as the payment method on the finish screen.

To apply the deposit, you simply select [Apply Deposit].



If the deposit was made using a credit card, the total charge is simply the final total — not the full deposit amount. The 'change' is returned to the card automatically. If the deposit was placed using cash, and there is any remaining change (that is, if the deposit amount was greater than the final total), the system displays the amount that must be given to the customer (as in the image below).



If the final total exceeds the amount the customer deposited, the customer will need to provide additional payment in order to close the transaction. This is just like closing to multiple tenders (See "Settle To Multiple Tenders"). After you apply the deposit, the other payment methods programmed into the system will display as normal on the Finish screen.

---

## Order Deposit Limit

If an order deposit limit has been set, you cannot order items on the Order screen if doing so will bring the final total higher than that limit.

A warning message will display when you try to order an item that brings the full check amount to a total greater than what is allowed. The item will not be added to the order. (In the scenario shown below, the user attempted to add a \$9.00 item to the order with a \$50 deposit. A deposit limit of 100% is in place.) If no order deposit limit has been set, items can be added indefinitely.

The screenshot displays the PixelPoint POS interface. On the left, a menu lists items: 1 Caesar Salad (\$3.99), 1 House Salad (\$3.99), 1 Garden Salad (\$3.99), and 1 Greek Salad (\$3.99). The Greek Salad item is highlighted in red. Below the menu is a 'Void Item' button and a summary box showing: Net Total: Tax 1, Final Total: \$16.76, Visa: \$100.00, and Change: \$0.00. The main area contains a grid of menu buttons including Beef Wellington (crossed out), Chicken Wings Plate, Sea Bass Dinner, Turkey Festival, Dinner Special, Sirloin Steak Dinner, and Southern Chicken Dinner. A central dialog box with a yellow warning icon displays the message: 'The total would exceed Deposit limit' with an 'OK' button. To the right of the dialog are buttons for Commands, Pasta Dishes, Kids Menu, Desserts, Non-Alcoholic, Beer, Wines, Cocktails, and Shots. At the bottom, there are buttons for Dine-IN, Member, Print Receipt, Reorder, and navigation arrows. The footer bar shows: # of Cust: 0, Time Seat: 4:54:22 PM, Manually Entere, Last Tip \$0.00, Server Supervisor, Logout, #48, and icons for Finish, Split Checks, Functions, and Leave Table.

## Printing

This chapter deals with all of the printing done through PixelPoint POS. It discusses things like checks, receipts, charge slips, cash out summaries, and all other kinds of print outs.

Printing in PixelPoint can be divided into two types—local printing and remote printing. Local printing is presented first ([Click here](#)) in this chapter and is followed by Remote printing ([Click here](#)). Finally, this chapter includes information about how to print receipts themselves ([Click here](#)).

## Local Printing

The term *Local Printing* refers to printing you do at the local printer (that is, the one that is at the station).

### Checks & Receipts

You can generate both a check and a receipt by selecting [Finish] and then [Print Receipt]. Among the various items shown on these printouts are the quantities, descriptions and prices of the items that were ordered. Items are grouped together in categories like food items, bar items, non-alcoholic items and merchandise items.

The difference between a check and a receipt is that a check is given to the customer before they have paid, so they know what they owe. It therefore contains no information about how the order was paid for. A receipt, however, is printed after the transaction has been settled, and does include information about the methods of payment used. The examples below are typical, but it is possible to change their layout and contents. The printout on the left is a sample check and the printout on the right is a sample receipt.

```

PixelPoint Restaurant
888 Chrislea Road
Vaughan, ON Canada
Table #1
Trans#: 2135 Serv: Supervisor
4/10/2009 2:05 PM # Cust:1
=====
Quan Descript Cost
=====
1 Caesar Salad $3.95
1 Garden Salad $3.95
1 Greek Salad $3.95
1 Mango Passion Salad $4.95
=====
Net Total: $16.80
PST $1.34
GST $1.01
=====
TOTAL: $19.15
Amount Due: $19.15
Food: $16.80
Watch for New
Daily Specials ..
    
```

```

PixelPoint Restaurant
888 Chrislea Road
Vaughan, ON Canada
Table #1
Trans#: 2135 Serv: Supervisor
4/10/2009 2:05 PM # Cust:1
=====
Quan Descript Cost
=====
1 Caesar Salad $3.95
1 Garden Salad $3.95
1 Greek Salad $3.95
1 Mango Passion Salad $4.95
=====
Net Total: $16.80
PST $1.34
GST $1.01
=====
TOTAL: $19.15
Food: $16.80
=====
CASH $20.00
Change $0.85
=====
Watch for New
Daily Specials ..
    
```

### Charge Slips

If using credit authorization (PixelPoint's Authorization Manager), charge slips print at the local printer. Again, although the example below is typical, you can change the layout and contents of charge slips.

```

=====
REF:2131
PixelPoint Demo Rest
Payment Approved
MasterCard
Tab:5
Supervisor 4/10/2009 2:05 PM
=====
Card Num:51
Expiry:0003
Response:Approved
Transaction # 2129
MasterCard
Amount $49.88
TIP : _____
TOTAL : _____
Signature
X _____
    
```

```

=====
** Customer Copy **
PixelPoint Demo Rest
Tab: 5
Supervisor 4/10/2009 2:05 PM
Transaction # 2129
MasterCard
Amount $49.88
TIP : _____
TOTAL : _____
    
```

### Cash Out

An employee cash out report provides detailed information about an employee's activity during the shift. It provides sales-related information, time clock information and statistical information about the number of customers, transactions, voids, discounts and much more. See "Cash Out Report" for more information.

### Clock Out

The clock out slip tells managers when employees clocked in, went on break and clocked out. It needs manager authorization to print.

```

=====
Shift Report
Supervisor
=====
Type      Start Time  End Time  Hours
Shift    4/10/2009  1:58:50 PM  8:08:08 PM  6.15
=====
Total Hours  6.15
=====

```

### Management Reports

Local printers can print management reports, which provide sales, time clock and operational information. To retrieve these, select [Manager], [Sales Functions], and then one of the reports. Access to these reports is generally restricted to managers, however.

### Employee Schedules

If using PixelPoint's Employee Scheduler module, you can print out your schedule for the next one or two weeks. To do this, select [Your Settings] then [Print Next Week's Schedule]. See "Your Settings Screen".

### How To Make

A description of every item on the menu can be programmed into the system. If a description for a given item is available, you can print it by selecting [Functions], [How To Make], and then [Print]. See "How to Make Item" for more information.

### Adjustments

[Your Settings] (See here) has an adjustments section for pay ins, pay outs, pick ups and declaring floats. The local printer prints a receipt slip each time you make one of these adjustments.

### Billboard Lists

The Billboard Screen has three columns, listing the current specials, desserts and sold out items. You can print any of these lists from this screen.

## Remote Printing

The term *Remote Printing* refers to printing done at printers not next to the station you are working on. Remote printers are typically situated in the kitchen and at the bar. Remote printing is done to assist in the preparation of orders.

```

=====
Supervisor
#2140
4/10/2009 1:18 PM Ord#: 1
Table #22 {4}
=====
Dine-IN
Appetizer
A> 1 Chicken Noodle S

```

Information at the top of the remote print identifies the order. The large number (#2140) in the above example is the transaction number. On the next line down is the date and time of the order, along with the *order number*. The next line displays the table number along with the number of guests (in brackets.)

### Sort By Seat

If you use *seating* at your establishment, this may be reflected on the remote print, so that the person preparing the order knows which seat is getting which item(s.)

```

=====
Supervisor
#2137
4/10/2009 12:18 PM Ord#: 1
Table #22 {3}
=====
Dine-IN
Seating 1
1> 1 Chicken Noodle S
1> 1 Beef Tenderloin
=====
Seating 2
2> 1 Carrot & Herb So
2> 1 Spaghetti House
=====

```

### Sort By Report Category Printing Priority

The remote print may be sorted by report category, so that all wines will be together, all beers will be together, and so on.

### Sort By Product Printing Priority

The remote print can be set up to show items in any order the establishment chooses. It can thus decide, for example, that Product Y will print before Product X, but after Product W, or in any other order.

### Sort By Course

If the establishment organizes its menu items by courses, the remote print may reflect this, in that all appetizers will be together, all entrees will be together and so on. The print will sort by course no matter what order items are ordered in. So, Appetizers will print first and will be followed by Main Course items, which will then be followed by Desserts.

### Course Prefixes

If the establishment uses courses, line items on remote prints may start with a course prefix, making it easy to identify which item is an appetizer, which is a main course and which is a dessert. This prefix could be a letter, number, symbol, word or combination of any of these. In the example remote print below, the course prefix has a letter representing the course (A for appetizer, for example) and a number representing the seat that ordered the item.

## Combined Sorts

You can combine any of the above sorts. For example, you can have remote prints sorted by course as well as by seat. In the image below, the prefixes reflect these two sorts; the letter represents the course and the number represents the seat.

```

=====
Supervisor
#2139
10/10/2009 12:30 PM Ord# 1
Table #22 {3}
=====
Dine-IN
Appetizer
A1> 1 Clam Chowder Sou
A2> 1 Greek Salad
=====
Main Course
M1> 1 Pork and Bean Ca
M2> 1 Sole & Shrimp
=====

```

The criteria listed above can be separated on the remote print by a dashed line or a page cut (depending on printer capability). For example, appetizers will print first and will be followed by a separator, then the main courses will print and be followed by a separator, and so on. Remote printing can also be set up to put a page cut separator after every item (not just after each course).

## Print Consolidation

Say a large order prints in the kitchen. The chef needs to know what meats to put on the grill right away. Remote prints may have a consolidation section (which summarizes key products (such as grill items)) for this purpose (see the image below). Anything can be included in the consolidated section (not just whole menu items). Consolidation of an item is activated in the item's programming in BackOffice.

```

=====
Supervisor
#2140
4/10/2009 1:18 PM Ord# 1
Table #22 {4}
=====
Dine-IN
*?*
1 Swiss Steak Cafe
=====
Appetizer
A> 1 Chicken Noodle S
A> 1 Tomato Soup
A> 1 Chicken Noodle S
A> 1 Garden Salad
A> 1 Ranch Dressing
=====
Main Course
M> 1 Pork and Bean Ca
M> 1 New York Strip S
M> 1 New York Strip S
=====
Dessert
D> 1 Butter Tart
D> 1 Butter Tart
D> 1 Butter Pecan Tar
D> 1 Butter Pecan Tar
=====
=== CONSOLIDATED ===
Tomato Soup 1
Garden Salad 1
Pork and Bean Casser 1
New York Strip Steak 2
Butter Tart 2
Butter Pecan Tart 2
Chicken Noodle Soup 2
=====

```

## Filter By Sale Type

Your establishment may have separate printers for different types of sales. For example, it may have one printer for Dine-In meals and one printer for Take-Out meals.

If this is the case, the system determines which printer to send the meal to based on the sales type selected when the order is placed. There will be a sales type button on the Order screen. Make sure it is set to the appropriate sales type to ensure that the order goes to the right printer. Otherwise, a customer seated at a table may get a meal in a box instead of on a plate.



## Printing Receipts

The receipt contains a header (which probably includes the name and address of your establishment) and a footer (containing something like a message of thanks from your establishment). It also contains information regarding the table, server, time and date of service. The main body of the receipt contains all chargeable items, their quantities and prices. Under this is the total before taxes, each applicable tax and the final total. If other charges, such as discounts or gratuities were applied, they will be shown as well.

Chargeable items are grouped so that all food is together, all non-alcoholic beverages are together, all merchandise items are together, and so on.

```

PixelPoint Restaurant
688 Christie Road
Vaughan, ON Canada
Table #1
Trans: 2135 Serv: Supervisor
4/10/2009 2:27 PM # Cust:1
=====
Quan Descript Cost
-----
1 Caesar Salad $3.95
1 Garden Salad $3.95
1 Greek Salad $3.95
1 Mango Passion Salad $4.95
-----
Net Total: $18.80
PST $1.34
GST $1.01
=====
TOTAL: $19.15
Food: $18.80
=====
CASH $20.00
Change $0.85
=====
Watch for New
Daily Specials ..

```

---

**Note:** The receipt layout at your establishment may not match the example above. It is customizable.

### To print a receipt:

1. Select [Finish]; this presents the Finish Check screen.
2. Select [Print Receipt] to print the guest check.
3. Select the logout button located in the lower-left corner of the screen to log out. Present the check to the customer.

### To Re-Print a Receipt:

If the check has not been settled:

1. Open the check.
2. Select [Finish].
3. Select [Print Receipt]. The guest check prints with the word REPRINT on it (indicating that this check was also printed earlier).

If the check has been settled:

1. Select [Your Settings] from the Table Layout screen.
2. Select [Your Trans].
3. Select [Show Closed Transactions].
4. Select the closed check from the list.
5. Select [Print Receipt].
  - If you know the transaction number, you can skip steps 4 and 5 by selecting [Print Receipt By #] and entering the transaction number.
  - You may need management authorization to re-print a receipt.

---

**Note:** The word REPRINT will appear on the print.

## Advanced Types of Orders

Orders can be less straightforward than those discussed in the previous chapter. This chapter contains various topics explaining how orders can have many further variations. For example, some products are not added to orders by pressing buttons on the touch screen, and sometimes one product may have different prices at different times of the day. The contents of this section are:

- Barcodes & PLUs
- Members
- Member Screen
- Price Levels
- Product Types
- Rentals
- Selling Gift Cards
- Weighed Items

## Barcodes & PLUs

Sometimes there is an easier way to order an item in PixelPoint POS than to press a button specifically devoted to that item (because there are too many similar products to have buttons for all of them on one menu, for example.) Barcodes and *PLUs* are often used in these cases.

PixelPoint POS can be configured to interface with barcode scanning devices and can be set up to scan different kinds of barcodes. The different types of barcodes are discussed individually below. An alternative to barcodes, *PLUs*, are discussed at the end of this section.

A barcode scanner is needed for any of the barcode functions to work. You must also have a printer capable of printing barcodes in order for transaction barcodes to print.

### Product Barcode

When you scan an item on the Finish screen, the system retrieves the product record containing the corresponding *UPC* and adds the item to the transaction. This capability means that PixelPoint is fully able to function in a large-scale retail environment.

### Coupon Barcode

When you scan a coupon on the Finish screen, the system retrieves the coupon record containing the corresponding *UPC* and applies the discount to the check

### Transaction Barcode

Your establishment can have the customer check set up to print with a barcode that matches the transaction reference number. When you scan the barcode on the check, the system retrieves the transaction on the screen. This is often useful in situations and job positions like:

- Cashiers retrieving guest checks.
- Servers applying charge tips.
- Delivery drivers selecting orders to be taken.

### Authorization Slip Barcode

If the slips that print when a transaction is settled by credit card have a barcode on them, you can scan them at a station and the Add Tips screen will automatically open with the transaction loaded (provided your system is configured to do this.) This makes it very easy to add charge tips without having to sort through many transactions. See "Tips" for more information.

### PLU Numbers

An alternative method of adding products to orders, besides individual buttons for each one and besides scanning barcodes, is to enter a product reference number. Establishments with extensive wine lists often do this; they will have a menu or list containing all of the wines they offer, with a reference number printed next to each one.

A function button, [PLU Lookup], can be applied to the order template to enable you to order items using their reference number. A keypad displays when you select this button. Enter the reference number and select [OK]. The product with the corresponding reference number will be applied to the check.

## Members

You can apply members to your PixelPoint POS system. Members are used for a variety of functions:

- Incentive Programs
- House Credit
- Reservations
- Delivery Orders
- Take Out Orders

You can retrieve member information by last name, phone number or member card/number, by using the Member Screen. If the member has a card, you can associate them with a transaction simply by swiping the card while the check is up on the screen.

### Incentive Programs

Some establishments like to track customer purchases and reward them with discounts or merchandise. You can do this by giving menu items point-values—a number of points that members earn for ordering each item. When you apply a member to a check, all of the points earned from the products the member ordered are then added to that member's account. Upon reaching specified point amounts, the member becomes eligible for certain incentives. For example, an establishment could have an incentive where customers can redeem 500 points to get something like a 25% discount off a meal.

### House Credit

There are two forms of house credit that can be applied to members. One is on a *gift card*, which is given to a customer with a pre-paid dollar value applied to it. The card is used as a method of payment, depleting the funds that were pre-purchased. The customer can replenish the card funds at any time and, even if the balance reaches zero, the card can still be used to retrieve the member record and apply points for incentive programs.

The second form of house credit is a *house account*. Members are granted a line of credit with the establishment. They pay "On Account" and can be billed monthly. The member can also apply payments at their convenience. The account has a credit limit and the balance is recorded and updated as purchases are applied to it.

### Ordering

When a customer calls in a reservation, delivery order or take out order, the establishment will need you to provide a name, phone number and perhaps further information. Since you are taking this information down anyway, it only makes sense to apply it to a member account. One member account can be applied to all of these forms of ordering.

### Member Groups

Different members can belong to different groups and, in so doing, acquire different incentives within the system. Member groups may differ in any of the following:

- **Price:** A member of one group may pay a different price for the same item ordered by the member of another group.
- **Points:** A member of one group may acquire 10 points for the same item that a member of another group may acquire 20 points for.

- **Discounts:** A member of one group may have a coupon automatically applied to a check simply because of the group they belong to, whereas a member of another group does not get this benefit.
- **Tax Exemption:** A member of one group may be exempt from a particular tax that a member of another group has to pay.

Because different groups may have different incentive settings applied to them, make sure you apply the member to the proper group.

---

**Note:** PixelPoint's Authorization Manager module is required for any member activity involving the application of credit, such as gift cards and house accounts.

## Member Screen

There are several tabs on the member screen. This section discusses the buttons found along the blue toolbar at the bottom of all of the tabs, as well as the content of each of the tabs.

**Scott Dunlop**

Info	Statistics	Other	Future Orders	Order History from... <input checked="" type="checkbox"/>	Available Funds: \$545.00 Amount Due: -45.00
------	------------	-------	---------------	--	---

**Contact**

First Name: <input type="text" value="Scott"/>	Home Phone: <input type="text" value="(905)122-3344"/>
Last Name: <input type="text" value="Dunlop"/>	Business Phone: <input type="text" value="(905)264-4700"/>
Company Name: <input type="text" value="Scott Enterprises Inc."/>	Cell Phone: <input type="text" value="(905)323-3323"/>
Member Group: <input type="text" value="Business"/>	Email: <input type="text" value="scott@website.com"/>








Is Gift Certificate

**Address**

Address: <input type="text" value="234 Duffy Drive"/>	City: <input type="text" value="Toronto"/>
Unit No.: <input type="text"/>	Prov/State: <input type="text" value="Ontario"/>
Buzzer Code: <input type="text"/>	Postal: <input type="text" value="L4L 3L4"/>
Delivery Zone: <input type="text" value="Zone A"/>	Country: <input type="text" value="Canada"/>

Directions: North on highway 400 to King Road. East 5km to the Thompson Sideroad. Go North 2km to Duffy Drive. Turn right and go East 1km. Large blue house with white trim.

**Ship To: Same As Info**

 Cancel	 Keyboard	 New Member	 Card Find	 Last Name Find	 Company Find	 Telephone Find	 Use Member
--	--	--	---	--	---	--	--

### Toolbar Icons

**Cancel:** Exits you from the screen.

**Keyboard:** Can be used to enter characters into a text field for data entry. You can also simply touch the desired field and type in the information using the keyboard window that launches.

**New Member:** Adds a new member.

**Card Find:** Retrieves a member record when you swipe a member's card.

**Last Name Find:** Enables you to find a member record by inputting the last name. You can specify a partial name by typing in the text box, or you can search through the entire list of members by selecting the [Last Name Find] button on the screen that displays.

**Company Find:** Shows all companies that have members assigned to them. If more than one employee works for a company, a member list will follow the company list. The Company Find feature searches POS Company Name and Company fields in BackOffice Member Setup.

**Telephone Find:** Retrieves a member record when you enter a phone number.

**Use Member:** Applies the member record to the check.

## Info Tab

The Info tab contains basic information about the member, such as member name, address and phone number. Along with this is delivery information, such as the zone in which the address is located and directions to the customer's residence. Other information includes the member group the customer belongs to, the company they work for (in the event the establishment bills the company for its employee transactions) and their e-mail address. There is also a checkbox indicating whether this is a Gift Certificate/Card account.

To enter information, simply touch the field you want to edit; this presents the keyboard screen. The area in the bottom right shows the amount of credit available and the amount the member currently owes.

Most of the fields on this screen are self-explanatory, but some need explanation:

### Delivery Zone

Delivery destinations can be divided into zones, so drivers can more easily take or be given orders in one general area, rather than taking them at random.

### Directions

Driving instructions to get to the customer's residence. This information is included on the bill so the driver can use it when delivering orders there.

### Member Group

Members are often part of groups like Seniors and Students. The establishment decides what member groups it wants to have, and you choose from them when creating the record. Member groups enable the establishment to adjust pricing levels by member group. See "Price Levels" for more information.

### Company Name

Members can be associated with a company. For example, say the staff of a nearby company frequently dines at your establishment. You can set these people up as members and associate them with their company. You could then invoice the company each month for meals ordered by its staff, making it easier for your billing system, as well as the members who dine at your establishment.

### Is Gift Certificate

If you are creating the member account because the member has purchased a gift card, check this box. It tells the system that this member does not have a credit membership (but instead has a gift card membership).

With gift card memberships, customers pre-pay for transactions that have not yet taken place. When a transaction does take place, later on, funds are accessed through the gift card and are withdrawn from the account's balance.

With credit memberships, the establishment gives a credit limit to the member. The member, in turn, is invoiced for transactions applied to their account. Order transactions do not reduce a pre-paid balance, but are added on to a total that the member will pay later.

Both types of accounts need PixelPoint's Authorization Manager module to function.

## Ship To Tab

Displays addresses for shipping orders to this member. Some people may not want orders shipped to their home or billing address, but may want them shipped instead to some place like their office or a warehouse location. Note that this tab may not be available on your system.

By default, [Same As Info] is selected on this tab; this means that there is no separate shipping address for the member and that orders should be sent to the address on the "Info Tab". If there are shipping addresses programmed in to the system, they will be listed as buttons below [Same As Info].

You can enter a shipping address on this tab by filling in the contact information fields on it.

Select [New] to add an additional shipping address. Select [Save] when you are finished. [Remove] deletes this particular shipping address.



## Statistics Tab

The Statistics tab shows statistical information about the customer. The "Current Points" field shows how many client retention points the member has. This number, along with other member information, is printed on the receipt.

"Internal Memo", on the right, is an editable field that can contain extra information.

**Scott Dunlop**

Info	Ship To	<b>Statistics</b>	Other	Future Orders	Order History	Available Funds: \$500.00
					<input checked="" type="checkbox"/>	Amount Due

Member Since	5/3/2010 12:26:25 PM	Internal Memo 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.
Current Points	1500	
# of Deliveries	1	
# of Visits	4	
Last Order Date	9/22/2011 5:08:45 PM	
Last Visit Date	9/22/2011 5:12:39 PM	
Amount Due		

Cancel    New Member    Keyboard    Card Find    Last Name Find    Telephone Find    Use Member

## Other Tab

The Other tab contains further information that can be applied to a personalized card. You can see a digital photograph of the customer (if there is one in the system), assign a swipe card to the member record, and associate the member with a company in the event the company is to be invoiced for the member's On Account purchases.

The screenshot displays the 'Other' tab for member Scott Dunlop. The interface includes a navigation bar with tabs: Info, Ship To, Statistics, Other (selected), Future Orders, Order History, and Available Funds: \$500.00. The main content area features a digital photograph of the member, a 'Picture' button, and an 'Assign Card' button. To the right of the photo, there are fields for 'Company' (ABC Company), 'Ref Code', and a 'Date' section with three date pickers: Birth Date (01/14/1963), Anniversary Date (04/01/2010), and Expiry Date (04/28/2030). A bottom toolbar contains icons for Cancel, New Member, Keyboard, Card Find, Last Name Find, Telephone Find, and Use Member.

This tab also enables you to specify calendar dates that concern this member. There are three different dates. The first of these is the member's birth date, which is self-explanatory. The two other dates are explained below.

### Anniversary Date

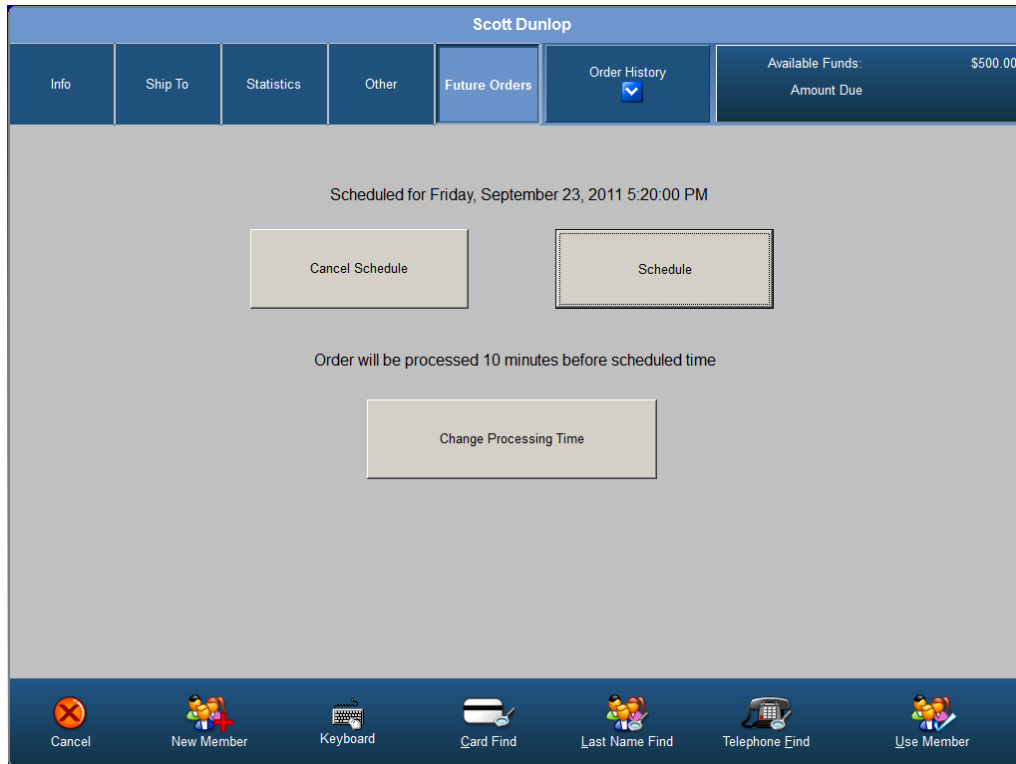
This is the date when the member record was first created. The system automatically enters it for you.

### Expiry Date

If the membership is canceled or expires for any reason, you can modify this date (which is entered automatically when you first create the record) to reflect when the membership ended.

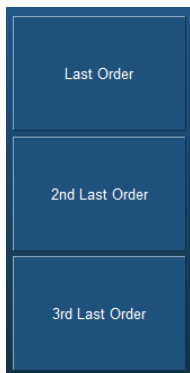
## Future Orders Tab

The fourth tab enables you to schedule the current transaction as a future order, instead of having the order made immediately. When associating a member to a future order, go to this tab and select [Schedule] (if available). Follow the instructions to determine when the customer needs the order ready. Using this feature, you can order meals hours or even days in advance of processing the order. Since it is available to members only, the Future Orders feature is one advantage of having member accounts.

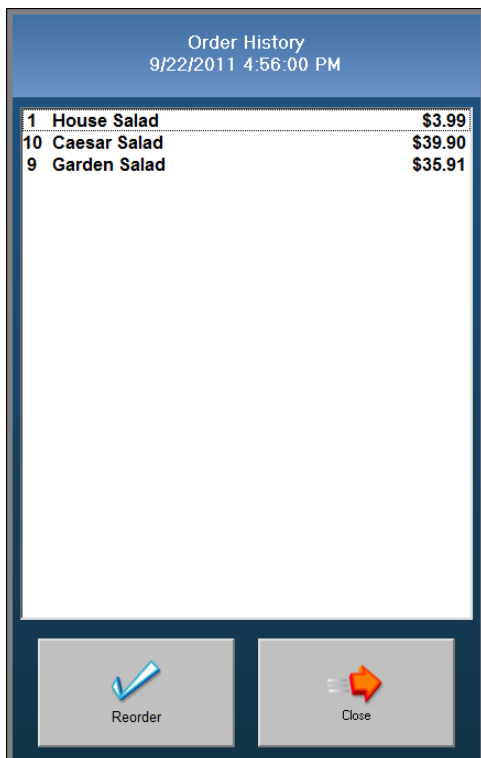


## Order History

The three blue buttons that appear when you select [Order History] contain information about the last three meals the member has ordered (provided that the member was applied to each of them).



Selecting one of the buttons that display when you select [Order History] brings up a window that provides details about the contents (and time) of the order. This window also has a [Re-Order] button that automatically adds selected items to the current check.



## Price Levels

PixelPoint can be set up so that products have different prices in different situations. When one of these situations is in effect, you may find that the price of an item or group of items has changed from its "regular" price. These differences in pricing are called Price Levels.

One common event where you would find a difference in pricing is "Happy Hour". This is a period in which many establishments reduce the price of their alcoholic beverages in an effort to draw more customers. A price level can be scheduled to start and stop at specific times, like with Happy Hour, or to apply all of the time (like, for example, with student discounts, which usually apply no matter what time or day it is).

### Price By Report Category

In this situation, prices are different for items in a particular *report category* or group of categories, and they are usually different only for a certain period of time. For example, Happy Hour is usually an hour or two long and applies to liquor items only.

### Price By Member Group

In this situation, prices are different for a particular *member group*; at some establishments, certain kinds of people get special pricing all of the time, or during a certain period of time. For example, students often get discount pricing. By applying a student member to the check, the prices would be less than they would be if a non-student was ordering. Seniors are another member group that often gets special pricing.

### Price By Station

In this situation, prices are different depending on the *station* the item was ordered from. For example, in establishments that offer both casual and fine dining, the stations in casual dining may offer a coffee for \$1, whereas the stations in fine dining may offer that same coffee for \$2.

### Price By Sale Type

In this situation, prices are different depending on how items are sold (their *sales type*.) For example, establishments that offer both delivery and sit-down dining may increase prices for delivery orders in order to take the cost of delivering the food into account.

## 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 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

A *modifier*; something that modifies other products (typical modifiers are things like condiments, sauces, etc..) Options may or may not carry a price. If the option does not have a price, it will not print on the receipt (unless individually set to do so in its advanced programming.) 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 by selecting [Send Command] on the Table Layout Screen; the system asks you to select the desired table and then a 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 Product

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

### 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 could select the appetizers, select "Delay" (which, say, is set for 10 minutes), and 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 or can be based on the preparation time of the ordered items. 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.

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.

### **Merchandise**

A retail item. It is selected by using a barcode scanner rather than the touch screen. Upon scanning the barcode, the item will appear on the check. Merchandise items print on the receipt. "Large Polo Shirt" is an example of a merchandise item.

### **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 to keep 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] 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. See "Post Inventory Usage" for information about this function.

### **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 select '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.

## Rentals

One of the types of products in PixelPoint POS is called a Rated Item (See "Product Types").

A rated item is an ordering product without a set price. Its price is instead determined by how long the item is used. The longer the item is actively in use, the greater the price.

Some examples of rated items are:

- Pool Tables
- Bowling Lanes
- Internet Access

The remainder of this section takes you through an example of how you would typically use a rated item in PixelPoint POS. Say two customers enter the establishment wishing to play pool (billiards). You:

1. Open a check and select [Pool Table]. This starts charging the customers for using a pool table.
2. Soon afterward, you return to the check and you see that it shows the product with the price of \$0.33.

1	Pool Table	\$0.33
---	------------	--------

3. Returning to the check later on, you see that the price of the rental has now increased to \$23.33.
4. The customers decide to stop playing and one of them orders something to drink.
5. You select [Functions], then [Stop All Timers]. This halts the timer where it is. You also add the beverage to the order.

1	Pool Table	\$23.33
1	Canadian Mountie	\$5.00

---

**Note:** Timers can also be stopped by selecting [Print Receipt].

6. After finishing their break, the customers decide to play pool some more. The server selects [Pool Table] again and a new entry is added to the check. Its price starts to accumulate just as the first entry did.

1	Pool Table	\$23.33
1	Canadian Mountie	\$5.00
1	Pool Table	\$3.33

7. When the customers decide to stop for the night, you settle the transaction the way you normally would (just as if the order only contained ordering products). (See "Settling A Check".)



## Selling Gift Cards

A gift card (or gift certificate) works much like a credit card in that you can pay for all or part of an order or sale using the balance on the card. The difference however, is that the balance is pre-purchased (usually by someone else). By using the card, you deplete those pre-purchased funds.

Once the funds are depleted however, the card may still be used for points in *incentive programs*. The funds can also be replenished at any time.

In a situation where a customer wishes to use a gift card as partial payment, PixelPoint pre-authorizes up to the maximum amount allowable on the card. For example, say a customer named Joe pays using a gift card. The total is \$100 but he only has \$80 in available funds. Rather than reject the entire payment, PixelPoint will accept the \$80 as partial payment, leaving the remaining \$20 outstanding for an alternate method of payment.

PixelPoint uses a "gift card wizard" to simplify the selling process. The advantage of the wizard (aside from obvious simplicity) is that you can sell multiple gift cards in a single transaction. It also has the added benefit of applying to an existing check, rather than making you open a blank one.

### To Sell a Gift Card:

1. Go to the Finish screen and select [Gift Card].

2. Select a value by using one of the pre-set buttons or [Enter Amount].
3. If you want to apply the gift card to a specific member record, click on [Select] to bring up the member screen. If you are assigning it to a gift card record, simply swipe it. If the gift card does not have a magnetic strip, select [Manual Enter] to assign a number.
4. At this point, you can repeat the process to create another gift card. You can keep doing this, for many cards, in a single transaction.
5. Select [Finish] when you are done. PixelPoint takes the information, processes the member/gift card records and applies the selected balances to their respective accounts.

The system returns you to the Finish screen when it is finished. Each gift card record is applied as a separate tender entry and displays both in the Totals window and in the Payments window that opens when you select [Payments] (See the image below). In addition, the total sum of all of the card values is added to the check and displays in the "Amount Due" window.



Payments	Amount	TIP	AuthCode
On Account	-25	0	2231
On Account	-25	0	2232
On Account	-25	0	2233
On Account	-50	0	2234
On Account	-50	0	2235
On Account	-95	0	2236

**To replenish a card balance:**

1. Open a new check.
2. Select [Finish].
3. Enter the desired amount to be added to the Gift Card.
4. Select [On Account] as the method of payment.
5. Select [Yes] when the confirmation window displays.
6. Swipe the gift card when the system asks you to assign the swipe card.
7. Select [Yes] after the system locates the member record and displays the confirmation window prompt.
8. Have the customer sign the credit sales slip when it prints.
9. Close the check to the desired method of payment.

The revised balance is applied immediately.

## Weighed Items

Some items are priced based on their weight. In such situations, you need a weight scale. You can use weighed products in PixelPoint POS with the weight scale either interfaced to the PixelPoint system or as a separate component.

The programmed price of a weighed item is how much one unit of a certain weight costs. The unit can be any kind of weight measurement; it can be in the Metric or Imperial system, and it can be large or small (ounces or pounds, grams or kilograms, etc.). The only requirement is that the unit the price is based on must be one that the scale displays.

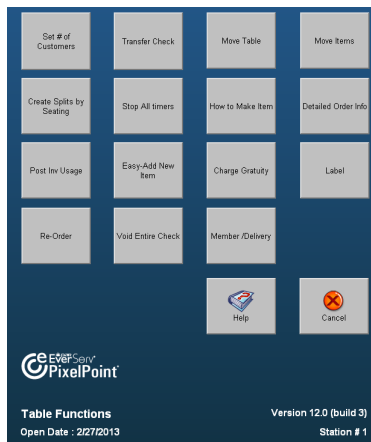
The price that each customer pays for the item depends on how much of the item they order. The weight scale determines the quantity. For example, say that a kilogram of meat costs \$2. You weigh the amount of meat the customer wishes to buy and the scale shows "1.25 kg". The price that the customer would pay for the meat is \$2.50 ( $2 \times 1.25$ ).

If the scale is interfaced to the PixelPoint system, the quantity/weight is automatically applied when you select the product. To order a weighed item in this case, you simply place the item on the weight scale and select the appropriate product on the Order Screen.

If the scale is not interfaced to the PixelPoint system, you must apply the quantity/weight using the quantity button. To do this, you simply select [ $@1$ ], enter the weight shown on the scale using the keypad that displays, and then select the appropriate product from the Order Screen.

## Functions Menu

There are many different ordering functions available to you when you place the order. You can access many of these from the Order Screen by selecting [Functions]. Others may be found on the Order Screen itself, if your system is configured for them.



Listed at the bottom of the Functions Menu is pertinent information about your system. You will find the version number of the PixelPoint system in the bottom-middle of the window. You may need this if corresponding with a software support representative.

The "Open Date" is in the bottom-left of the window, indicating the date your transactions are being posted to. In the event that the End of Day process was not run the previous night, you may notice that the Open Date is set to the day before even though the prints and receipts show the current date. If you notice that this date is different from the current date, you should notify your manager.

The station number in the bottom right corner identifies which station you are currently on.

---

### Table Functions Menu Buttons

The following Table Functions Menu buttons are explained in the chapters that follow:

#### General Order Functions

- How to Make Item
- Charge Gratuity
- Label

#### Table Service Functions

- Set Number of Customers
- Transfer Check
- Move Table
- Move Items
- Create Splits By Seating
- Detailed Order Info

#### Quick Service

- Member Delivery

#### Bar Service

- Stop All Timers
- Re Order

#### General Manager Functions

- Post Inventory Usage
- Easy Add New Item
- Void Entire Check

#### Extra Functions

- Product Search
- Label CC Name
- Keep CC

## How to Make Item

### Order Screen / Functions / How to Make Item

This function provides item information for a selected product. Depending on what your establishment has put in to the system, [How to Make Item] may contain preparation instructions, nutritional content, allergy-related information and much more. If your establishment has not put in any information for a product, this function will not work when that product is selected.



#### To use How to Make Item:

1. Open the check.
2. Select the item you wish to get information about.
3. Select [Functions].
4. Select [How to Make Item]. A window displays, showing an image of the item and a detailed description. [Print] enables you to print the information.
5. Select [OK] to return to the Order Screen.
  - If you do not wish to order the item, select [Void] to remove it.

You can also use the [Sold OUT Item] and [Sold IN Item] buttons on this screen to flag items as one or the other when you look up their product information. For more information about these buttons, see "Product Functions".

## Charge Gratuity

### Order Screen / Functions / Charge Gratuity

In some cases with larger parties, gratuity is added to the check.

#### To add a gratuity:

1. Select the table.
2. Select [Functions].
3. Select [Charge Gratuity].
4. Enter the percentage (of the Net Total) to apply to the check. For example, "13.5" = 13.5%
5. Select [OK].

When you go into the Finish Screen you will see a gratuity added to the check (the difference between the "Final Total" and "Total (w/TIP)" values). It is also included on the printed receipt.

Net Total :	\$19.75
PST	\$1.58
GST	\$1.19
=====	
Final Total :	\$22.52
Total (w/TIP) :	\$25.48

The system does not require that the suggested total ("Total (w/TIP)") be paid, only that the "Final Total" be paid. However, if your local laws permit it and your establishment wishes to enforce the total with tip, PixelPoint can do this.

Your system can also be programmed to automatically calculate an amount for the gratuity. If it is programmed this way, you will not need to follow the steps above (unless you need to change the amount of gratuity), but your Order Screen and Finish Screen will already show a "Total (w/TIP)" line.

## Label

### Order Screen / Functions / Label

When working with saved checks, a label can make it considerably easier to find the particular one you want. The system assigns a reference number to each saved check; however, you can replace this number with a text label, such as the customer's name, to help you find the check later.

#### To apply a label:

1. Select [Functions] when the saved check is on the screen.
2. Select [Label].
3. Enter the desired label text.
4. Select [OK].

Table #	Transaction	Total	Since order
Q#1	2133	\$44.34	2 min
Q#1	2161	\$9.00	2 min
Q#1	TOM HURRY	\$32.89	2 min
#7	KIRK LANGST	\$35.17	1 min
#19	2164	\$10.14	0 min
#19-2	2165	\$4.51	0 min

When you return to the check, you will see the label in the center of the black status bar on the Order screen. You will also see the label on the Transaction View Screen and the Split Checks screen (See here).

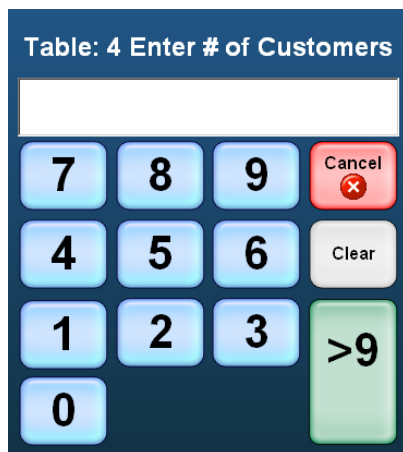
## Set Number of Customers

### Order Screen / Functions / Set # of Customers

In *Table Service* mode PixelPoint prompts you to enter the number of customers when you open the table. In *Quick Service* mode it will assume a customer count of one. If you want to change the number of customers at a table, or you want to make a quick check order for more than one person, you can use this function to do so.

#### To change the number of customers:

1. Open the check.
2. Select [Functions].
3. Select [Set # of Customers].
4. Enter the new number of customers.
  - If the number is greater than 9, select [>9] before entering the number. Then press [OK].



When you enter the number on the keypad, the "# of Cust:" field on the Order Screen status bar changes to reflect that number.

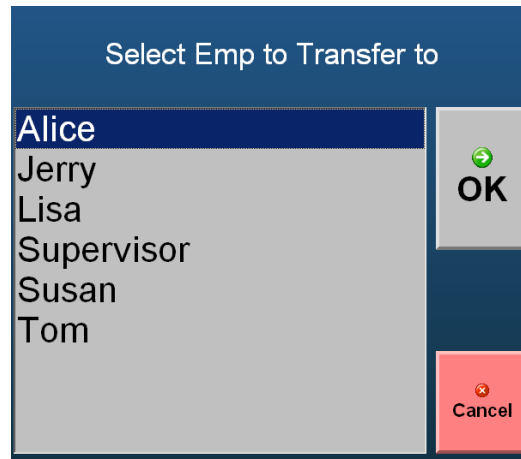
# of Cust: 1      Time Seat: 1:54:33 PM



## Transfer Check

### Order Screen / Functions / Transfer Check

This function transfers the check to another server.



#### To Transfer a Check:

1. Open the check.
2. Select [Functions].
3. Select [Transfer Check].
4. Select the person you wish to transfer the check to; (s)he must be clocked in.
  - You may need management authorization at this point.

The table's icon on the Table Layout screen becomes transparent, indicating that it belongs to another server. This also means that the server who received the check will be credited with the sale when it is settled.

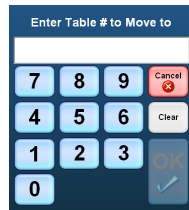
## Move Table

### Order Screen / Functions / Move Table

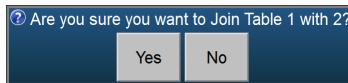
Customers do not always stay at the first table they sit down at, and sometimes they move to join people seated at another table. You can use this function to handle either situation.

#### To move a check to another table:

1. Open the check to be moved.
2. Select [Functions].
3. Select [Move Table].
4. Enter the table number you are moving the check to and select [OK].



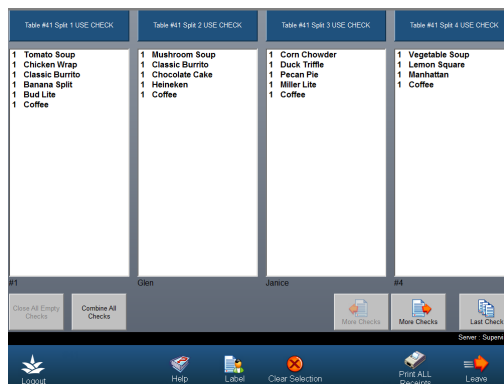
If there is no one at the table you are moving the check to, the system returns you to the Table Layout screen and moves the check to the new table. If there is someone at the table you are moving the check to, the system asks you to confirm that you would like to join the tables. Select [Yes] to merge the two checks together and [No] to cancel the move function.



Though the orders will be merged into one check, they will still remain in the form they were when brought across.

<b>Seat 1</b>	
1 Caesar Salad	\$3.95
1 Earthquake	\$5.00
<b>Seat 2</b>	
1 Chicken Chilli	\$9.95
1 Coffee	\$1.25
<b>Seat 1</b>	
1 Clam Chowder Soup	\$3.95
1 Fillet of Cod	\$7.95
1 Blue Hawaii	\$5.00
<b>Seat 2</b>	
1 House Special Spaghetti	
1 Bourbon: Knob Creek	\$4.00

In the example above, seat numbering was used at both tables. Upon joining the two tables, the seat numbers and their respective orders remain intact. This makes things very easy if you need to split the check; each seat will be put into its own split, as shown below.



## Move Items

### Order Screen / Functions / Move Items

If you mistakenly place an order on the wrong table and you wish to move the item(s) to the proper table, you can use the Move Items function.

#### To move items to another table:

1. Open the check containing the item(s) to be moved.
2. Select [Functions].
3. Select [Move Items].
4. Enter the table number you wish to move the item(s) to. A Split Checks screen displays, showing a check for each table.

Table #1 Split 1 USE CHECK	Table #2 Split 1 USE CHECK
<b>Seat 1</b>	<b>Seat 1</b>
1 Garden Salad	1 Fillet of Cod
1 Ranch Dressing	1 Coffee
1 Carrot & Ginger Soup	<b>Seat 2</b>
<b>Seat 2</b>	1 Blackened Salmon
1 Mango Passion Salad	1 Beam Me Up Scotty
1 Mushroom Soup	

5. Select the item(s) you wish to move. The system highlights items as you select them.
  - If you select the wrong item, select [Clear Selections] to try again.
6. Touch the check for the table where you want the items to go.
7. Select [Leave] to return to the Table Layout screen when you see that the items have appeared on the right check.

---

**Note:** You will need management authorization if you are moving an item after the receipt has been printed.

## Create Splits By Seating

### Order Screen / Functions / Create Splits By Seating

Say that you have been working on an order and have applied seat numbers. The customers now tell you that they would like separate checks. As an enhancement to applying Split Checks, PixelPoint developed the [Create Splits By Seating] function. This enables you to instantly split the check by each seat.

Table #44 Split 1 USE CHECK	Table #44 Split 2 USE CHECK
<b>Seat 1</b>	<b>Seat 2</b>
1 Gilled Halibut	1 Garden Vegetable Soup
1 Bruschetta	1 House Special Salad
1 Appletini	1 Side Ribs (Half Rack)
	1 Tea

#### To create a split check for each seat:

1. Open the check.
2. Select [Functions].
3. Select [Create Splits By Seating].
4. The Split Checks screen displays with individual checks already made. Each split contains items that one customer ordered.
  - This function will not work unless seating has been applied.
5. Select [Leave] to return to the Table Layout screen.

Customers may not want a separate check for each and every seat. Sometimes they want some seats combined. For example, one person may be buying for someone else, but not for a third or fourth person at the table. If you want to combine any of the seats, you can move a seat's items from one split to another. Say you want to combine seats three and four.

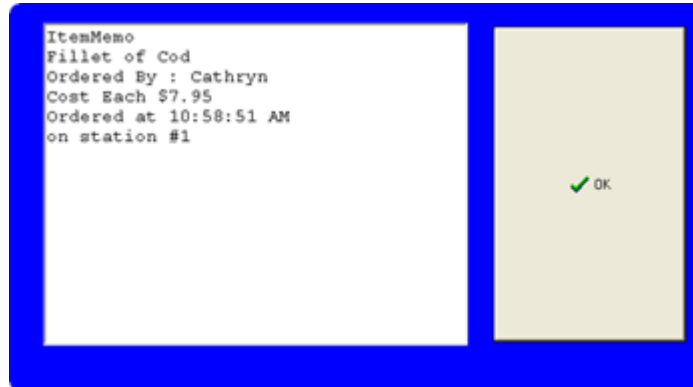
#### To combine split checks:

1. Select the bar labeled "Seat 3", located at the top of Split 3's item list.
2. Touch the white area around Seat 4's item list. All of the contents of Seat 3's split move to Seat 4's split.
  - To move an individual item instead of the whole order, select only the item—not the seat title.
3. Settle Seat 3's split to \$0.

## Detailed Order Info

### Order Screen / Functions / Detailed Order Info

This function provides detailed information about the ordering of a selected item.



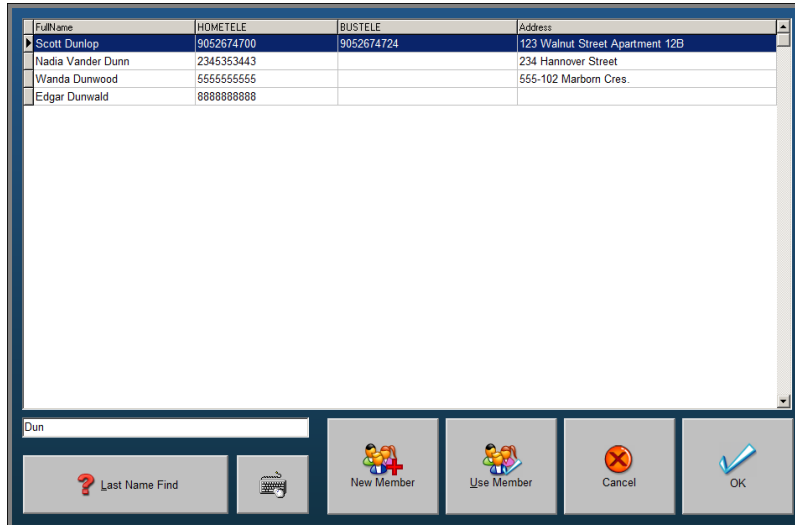
#### To use Detailed Order Info:

1. Open the check.
2. Select an ordered item.
3. Select [Functions].
4. Select [Detailed Order Info]. The Detailed Order Info window lists the name of the server who placed the order, the time it was placed, the station it was placed at, and its cost.
5. Select [OK] to close the window.

## Member/Delivery

### Order Screen / Functions / Member/Delivery

This function can be used to look up, add, and modify a member's account, as well as to associate a member with a check.



**Tip:** Use the *QuickMember* policy in BackOffice to configure the method of lookup. The *StrictQuickMember* policy can be used to return the user to the previous screen instead of the Member form when they select the cancel button and when *QuickMember* is set to something other than 0 (Normal Delivery).

### Member/Delivery Buttons

**Last Name Find:** Lists all of the members in the database (if no text has been typed into the text box above it). Typing text in the text box narrows down the results returned by the button.

**Keyboard:** Displays a keyboard, enabling you to use a touch screen to type in the last name of the member you want to find.

**New Member:** Takes you to a blank member record on the Member Screen, enabling you to create a new member.

**Use Member:** Associates the selected member with the check and returns you to the Order Screen.

**Cancel:** Takes you to the Member Screen, with the "Member Default" record showing, if no member is associated with the check. If a member is associated with the check, the screen shows that record.

**OK:** Opens the selected member's record, taking you to the Member Screen and enabling you to make changes to it.

Each Member Screen tab is described in the "Member Screen" section.

## Stop All Timers

### Order Screen / Functions / Stop All Timers

This function stops the timer on a rental item (such as a pool table, bowling alley or golf clubs) (See "Rentals" for more information).

1	Pool Table	\$23.33
1	Canadian Mountie	\$5.00
1	Pool Table	\$3.33

#### To Stop a Timer:

1. Open the check.
2. Select [Functions].
3. Select [Stop All Timers]. The system returns you to the Order Screen and halts the timer. The rental amount displays on the check.

---

**Note:** Printing the customer receipt also stops the timer.

If you want to rent the item again, simply select it from the Order Screen again. The rental will appear on a separate line on the check each time you select it.

## Re-Order

### Order Screen / Functions / Re-Order

Say that a group of people have ordered their drinks and now request "another round". Rather than taking the whole order all over again, you can simply use the Re-Order function to retrieve a list of what has been ordered. By selecting the desired items on this list, you can send a fresh order of these items to the bar (or kitchen).



#### To Reorder Items:

1. Retrieve the check.
2. Select [Functions].
3. Select [Re-Order].
4. Select the items you wish to re-order.
5. Select [Re-Order].

The system returns you to the Order Screen and adds the selected items to the check. You can then select additional items before sending the order.



## Post Inventory Usage

### Order Screen / Functions / Post Inv Usage

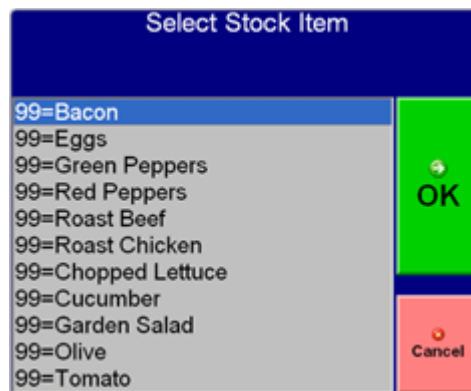
Recipes for ordering products can be programmed into PixelPoint; ordering one of these products depletes the stock items used to make it. For example, say your establishment offers a Cheese Sandwich and that the recipe for this product is:

- 2 slices of bread
- 1 slice of cheese
- .5 ounce butter
- .5 ounce mayonnaise

Every time someone orders a Cheese Sandwich, these items are depleted from your inventory (in these quantities). However, there may be situations when you need to deplete inventory for things other than recipes. Post Inventory Usage enables you to do this.

---

**Note:** PixelPoint's inventory system, StockBoy, is required for this function to work.




---

## Buffet

One common situation where you would use Post Inventory Usage is a buffet. No two plates of food are exactly the same in a buffet so no set recipe can be applied.

### To apply inventory to a buffet:

1. Open a new check.
2. Set the number of customers as 0.
3. Select [Functions].
4. Select [Post Inv Usage].
5. Select one of the items used in the buffet from the list of stock items that displays.
6. Enter the quantity that was used for the entire buffet. PixelPoint applies the stock item to the check in the quantity you specify.
7. Repeat steps 3-6 for each inventory item used in the buffet.
8. Select [Finish] after entering all of the stock items that were used in the buffet.
9. Settle the check to \$0; PixelPoint automatically adjusts the inventory levels.

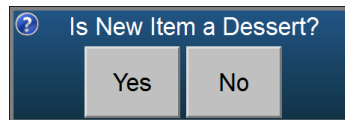
## Easy Add New Item

### Order Screen / Functions / Easy-add New Item

This function enables you to add products to PixelPoint 'on the fly,' without resorting to programming them through BackOffice.

#### To add new items to the menu:

1. Select a blank button on the Order Screen where you wish to add the item.
2. Select [Functions].
3. Select [Easy-add New Item].
  - You may need management authorization at this point.
4. Enter the name of the item.
5. Select the type of product.
  - If you are not sure about the product type, select "Ordering Product".
6. Enter the price.
7. Select whether this is a dessert (of the day).



8. Select whether this is a daily special.
  - If you answer "Yes" to either Special or Dessert, the item will be added to the Billboard Screen.
9. Touch anywhere on the screen to refresh the display if the new item does not appear on the Order Screen immediately.

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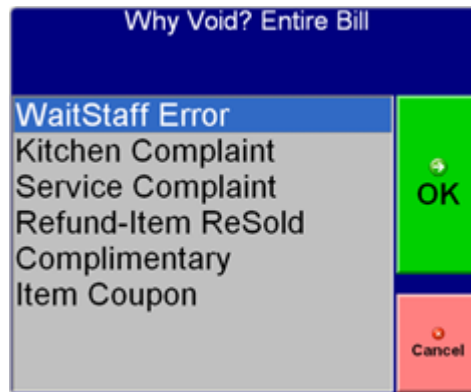
**Note:** This function should only be used to add new (and vital) items to the system. Before adding the item, ensure that it does not already exist on the system.

## Void Entire Check

### Order Screen / Functions / Void Entire Check

Say that you need to void everything that has been ordered on a customer's check. Rather than do this item by item, you can do it all at once by using this function.

A Void Reasons window displays when you select this function (as shown in the screenshot), asking you to give a reason why you want to void the whole bill. Select the appropriate reason. You may need management authorization to use this function.



You will remain in the check, but all ordered items will be voided out.

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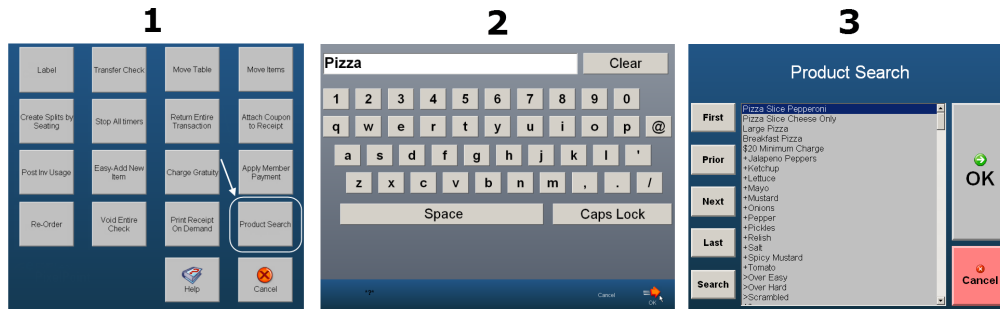
**Note:** Any items on the check that have not yet been sent will NOT be voided.

## Product Search

### Order Screen / Functions / Product Search

Your system may be configured with a [Label CC Name] function button on your Order Screen.

This function allows users to find and order products by description in the POS.



### To use Product Search:

1. Open *Product Search* from the Functions menu.
2. Select the [Search] button to open the onscreen keypad.
3. Enter a search phrase and then select [OK].

Products that match the search phrase will be shown at the top of the Product Search window and can be chosen from there.

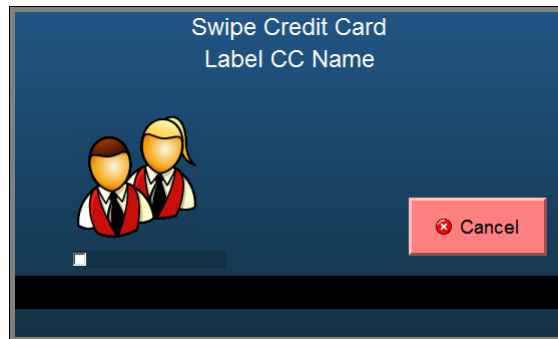
## Label CC Name

### Order Screen / Functions / Label CC Name

Your system may be configured with a [Label CC Name] function button on your Order Screen.



This function automatically labels the transaction with the name stored on a credit card. When you select this function, the system prompts you to swipe the card.



The Label CC Name function may be in other places on your system, instead. For example, it may have been added to the Functions Menu. In addition, some versions of the Keyboard Screen also have the [Label CC Name] function button on them.

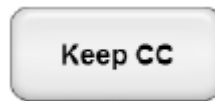
## Keep CC

### Order Screen / Functions / Keep CC

Your system may be configured with a [Keep CC] function button on your Order Screen. This feature enables you to do things like keep a tab with a customer's credit card.

#### To use Keep CC:

1. Select [Keep CC].

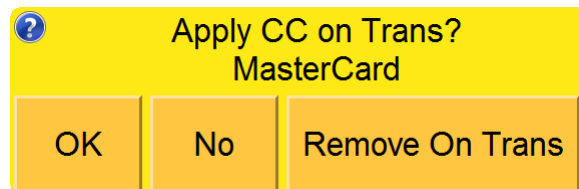


2. Swipe the customer's card when prompted.
  - The button's label changes to [Apply CC] and the credit card type's logo appears on it.
  - The transaction is automatically labeled with the name on the credit card.

You can now use the button to apply payment to the transaction directly. To settle the transaction to the customer's credit card, simply select this button.



When you select [Apply CC], a prompt appears asking you to confirm what you want to do.



**OK:** Settles the transaction to the kept charge card, and changes the button back to [Keep CC] so you can keep another charge card for a new order.

**No:** Returns you to the Order Screen, with the credit card still kept on the system, so you can apply payment to the order later, when you do want to.

**Remove On Trans:** Removes the card from the transaction. When you do this, you will get another prompt asking for confirmation that you do indeed want to remove the charge card.

If you go to the Finish Screen after you select [Keep CC] and swipe a card, you will see that the credit card has been added to the available list of payment methods on the right, and that the credit card is already selected for you as the payment method.

You can then settle the transaction to this credit card through the Finish Screen using the [Apply CC On Trans] button immediately. Of course, you can also select another payment method if you want to close the transaction to something else (or if you are working on another transaction for a different customer.)

## Service Modes

This chapter contains information that applies to individual types of service (such as Table service, Quick service, etc.). Information contained in one section may not be applicable to other kinds of operations. However, if your establishment offers more than one kind of service (For example, it may have dine-in seating but may also do take-out), you will find that information in more than one section is useful to you. This chapter has the following sections:

- Table Service
- Quick Service
- Bar Service
- Cashier Service
- Delivery and Pickup Service
- Hostess Service

## Table Service

The definition of a Table Service establishment is one where the customer dines at the restaurant and is served at a table. Though there are many variations, the general concept of a Table Service establishment is one that involves a server opening a guest check and leaving it open for the duration of the meal. The customer pays for the meal only when finished dining.

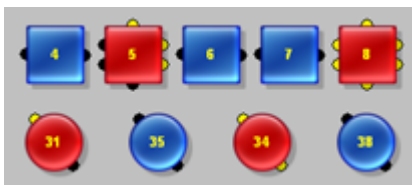
This section addresses features and functions that are important to Table Service operations. Topics here explain things such as starting a table and how to take a basic order in Table Service. The section is broken down as follows:

- Starting A Table
- Table Orders
- Hold and Fire
- Hold Order
- Bussing



## Starting A Table

Every table has a graphic representation on the Table Layout Screen. You work with these images to handle tables' checks. As you open, add to and close checks, the color coding of the table images will change automatically (See the Table Layout Screen for what the different colors mean). Table icons come in three general shapes—circles, squares and diamonds—though these shapes can be altered slightly. The nodules on each table represent the number of seats the table has.



In the above image, Table 5 has a seating capacity of six, yet only three seats are occupied. Table 8 also has a capacity of six, but all seats are occupied. Tables 4 and 34 have seating capacities of two; there is no one seated at Table 4, but Table 34 is full (it has two people seated at it).

### To Start a Table:

1. Select the table icon that represents the actual table you want to work on. The icon should be blue if you want to start a new table.
  - If you do not see the table icon on the screen, you may need to change the dining section. Select the name of the desired dining section on the top right corner of the screen. The Table Layout screen display will change to that dining section. The system will continue to return you to that section until you choose another section.
2. Enter the number of people seated at the table when the numeric keypad displays. If there are more than nine people at the table, select [ $>9$ ] (which enables you to enter a two digit number), enter the number, and then select [OK].
  - Your establishment may not need you to enter the number of customers.
3. Place the order when the system displays the Order Screen.

When you return to the Table Layout Screen, note that the table icon has changed so the corresponding number of seats are highlighted (as in the above image).

## Table Orders

There are many different ways you can place an order, as there are many different kinds of operations. The Order Screen should be designed to best suit your kind of operation. This section takes you through a very basic order. See the Order Screen for an explanation of the screen's contents.

If your establishment uses a Hold and Fire method of placing and sending orders, see "Hold and Fire" for instructions, instead of this section.

Say there is a customer who has just sat down at Table 31. Start the table, as outlined in "Starting A Table", selecting Table 31 and entering "1" for the number of customers. When you ask for the customer's order, she says that she wants the soup of the day and a cup of tea.



### To Enter an Order:

1. Select [Soup & Salad] from the order page grid.
2. Select [Soup of the Day] from the product grid.
3. Select [Non Alcoholic] from the order page grid.



4. Select [Tea] from the product grid.
5. Select the logout button in the lower-left corner of the screen to log out. The system sends the food order to the kitchen and the beverage order to the bar.
  - If you select [Leave Table] instead, the system sends the order, but returns you to the

floor layout instead of logging you out.

**Note:** Your menu will not be the same as that in the images here. Your establishment may not even sell these products. What follows below is just an example.

The customer may order a dessert at a later time.

**To add to an order:**

1. Log in.
2. Select the Table 8 icon from the Table Layout screen (the icon should be red). The order screen displays.
3. Select [Dessert] from the order page grid.
4. Select [Pecan Pie] from the product grid.



5. Select the logout button to log out. The system sends the order for the dessert to the kitchen and logs you out.

## Hold and Fire

Your system may be configured to be what is usually called a Hold & fire operation. This means that a number of items, usually for different courses of the meal, are entered into the system at the same time, but not sent to the kitchen at the same time.

The server will fire some items and 'hold' the rest of the order until an appropriate time (usually in time for the kitchen to start making the next course). For example, you may be trained to fire the appetizers right away and hold the rest of the order. After a certain period of time, you will then fire the entrées for the main course and hold the desserts. When the customers have eaten the main course, you fire the desserts.

Your system may be configured for this in one of several ways. For example, it may be configured such that you, the server, add "Hold and Fire" commands between the courses on the order receipt window.

It could also be configured to use course bands, which make it very easy to tell what has been ordered for what course. These course bands also enable you to set what course a product is a part of; simply add the product to that course's section. This makes it easy to handle situations, say, where a customer wants additional appetizers as their main course.

---

## Hold and Fire Indicators

Your system can be configured to indicate that a table has a hold and fire item on it. If your system is set to do this, then you will see a white pause symbol on the table's icon when you return to the Table Layout Screen after you apply a hold and fire command.

Systems that are set to show the white pause symbols can also be configured to show that a long time has passed since the hold and fire was applied and that the next part of the order should be fired. After a period of inactivity, the pause symbol will do one of the following:

- Turn yellow.
- Turn yellow and flash on and off.
- Alternate between white and yellow.



A guide to these indicators is available in the software itself; you can get a reminder of what these indicators mean by selecting [Table Info] and then [Legend]. (See "Table Legend")

---

## Using Hold and Fire

The instructions below take you step by step through the process of placing and firing an order in a number of situations. Your establishment will only use one of the following methods, and, even for that method, it may train you to process the order a little differently. What is given below is intended as an example of the functionality of your software and the recommended process for using it.

### To place an order using manual hold and fire:

1. Open a table.
2. Order drinks.

3. Order appetizers.
4. Insert a Hold and Fire command.
5. Order main courses.
6. Insert a Hold and Fire command.
7. Order desserts.

1	Lipton Ice Tea	\$1.59
1	Barq's Root Beer	\$1.59
1	Calamari	\$6.99
1	Bruschetta	\$4.99
Hold and Fire		
1	Fried Chicken Dinner	\$8.50
1	Fries	
1	Fried Chicken Dinner	\$8.50
1	Garden Salad	
Hold and Fire		
1	Raspberry Cheesecake	\$7.99
1	Tiramisu	\$7.99

8. Leave the check.
9. Open the check again when it is time to fire the next course.

1	Lipton Ice Tea	\$1.59
1	Barq's Root Beer	\$1.59
1	Calamari	\$6.99
1	Bruschetta	\$4.99
Hold and Fire		
1	Fried Chicken Dinner	\$8.50
1	Fries	
1	Fried Chicken Dinner	\$8.50
1	Garden Salad	
Hold and Fire		
1	Raspberry Cheesecake	\$7.99
1	Tiramisu	\$7.99

10. Select the first Hold and Fire command.
11. Select [Void Item].

1	Lipton Ice Tea	\$1.59
1	Barq's Root Beer	\$1.59
1	Calamari	\$6.99
1	Bruschetta	\$4.99
1	Fried Chicken Dinner	\$8.50
1	Fries	
1	Fried Chicken Dinner	\$8.50
1	Garden Salad	
Hold and Fire		
1	Raspberry Cheesecake	\$7.99
1	Tiramisu	\$7.99

12. Leave the check.
13. Repeat steps 9 to 12 until all of the Hold and Fire items have been voided.

---

**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.

If your establishment uses the following type of Hold and Fire, then you will have course bands and section labels on your menu, and a [Fire Order] button on your Order Screen. You cannot use

this method if you do not have [Fire Order].

**To place an order using course bands:**

1. Open a table.
2. Insert the "Drinks" section label.
3. Order drinks.
4. Insert the "Appetizers" course band.

Drinks		
1	Coca Cola	\$1.59
1	Barq's Root Beer	\$1.59
<b>A</b> Appetizers		

5. Order appetizers.
6. Insert the "Main Course" course band.
7. Order main courses.
8. Insert the "Desserts" course band.
9. Order desserts.

Drinks		
1	Coca Cola	\$1.59
1	Barq's Root Beer	\$1.59
<b>A</b> Appetizers		
1	<b>A</b> Calamari	\$6.99
1	<b>A</b> Bruschetta	\$4.99
<b>M</b> Main Courses		
1	<b>M</b> Fried Chicken Dinner	\$8.50
1	Fries	
1	<b>M</b> Fried Chicken Dinner	\$8.50
1	Garden Salad	
<b>D</b> Desserts		
1	<b>D</b> Raspberry Cheesecake	\$7.99
1	<b>D</b> Tiramisu	\$7.99

10. Select [Fire Order].
11. Select the first course to fire ("1 - Appetizer", for example).



12. Select [OK].
  - The system automatically adds a "Hold and Fire" command after the course.

Drinks		
1	Coca Cola	\$1.59
1	Barq's Root Beer	\$1.59
A Appetizers		
1	A Calamari	\$6.99
1	A Bruschetta	\$4.99
Hold and Fire		
M Main Courses		
1	M Fried Chicken Dinner	\$8.50
1	Fries	
1	M Fried Chicken Dinner	\$8.50
1	Garden Salad	
D Desserts		
1	D Raspberry Cheesecake	\$7.99
1	D Tiramisu	\$7.99

13. Leave the check.

14. Open the check again when it is time to fire the next course.

Drinks		
1	Coca Cola	\$1.59
1	Barq's Root Beer	\$1.59
A Appetizers		
1	A Calamari	\$6.99
1	A Bruschetta	\$4.99
Hold and Fire		
M Main Courses		
1	M Fried Chicken Dinner	\$8.50
1	Fries	
1	M Fried Chicken Dinner	\$8.50
1	Garden Salad	
D Desserts		
1	D Raspberry Cheesecake	\$7.99
1	D Tiramisu	\$7.99

15. Select [Fire Order].

16. Select the next course to fire.

17. Select [OK].

- The system again highlights the items that will be fired.

18. Leave the check.

19. Repeat steps 14 - 18 until all of the courses are fired.

---

**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.

---

## Seating Positions

Course-based Hold and Fire also works with seats — if your establishment is configured so that you can add seating positions to a check to separate orders, you can add course bands within each seat. When you fire a course, the products for that course in each seat will be fired at the same time and the products for other courses in each seat will be held. When you are creating orders on the system, make sure you add the seating position band to the check first and then add course bands within each seat.



**To add to an order:**

1. Select the course band or a product in the section you want to add the product to.
2. Add the product.

For example, if you want to add additional drinks to an order with course bands, select the drinks at the top of the check and then add the new drinks from the menu.

---

**Send Order Preview**

Your system may be programmed to have a [Send Order Preview] option when you select [Fire Order] for the first time on a check. You can use this function to send a preview of all of the course items to the kitchen. Once you have fired a course, however, this option will no longer be available.





## Hold Order

Your system may be configured with a [Hold Order] function button on your Order Screen.

This feature logs you out of the station but holds the entire order — no items are sent to the kitchen or any other printer. This enables you to leave a station without sending any items and without tying up the station. Other servers can use the station to place orders without having to wait for you to come back and without making any changes to your order.

You can use this feature for situations where you need to clarify the details of an order and you need to return to the guests to check with them. Instead of making sure that all of your fellow servers do not touch the station while you are gone, you can simply select [Hold Order] and then go speak with the guests. When you return, simply log back in to the station and select the table again.

Your Table Layout Screen can be configured to indicate that a table has a held order. If it is, you will see a white hand icon on the table when you log back into the station after selecting [Hold Order]. You will also normally see these icons on tables that are not your own and that have held orders.

If a table has an order that has been held for a long time, the white hand icon will do one of the following, depending on how your system is configured:

- Turn yellow.
- Turn yellow and flash on and off.
- Alternate between white and yellow.

The length of time it takes before the icon's behavior changes also depends on how your system is configured. Your management can specify how long the icon stays white.



A guide to these indicators is available in the software itself; you can get a reminder of what these indicators mean by selecting [Table Info] and then [Legend]. (See "Table Legend")

## Bussing

The Table Layout Screen has a [Send Command] button that enables you to initiate *bussing commands*.



Bussing commands are programmable and can include instructions such as:

- Clear Table
- Replace Cutlery
- Replenish Water

### To Send a Bussing Command:

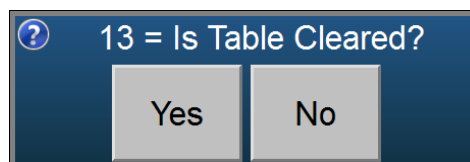
1. Select [Send Command] from the Table Layout screen.
2. Select the table you want to send the command to.
3. Select a bussing command from the list the system displays.

The bussing command prints in the kitchen (or wherever the establishment has set them to print).

PixelPoint can be programmed to put tables into bussing mode when you close the check (your establishment may or may not have done this). When a table is in bussing mode, the table icon on the table layout screen will change to a flashing trash can.



When the table is in bussing mode, anyone on the Table Layout screen can select the icon. The system will ask if the table is cleared. If you select [Yes], the icon will change to the original blue table graphic, and new customers can be seated at the table. If you select [No], the icon will stay the trash can.



## Quick Service

A Quick Service establishment is one where customers pay at the same time (or just before) they get their order. This form of service includes not only fast food establishments, but also places as different as cafeterias and retail shops.

This section addresses important functions in Quick Service operations. It includes how to place quick orders, how to manage pick ups and deliveries, and much more.

This mode of operation is for users such as fast food order takers, cashiers and bartenders. In fact, service modes such as Delivery and Pickup Service (and often Bar Service and Cashier Service) are kinds of Quick Service. So, topics in this section apply to those modes too. However, because each of these has its own specialized and exclusive topics, it is presented as a separate service mode in its own section.

You do not work with tables in Quick Service; you work only with the check itself. There are two ways to work in Quick Service mode. In the first way (and the default way), the system presents you with a blank check on the Order Screen when you log in and every time you close a check. In the second way, you use the Transaction View Screen, which enables you to choose between the option of creating a new check or selecting a saved one.

The contents of this section are:

- Quick Orders
- Drive Thru Service
- Combos
- Size Up/Down

## Placing Quick Service Orders

Because there are so many different kinds of Quick Service establishments, the way orders are placed in each one can be quite different too. However, the following basic process applies to most types.

### To place an order for a Quick Service check:

1. Enter the order on the Order Screen when the customer approaches and tells you the order.
  - If in a cafeteria, enter the order as presented on the tray.
2. Tell the customer the check total.
3. Select [Finish].
4. Settle the check using the method of payment the customer gives you (To learn how, see the various subsections of "Settling A Check").

The system returns you to the Order Screen so you can process the next order. See "Table Orders" for further details about placing orders.



Depending on which buttons your establishment chooses to apply to your order form, you may have a [Print Receipt] button on the Order Screen, as in the image above. This button prints the receipt so it can be given to the customer, placed on a tray so other employees can make the order, or a variety of other things.

If your establishment settles most transactions to cash, your order template may also have [Close Cash]. This button eliminates the need to go to the Finish Screen to close a cash transaction. [Close Cash] assumes exact change and immediately settles the check.

You can find descriptions of the other buttons on the sample Order Screen above in the "Order Screen" section (See here).

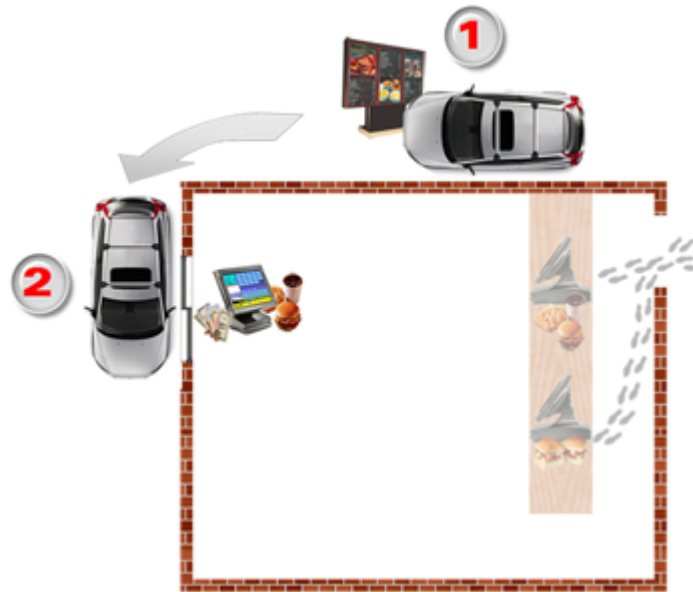
## Drive-Thru Service

This sections describes some of the most common types of Drive-Thru Services.

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### Single Window Drive-Thru

In this type of service, the establishment has one window for managing drive-thru orders. This window is used for taking payment and giving customers their orders. The image below shows the process for customers.



You can take orders either at the Drive-Thru window station itself, or at another station within the establishment (any of the stations at the front counter, for example). In fact, your establishment can use multiple stations to process and save these orders. Customers get their orders using the same window they used to pay for them - the Drive-Thru window 2 shown in the image above.

#### To process an order in a single window Drive-Thru environment:

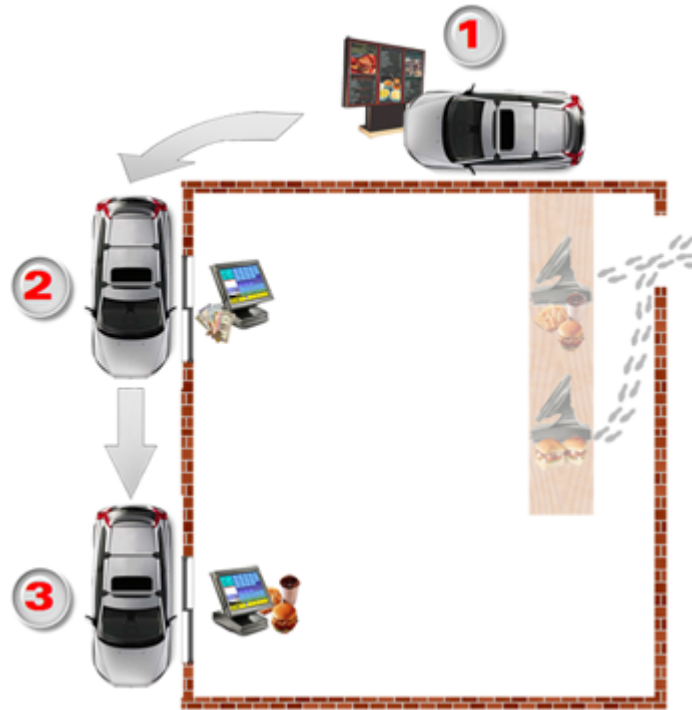
1. Enter the order on a blank check on the Order Screen. (The basic order process is outlined in detail in "Table Orders").
2. Select [Save Check].
  - The order prints in the kitchen or displays on the video display system there.
  - You can take another order at this point, even though the first order is not completely finished.
9. When the customer arrives at the first window, select [Get Check]. The system retrieves the check and displays it for you.
3. Settle the transaction. The order disappears from the screen and the system brings you to a new blank check.
4. Present the order to the customer when it is ready.
  - If you are using a video display system, use the *bump-bar* to remove the order from the screen.

---

### Double Window Drive-Thru

In this type of service, the establishment has two windows for managing drive-thru orders. The

process is the same as in a single window drive-through environment, except that customers get their orders at the second window indicated by a 3 in the image below.



Although the second window is generally used for order pick up, you can take orders at it as well. Additionally, if both stations are busy, establishments can use front-counter stations to take drive-thru orders.

### To process an order in a double window Drive-Thru environment:

1. Enter the order on a blank check on the Order Screen. (The basic order process is outlined in detail in "Table Orders").
2. Select [Save Check].
  - The order prints in the kitchen or displays on the video display system there.
  - You can take another order at this point, even though the first order is not completely finished.
3. When the customer arrives at the first window, select [Get Check]. The system retrieves the check and displays it for you.
4. Settle the transaction. The order disappears from the screen and the system brings you to a new blank check.
5. Ask the customer to advance to the second window.
6. Present the order to the customer when it is ready and when the customer has arrived at the pick up window.
  - If you are using a video display system, use the *bump-bar* to remove the order from the screen. Although the check is already closed, the order will still appear on the video display system (so you know which orders have yet to be prepared and/or given out.) The order will not disappear until you use the bump-bar.

---

## Dual Drive-Thru Systems

Some establishments have more than one drive-thru lane; these lanes may be identical, or, in establishments that have more than one kind of dining, they may be different (in terms of the

products they offer, or in other ways). These systems generally operate in the same way as the drive-thru systems described above, even if they differ in their physical layout. Each lane has its own drive-thru window(s) and station(s) for taking orders. These stations have the appropriate menu for the lane they service and are programmed NOT to see saved checks from other lanes.

If the drive-thru lanes all have the same menu, your establishment can still program stations NOT to see saved checks from other lanes. So, if an order is placed in Lane 1, only the stations programmed for Lane 1 can retrieve that order. The stations programmed for Lane 2 can only retrieve Lane 2 orders.

## Combos

When ordering a *combo*, you simply select the combo product (e.g., [Big Burger Combo] and the system adds all items within that combo. The individual items appear as modifiers within the combo product.



Say that a server ordered [Big Burger Combo] from the menu in the above image. When [Big Burger Combo] was selected, the system added a banquet burger, large fries and a large soda to the check. Though each individual item can be ordered separately, with its own price, the price of the combo overrides the price of the components.

Combo ordering can be programmed simply as a variation of forced questions. However they are programmed, combos often involve forced questions. For instance, there may be a forced question asking what kind of soda the customer wants, or whether the customer wants fries or onion rings. See "Forced Questions" for more details.

---

## Auto Combo Recognition

Your system may be programmed to automatically display the combos that contain the individual items you have added to the check already. For example, say a customer orders an "Original Bacon Cheeseburger" and then orders fries.

If your establishment uses auto combo recognition and has a combo with these two items in it (and, say, a drink), the combo will display in the Combo Grid on the Order Screen, letting you know that there is a combo available that the customer can order if they want to. How much it will cost the customer to upgrade to the combo will be displayed on the combo's button on the button grid.

Your system can be configured to display items in the Combo Grid in a number of ways. However it is configured, you will not see any buttons for the Combo grid until you add items to the order



that are available in combos.

Your system may be configured to display the Combo Grid as a grid just like the Menu Grid or Product Grid, as in the image below.



Your system might also be configured for auto combo recognition in another way. It might be set to automatically convert individual combo items into a combo product if all the individual parts of that combo are added to the check.

For example, say your system is configured for this and that it has an Original Bacon Cheeseburger Combo (which includes an Original Bacon Cheeseburger, fries, and a drink.) You would be able to touch all the individual buttons, [Original Bacon Cheeseburger], [Fries], [Drink], and the system would automatically convert these three items on the Item List into the one combo product for you.

## Size Up/Down

Combos (See here) work well with the [Size Up] and [Size Down] function buttons. All quick order templates generally have these buttons, but PixelPoint enables you to add them to any order template.

Should you wish to "Super Size" or "Kid Size" a combo, you can do so by selecting one of these buttons. Super-sizing involves increasing the size of an item. So, for example, pressing [Size Up] would change a medium pizza to a large pizza. Kid-sizing involves decreasing the size of an item. Following the example above, pressing [Size Down] would change the medium pizza to a small one.

## **Bar Service**

It is hard to classify Bar Service as a Table Service operation or a Quick Service operation because it can be either. In many establishments, Bar Service is a hybrid of the two; you can either acquire your drink from the bartender or order it from a Table Service representative.

The contents of this section address Bar Service functions that are used in all of these types of operation. Probably the most important concept to Bar Service is running a tab; that concept is explained in detail here ([See here](#)).

There are two functions on the Functions Menu that are used frequently in Bar Service. See "Re Order" and "Stop All Timers" for detailed information about them.

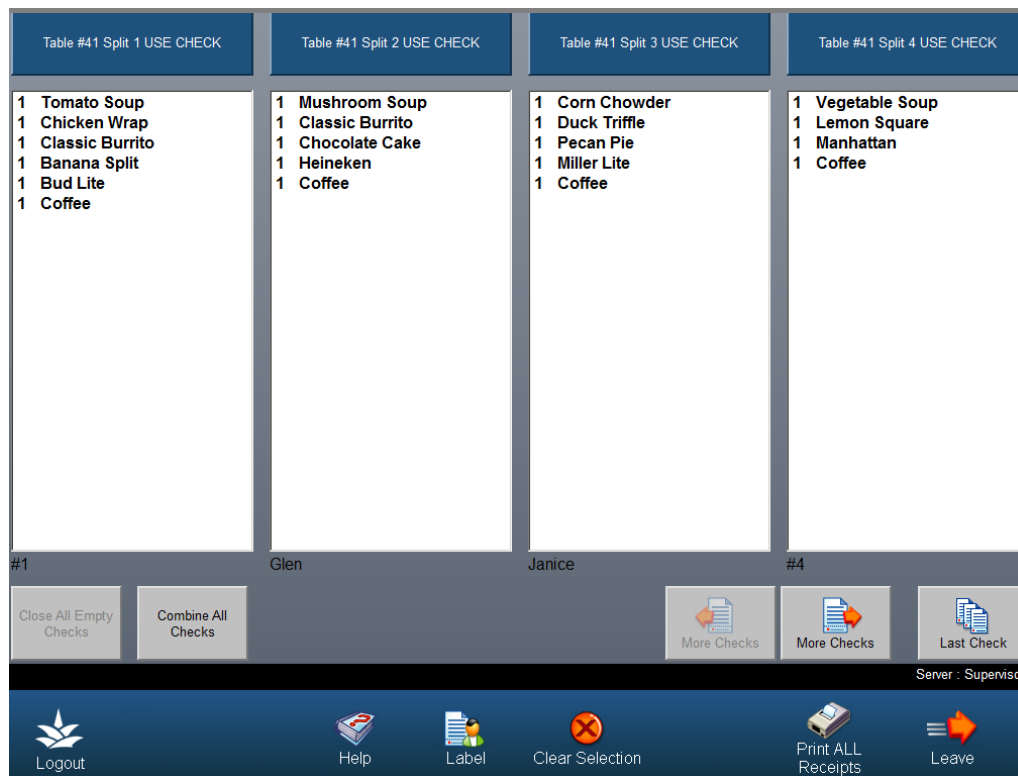
## Running a Tab

Sometimes you may want to save the Quick Service check rather than close it right away. For example, you usually do this at service bars, when the customer requests a 'tab' so they can pay for all of their quick orders at the end of the evening.

### To Save a Check:

1. Enter the order on the Order Screen.
  - When you select the first item, [Get Check] changes to [Save Check].
  - You can optionally select [Functions] and then [Label] to apply a name to the check. This will make the tab easier to identify and retrieve later on.
2. Select [Save Check].

The check disappears from the screen, the items are sent and the open check is retained within the system.



### To Get a Check:

1. Select [Get Check] on the Order Screen. A list of all saved checks displays, and the check number displays in the bottom left corner. This can be replaced with a label using the Label function.
2. Select the desired check by touching its blue title bar at the top. The order screen displays with the retrieved check.

You can now add to the order, save or close the check.

---

## Tab Cards

Tab cards enable market style restaurants to easily access a transaction by swiping a card into Pixel POS. To use a tab card, simply swipe it through when you are on the Floor Layout screen (See "Table Layout Screen" for a similar kind of screen), and it will bring up the transaction linked to that card. You can then add more items or close out the check.

The way tab cards work is that each card has a table # stored on it. This table # functions as the tab #. Swiping the card will bring up the table that is stored on it. You can have any table # from 5000-29999, so there is practically no limit to the number of open tabs you can have. You can also split tab checks, in the same way you split other checks (See "Split Checks").

---

**Note:** You can secure a tab either by holding the customer's credit card or by asking for a deposit. Give the customer their credit card or their deposit back when you close the tab.

## Cashier Service

Cashier service can apply to both Table Service and Quick Service environments. See "Table Service" and "Quick Service" for more information about these modes of operation without cashiers.

In a Table Service environment, the server opens the check, tends to the order and prints the check upon completion. At this point, however, the customer takes the check to the cashier for payment. The cashier retrieves the check on the system and settles it.

In a Quick Service environment, Cashier Service typically applies to a cafeteria-type establishment, in which the customers assemble their own orders and then take them to the cashier for payment.

This section addresses how to close checks in these situations and what happens when closing another person's check. It has two main subsections—one for Cashiers in Table Service and one for Cashiers in Quick Service.

Note that when cashiers are handling the final part of orders, the person who opens the check is not the one who closes it, as they usually are in environments where servers close their own checks.

A general PixelPoint rule is that the person who closes the check is the person who gets credit for the sale. This person is also responsible for the payment received. Because of this rule, cashiers, by default, get the credit for the sales they complete. (Your establishment can change this, however, to make sure it can keep track of the transactions each server handles.)

## Cashiers in Table Service

There are two methods for retrieving and closing checks that a cashier working in a Table Service environment may use.

---

### Method 1 - Standard Check Retrieval

When using this method, the cashier's system interface is set to Restaurant Seating.

#### To retrieve a standard check:

1. Select the table indicated on the check when the customer approaches and presents the check to you. The system retrieves the check.
2. Select [Finish] and close the check. (See "Settling A Check".)

---

### Method 2: Retrieval by Check Scan

When using this method, the cashier's system interface is set to Quick Order (although the cashier is working in a Table Service environment).

#### To retrieve a check by scanning it:

1. Scan the barcode on the check when the customer approaches and presents the check. The system retrieves the check automatically.
2. Select [Finish] and close the check. (See "Settling A Check".)

With this method, it is essential that the system be equipped with barcode readers and receipt printers capable of printing barcodes. The barcode on each receipt represents the transaction number.

This method, though initially a little costlier, is considerably faster and more accurate than the manual retrieval method above. This solution also gives you the tools to retrieve credit-card slip reference numbers for faster and more accurate application of charge tips.

No matter which method is used, when the cashier retrieves the check for settlement, ownership of that check is transferred from the server to the cashier. It is now the responsibility of the cashier to ensure that the check has been properly tendered and that any charge tips have been applied.

```

Pixel Food Market
=== CASH-OUT SUMMARY ===
Cashier
Punch Index: 2017
Printed: 10/10/2009 03:32:21 PM
Shift Type      Start      End
Shift           12:33PM   3:32PM
Hours Worked:   26.98
Hours Scheduled: 0.00
Difference:     26.98
=====
Product:
Pizza[1.0]:    10.00
Product Total: 10.00
=====
Number of Customers: 1
Number of Transactions: 1
Net Total (no Tax): 10.00
Average Number of Customers: 1.00
Average Transaction Value: 10.00
Average Value per Customer: 10.00
Avg Sales per Employee-Hour: 0.37
Declared Tips: 0.00
=====
Cashier Transactions:
Employee      Cash  Charge  Tips-SC
Waiter        0.00  11.00   1.00
=====
MasterCard
  Trans#  Tender  Tip  Total
    2056  11.00  1.00 12.00
Total[1]  11.00  1.00 12.00
POS Tendered
                                     12.00
=====
POS Calc/Declared 12.00
=====
Cash
  Trans#  Tender  Tip  Total
Tip (Charge Card)
MasterCard -1.00
=====
POS Calc/Declared -1.00
=====
Over/Short(-) (Base Currency) 0.00
=====
Summary
Cash (Base Currency) 0.00
Adjustments -1.00
Cash (with Adjustments) -1.00
Charge (no Tip) 11.00
Charge Tip 1.00
Charge (with Tip) 12.00
Tendered (no Tip) 11.00
Tendered (with Tip) 12.00

=== End of Report ===
    
```

```

Pixel Food Market
=== CASH-OUT BY WHO STARTED ===
Waiter
Punch Index: 2016
Printed: 10/10/2009 04:12:16 PM
Shift Type      Start      End
Shift           12:33PM   4:12PM
Hours Worked:   27.65
Hours Scheduled: 0.00
Difference:     27.65
=====
Product:
Pizza[1.0]:    10.00
Product Total: 10.00
=====
Number of Customers: 1
Number of Transactions: 1
Net Total (no Tax): 10.00
Average Number of Customers: 1.00
Average Transaction Value: 10.00
Average Value per Customer: 10.00
Avg Sales per Employee-Hour: 0.37
Declared Tips: 0.00
=====
MasterCard
  Trans#  Tender  Tip  Total
    2056  11.00  1.00 12.00
Total[1]  11.00  1.00 12.00
POS Tendered
                                     12.00
=====
Summary
Cash (Base Currency) 0.00
Charge (no Tip) 11.00
Charge (with Tip) 12.00
Charge Tip 1.00
Tendered (with Tip) 12.00

=== End of Report ===
    
```

The Employee Cash Out Report for servers should be set to reflect sales based on the employee who started the transaction. Otherwise, no sales transactions will show on servers' cash out reports, because the default cash report includes only those transactions an employee closes. In cashier service, servers do not close transactions. PixelPoint has a report you can use in this case. It is called "SQLPOSEmpCashOutByWhoStart" and is applied in the BackOffice system (an example of it is shown on the right above).



## Cashiers in Quick Service

When cashiers are working in a Quick Service environment, the customer typically assembles their own order and then presents it to the cashier for payment. Though this is usually called a cafeteria environment, many newer establishments are applying this to places like food courts.

Unlike in a Table Service environment, there is no transfer of the check from one person to another (and thus the default Cash Out Report is suitable for this situation). The cashier is set up just like a regular Quick Service employee (like in a fast food establishment). The only difference between this and full Quick Service is that it is the customer and not the employee who retrieves the order.

Closing a Quick Service check in this situation usually involves the cashier reviewing the contents of the order, entering it all on a blank check, and settling the check with the customer.

---

## Till Management

It is likely that you would want to have Till Assignment applied to your system in this kind of environment. You would probably benefit from it if your establishment meets the following criteria:

- Multiple cashiers are working at the same time.
- Cashiers are fully responsible for their drawer inserts.
- Cashiers move among the stations with their inserts.

For further information on till management, see "Till Assignment".

## Delivery And Pickup Service

There are two key people involved in managing delivery orders. The first is the *order taker*. This is the person who takes the order and closes the check (if paid up front) or saves the check for payment later on. The order taker also monitors deliveries, in case anyone asks about the status of an order or delivery run.

The other key person is the *delivery driver*. This is the person who picks up the orders for delivery, brings them to customers in other locations, presents the check, collects payment at the customer's door (be it cash or credit card) and finalizes the transaction upon returning (by either settling it to cash or applying a charge tip before closing).

Pick Up orders (sometimes referred to as Take Out or Take Away orders) are processed similarly to delivery orders, except that a delivery driver is not involved in the process. Instead, customers come to pick up their own orders. The order taker creates the take out order and saves it on the system. When the customer arrives, the *order taker* retrieves the order and closes it.

This chapter has the following topics:

- Delivery Scenarios
- Order Taker Screen
- Placing Delivery Orders
- Driver Screen
- Delivery Dispatch
- Pick Up Orders
- Delivery Features

## Delivery Scenarios

This section addresses some situations and features that you may come across when working in a Delivery Service environment. Understanding the concepts in this section may make the rest of this chapter easier to understand.

---

### COD Orders

In this case, the customer calls in the order, indicating that it is *COD* (which means that they want to pay when they actually get the order, and not before.)

1. After placing the order, the order taker selects [Save Check], leaving it open to be settled after delivery.
2. The driver signs in and selects the order when it is ready.
3. The driver selects [Driver Out]. A Driver Out Report prints with delivery information for each selected transaction.
4. The driver selects [Driver In] upon returning. A Driver In Report prints.

---

### Driver Out Report

The Driver Out Report shows member information, directions to the location, the time of departure, the cost of the order, and what to do when the delivery location is reached. In the example below, the driver is to collect \$70.34 from the customer.

```

Driver Out Report
Driver
Punch Index: 2044
Time Out: 10/10/2009 4:28 PM
=====
Transaction #2243
Delivery Zone: Zone A
John Smith
Telephone #(905)284-4700
123 Smithers Street
Apt. 10
Toronto, Ontario, L4M 4M5
Directions
South on King St, Right on Wellington,
Left on Hoover, 2nd Apartment Bldg on
right.
Collect:           $70.34
Time Delivered:_____
=====
Amount Due:       $70.34
=====

```

---

### Driver In Report

```

Driver In Report
Driver
Punch Index: 2044
Time In: 10/10/2009 4:48 PM
Minutes en Route: 20
=====
CASH                2243   $70.34
Total CASH:         $70.34
=====
All Paid
=====

```

The Driver In Report shows how long the delivery was on the road for, details about the method of payment used, and the fact that it was completely settled.

---

## Prepaid Orders

Sometimes customers prefer to pay for delivery orders at the same time they place them. This frequently involves them giving you credit card information over the phone.

Say, for example, that an order was paid for before delivery and that you have settled the transaction to credit (On Account in this case). When the transaction is pre-authorized, the charge slip(s) print and the driver takes it with the order for signing. When the driver selects [Driver Out], a Driver Out Report is generated.

```

Driver Out Report
Driver
Punch Index: 2044
Time Out: 10/10/2009 4:28 PM
=====
Transaction #2245
Jennifer Jackson
Telephone #(404)049-5959
123 Walnut Grove

Toronto, Ontario, L4L 8K9
On Account          2305   $50.45
** All Paid **
Time Delivered: _____
=====
On Account          2245   $50.45
Total On Account:   $50.45
=====
All Paid
=====

```

The report above shows that the total of \$50.45 was settled to On Account. The driver simply needs the customer to sign the charge slip. The driver then returns with the signed copy and applies the charge tip before selecting [Driver In].

```

Driver In Report
Driver
Punch Index: 2044
Time In: 10/10/2009 4:48 PM
Minutes on Route: 20
=====
On Account          2245   $50.45
Total On Account:   $50.45
=====
All Paid
=====

```

The Driver In Report for this example confirms that the amount of \$50.45 was paid On Account.

---

## Split Tendering

It is also possible to split the tendering of a delivery. For example, say that someone places a large order and the establishment wants a credit card deposit before processing it. You can apply this partial payment to a credit card. You would process this portion in exactly the same way as in the Prepaid Order section above. You could then settle the remaining amount to cash in exactly the same way as described in the *COD* Order section (above.)

---

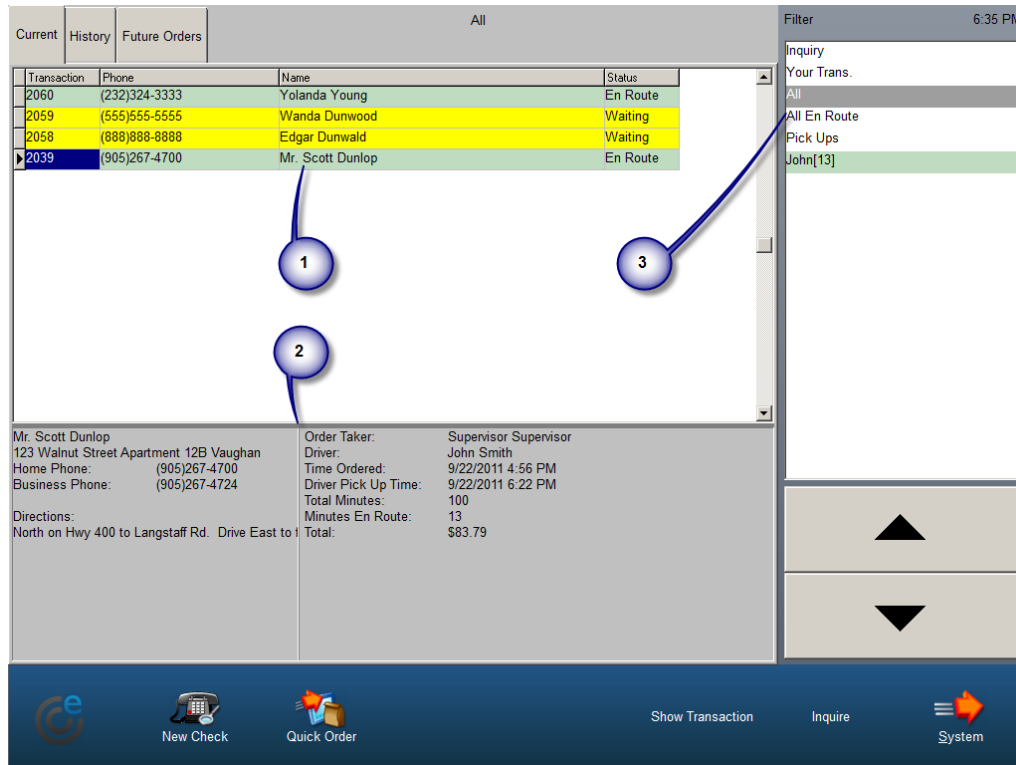
## Pay Later

A [Pay Later] button appears on the Finish Screen when placing a future order. [Pay Later] automatically saves the check to the Future Orders tab on the Delivery Order Taker Screen and stores it as a non-credit payment until the processing time/date of the order.



## Order Taker Screen

This screen is primarily used to take quick orders placed over the phone. To start a delivery order when a customer calls, you first need to open a check and establish a member record. You then apply this record to a check. Employees responsible for doing this are generally called order takers, and so this screen is called the Order Taker Screen.



The Order Taker's screen is divided into three general sections.

### Order Taker Screen Layout

#### 1. Order Chart

Lists delivery orders. Each line in this section represents a different order and is color-coded according to the order's status. Yellow lines represent orders that are being made and/or are waiting to be taken by a driver. Green lines represent orders that are being delivered (that are already en route).

#### 2. Order Detail Window

Contains details about the order selected in the Order Chart (1). The window on the left contains information about the member for that order. It shows the member's name, address, telephone number and delivery instructions. The window on the right contains information specific to this order—who took it, who is delivering it, when it was placed, when the driver left with it, how many minutes have passed since each, and the total amount.

#### 3. Order Filter Window

Enables the order taker to isolate orders by viewing only those of a certain type or status, or only those with specific delivery drivers. Selecting one of the titles in this window affects what shows up in the Order Chart (1) window, the History Tab and the Future Orders Tab.

---

## Order Taker Screen Tabs

**Current Tab:** Displays orders currently being made and delivered.

**History Tab:** Displays all delivery orders placed during the current shift.

**Future Orders Tab:** Displays all delivery orders scheduled to be filled at a later time or date.

---

## Toolbar Icons

**Logout:** Logs you out of the system.

**New Check:** Creates a new check.

**Quick Order:** Takes you to the Quick Order Screen to process an order for immediate settlement.

**Show Transaction:** Displays the contents of the highlighted order.

**Inquire:** Enables you to isolate and locate a member's order without having to open a check.

**System:** Takes you to the Table Layout Screen. It is equivalent to [Leave] on other screens.

## Placing Delivery Orders

This section discusses how to place delivery orders. The process is different depending on when the delivery is scheduled for—immediately or some point in the future.

### To place a Delivery Order:

1. Select [New Check] on the Order Taker Screen.
2. Select [New Member] and create a new record if the member is not already on file; enter the necessary information into the member record.

OR

Select [Last Name Find] to view the full list of members, or type in (a part of) the member's last name in the text box and then select [Last Name Find] to display only those members matching the text you entered.

- If the customer is placing the order for some point in the future, follow the steps in the "To place a Future Order" section below, instead of continuing on here.
3. Select [Use Member] to apply the member to the check.
  4. Enter the customer's order when the order screen displays.
  5. Make sure that the *sales type* is set to "Delivery". If it is not, the order will not show up on the driver's screen.
  6. Select [Save Check] if the order is to be paid at the time of delivery (this is often called *COD*.) The system returns you to the Order Taker Screen and adds the order to the Order Chart, with its line colored yellow.
    - If the order is prepaid, close the check to the appropriate method of payment instead of selecting [Save Check]. The system will print a charge slip. Make sure this accompanies the order for signing.

### To place a Future Order:

1. Select [New Check] on the Order Taker Screen.
2. Select [New Member] and create a new record if the member is not already on file; enter the necessary information into the member record.

OR

Select [Last Name Find] to view the full list of members, or type in (a part of) the member's last name in the text box and then select [Last Name Find] to display only those members matching the text you entered. Highlight the member's name and select [OK].

2. Switch to the Future Orders tab.
3. Select [Schedule] and specify the chosen ready time.
4. Select [Use Member] to apply the member to the check.
5. Enter the customer's order when the order screen displays.
6. Make sure that the *sales type* is set to "Delivery".
7. Select [Finish]. At this point, you can do one of the following:
  - Settle immediately (usually done, for example, when a credit card number is provided over the phone). In this case, the transaction is settled but still retained on the system. When the chosen order time arrives, the system prints the order and posts it on the Delivery screen for retrieval and processing.
  - Take partial payment (done when a customer pays a deposit using a credit card). In this case, a pre-authorized deposit is posted to the transaction with the remainder still owing. When delivered, make sure the charge slips are signed.
  - Select a non-credit method of payment and then select [Pay Later]. This saves the check without tendering.



---

## **Future Order Credit Transactions**

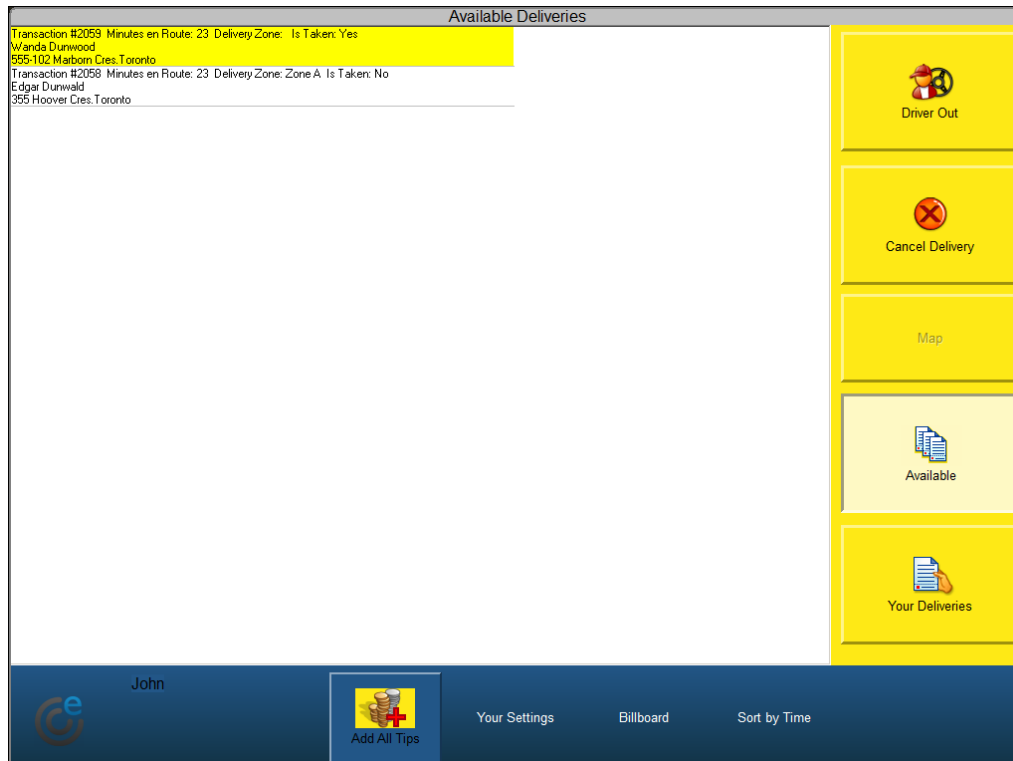
Though credit authorization slips print immediately when transactions are pre-authorized, they will also re-print for future orders on the processing day of the order.

Non-credit future orders are closed when the driver returns from a delivery and has confirmed that the product was delivered. Pre-authorized credit transactions however, will remain open until the Add Tip process has been completed (See "Tips").

## Driver Screen

When the delivery driver logs into the system, the screen below appears and displays a list of all orders to be delivered.

The large white section with order names is the "Order Chart". It is similar to the order taker's Order Chart (See "Order Taker Screen"), except that it does not show delivery orders that are en route (that is, it does not show orders that are color-coded green). Notice that this display only shows information about orders that you, as a driver, would need to know—how long the order has been active, the geographic location the order needs to go to, etc.



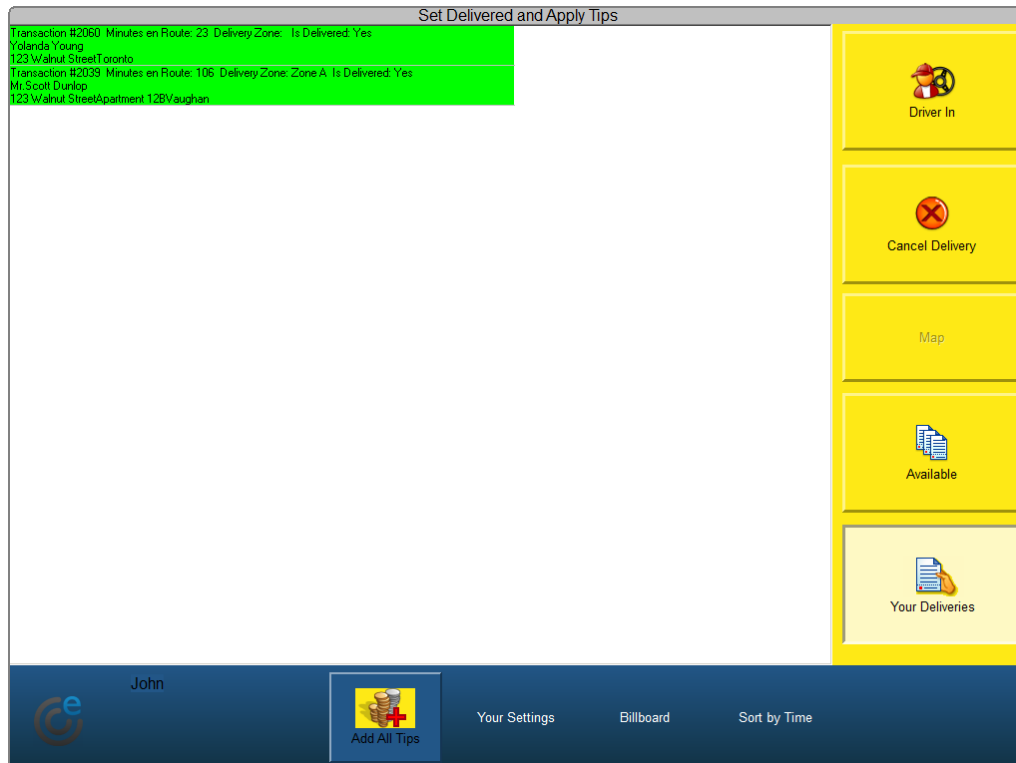
In Delivery Service, the role of the driver is almost like that of the server in a Table Service environment; the driver takes possession of the check, interacts with the customer and closes the check when back at the establishment and when the delivery is made.

The exception to this is when the delivery order is paid up front. It is then the order taker and not the driver who closes the check. Also, it is the order taker who monitors order and delivery times, should a customer inquire as to the status of an order.

### To leave on a delivery run:

1. Sign in to the Driver Screen.
2. Select all orders to be taken on the trip. Once selected, they are highlighted and tallied in the bottom left corner of the screen.
3. Select [Driver Out] after picking the orders you are going to take. This logs you out and prints a Driver Out Report to accompany you on the trip. This report includes all names, addresses and amounts owing for each delivery. (See "Delivery Scenarios".)

After you have delivered all of the orders and collected payments or signatures for them, you return to the establishment. When you log back in to the system, a screen like the one below displays.



## Toolbar Icons

**Driver Out:** Displays when you log in to the system to leave on a delivery run. This button flags you as being out and therefore unavailable to take additional orders until you return. This button allocates all selected orders to you and flags them as being en route. When you select this button, the en route timer also starts.

**Driver In:** Displays when you log back into the system after having left on a delivery run. This button marks all orders in your delivery as settled and flags you as being ready to accept orders for the next delivery run. It is recommended that you add all applicable charge tips before selecting [Driver In].

**Cancel Delivery:** Displays a list of the current delivery orders, enabling you to select one and remove it from the driver's list. The system puts the canceled order back in the order taker's delivery queue.

**Map:** Generates delivery maps for orders and charts directions between the establishment's address and the member's address. You need Internet access and a Microsoft MapPoint account in order to use this function.

**Available:** Lists all of the delivery orders that have not been selected by a driver. This enables you to add additional orders to your delivery run; to do so, just select them from the list.

**Your Deliveries:** Lists all of the deliveries you currently have assigned to you.

**Add All Tips:** Processes charge tips for any deliveries that were paid on credit. It is necessary to apply a charge tip for all credit deliveries, regardless of the amount of the tip (even if there was a zero tip). The process for this is exactly the same as for table servers applying charge tips. You can retrieve orders for tipping either by selecting the transaction from the tip screen or by using a barcode scanner on the transaction slip. You can apply a charge tip to the delivery order no

matter who settled it. (See "Tips" for more information.)

**Your Settings:** Provides access to all shift-operations functions (like cashing out, clocking out and going on breaks). (See "Your Settings Screen".)

**Billboard:** Takes you to the Billboard screen to view billboard messages. Provides information about employee notices, daily specials, desserts and sold out items. (See "Billboard Screen".)

**Sort by Time:** Sorts all of the displayed delivery orders by the time of the order. Those waiting the longest (that is, those that were ordered first) will be at the top of the list. Selecting this button changes the button label to [Sort By Zone]; when this is showing, the displayed delivery orders are listed in order of the zones they are due to be delivered to.

## Delivery Dispatch

Delivery order dispatching is an option that can be used if the establishment does not want its drivers to interact with the system. In this situation order takers take on the added role of dispatcher. This means that they assign orders to drivers and settle their checks upon return.

Transaction	Phone	Name	Status
2062	(905)267-4700	Mr. Scott Dunlop	En Route
2059	(555)555-5555	Wanda Dunwood	En Route
2058	(888)888-8888	Edgar Dunwald	En Route

Mr. Scott Dunlop  
123 Walnut Street Apartment 12B Vaughan  
Home Phone: (905)267-4700  
Business Phone: (905)267-4724

Order Taker: John Smith  
Driver: Sara Smithers  
Time Ordered: 9/23/2011 9:41 AM  
Driver Pick Up Time: 9/23/2011 10:01 AM  
Total Minutes: 21  
Minutes En Route: 0  
Total: \$25.14

Directions:  
North on Hwy 400 to Langstaff Rd. Drive East to

Driver In

Filter 10:02 AM  
Inquiry  
Your Trans.  
All  
All En Route  
Pick Ups  
Sara[0]

New Check Quick Order Add Tips Show Transaction Inquire System

### To manage a delivery trip as a dispatcher:

1. Place the delivery order as normal (See "Placing Delivery Orders" to learn how).
2. Swipe in as the driver and select the orders to be taken when a delivery trip is ready.
3. Select [Driver Out]. The delivery manifest prints and the driver leaves with the orders.
4. Log back in to the system.
5. Select the driver's name in the Order Filter Window (on the right-hand side of the screen) when the driver returns.
6. Select [Driver In].
7. Settle the orders (See the various subsections of "Settling A Check" to learn how).
  - Make sure you apply charge tips when settling the orders, and make sure you are logged in as the driver when doing this.

## Pick Up Orders

A pick up order is one in which the customer calls ahead to place the order and then comes to pick it up. Orders like this are often also called take out orders. Pick up orders are processed via the Order Taker Screen.

Transaction	Phone	Name	Status
2063	(234)535-3443	mr. Nadia Vander Dunn	Pick Up
2061	(234)234-2342	James Jordan	Pick Up

James Jordan  
32 Malloy Blvd. Toronto  
Home Phone: (234)234-2342  
Business Phone: ( ) -  
Directions:

Order Taker: Supervisor Supervisor  
Driver:  
Time Ordered: 9/22/2011 6:20 PM  
Driver Pick Up Time:  
Total Minutes: 944  
Minutes En Route: 0  
Total: \$66.54

Process Pick Up

New Check Quick Order Show Transaction Inquire System

### To place a pick up order:

1. Select [New Check] on the Order Taker Screen when the customer calls in the order.
  - If you are not working from the Order Taker Screen and need to process a pick up order, go to the Table Layout Screen and select [Manager] and then [Show Delivery Status Form].
2. Select [New Member] and create a new record if the member is not already on file; enter the necessary information into the member record.

OR

- Select [Last Name Find] to view the full list of members or type the member's last name in the text box and then select [Last Name Find] to locate them in the database.
- If the customer does not want the order to be processed as soon as possible, switch to the *Future Orders* tab and then select [Schedule] to apply the desired ready time (provided this function is available on your system).
2. Select [Use Member] when you have the member record on the screen.
  3. Enter the customer's order when the order screen displays. Make sure that the sales type is set to "Pick Up". If it is not, you will not be able to retrieve the order through the Pick Up screen.
  4. Select [Save Check].

The system returns you to the Order Taker Screen and sends the order to be prepared.

When the customer comes to the establishment to pick up their Pick Up order, the order will need to be completed by handing it over to the customer and marking the order as complete in the system.

**To complete a pick up order:**

1. Select [Pick Ups] from the Order Filter window on the Order Taker Screen.
2. Select the customer's order from the list of pick up orders that appears in the Order Chart window.
  - If the order does not appear in the list, select the Future Orders tab. It may have been scheduled for a specific time that has not arrived yet. You can still close the check, before the scheduled time, by continuing with the next step.
3. Select [Process Pick Up] to retrieve the order.
4. Close the check and give the order to the customer.

---

**Note:** If the order does not appear on either of the lists mentioned above, it is likely that Pick Up was not selected as the sales type when the order was placed. The order can be retrieved as a saved check with the station's default sales type (which is likely Dine-In). To retrieve saved Dine-In checks, go to the Table Layout Screen and select [Transaction View].

## Delivery Features

PixelPoint POS has many features that can further enhance the delivery process. Some of these features may need another module or agent, or further configuration. Consult your PixelPoint dealer for more information.

Delivery features include:

### Member Lookup Auto-prompts

When the *order taker* goes to the Member Screen to retrieve an order, PixelPoint can be set to automatically prompt for a member phone number, swipe card, or name. That is, you can specify one of these as the default lookup method. However, you can still override the default lookup method if the situation calls for it.

---

**Tip:** To prevent unauthorized member telephone lookups in environments where the *QuickMember* policy is configured to prompt for member telephone numbers, enable the *AskForMemberPin* policy in BackOffice Policy Setup. The user will then be prompted to enter a PIN number if one has been set up.

### Call Display

Another method for quick member retrieval is using a call display system that can work with PixelPoint. Using such a system, a call display window appears on the screen, enabling you to view the identity of callers and retrieve their member record simply by selecting their name on the display.

### Bar-coded Order Selection

Using a barcode reader, drivers can select orders by scanning the barcode on the order slip rather than by selecting it on the screen. This makes the process faster and reduces the likelihood of selecting the wrong order.

### Delivery Zones

Delivery zones are geographic areas which help to locate where a member lives. Located within the member record is a zone field, which the order taker can use to specify what delivery zone the member is in. When assigning orders to delivery drivers, the zone field helps the order taker decide which orders should go on which trip. For example, if a driver is traveling to the East end of town, it would not make sense to give an order in the West end to that driver (if there was a driver available for West end deliveries, that is). Zones help the delivery team distribute their orders on each trip in a way that minimizes the time and cost involved.

### Operational Toggle Button

There is a button called [Show Delivery Status Form] on the Manager Functions Menu. This enables a server working in either Table Service or Quick Service to quickly flip over to the Order Taker Screen to process a take out or delivery order. Upon completing the transaction, the system returns the user to their regular mode of operation.

### Surcharge

A surcharge is an additional charge you wish to apply to the check. It is a percentage calculation based on either the Net Total (total before taxes) or Final Total (total after taxes).



1	Sample Surcharge	\$1.00
1	Lobster Tails	\$28.95
Void Item		
Net Total : \$29.95		
*****		
Final Total : \$34.95		

Not only can PixelPoint POS apply this surcharge, but it can also be set to work with a minimum and/or maximum charge. A minimum charge is the smallest amount that will ever be applied to a check, no matter if what the system calculates as the surcharge is less (For example, if the minimum charge is \$1.00 and the system calculates the surcharge should be \$0.80, the surcharge on the check will be \$1.) A maximum charge is the largest amount that will ever be applied to a check, even if what the system calculates as the surcharge is larger (For example, if the maximum amount is \$20.00 and the system calculates the surcharge should be \$22.00, the surcharge on the check will be \$20.)

You can set the calculation of surcharge to vary with the *price level* being used (See "Price Levels"). So if a discounted price level is applied, you may want the surcharge to be higher to make up for the lost revenue. For example, say that "Happy Hour" is in effect. Your normal surcharge is 10% of the order price. However, because it is "Happy Hour", you want that surcharge to be 15%. PixelPoint POS can have a different surcharge for each of up to eight price levels.

You can also set surcharges to apply to a specific *sales type*. For example, you may want to add a surcharge to delivery orders in order to take the additional cost to your establishment into account.

## Host(ess) Service

Hostess Service refers to a kind of operation in establishments that have Dine-in service. Hostess Service mainly has to do with seating management; this means managing line ups at the door, accommodating reservations and coordinating bussing. This section contains topics like how to work with the hostess screen, create reservations and send bussing commands. It is organized as follows:

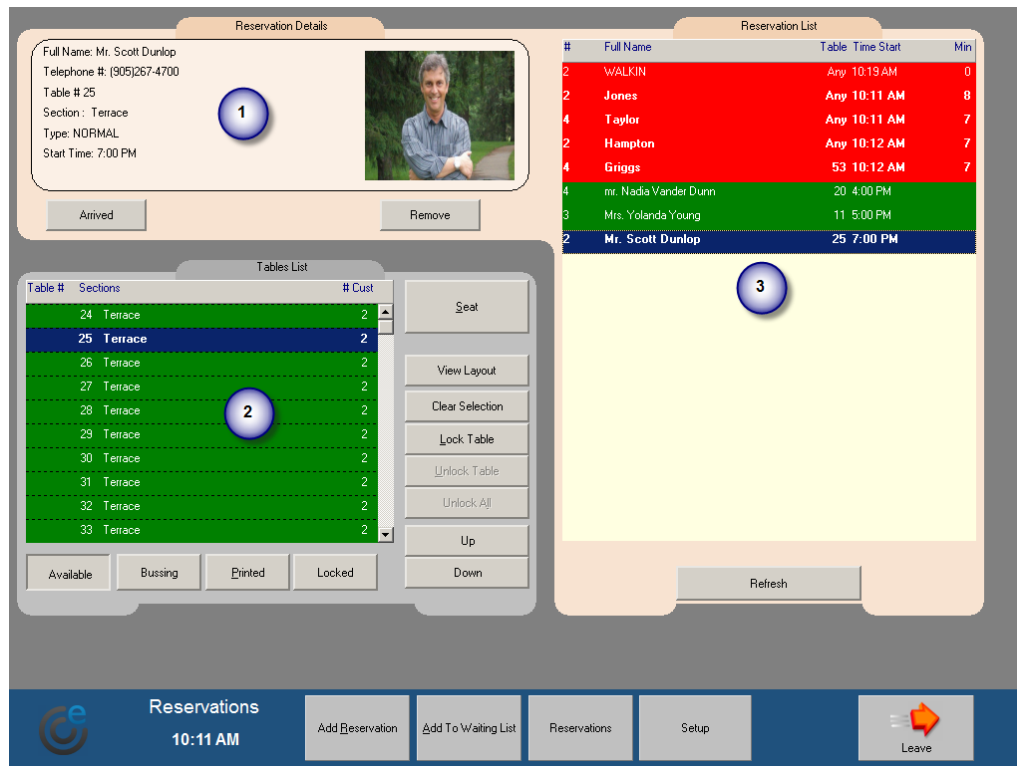
- Host(ess) Screen
- Adding Reservations
- Reservation Indicators
- Seating Customers
- Pagers

### **To set yourself up as a host or hostess:**

1. Log in.
2. Select [Your Settings].
3. Select [System Interface].
4. Select [Host/Hostess] and then [OK].
5. Select [Save].
  - You may need management authorization to make this change.
6. Log out.
7. Log back in.
8. Select [Reservations] (in the bottom right-hand corner of the screen).

## Host(ess) Screen

With PixelPoint POS, you can manage reservations and waiting lines from a station. You do this on the Host(ess) Screen, which is shown and explained in detail below.



## Host(ess) Screen Layout

### 1. Reservation Details

Contains detailed information about the reservation selected in the Reservation List (2). This includes the name of the guest, their phone number, the reserved table, the dining section it is in, the type of reservation and when the reservation is scheduled to begin. If a photograph is included in the member record, it will also be displayed here.

### 2. Reservation List

Contains a list of all guests waiting for a table, as well as reservations scheduled for the current day. When you place a reservation, it shows up here. Information contained in this window includes the name of the guest, the number of people in the party, the requested table number, the time the entry was made and the number of minutes the guests have been waiting. When you select a reservation entry in this window, the Reservation Details section (1) shows further details about it.

### 3. Tables List

Contains table-related information. When a reservation record is selected, this window displays all of the tables that are available for it. The table records are color coded to mark how well they match the criteria for the reservation. If the line is:

- **Green**, then the table is an exact match (for both dining section and seating capacity).
- **Olive**, then the table is a partial match (for either dining section or seating capacity).
- **Gray**, then the table matches neither criteria but is still available for selection.

## Host(ess) Screen Buttons

**Arrived:** Indicates to other hosts that the guest has arrived and is waiting for a table. When you select this button the arrived symbol displays next to the guest's name in the Reservation List.

**Remove:** Cancels the selected reservation. The four buttons under the Tables List (3) control which tables you see in the list.

**Available:** Shows all of the tables at which you can seat the reservation. This button is selected by default.

**Bussing:** Shows all tables that are currently in bussing mode (indicated on the Table Layout Screen as pulsating trash cans). These tables will be ready very soon. Select this when there are no tables available for seating and you want to know which tables will be ready next.

**Printed:** Shows all tables that have had their checks printed (indicated on the Table Layout Screen as green tables). These tables will be ready in a few minutes. You would select this in the event you are looking for a table to seat guests at and there are no tables shown under either [Available] or [Bussing].

**Locked:** Shows all tables that have been locked by a host. You typically lock a table to warn others not to seat anyone there (usually when the table has been reserved and there is insufficient time to seat another party there before the reservation arrives).

**Seat:** Seats the guest entry displayed in the Reservation Details window at the highlighted table in the Tables List window. The system removes the entry from the Reservation List and shows the table entry as unavailable. The table icon on the Table Layout screen flashes white, telling servers that someone is seated at that table and needs service. If the table has not been attended to after a certain length of time, the icon will start flashing yellow with an exclamation symbol.

**View Layout:** Shows you where the selected table is on the floor layout. The table has a faint circle around it.



**Clear Selection:** Removes the highlight from the selected Table Window entry, enabling you to select another table.

**Lock Table:** Locks the selected table in the Table Window (locked tables have a lock icon to the left of the table number). The purpose of doing this is to prevent anyone from accidentally seating guests at a table that you want to keep available. For example, say that a reservation for Table 4 is expected to arrive in 10 minutes. Right now, the table is now available. You select this table and press [Lock Table] to display the lock icon. This tells everyone not to seat people at that table. When the reservation arrives, you can then unlock the table and seat them.

**Unlock Table:** Unlocks the selected table in the Table Window (that is, it removes the lock icon from the selected table entry).

**Unlock All:** Unlocks all tables that are currently flagged as locked.

**Up / Down:** Enable you to scroll up and down the table list.

---

## Toolbar Icons

**Logout:** Logs you out of the system.

**Add Reservation:** Enables you to add a reservation to the system. A wizard will walk you through the process of recording a name, the number of guests, table preferences and when they want to make the reservation for. See "Adding Reservations" for details.

**Add To Waiting List:** Enables you to add a guest to the list of people waiting for a table. A wizard will walk you through the process of recording their name, number of guests and table preferences. When you complete this, they are added to the list in the Guest Window.

**Reservations:** Enables you to view and edit the reservations for any given day.


**Setup:** Enables you to configure the reservation system; displays the "Reservation Setup" window (shown below). Adding or removing check marks in the Sections area controls what dining sections you can add reservations for. Pressing the [+] or [-] buttons in the Forward Reservation Visibility area changes the length of time before a reservation that it is included in the Reservations List. The [On] and [Off] buttons in the Paging Enabled section turn the interface for guest pagers on and off (See "Pagers").

### Reservation Setup

**Sections**

<input checked="" type="checkbox"/>	Non-Smoking Section
<input checked="" type="checkbox"/>	Smoking Section
<input checked="" type="checkbox"/>	Bar Platform
<input checked="" type="checkbox"/>	Patio Section
<input checked="" type="checkbox"/>	Gaming Section

**Forward reservation visibility**

 11 h

**Paging enabled**

**Statistics**

## Adding Reservations

You add reservations by using [Add Reservation] on the Host(ess) Screen. Say that a client calls and wishes to place a reservation. Follow the steps below.

### To Add a Reservation:

1. Select [Add Reservation] on the Hostess Screen. The following screen displays.
  - The remaining steps follow the numbers on the image below.

MEMBER DEFAULT Friday, September 23, 2011 7:00 PM Customers 4 Duration 1.00 H

Reference #

Month	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan							
Feb							
Mar					1	2	3
Apr	4	5	6	7	8	9	10
May					15	16	17
Jun	11	12	13				
Jul	18	19	20	21	22	23	24
Aug	25	26	27		29	30	
Sep							
Oct							
Nov							
Dec							

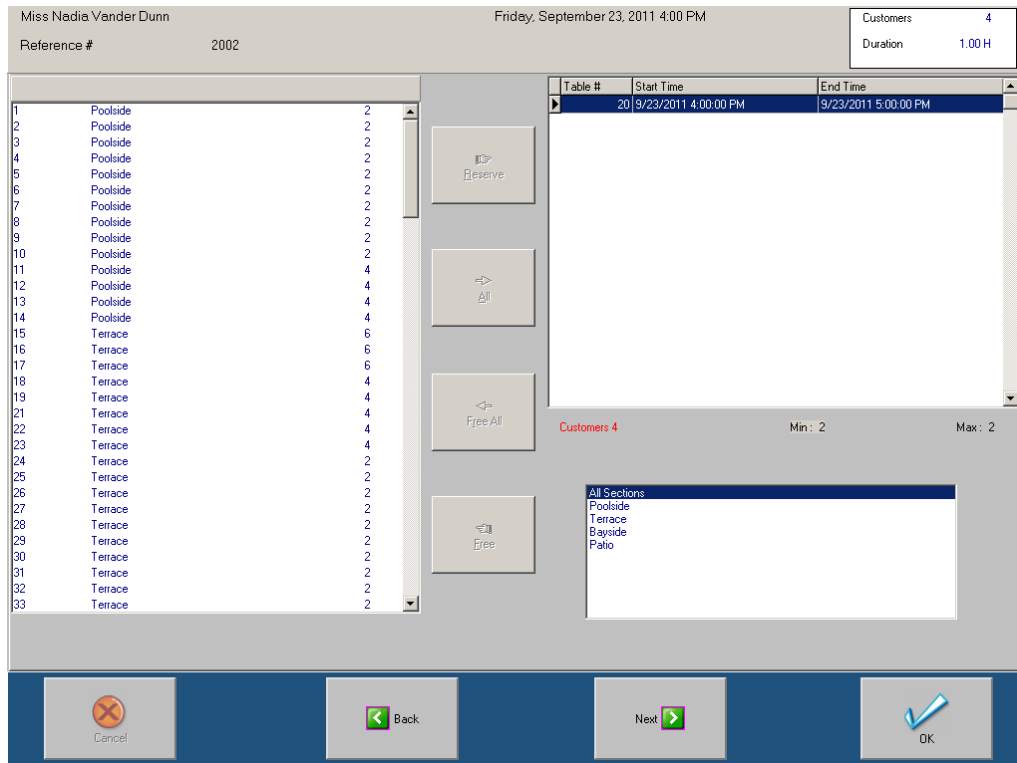
7:00 PM Reservations  
Reservations tables Customers  
1 1 2

Time	Customers	Duration
12:00		
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

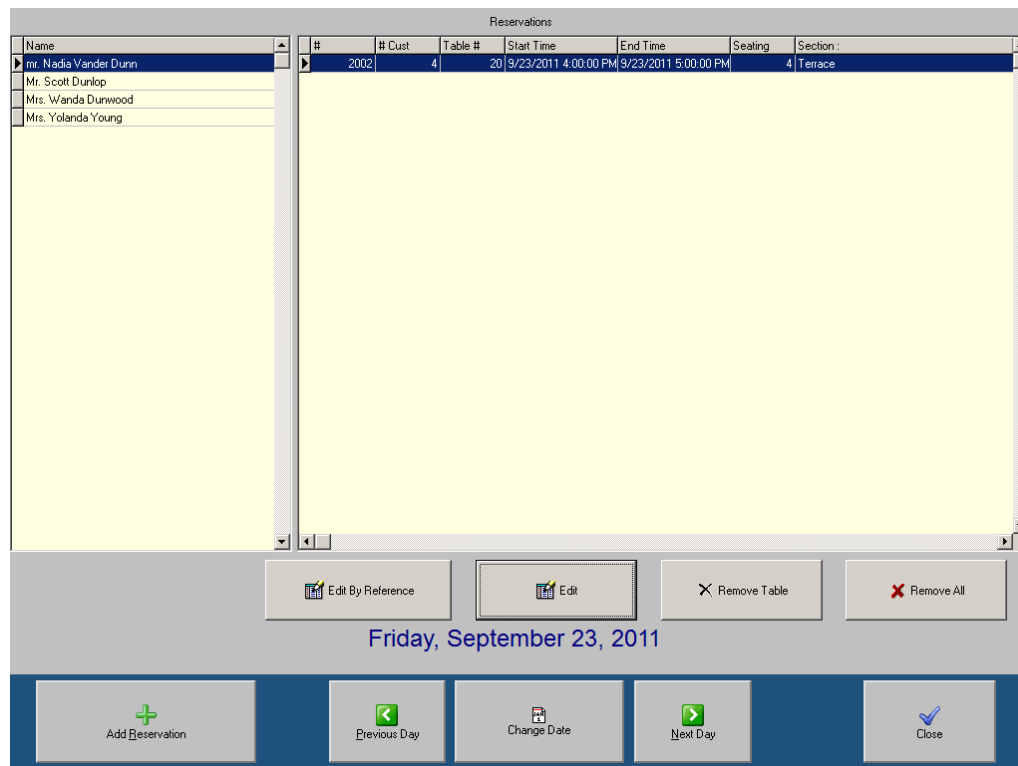
2. Select the year for the reservation by using the arrow keys.
3. Select the month.
4. Select the calendar day.
5. Select the time when the reservation will start. Select [AM] or [PM] to change from one to the other.
6. Select the number of guests who are expected.
7. Select the estimated duration of 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, specific 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 then identify the reason for the reservation (such as an anniversary or birthday) and also add a comment. Selecting [Finish] brings you back to the Host(ess) screen.

You can view and edit all of the current reservations by selecting [Reservations] on the Host(ess) Screen. When you select that button, a window displays (see the image below), listing all of the reservations for the current day. If you want to view reservations for another day, use either the arrow keys or specify a date by using [Change Date].





### To Edit a Reservation:

1. Select the reservation you wish to edit from the list on the left of the screen.
2. Select [Remove Table].
3. Select [Edit] (or [Edit By Reference] if you know the reservation's reference number). The add reservation screens display, enabling you to change any of the reservation's details.

The reason for first unreserving the table is to ensure that the selected tables are appropriate for the revised reservation. For example, if you reserved Table 3 for 6:00 and later 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:** PixelPoint's TableTime module is required for this function to work.

## Reservation Indicators

In addition to being able to see reservations on the Host(ess) Screen, your Table Layout Screen may be enhanced with reservation indicators on the table icons, enabling you to see what tables are booked for reservations on that screen too.

If your establishment has programmed these indicators, and a table is reserved for a reservation later on, you will see a white clock icon on the table.



By default, these indicators are programmed to turn yellow if the reservation is coming up in the next 15 minutes.



This makes it easy for hosts/hostesses to know not to seat guests at that table because someone will be using it soon. Your establishment can program these indicators to turn yellow sooner, in order to make sure that tables do not get opened if there is not enough time for the guests to finish their dining experience before an upcoming reservation is scheduled to arrive. Your establishment may set these indicators to turn yellow, say, 45 minutes or an hour before a reservation is scheduled. In this case, you could be trained such that you can open tables with reservation indicators on them, as long as they are not yellow.

If a table is booked for a reservation that is scheduled for a time that is already past, but the guests did not arrive on time for the reservation, the reservation indicator on the table icon will be orange, indicating that the reservation is overdue.



A guide to these indicators is available in the software itself; you can get a reminder of what these indicators mean by selecting [Table Info] and then [Legend]. (See "Table Legend")

## Seating Customers

The main function of a host or hostess is to seat customers. Customers who need to be seated can be divided into two main types—those who have a reservation and those who do not.

This second group is often called Walk-In Traffic, and the way you seat them depends on how full the establishment is. If the restaurant is not full and there are tables available for the next guest (s), you would use the permanent entry in the Reservation List section called "WALKIN" (See the image below).

The screenshot displays the PixelPoint POS interface for managing reservations. It is divided into several sections:

- Reservation Details:** Shows information for a reservation for 'Jones'. It includes fields for Full Name, Telephone #, Table #, Section, Type, and Start Time (10:11 AM). There are 'Walk-in' and 'Arrived' status options with corresponding icons, and 'Arrived' and 'Remove' buttons.
- Reservation List:** A table listing reservations with columns for #, Full Name, Table, Time Start, and Min. The list includes a 'WALKIN' entry and several named reservations like 'Jones', 'Taylor', 'Hampton', 'Griggs', and others.
- Tables List:** A table listing available tables with columns for Table #, Sections, and # Cust. Tables 3 through 27 are listed, mostly 'Poolside' and 'Terrace' sections, each with 2 customers.
- Reservations:** A bottom section showing the current time as 10:11 AM and buttons for 'Add Reservation', 'Add To Waiting List', 'Reservations', 'Setup', and 'Leave'.

### To seat walk-in traffic:

1. Select [WALKIN] from the Reservation List. The Tables List shows all tables that are available.
2. Select the desired table from the Tables List.
3. Select [Seat].

The table is now flagged as occupied. On the Table Layout Screen, the table's icon will start to flash, indicating that someone is seated there, but their order has not been taken yet. It will remain this way until someone selects the table and enters an order.

If, on the other hand, you cannot seat the next guest(s) immediately, because the restaurant is getting full or is completely full, the process is a little different.

**To seat walk-in traffic when busy or full:**

1. Select [Add To Waiting List]. The following window appears.

The screenshot shows a software window for adding a reservation to a waiting list. At the top, there is a text field labeled 'Name' containing the text 'Baxter'. Below this are three buttons: 'Keyboard', 'Swipe Member Card', and 'From Database'. The main area of the window is divided into three sections: 'Sections', 'Table:', and 'Customers'. The 'Sections' section contains a list with the following items: 'Any section', 'Poolside', 'Terrace', 'Bayside', and 'Patio'. The 'Table:' section contains a list with the following items: 'Any', '15', '16', '17', '18', '19', and '20'. The 'Customers' section contains a 5x5 grid of numbers from 1 to 25. At the bottom of the window, there are two buttons: 'Cancel' on the left and 'OK' on the right.

2. Enter the name of the party in the name field.
  - If any of the guests is a member, you can apply them using either [Swipe Member Card] or [From Database].
3. Select the desired dining section. You may leave the selection as "Any Section" if the customer does not care which dining section they are placed in.
4. Select a table from the list that appears, if you selected a specific dining section. You may keep the default selection of "Any" if the customer does not care which table they are seated at.
5. Select the number of people in the party.
  - If there are more than 25 people, select [Other].
6. Select [OK]. The waiting list entry is added to the Reservation List and the system starts a time clock to keep track of how long the party has been waiting.

Seating guests who have a reservation is quite different. For information about how to add reservations, see "Adding Reservations". The remainder of this section explains how to seat guests who have a reservation.

**To seat reservations:**

1. Select the table the reservation is for and then select [Lock Table] just before the customer arrives, if you have a chance to do so when the table is available. This tells your coworkers not to seat anyone at that table.
2. Select the table and then select [Unlock Table], if the table is locked when the customer arrives.
  - If the table is not ready yet, select the reservation entry and then select [Arrived]. A tiny symbol displays next to the reservation indicating that the reservation has arrived

and is waiting.

3. Select the reservation in the Reservation List.
4. Select the reserved table.
5. Select [Seat]. The reservation is placed at its table.

---

**Note:** If the guests for the reservation arrive at different times, you can always locate where the guests already at the establishment are by going to the Table Layout screen and selecting [Who Is Here]. It lists all members currently seated and which table they are seated at.

**Also note:** PixelPoint's TableTime module is required for this function to work.

## Pagers

Some establishments often have many guests waiting at the front of the store for a table. So that these guests do not have to stay in one location or crowd around a hostess podium waiting for their names to be called out, you can interface PixelPoint POS with different kinds of devices, like guest pagers. These pagers are given to guests who are waiting for a table; the guests know to come forward to the podium to be seated when the pager starts to blink (or activates in some other way).

If your system is interfaced with a guest pager system, there will be an [Assign Pager] button on the Waiting List Screen (as shown below).

The screenshot shows the 'Waiting List Screen' interface. At the top, there is a 'Name' field containing 'Baxter'. Below this are four buttons: 'Keyboard', 'Swipe Member Card', 'Erom Database', and 'Assign Pager'. The 'Assign Pager' button is highlighted with a red rectangular box. Below these buttons are three columns: 'Sections', 'Table:', and 'Customers'. The 'Sections' column lists: 'Any section', 'Non-Smoking Section', 'Smoking Section', 'Bar Platform', 'Patio Section', and 'Gaming Section'. The 'Table:' column contains 'Any'. The 'Customers' column is a grid of numbers from 1 to 25, with the number '2' highlighted in blue. At the bottom of the screen are two buttons: 'Cancel' (with a red X icon) and 'OK' (with a blue checkmark icon).

A keypad displays when you press this button, asking you to assign a pager to the guest. Pick a pager and enter the number that is displayed on it.

The screenshot shows a blue 'Assign Pager' keypad. At the top, the text 'Assign Pager' is displayed. Below it is a white input field containing the number '4'. The keypad consists of a 4x4 grid of buttons: the first row has '7', '8', '9', and a red 'Cancel' button; the second row has '4', '5', '6', and a blue 'Clear' button; the third row has '1', '2', '3', and a green 'OK' button; the fourth row has '0' and a green 'OK' button.

In addition, the Reservation Details section will now include a [Page Guest] button and the pager number for that guest's record (see below). To activate the pager, select [Page Guest].

**Reservation Details**

Full Name: Zian Khamseh Telephone #: (305)632-4632 Table # 11 Section : Non-Smoking Section Type: NDRMAL Start Time: 4:35 PM	<p>Reservation </p> <p>Arrived </p> <p>Yes</p>
---	--

 #4

## Part II: Manager Functions

This section addresses front-end features and functions that have to do with management-only operations.

It contains information about how to start the system at the beginning of the day, how to shut down the system at the end of the day, and gives detailed explanations of each function on the Manager Functions Menu.

There is also a troubleshooting section that provides help with common operational mistakes and discusses diagnosing system-related problems and taking preventative measures.

Specifically, the contents of this section are:

- Daily Processes
- Manager Functions Menu
- Training Mode
- Security
- Troubleshooting



## Daily Processes

This section contains information about processes that happen once (and only once) every day—they are called Start of Day and End of Day.

The way these processes happen and what takes place during them is different if your establishment is open for 24 hours a day or has a period when it is closed. In addition, these processes can also be set to run automatically, or be done manually.

## Start of Day

The Start of Day process begins the day's sales after the End of Day process is run. Its function is to get the system up and running again (if it closed down at all). The process happens once every 24 hours, but is a little different depending on whether the establishment is open for business for all 24 hours or whether it closes for a period.

---

### 24 Hour Operation

If the establishment is a 24 hour operation, it never closes down. Therefore the only thing that is needed in a Start of Day process is to tell the system that the beginning of the day starts immediately after the End of Day process is run. During Start of Day, the manager can also retrieve the End of Day reports for the previous day.

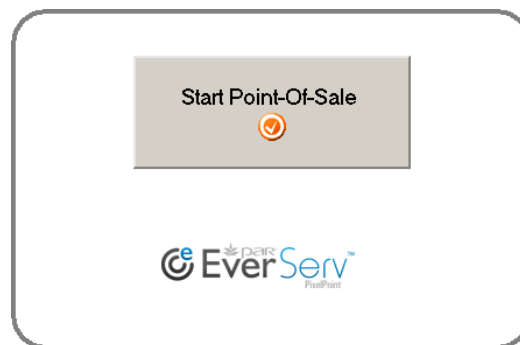
---

### Non-24 Hour Operation

In a non-24 hour operation however, the process is different, since the End of Day process shuts the system down in some way. Part of the Start of Day process, then, is getting the system back up again. It is important that this be done as follows.

#### To run Start of Day:

1. Start up the PC designated as *POSSERVER*.
2. Ensure that the PixelPoint License Manager and SQL Database Engine are running. They should have started automatically when the user logged in to Windows.
3. Start up Station 1.
4. Select [Start Point of Sale] when the startup window displays.



5. Confirm or change the date and time when the screen displays asking you to.
6. Start up any other stations. They will each display the login screen.

## End of Day

End of Day refers to the process of collating all of the day's sales and operational data. This is usually done after the establishment has closed; it is the last process before shutting down the system and leaving the establishment for the night. However, because some establishments do not close for the night at all, there are two types of End of Day processes.

One type of End of Day process applies to establishments that have a set opening time and closing time. These establishments have non-24 hour operations. The other type applies to establishments that never close. They have 24 hour operations.

This section describes what happens during End of Day and how 24-hour and non-24 hour processes differ from one another. This section also guides you through how to run End of Day for both kinds of operations.

---

### Automatic End of Day

You can program PixelPoint to run the End of Day automatically at a scheduled time. This method can be particularly useful for establishments that want to have their sales reflect an exact 24-hour period. It is also useful in the sense that management never has to worry about running the End of Day process. You can schedule End of Day to be run automatically whether your establishment is open for 24 hours a day or not. In addition, there are several policies (configured in Policy Setup in BackOffice) that can help with automatic End of Day. They enable the system to do things like attempt to automatically clock out employees or settle the batch of charge transactions.

---

### 24 Hour Operation

In this kind of operation, the establishment never closes. Because of this, there may never be a time when there are no open checks and when all staff are cashed out and clocked out. So, the requirements for End of Day that had to be met in the above section cannot be met.

To accommodate 24-hour operations, the End of Day process changes so that there can be open checks and clocked-in staff. PixelPoint moves all open checks to the current day and changes currently working staff's time clocks over to the new day as well. In this case, PixelPoint runs End of Day "in the background". This means that it does not affect front end operations at all; people using the system cannot tell that End of Day is running. With this kind of End of Day process, you have access to the End of Day reports through the external Report Viewer application; the Sales Summary report will contain all of the End of Day information.

There are two ways End of Day can be run within a 24 hour operation: automatically and manually. Automatic End of Day in a 24-hour operation is fully automated — you do not need to do anything in order to run it.

If you do not program PixelPoint to run End of Day automatically, you can do it yourself by just selecting a few buttons. You should choose a time when the establishment is not very busy to run the End of Day process. This will give you the opportunity to ensure that all charge tips have been applied. It also means that you can co-ordinate the settlement of charge transactions with the End of Day process. However, running End of Day manually means that it is your responsibility to ensure that End of Day is run every day.

#### **To run End of Day manually:**

1. Log in to Station 1.
2. Select [Manager].
3. Select [Sales Functions].
4. Select [Day: Finish Sales].
5. Select [Yes].

---

## Non-24 Hour Operation

In this kind of operation, the establishment opens for business at a certain time. It also closes for business at a certain time. In an operation such as this, the requirements for End of Day are quite clear:

- All checks must be closed.
- All charge tips must be applied (if using Authorization Manager).
- All staff must be cashed out and clocked out (this does not include the manager).

When these requirements are met, you (the manager) are the only person logged into the system. You run the End of Day process from the main station (Station 1). During the process, PixelPoint collates sales and time clock data from every station and generates all necessary reports on the station's printer. It also cashes and clocks you out, and places all stations into shutdown mode. When the system is finished, you simply touch [Turn Station Off] on each station's screen and the station shuts down.

### To run End of Day:

1. Ensure all checks are closed.
2. Ensure all charge tips have been applied (if using Authorization Manager).
3. Ensure all staff have cashed out and clocked out. You should be the only one remaining on the system.

If your system is set to run End of Day automatically, you do not need to do anything else. The system will take care of the rest. If you are running End of Day manually, then follow the steps below:

4. Log in, if you are not logged in already.
5. Select [Manager].
6. Select [Sales Functions].
7. Select [Day: Finish Sales].
8. Select [Yes]. The PixelPoint Finish Day Assistant appears, informing you of any open tables, unsettled charges and clocked in employees. (See "Finish Day Sales Assistant".)
  - If there are any of these, you will not be able to proceed. [Continue] will be unavailable. Close all tables, settle all charges, and clock out all employees. [Continue] will then become active.
9. Select [Continue]. PixelPoint carries out the remainder of the End of Day process, the last part of which sets all stations to shutdown mode.
10. Select [Turn Station Off] on each station to shut the station down.

## Manager Functions Menu

The Manager Functions menu is available from the Table Layout Screen. Select [Manager] to retrieve the menu (shown below). The following sections provide a detailed overview of each of the functions available on this menu. To reach and use each function, select the corresponding button on the menu.



The bottom of the Manager Functions menu has important information about your system. The version number of your PixelPoint system is in the bottom of the screen; you may need this if corresponding with a software support representative.

In the bottom left of the window is the Open Date. This indicates the date to which your transactions are being posted. In the event the End of Day process was not run last night (See "End of Day"), you may notice that the Open Date is set to the day before, even though the prints and receipts show the current date. To fix the date, you need to run End of Day. However, be aware that your sales information might not be accurate because of the difference from when you usually run End of Day.

The station number in the bottom right corner identifies which station you are currently on.

By default, the Manager's Function Menu contains the following buttons:

---

### Manager Functions Menu Buttons

**Sales Functions:** Brings you to the Sales Functions menu, which enables you to access several sales-related functions. See "Sales Functions" for information about each of the functions available on this menu.

**Set Weather:** Enables you to record the day's weather—this is often useful for monitoring sales, as activity in venues with outdoor dining areas is often greatly dependent on the weather. (See

"Set Weather".)

**BackOffice:** Opens PixelPoint BackOffice. (See "BackOffice".)

**Transaction Viewer:** Displays the Manager's version of the Your Trans Screen. (See "Transaction Viewer".)

**Employee Time Clock:** Takes you to the employee time clock function, which enables you to control all aspects of employee shifts. (See "Employee Time Clock".)

**Authorization Manager:** Takes you to the Authorization Manager function, which enables you to view and process all pre-authorized charge transactions. (See "Authorization Manager".)

**Employee Functions:** Brings you to the Employee Functions menu, which enables you to access several sales-related functions. See "Employee Functions" for information about each of the functions available on this menu.

**Product Functions:** Brings you to the Product Functions menu, which enables you to access several product-related functions. See "Product Functions" for information about each of the functions available on this menu.

**Special Functions:** Brings you to the Special Functions menu, which enables you to access functions that end POS operations. See "Special Functions" for information about each of the functions available on this menu.

**Printer Manager:** Takes you to the Printer Manager function, which enables you to manage all of the printers on the system. More specifically, it deals with routing print jobs to different printers and clearing them when problems arise. (See "Printer Manager".)

**Reservations:** Takes you to the Host(ess) Screen, which enables you to perform host and hostess functions.

**Show Delivery Status Form:** Takes you to the Order Taker Screen, which enables you to perform order taker functions.

**Pay Expenses:** Takes you to the Pay Expenses function, which enables you to record *pay-outs* to suppliers. (See "Pay Expenses".)

**End User License Agreement:** Displays the same End User License Agreement (EULA) that shows after each POS software update. Use this button at any time to review the EULA.

**Help:** Launches PixelPoint POS help.

**Cancel:** Closes the menu and returns you to the previous screen.

---

**Tip:** When new value-adding features or major bug fixes have been introduced into new releases of PixelPoint software, a [New Features Are Available] button will appear beside the EULA button automatically. Select this button to learn about new features as they become available.

## Sales Functions

### Table Layout Screen / Manager / Sales Functions

Selecting [Sales Functions] on the Manager Functions menu presents the following window.



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### Sales Functions Menu Buttons

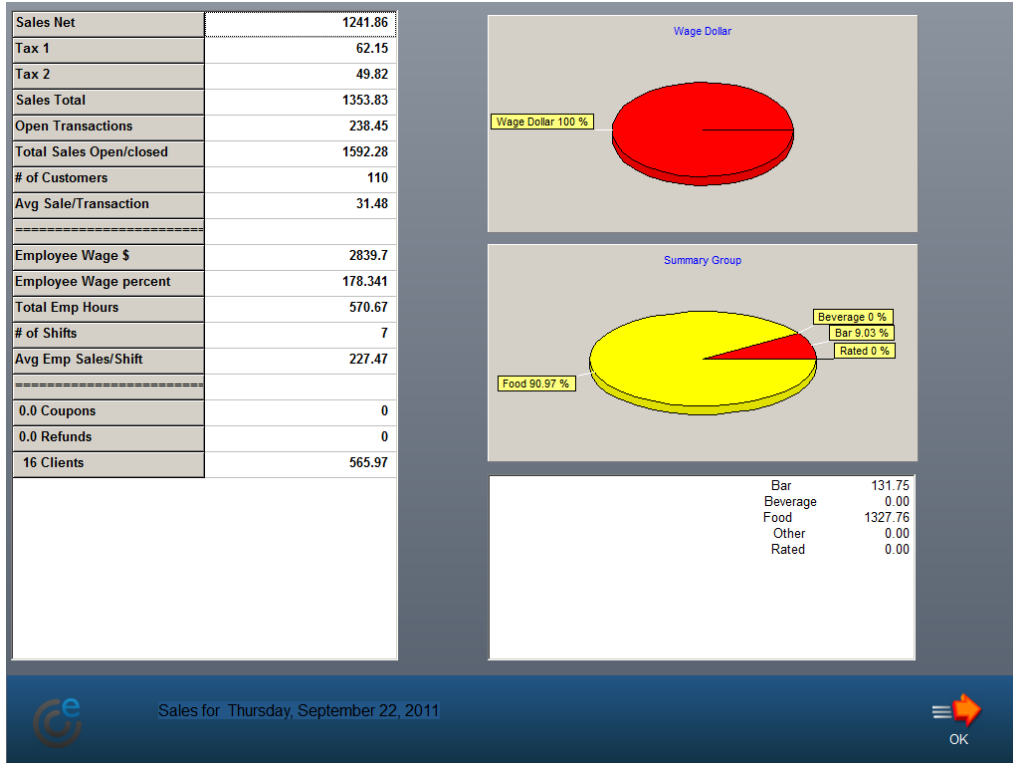
#### [Day: View Reports]

Presents management reports for quick viewing. The reports presented are the same type as those generated through Report Viewer. You can change the list of reports that are displayed here in BackOffice.

#### [View Current Sales]

Presents a screen report of sales, statistics and employee-related data (shown below). It is for viewing only.





**[Day: Print Sales]**

Generates a printed report summarizing the View Current Sales information.

**[Day: Finish Sales]**

Executes the End of Day process (See "End of Day"). Displays the Finish Day Sales Assistant, to help you with this process (See "Finish Day Sales Assistant").

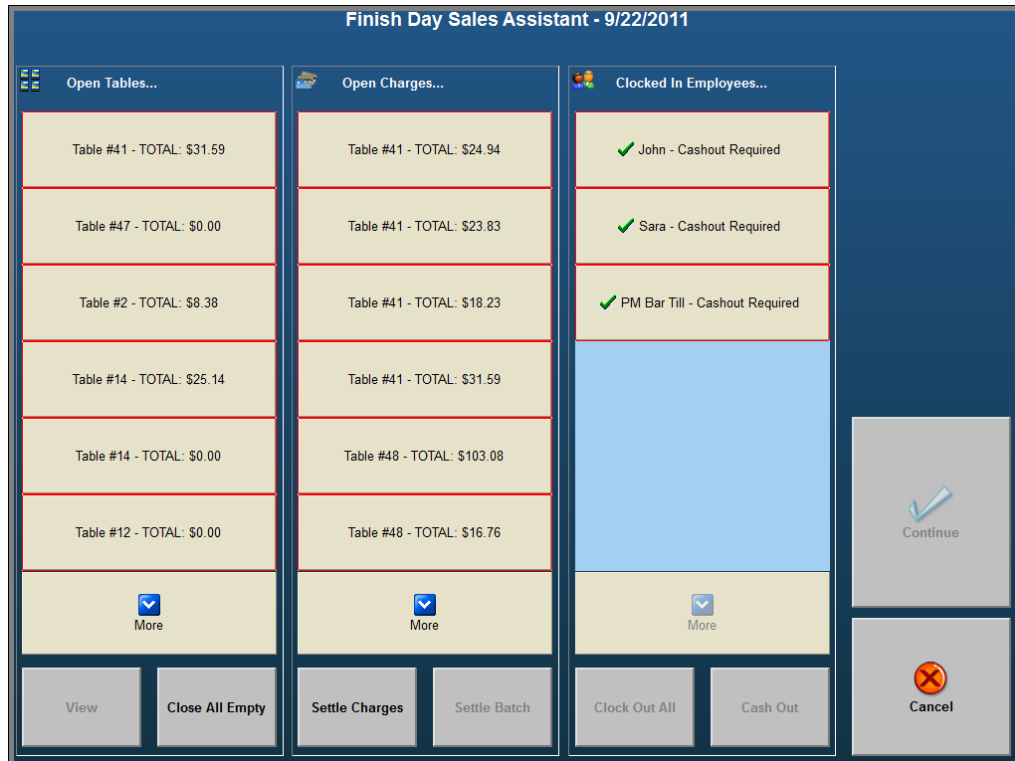
**[Tender Balancing]**

Presents the tender balance screen (See "Tender Balancing"); used if tender balancing has been programmed and set to run as part of the End of Day process. The manager enters the amounts collected for each method of payment on the screen that displays. The system then compares this information to what it calculates there should be; the difference is reflected as an over or short within the End of Day report (See "Tender Balancing" for more information).

## Finish Day Sales Assistant

### Table Layout Screen / Manager / Sales Functions / Day: Finish Sales

This screen displays when you select [Day: Finish Sales] on the Sales Functions Menu. It does not appear, however, if your establishment is open 24-hours a day. This topic explains the different components on this screen and what it enables you to do.



### Open Tables

Lists all tables that are still open and the total dollar amount of the check on each of them.

### Open Charges

Lists all charges that have not been settled or had tips added to them.

### Clocked In Employees

Lists all employees currently clocked in the system. If an employee has closed any transactions and has not yet cashed out, their button will read "Cashout Required" after their name.

### View

Displays information about the selected table in the 'Open Tables' pane. The screen that appears shows the current items on the table's order receipt as well as the transaction totals. This screen also has a [Use Check] button that brings you right to the check, so you can close it or make changes to it.

### Close All Empty

Closes all tables that are open but have no unpaid items on them. (These tables will therefore be listed as having "\$0.00" totals on them.)

### Settle Charges

Brings you to the Authorization Manager screen so you can settle the listed open charges (See

"Authorization Manager").

**Settle Batch**

Enables you to settle the batch of transactions, if there are no transactions that need charge tips to be added to them (and if there is a batch to be settled).

**Clock Out All**

Clocks out all employees (as long as they do not need to cash out).

**Cash Out**

Cashes out the selected employee.

**Continue**

Continues with the End of Day process. This button will not be available until the three window panes here are empty. That is, you cannot continue until all tables are closed, all charges are have tips added to them, and all employees are clocked out.

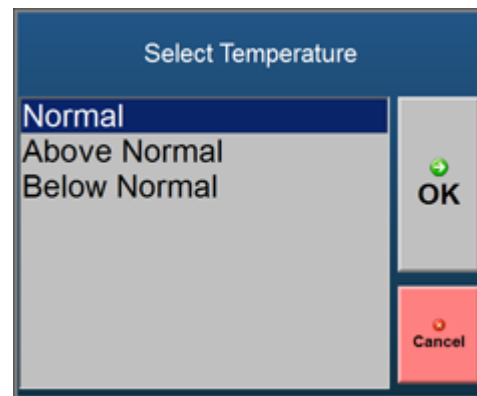
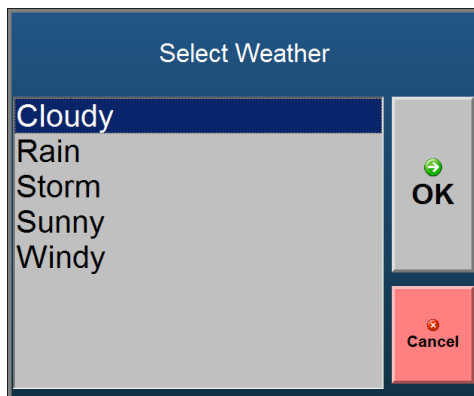
## Set Weather

### Table Layout Screen / Manager / Set Weather

This function is especially useful for establishments with outdoor seating areas (such as a patio.) Sales in these areas are very much affected by the weather.

When reviewing the sales figures for past days, it is helpful if you know what the weather conditions were for that day, as this can help to explain why sales were up or down. You can use this function to record weather conditions for the current day, as an aid for reviewing data later on.

After you select [Set Weather], select the weather conditions from the list and select [OK]. Then select the temperature and press [OK] to finish the function. This information is appended to the Sales Summary Report.



## BackOffice

### Table Layout Screen / Manager / BackOffice

Selecting [BackOffice] takes you to the PixelPoint POS System Setup program (called BackOffice). From there you can make all sorts of adjustments to the programming of the POS system.

You can also program BackOffice to open a company intranet site, or your PAR Partner Center account, thus getting access to the latest news and other important information.

**PixelPoint BackOffice**

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

Menu Setup Product Setup Employee Setup Member Setup Coupon Setup Report Viewer Update POS Exit Setup

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Tuesday, September 20, 2011 Supervisor

## Transaction Viewer

### Table Layout Screen / Manager / Transaction Viewer

Transaction Viewer shares many of the same features as the [Your Trans] function (see "Your Trans Screen") but also adds the ability to display transactions from any or all employees.

Transactions	Net Total	Final Total	Who Served	Who Finished	Time Started	M
	\$9.47	\$10.25	Supervisor	Supervisor	5/30/2013 10:54:30 AM	
Member/Deliveries	\$11.94	\$12.95	Supervisor	Supervisor	5/31/2013 2:05:24 PM	
	\$3.98	\$4.30	Supervisor	Supervisor	5/30/2013 10:54:14 AM	

-Totals	
Total Cust:	4
# of Tran:	3
Gross Sales:	\$27.50

<b>Transaction Details</b>	
<b>Payment Details</b>	

Show Open Transactions

Show Closed Transactions

Show Closed by Date Range

Print Receipt

Print Receipt by #

View by #

Page Up

Page Dn

Unclose by #

All Types

Member /Delivery

Help

All Employees

Logout

Transaction Viewer

View

Un-Close

Select Employee

Show All Employees

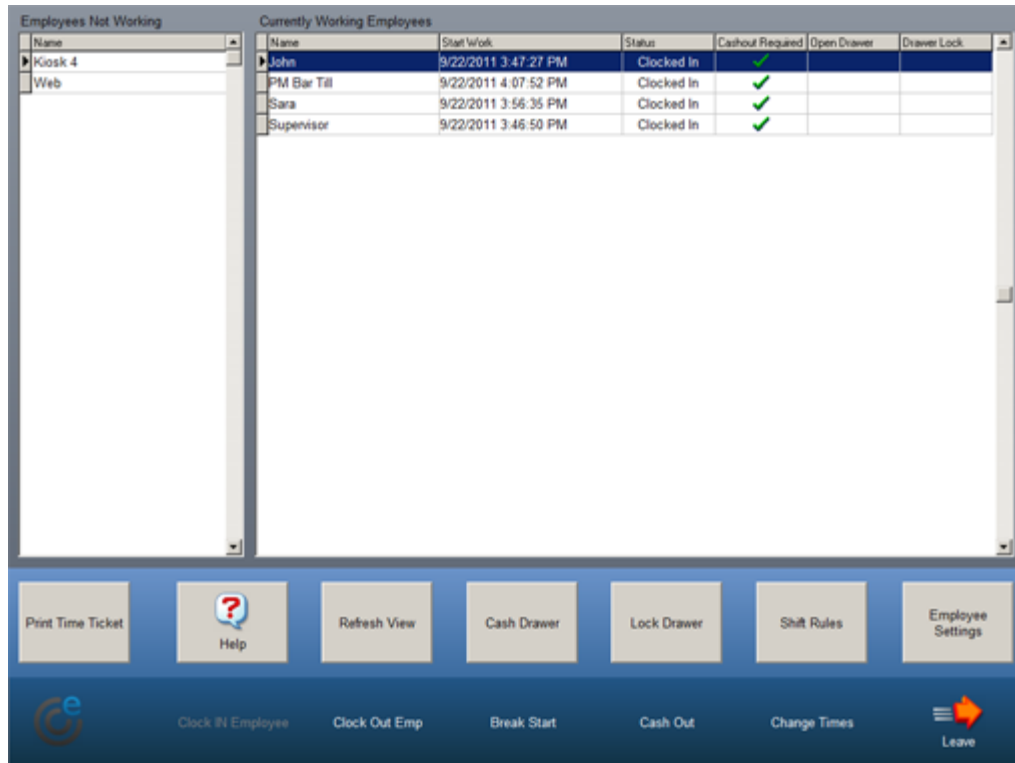
Leave

For a full explanation of this screen, see "Your Trans Screen".

## Employee Time Clock

### Table Layout Screen / Manager / Employee Time Clock

The employee time clock function enables you to control all aspects of employee shifts. It is typically used in establishments where many employees are not granted the ability to clock themselves in/out or do much within the Your Settings Screen.



The pane on the left contains a list of all employees who are not currently clocked into the system. The pane on the right contains a list of all employees who are currently clocked into the system. This pane lists when the employee started working, their status, whether they will need to cash out, which drawer they are assigned to, and which station, if any, their drawer is locked at.

### Employee Time Clock Buttons

**Print Time Ticket:** Prints the last time ticket of the highlighted employee.

**Help:** Launches PixelPoint POS help.

**Refresh View:** Updates the lists of who is working and who is not working to show every employee's status at that exact point in time.

**Cash Drawer:** Assigns the employee a cash drawer. Choose which cash drawer to assign after selecting this button.

**Lock Drawer:** Locks the employee's drawer at a specified station.

**Shift Rules:** Takes you to the Shift Rules screen, which identifies who is on (or should be on)

breaks, overtime, etc. See "Shift Rules" for more information.

**Employee Settings:** Takes you to the highlighted employee's Your Settings Screen, from which you can change any of the employee's settings (depending on your security clearance). See "Your Settings Screen" for further information.

---

## Toolbar Icons

**Logout:** Logs you out of the system.

**Clock IN Employee:** Clocks in an employee who is not currently clocked in. Select the employee name from the list on the left of the screen and then select this button.

**Clock Out Emp:** Clocks out an employee who is currently clocked in. Select the employee name from the list on the right of the screen and then select this button.

**Break Start:** Puts the highlighted employee on break.

**Cash Out:** Cashes out the highlighted employee.

**Change Times:** Enables you to change the clock in/out times of the current shift's employees. See "Change Times" for more information.

**Leave:** Exits the screen, returning you to the Table Layout Screen.



## Shift Rules

### Table Layout Screen / Manager / Employee Time Clock / Shift Rules

This screen enables you to view the status of, and alerts about, employee breaks and overtime. The buttons on the left of the screen provide different views of the shift rules and control what is displayed in the screen's main window.

#### View At A Glance

Shows you which employees are due for breaks, meal breaks and who is on overtime.

Employee	JobDescription	DurHrs	BreaksTaken	MealTaken	BreakTaken	BreakReq	MealReq	OverTime	MinuOverBreak
PM Bar Till	Managers	141.46	0	0	0				
Sara	Wait Staff Managers	141.65	0	0	0				
Supervisor	System Administrators	141.81	0	0	0				
John	Wait Staff Managers	141.8	1	0	1				

#### All Shifts

Displays the full status of each employee, including their current working job position, hours, breaks and overtime.

Shift Rules		10/10/2009 4:56:28 PM							
Show	Shift Summary								
	Employee	JobDescription	CurHrs	BreaksTaken	MealTaken	BreakTaken	BreakReq	MealReq	
View At A Glance	Supervisor	System Administrators	6	1	1	0			
	Angelo	Wait Staff Normal	4.21	1	0	1		Yes	
	Dom	Wait Staff Normal	4.11	1	0	1		Yes	
	Helen	Cashiers	4.05	1	0	1		Yes	
	Kathy	Wait Staff Normal	4.04	1	0	1		Yes	
	Kyle	Wait Staff Normal	4.02	1	0	1		Yes	
	Mitch	Cashiers	3.89	1	0	1		Yes	
	Marge	Cashiers	2.31	0	0	0	Yes	Yes	
	Adeana	Wait Staff Normal	1.9	0	0	0	Yes	Yes	
	Driver	Managers	1.63	0	0	0	Yes	Yes	

**Break Due**

Displays information about scheduled employee breaks that are not meal breaks.

Shift Rules		10/10/2009 4:56:28 PM							
Show	Shift Summary								
	Employee	JobDescription	CurHrs	BreaksTaken	MealTaken	BreakTaken	BreakReq	MealReq	
View At A Glance	Marge	Cashiers	2.31	0	0	0	Yes	Yes	
	Adeana	Wait Staff Normal	1.9	0	0	0	Yes	Yes	
	Driver	Managers	1.63	0	0	0	Yes	Yes	

**Meal Due**

Focuses on employee meal breaks and when they are due; tells you when employees are supposed to have their meals.

Shift Rules		10/10/2009 4:56:28 PM						
Show	Shift Summary							
	Employee	JobDescription	CurHrs	BreaksTaken	MealTaken	BreakTaken	BreakReq	MealReq
View At A Glance	Angelo	Wait Staff Normal	4.21	1	0	1		Yes
	Dom	Wait Staff Normal	4.11	1	0	1		Yes
All Shifts	Helen	Cashiers	4.05	1	0	1		Yes
	Kathy	Wait Staff Normal	4.04	1	0	1		Yes
	Kyle	Wait Staff Normal	4.02	1	0	1		Yes
	Mitch	Cashiers	3.89	1	0	1		Yes
Break Due	Marge	Cashiers	2.31	0	0	0	Yes	Yes
	Adeana	Wait Staff Normal	1.9	0	0	0	Yes	Yes
Meal Due	Driver	Managers	1.63	0	0	0	Yes	Yes
On Overtime								
Weekly Forecast								

**On Overtime**

Shows you employees who are currently working overtime.

Shift Rules		10/10/2009 4:56:28 PM								
Show	Shift Summary									
	Employee	JobDescription	CurHrs	BreaksTaken	MealTaken	BreakTaken	BreakReq	MealReq	OverTime	MinO
View At A Glance										
All Shifts										
Break Due										
Meal Due										
On Overtime										
Weekly Forecast										

**Weekly Review**

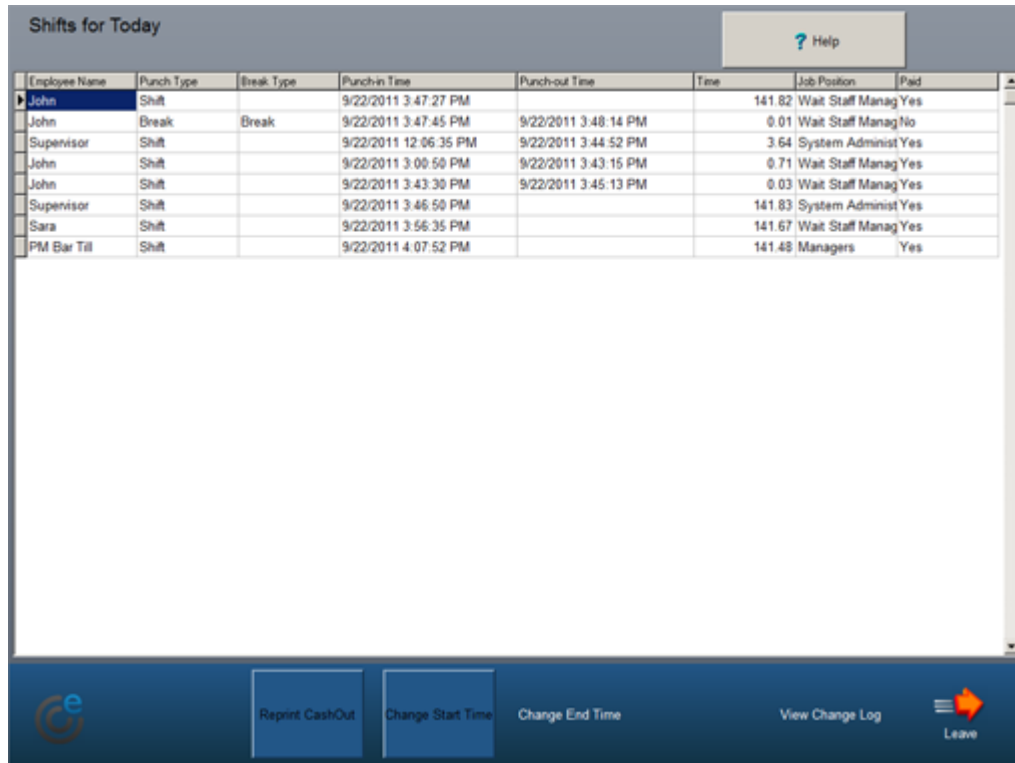
Reviews the weekly scheduling of employees. It examines each employee's hours worked up to this point, compares that to the remaining hours scheduled for the week, and alerts you about any overtime hours.

Shift Rules		10/10/2009 4:56:28 PM			
Show	Weekly Forecast (07/10/2009 - 14/10/2009)				
	Employee	TotalSchedHrs	TotalHrsWorked	TotalHrsStillSchedToWork	OverTimeForecast
View At A Glance	▶ Adeana	36		26	-10
	Kevin	34		14	-20
All Shifts	Katherine	36		36	0
	Peter	32			-32
	Scott	28		16	-12
	Kyle	16		10	-6
Break Due	Mitch	22		18	-4
	Margaret	36		36	0
	Norman	20		20	0
Meal Due	Angelo	16		16	0
	Martin	20		20	0
On Overtime	Tessa	20		20	0
<b>Weekly Forecast</b>					

## Change Times

### Table Layout Screen / Manager / Employee Time Clock / Change Times

There may be times when the clock in or clock out time for an employee has to be adjusted. You can adjust these times by using the [Change Times] button on the Employee Time Clock screen. Selecting it displays the following screen.



Employee Name	Punch Type	Break Type	Punch-in Time	Punch-out Time	Time	Job Position	Paid
John	Shift		9/22/2011 3:47:27 PM		141.82	Wait Staff Manag	Yes
John	Break	Break	9/22/2011 3:47:45 PM	9/22/2011 3:48:14 PM	0.01	Wait Staff Manag	No
Supervisor	Shift		9/22/2011 12:06:35 PM	9/22/2011 3:44:52 PM	3.64	System Administ	Yes
John	Shift		9/22/2011 3:00:50 PM	9/22/2011 3:43:15 PM	0.71	Wait Staff Manag	Yes
John	Shift		9/22/2011 3:43:30 PM	9/22/2011 3:45:13 PM	0.03	Wait Staff Manag	Yes
Supervisor	Shift		9/22/2011 3:46:50 PM		141.83	System Administ	Yes
Sara	Shift		9/22/2011 3:56:35 PM		141.67	Wait Staff Manag	Yes
PM Bar Till	Shift		9/22/2011 4:07:52 PM		141.48	Managers	Yes

This screen has a list of all employees who are currently clocked in and those who have clocked in and out within the last 48 hours.

### Toolbar Icons

**Reprint CashOut:** Prints a copy of the employee's cash out report.

**Change Start Time:** Changes the time that an employee started their shift; you can use this to adjust when the shift should have started. When you finish, PixelPoint applies the adjusted start time to the employee's time clock. Selecting this button presents a calendar screen on which you can set the date and time you want to change the beginning of the shift to. The date and time displayed below the calendar identifies your selection.

**Select Start Time**

Thursday, September 22, 2011 12:06:35 PM

← Year   ↓ Month   **September, 2011**   ↑ Month   → Year

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

↑ + 1 h

↑ + 30 min

↑ + 15 min

↑ + 5 min

☀ AM

↓ - 1 h

↓ - 30 min

↓ - 15 min

↓ - 5 min

☾ PM

✖ Cancel

✔ OK

**Change End Time:** Works like [Change Start Time], except that you use it to change the time when an employee's shift ended. As above, the adjusted end time is applied to the employee's time clock.

**View Change Log:** Lists previous changes made to shift times; this information is taken from the system log.

**Leave:** Exits the Change Times screen and returns you to the Employee Time Clock screen.

## Authorization Manager

### Table Layout Screen / Manager / Authorization Manager

The Authorization Manager function enables you to view and process all pre-authorized charge transactions. It works through the use of a credit authorization module called PixelPoint Authorization Manager. This program, in conjunction with a *CCVS*, enables you to process credit transactions directly through the POS without the aid of an external banking system.

This section first explains the Authorization Manager screen and then illustrates how the process of credit authorization works.

The screenshot shows the Authorization Manager interface. At the top, there is a 'Select' dropdown menu and several buttons: 'List Forced (Add Tips)', 'List Pre-Authorized' (highlighted in blue), 'Voided', 'Pending', 'All Charges', 'REPRINT SLIP', 'Settle History', and 'Settle all Charges/ END OF DAY'. Below this is a table with the following data:

Reference #	Transaction	Pay Method	Auth Status	Auth Code	Tender	Change	Total Tender	Employee Name
2158	2034	Visa	Pre Auth	Approved	10.6	0	\$10.60	Supervisor
2159	2037	Visa	Pre Auth	Approved	2.15	0	\$2.15	Supervisor
2160	2038	Visa	Pre Auth	Approved	5.15	0	\$5.15	Supervisor
2161	2039	MasterCard	Pre Auth	Approved	2.55	0	\$2.55	Supervisor
2162	2040	MasterCard	Pre Auth	Approved	7.58	0	\$7.58	Supervisor
2163	2041	Amex	Pre Auth	Approved	5.94	0	\$5.94	Supervisor

At the bottom of the screen, there is a navigation bar with icons and labels: Logout, Help, Show All Employees, Select Employee, Void, Add Tips, and Leave.

### Authorization Manager Buttons

**List Forced (Add Tips):** Shows all charge transactions that have had a tip applied. All charge transactions MUST have a tip applied (at some point), even if the amount of the tip is zero.

**List Pre-Authorized:** Shows all charge transactions that have not had a tip applied. Once a charge transaction has the tip applied, the record is moved from the "Pre-Authorized" to the "Forced" list.

**Voided:** Shows all charge transactions that have been voided.

**Pending:** Shows all pending charge transactions. Transactions can be removed via the [Remove Pending] button at the bottom of the window if the user's security level meets the requirements.

**All Charges:** Shows all charge transactions.

**Reprint Slip:** Reprints the charge slip for the highlighted charge transaction.

**Settle History:** Shows previous Settle History reports.

**Settle All Charges/End of Day:** Settles all charge transactions. All charge transactions must have a tip applied before using this button. The button's function will not work if there are any transactions that do not have a tip applied. It is at this time, when you select this button, that funds are actually transferred from the customer to the establishment.

---

## Toolbar Icons

**Logout:** Logs you out of the system.

**Help:** Provides on-line help.

**Show All Employees:** Displays all charge transactions.

**Select Employee:** Enables you to restrict the charge transactions listed on the screen to only those belonging to a specific employee.

**Void:** Voids a pre-authorization. Upon selecting this button, the system asks if you wish to unclose the check.

**Add Tips:** Applies tips to charge transactions.

**Leave:** Exits the screen, returning you to the Table Layout screen.

---

## Credit Transactions: A Walk-through

The following example scenario illustrates what happens during a typical credit transaction:

1. You present the customer with the check and the customer in turn gives you a Visa® credit card.
2. Opening the table, you go to the Finish Screen, enter the amount of the check and select [Visa].
3. The system closes the table, it turns green, and you wait for the transaction to be approved.
4. The transaction information is sent through PixelPoint Authorization Manager to the CCVS.
5. The CCVS contacts the credit service/bank and requests approval.
6. The credit service/bank checks the information and, if there are sufficient funds, sends a message back saying that it has been approved. It does not remove the funds at this point, however. The transaction is simply *pre-authorized*.
7. The pre-authorization message comes back to the CCVS, which relays this information to PixelPoint Authorization Manager.
8. The message "Approved" or "Declined" displays on the screen and the charge slip prints.
9. You present the credit card, with the charge slip, to the customer.
10. The customer signs the store copy (labeled "Merchant Copy") and keeps their copy.
11. You take your signed copy to the station.
12. Within [Your Settings] you select [Add Tips] and apply the tip to the transaction (See "Tips").
13. PixelPoint applies the charge tip to your Cash Out Report.
14. You settle all charges, which now include the charge tips. This is done on the Authorization Manager screen.
15. When the Pre-Authorization screen is clear, you select [Settle All Charges / End of Day] to



settle the charges.

16. All charge transactions (with a tip amount applied) are sent to the *CCVS*, which relays them to the credit service/bank. The bank then transfers funds to the establishment.

---

**Note:** You may need management authorization for some steps.

## Employee Functions

### Table Layout Screen / Manager / Employee Functions

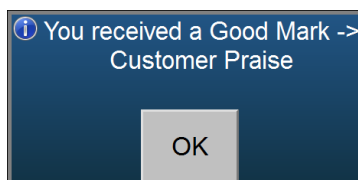
The Employee Functions menu enables you to carry out employee-related functions such as assigning swipe cards, applying performance points, transferring checks and adjusting an employee's schedule.



### Employee Functions Buttons

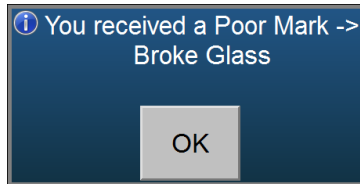
**Set Employee Access Card:** Enables you to assign a swipe card to any employee. This button prompts you to select the employee you want to assign a card to and then to swipe the card. You can also use this function to assign an employee a manual entry number instead of a card.

**Good Performance:** Enables you to give an employee points for good performance. The system prompts you to select a reason from the list for why the employee is getting these points. Employees who get good performance points are sent a message like the one shown below indicating that they have done well.



**Note:** Performance points are summarized in the *Employee Ranking* report in PixelPoint Report Viewer.

**Poor Performance:** Works exactly the same way as [Good Performance], except that the points, and the reasons for them, are negative. The message sent to employees is shown below.



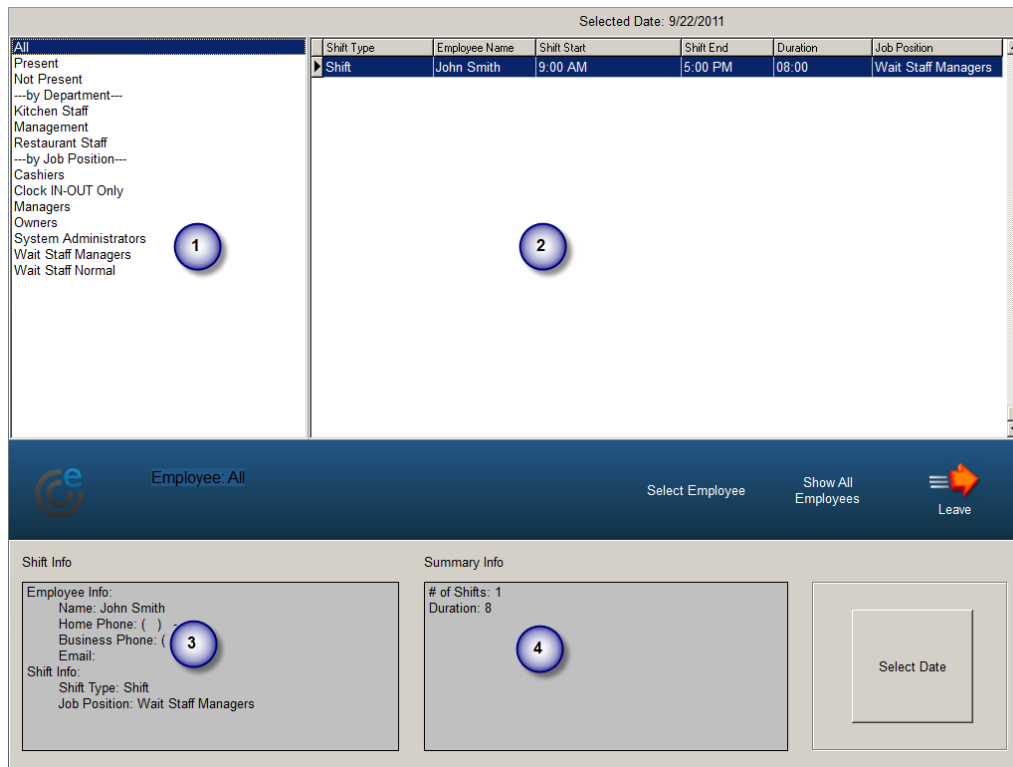
**Transfer All Checks:** Controls the transfer of employees' open checks to other servers. It is commonly used during a shift change, when one server takes over another server's tables. Unlike the version on the Your Settings Screen, which is restricted to checks applying to the current user, this manager's version enables you to control the transfer of all checks between all employees.

**Employee Schedule:** Enables you to review employee schedules. See "Employee Schedule" for full details about this particular function.

## Employee Schedule

### Table Layout Screen / Manager / Employee Functions / Employee Schedule

This is a manager's function that enables you to view staff schedules for any given day. It works in conjunction with PixelPoint's Employee Scheduler module.



The window on the left enables you to filter the display by department or job position. You can also filter the list to show only employees who are currently clocked in (Present) or currently clocked out (Not Present). The [Select Date] button enables you to choose the beginning and ending date of the schedule.

## Employee Schedule Window Layout

### 1. Filter Window

Enables you to filter the display in the Detail Window (2).

- **All:** Shows all employees with schedule information (regardless of the schedule type).
- **Present:** Shows the schedule records for all employees who are currently clocked in.
- **Not Present:** Shows the schedule records for all employees who are not currently clocked in.
- **By Department:** Contains a list of each department. Select a department to filter the display on the right and view the schedule records for all employees in that department.
- **By Job Position:** Contains a list of each job position. Select a job position to filter the display on the right and view the schedule records for all employees with that job position.

### 2. Detail Window

Lists all employees who have schedule information for that day.

### 3. Shift Info

Provides contact information and shift information for the selected individual.

#### **4. Summary Info**

Provides general information based on the display above. The line "# of Shifts" identifies how many people are scheduled. The "Duration" line indicates how long all of the shifts in the Detail Window (2) are put together.

---

#### **Toolbar Icons**

**Logout:** Logs you out of the system.

**Select Employee:** Enables you to restrict the display to one specific employee.

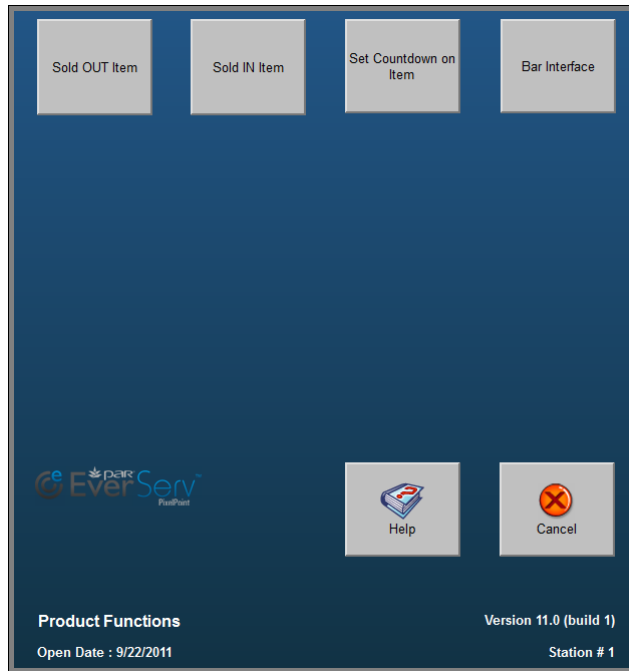
**Show All Employees:** Removes all filtering and so shows all employee schedules.

**Leave:** Returns you to the previous screen.

## Product Functions

### Table Layout Screen / Manager / Product Functions

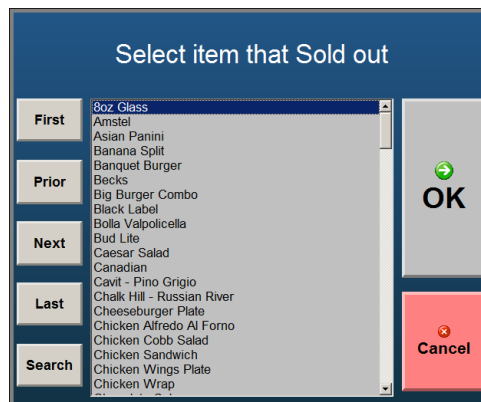
The Product Functions menu contains functions that deal with the availability of products and orders.



### Product Functions Buttons

#### [Sold OUT Item]

Sets an item as sold out. Selecting this button brings up a list of all products. Select the product that has sold out and then press [OK].



When you select this button, PixelPoint:

1. Sends a message to all users, telling them that the item is now sold out.
2. Places a large red X across the product's button on the Order Screen, preventing users from ordering the item.



- If the item record contains How To Make information (See "How to Make Item"), this will be displayed if the sold out product's order button is selected. The purpose of this is to enable you to view the contents of the item and to suggest alternative dishes based on the ingredients.
3. Adds the item to the Sold Out section of the Billboard.

### **[Sold IN Item]**

Marks an item as Sold In and so makes it available for ordering again. Selecting this button brings up a list of products which are currently not available. Select the product to put back on the menu and then click [OK].

When you select this button, PixelPoint does the following:

1. Sends a message to all users, telling them that the item is now available.
2. Removes the red X from the ordering button, enabling you to order the item.
3. Removes the item from the Sold Out section of the Billboard.

### **[Set Countdown on Item]**

Associates a quantity with an item, indicating how many are left. Select the item from the list that appears and then click [OK].

Upon doing this, a number of things happen:

1. The number appears in the bottom right corner of the button.
2. Every time the item is ordered the number decreases by one.
3. When the number reaches zero, the item is flagged as Sold Out (see [Sold OUT Item] in this section).

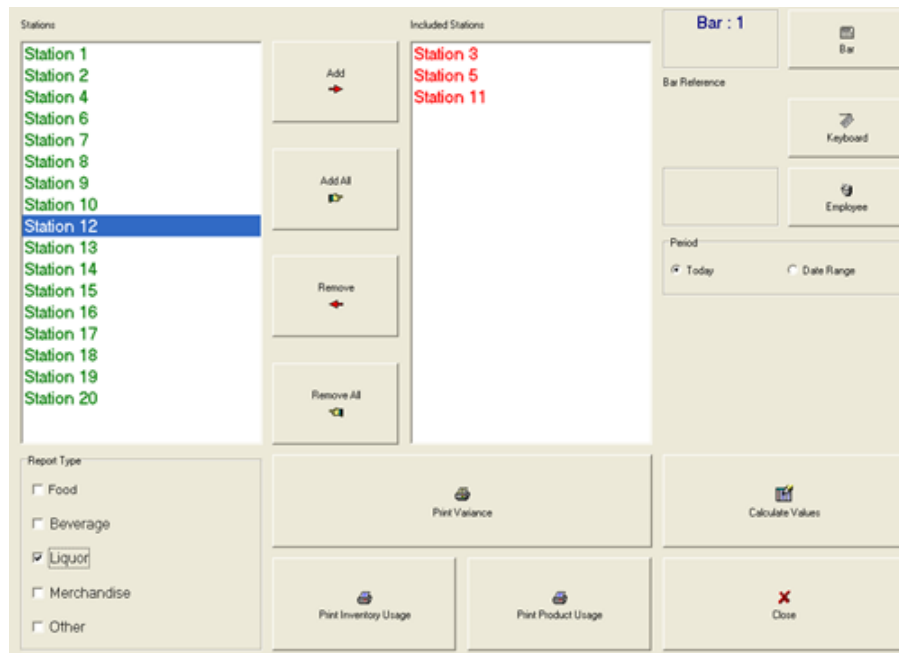
### **[Bar Interface]**

Opens a function that monitors and controls bar information and usage. See "Bar Interface" for details.

## Bar Interface

### Table Layout Screen / Manager / Product Functions / Bar Interface

This function works in conjunction with a Liquor Dispensing System. The interface enables you to compare the amounts of liquor poured that PixelPoint has calculated to those that the liquor dispensing system reports, to make sure that all of the liquor used has been paid for.



### Stations Lists

Each bar works with orders from specific stations. In the example above, the bar takes drink orders from stations 3, 5 and 11. Highlight the desired station number in the "Stations" window on the left and select [Add] to include it.

- [Add All] includes all stations.
- [Remove] removes the highlighted station from the "Included Stations" window.
- [Remove All] removes all stations from the "Included Stations" window.

### Report Type Area

Enables you to isolate what Summary Group types you want to review. For example, if Liquor is selected, it will review liquor items only.

### Bar Interface Buttons

**Print Variance:** Prints a comparative report showing the difference between PixelPoint's and the LDS's calculations.

**Print Inventory Usage:** Prints a report of inventory (stock item) usage.

**Print Product Usage:** Prints a report of product usage.



**Bar:** An establishment can have several bars, each with a liquor dispensing system. Select [Bar] to set up interface comparisons on multiple bars. The display Bar:1 (in the top-right of the screen) will change to Bar:2 and so on, representing each of the bars.

**Keyboard:** Enables you to type text information where needed. It is present because most touch screen stations do not have a keyboard attached.

**Employee:** Isolates orders placed and handled by a specific employee.

**Period:** Enables you to choose between the current day's sales or sales during a specific date range. Selecting [Date Range] enables you to review transactions that took place between a certain beginning and ending date.

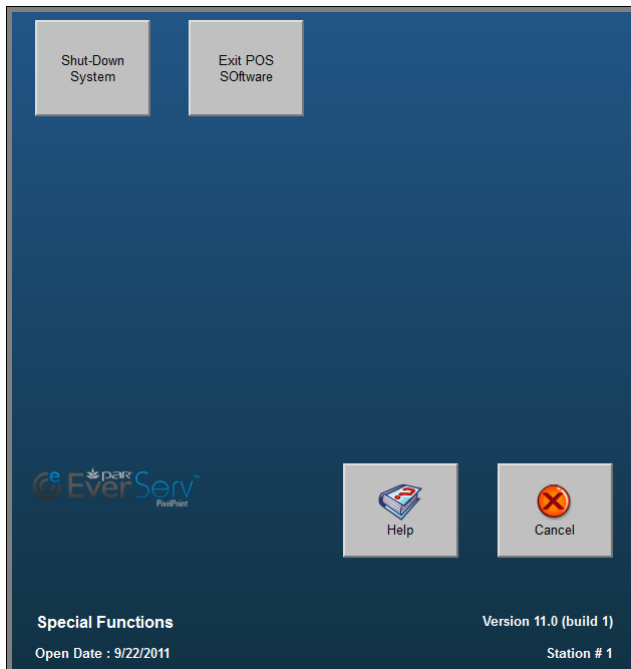
**Calculate Values:** Calculates sales/usage data. Select this after you have selected your reviewing criteria, using the other buttons on the screen.

**Close:** Exits you from this screen.

## Special Functions

### Table Layout Screen / Manager / Special Functions

The special functions menu enables you to carry out a few tasks that most users should never be given permission to do.



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### Special Functions Menu Buttons

**Shut Down System:** Shuts the station down. When you select it, the system exits the POS software and shuts Windows® down. It is not recommended that you do this for Station 1.

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**Note:** Selecting this button also disables printers connected to the unit.

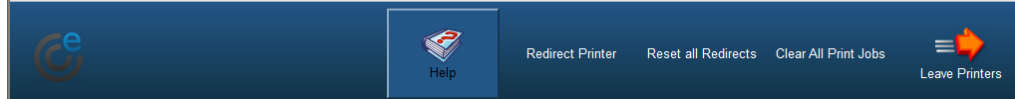
**Exit POS Software:** Exits from the PixelPoint POS software.

## Printer Manager

### Table Layout Screen / Manager / Printer Manager

This function enables you to manage various operations that have to do with printing. More specifically, it deals with routing print jobs to different printers and clearing them when problems arise.

Printer Name	Printer Description	Status
Bar2	Bar Printer	Is Spooling
Local1	Local Printer	Is Spooling

### Toolbar Icons

**Help:** Launches PixelPoint POS help.

**Redirect Printer:** Re-routes all print jobs from one printer to another printer. If a printer is not printing, see "Troubleshooting" to ensure that you have checked all possible causes of the problem before you redirect the printer.

#### To redirect a printer:

1. Select the problem printer from the list of printers.
2. Select [Redirect Printer]. A window appears, asking you to "Select Where to Redirect" the selected printer's printing to.
3. Select the printer where you would like to redirect printing to.
4. Select [OK]. Above the list of printers, it will state that the selected printer 'Is Redirected.' Any printing to the old printer will now be directed to the new selected printer.

PixelPoint can be set to automatically redirect print jobs. If the system does auto-redirect a print job, it will broadcast a message notifying you of this. The system is also capable of auto-canceling the redirection once the printer is back on line.

**Reset All Redirects:** Resets all print redirection, routing all print jobs to their default printers.

**Clear All Print Jobs:** Deletes all pending print jobs from the selected printer. If a printer has

been down for a while and people have been sending print jobs to that printer, all of those print jobs will begin to print once that printer is back on-line. If you want to cancel these print jobs, select the printer from the list and then select this button.

**Leave Printers:** Exits you from the Printer Manager screen and returns you to the Table Layout Screen.

## Reservations Function

### Table Layout Screen / Manager / Reservations

The Reservations function enables you to access and work with all host/hostess functions without changing your system interface in the "Your Settings Screen". This function brings you to the Host (ess) Screen, which enables you to do things like:

- Take a reservation
- Seat a reservation
- Seat walk-in customers
- Manage a line up at the door

The screenshot displays the Reservations Function interface, which is divided into several sections:

- Reservation Details:** Contains fields for Full Name (Jones), Telephone #, Table # (Any), Section (Any), Type, and Start Time (10:11 AM). It includes buttons for "Walk-in" and "Arrived" (Yes), and "Remove".
- Tables List:** A table listing tables and sections with their respective customer counts.
 

Table #	Sections	# Cust
3	Poolside	2
4	Poolside	2
6	Poolside	2
7	Poolside	2
9	Poolside	2
10	Poolside	2
24	Terrace	2
25	Terrace	2
26	Terrace	2
27	Terrace	2

 Below the table are buttons for "Available", "Bussing", "Printed", and "Locked". To the right are buttons for "Seat", "View Layout", "Clear Selection", "Lock Table", "Unlock Table", "Unlock All", "Up", and "Down".
- Reservation List:** A table listing reservations with columns for #, Full Name, Table, Time Start, and Min.
 

#	Full Name	Table	Time Start	Min
2	WALKIN	Any	10:33 AM	0
2	Jones	Any	10:11 AM	22
4	Taylor	Any	10:11 AM	22
2	Hampton	Any	10:12 AM	21
4	Griggs	53	10:12 AM	21
4	mr. Nadia Vander Dunn	20	4:00 PM	
3	Mrs. Yolanda Young	11	5:00 PM	
2	Mr. Scott Dunlop	25	7:00 PM	
4	Mrs. Wanda Dunwood	4	7:00 PM	

 A "Refresh" button is located below the list.

The bottom navigation bar includes the PixelPoint logo, the text "Reservations 10:11 AM", and buttons for "Add Reservation", "Add To Waiting List", "Reservations", "Setup", and "Leave".

For a detailed explanation of this screen and its uses, see "Host(ess) Screen".

**Note:** PixelPoint's TableTime module is required for this function to work.

## Show Delivery Status Form

### Table Layout Screen / Manager / Show Delivery Status Form

This function toggles between regular front-end operations and those of a delivery order taker. It takes you to the Order Taker Screen, which you can use to do things like:

- Take a pick up or delivery order.
- Check the status of a pick up or delivery order.
- Process a pick up or delivery order.

Transaction	Phone	Name	Status
2062	(905)267-4700	Mr. Scott Dunlop	En Route
2059	(555)555-5555	Wanda Dunwood	En Route
2058	(888)888-8888	Edgar Dunwald	En Route

**Mr. Scott Dunlop**  
 123 Walnut Street Apartment 12B Vaughan  
 Home Phone: (905)267-4700  
 Business Phone: (905)267-4724  
 Directions: North on Hwy 400 to Langstaff Rd. Drive East to

**Order Taker:** John Smith  
**Driver:** Sara Smithers  
**Time Ordered:** 9/23/2011 9:41 AM  
**Driver Pick Up Time:** 9/23/2011 10:01 AM  
**Total Minutes:** 21  
**Minutes En Route:** 0  
**Total:** \$25.14

Filter: 10:02 AM  
 Inquiry  
 Your Trans.  
 All  
 All En Route  
 Pick Ups  
 Sara[0]

Driver In

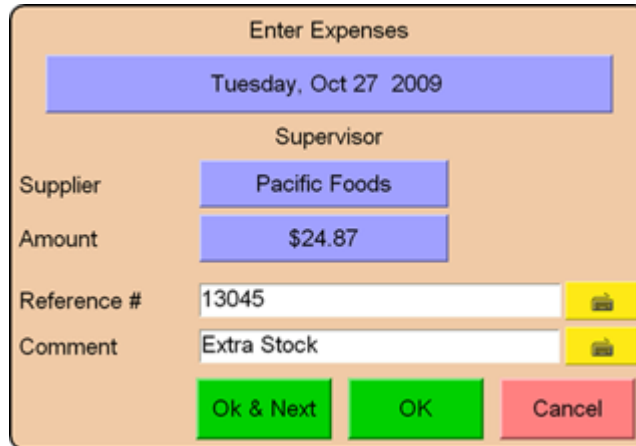
New Check   Quick Order   Add Tips   Show Transaction   Inquire   System

For a detailed explanation of this screen and its uses, see "Order Taker Screen".

## Pay Expenses

### Table Layout Screen / Manager / Pay Expenses

This function enables you to record expenses you want to schedule to be paid at a later date. It can be used for things like staff parking and phone bills.



Enter Expenses	
Tuesday, Oct 27 2009	
Supervisor	
Supplier	Pacific Foods
Amount	\$24.87
Reference #	13045
Comment	Extra Stock
Ok & Next    OK    Cancel	

Select the date you want the expense to be paid by selecting the blue date bar at the top of the window.

This function uses information about suppliers programmed into BackOffice; you need to select a supplier before you can select [OK].

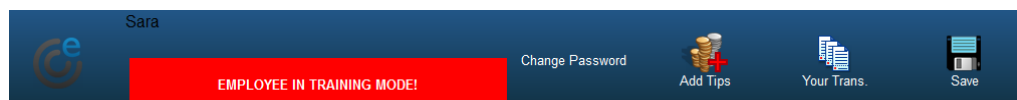
To finish recording an expense, select [OK] to return to the Manager's Function Menu, or [Ok & Next] to start recording a new expense.

## Training Mode

Employees who are new to the establishment, and/or PixelPoint, can be put on training mode to give them an opportunity to learn and try things out without causing problems if something goes wrong.

When an employee is in training mode they can do everything that other employees can do in terms of opening checks, ordering items and settling checks. However, there are some things that are different for employees in training mode. The differences are:

- Nothing prints (kitchen prints, bar prints, receipts, etc., do not print).
- Cash drawers do not open.
- The word "TRAINING" is displayed on the blue toolbar (as shown).
- Items cannot be transferred to or from checks.
- Tables and/or items cannot be moved to a table that belongs to the employee.
- Checks cannot be transferred to the employee.
- Transactions cannot be closed to a payment method that needs authorization.
- Transactions that belong to someone else cannot be closed.
- Sales are not included in the day's sales numbers.



---

**Note:** Because of the various changes for Training Mode (listed above), it should not be used with either credit authorization or till management.



# Security

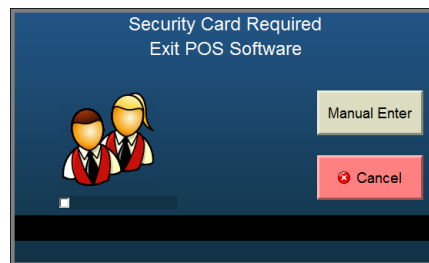
PixelPoint contains extensive security features to ensure reliable reporting, controlled user operations and monitored activities. Listed below are some key points to be aware of and some safeguards that should be considered when managing the system.

---

## Authorization

Security levels, based on job position, are in effect all throughout the system; a manager can do more on the system than a server, and a server can do more on the system than a cook.

When you encounter a function that your job position does not have sufficient security clearance for, PixelPoint tells you by presenting a window indicating the need for management authorization.



The message displayed identifies the attempted function and indicates that a manager must swipe an access card to authorize it.

When doing something that needs management authorization, the best approach is to do as much as you can yourself; keep going until you get the security message telling you that you can go no further. Then ask the manager to give you access to continue.

---

## Swipe Card vs. Manual Entry

You do not necessarily need a swipe card to access secured functions. Pressing [Manual Enter] on the message box that displays will enable you to enter a number on a numeric keypad.

However, in addition to the advantage of faster access, magnetic swipe cards are much more secure than manual entry numbers. Banking machines cover their keypad so prying eyes cannot see the numbers being entered. However this is not so simple to do on a POS station and it is possible that your manual entry number could be seen by someone else. This could be very bad, especially if it should happen to be a manager's number.

You never need to know the number contained on your swipe card, but all employees must memorize their manual entry number. Sharing this information could lead to false time clock entries. It is best to avoid these and other potential security problems by ensuring that everyone is using a swipe card.

---

## Receipts

Once a customer's check has been printed, all additional prints (for that transaction) will include the word REPRINT in large letters, regardless of whether the contents of the check have changed.

Receipts can be set to print automatically upon closing a check.

---

## Charge Tips

Charge tips (See "Tips") can be applied either by the server (through [Your Settings] / [Add Tips]) or by the manager ([Manager] / [Authorization Manager] / [Add Tips]). If possible, make adding charge tips a management function rather than an employee function. Doing so makes it easier for the manager to:

- Account for each and every charge slip.
- Check that the tip amounts are clearly marked and unaltered.
- Ensure that the tips are entered correctly.
- Easily co-ordinate the entry of tips with the batch settlement of the credit cards.

You can program PixelPoint's security levels to prevent servers from using [Add Tips] without management authorization. You can also set the system to prevent re-tipping.

If, at your establishment, servers do enter charge tips, run the Cash Out Report for each employee in detailed format and then cross-reference each charge slip with the cash out reports. Detailed cash out reports indicate the transaction number, tendered amount, tip applied and total amount for each credit card and on-account transaction. By using this method you can still do everything listed above; it simply takes longer and greater attention to detail.

---

## Voids & Coupons

The employee cash out report tracks and reports all actions involving negative values (voids/refunds, coupons/discounts and returns). It is recommended that all coupons be submitted with the cash out report for cross-referencing, so the manager can ensure transactions were processed properly and that everything adds up.

PixelPoint has the ability to set security levels for coupons and discounts, so that fewer employees are able to apply bigger discounts. For example, you could program the system so that a server can apply a 10% discount for students, but not the 50% Manager's discount.

---

## Voids Reasons

Every time you void or refund an item, you need to provide a reason for it. The system contains a set list of reasons for voids. All voids and the reasons for them are included in Cash Out Reports. Security levels can also be applied to the individual reasons, preventing servers from selecting certain reasons but allowing them to select others.

---

## Pre-Voids

A pre-void is a void made before sending the item. Pre-voids can also be tracked and reported within Cash Out Reports. Consider activating this feature if you suspect an employee is ordering an item, collecting payment and then voiding it before sending it.

## Cash Drawers

There is no reason why a cash drawer should be open while entering an order or after the check has been closed. If you find, however, that this is happening, an employee could be abusing the pre-void function (see above).

## Blind Tender Balancing

In an environment where each employee is responsible for their own money, tender balancing should be done as part of each employee's cash out process (See "Tender Balancing"). Tender-balancing forces the employee to enter totals for each method of payment before cashing out.

The tender balance screen can be set to either show or hide the amounts that the system has calculated. When these amounts are hidden, it is called a blind tender balance. In the example below, Amex<sup>®</sup> has been set as blind and Cash and MasterCard<sup>®</sup> have not.

Pay Methods	Amount	Calculated	Over/Short
CASH	191.00	190.27	0.73
MASTERCARD	200.00	201.28	-1.28
AMEX	0		

0	Total Charge Tip = \$13.00 Surcharge on Tip = \$0.00 Total Floats = \$200.00 Total Pickups = \$60.00 Total PayIns = \$0.00 Total PayOuts = \$8.60	
7 8 9	Add	Cancel
4 5 6	Clear	
1 2 3	Enter	
0 . +/-	OK	

Note that, for methods of payment set for blind tender balance, the window also does not indicate whether you are over or short from the calculated amount. You will only be able to see this on the Cash Out Report (See "Cash Out Report").

Since the MasterCard<sup>®</sup> line in this example, however, does show the amount the system has calculated, it also points out that the amount submitted is short by \$1.28.

This tendered information is included in the employee cash out report at the bottom of each method of payment's section. The MasterCard<sup>®</sup> section for this example would show as follows:

POS Calculated	201.28
Employee Declared	200.00
Over/Short	(-)1.28

## Sequential Transaction Numbers

Every check is assigned a sequential transaction number. All transactions are sorted sequentially

(within each method of payment) on cash out reports and should be cross-referenced with the actual slips (which are also numbered), to make sure that what was reported matches the actual orders. It is a good practice to ensure that all order slips are sequentially sorted before submitting them with the cash out report.

Transactions such as \$0 orders, split checks and joined tables are sequentially recorded within the system in the same way as other orders. Another security feature in PixelPoint is the ability to set security levels for these kinds of transactions, such that some employees can do them and others cannot.

## Troubleshooting

This section contains information intended to help with common operational mistakes.

There is also a section devoted to diagnosing system-related problems, and another one about taking preventative measures to ensure the safety and health of your system. Specifically, the contents of this section are:

- Correcting Mistakes
- System Problems
- Preventative Maintenance

## Correcting Mistakes

This section discusses ways to correct a few common mistakes that employees make. There is often more than one way to resolve these kinds of problems; what are offered below are working suggestions.

---

### Unclosing a Check

Say an order was accidentally closed when the customer was not finished dining. Now the customer wants to order something else. You need to unclosethe check.

The server and manager solutions presented below differ only in that the manager has access to the Transaction Viewer, which enables you to find transactions based on the employee who started them. Of course, managers can also use the server solution.

#### Server Solution:

1. Select [Your Settings] from the Table Layout Screen.
2. Select [Your Trans].
3. Select [Show Closed Transactions].
4. Select the closed transaction from the list. If you know the transaction number, you can use [Unclose by #] to retrieve the check.
5. Select [Unclose]. A window appears, asking if you would like to unclosethis transaction.
6. Select [Yes]. A window appears, asking if you would like to use the transaction now.
7. Select [Yes] to use it or [No] to remain in Your Trans.

#### Manager Solution:

1. Select [Manager] from the Table Layout Screen.
2. Select [Transaction Viewer].
3. Select [Show Closed Transactions].
4. Select the closed transaction from the list. You can use [Select Employee] to narrow the list down to transactions by a specific employee or you can jump directly to the transaction by using [Unclose by #], if you know the transaction number.
5. Select [Unclose]. A window appears, asking if you would like to unclosethis transaction.
6. Select [Yes]. A window appears, asking if you would like to use the transaction now.
7. Select [Yes] to use it or [No] to remain in the Transaction Viewer.

---

### Unclosing an Approved Credit Transaction

If a check was accidentally closed on another customer's credit card, and if the pre-authorization has gone through, you will need to remove the charge from the other customer's credit card.

#### To unclosethe approved credit transaction:

1. Select [Manager] from the Table Layout Screen.
2. Select [Authorization Manager].
3. Select the transaction you want to unclosethe.
4. Select [Void].
5. Select [Yes] when asked whether you want to unclosethe check.

This cancels the pre-authorization and unclosethe table, enabling you to close the check to the

right credit card.

---

**Note:** You will need a manager's security clearance to do this.

---

## Credit Returns

Say you want to reverse a credit transaction that has been settled. There are two ways to do this, the easiest of which is to simply refund the customer in cash. If the cash is removed from a till, it can be recorded as a Pay Out (See "Pay Out").

### To perform a cash refund:

1. Select [Your Settings] from the Table Layout Screen.
2. Select [Pay Out].
3. Enter the amount of the pay-out on the numeric keypad that displays.
4. Select [OK]. A confirmation window displays: You entered \_\_. Is this correct?
5. Select [Yes] to continue. Select [No] to return to the keypad, if you want to change the amount.
6. Select the best pay-out reason from the list in the window that displays. Ideally a pay-out reason called something like "Credit Return" will be programmed into your system.
7. Type a brief description about this pay-out on the keyboard that displays.
8. Select [OK].
9. The system prints a pay-out slip providing all necessary information. It needs a manager's signature for validation. Place this in the till to explain the lack of money.

The other method is to perform a credit adjustment. This solution involves creating another check with negative values, which you then charge to the same card. This, in effect, gives back the money that was taken during the first transaction. This solution needs the [Return/Exchange] function button to be present on the Order Screen (See "Order Screen"). It may also need a copy of the customer receipt.

### To perform a credit adjustment:

1. Open a new check.
2. Order the item to be refunded.
3. Select [Return/Exchange Item]. The item appears on the check with a negative price.
4. Repeat steps 2-3 for each item to be refunded.
5. Close the transaction to the same credit payment that you used before.

---

## Tender Balance Entry Errors

Say an incorrect total was entered into the Tender Balance screen during employee cash out (See "Tender Balancing"). Since cash out has already been done, [Cash Out] is now unavailable to the server.

### Server Solution:

1. Open a new check.
2. Close the check (it can be a \$0 transaction).
3. Select [Your Settings].

4. Select [Cash Out], now that it is available again.
5. Enter the correct totals when the Tender Balance screen displays; the new totals will overwrite the old ones.

**Manager Solution:**

1. Select [Manager] from the Table Layout Screen.
2. Select [Employee Time Clock].
3. Select the employee's record.
4. Select [Cash Out].
5. Enter the correct totals when the Tender Balance screen displays; the new totals will overwrite the old ones.

---

## Credit Tip Entry Errors

If an incorrect amount was entered into the Add Tips screen (which uses PixelPoint Authorization Manager), you will need to "re-tip" the transaction (See "Tips").

**To re-tip a transaction:**

1. Select [Your Settings] from the Table Layout Screen.
2. Select [Add Tips].
3. Select the transaction from the list on the left of the screen, or search for it by using [Search by Ref].
4. Enter the correct tip amount. This new tip amount will overwrite the old one.

Re-tipping is only available for credit cards (which are processed during End of Day). Other credit methods of payment, such as debit, on account and gift cards, are settled immediately, making re-tipping impossible. If you need to re-tip any of these other transactions, you have to void the entire transaction and redo it, applying the correct tip.

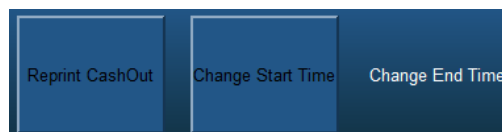
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## Correcting Shift Times

An employee forgets to clock in or out on time and the recorded time needs to be adjusted.

**To adjust the recorded time:**

1. Select [Manager] from the Table Layout Screen.
2. Select [Employee Time Clock].
3. Select [Change Times].
4. Select the employee record.
5. Select one of the buttons at the bottom of the screen.



6. Select [Change Start Time] to change the Clock In time.
7. Select [Change End Time] to change the Clock Out time.

---

**Note:** You will need a manager's security clearance to fix this problem.



## System Problems

If you run into a problem with your system, or a part of your system, there are many things you can do yourself to fix or identify the problem. Below are several problems you may come across and some suggestions as to what you can do about them.

### If a printer is not printing:

- Look to see if the printer is on-line. There may be a light on the front or top of the printer to indicate this.
- Turn the printer off and back on.
- Check the power cable to ensure that it is properly plugged in at both ends.
- Check the network cable connection at both the printer and the station it is connected to. Ensure it is properly connected at both ends.
- Check if the printer is out of paper.
- Feed paper through the printer to ensure nothing is blocking its path.
- Make sure the printer ribbon is secure and has ink, or, if the printer uses ink cartridges, that they have ink.
- Go into the Printer Manager to see if the printer has been redirected (See "Printer Manager").
- Run a self-test on the printer. To do this:
  1. Turn it off.
  2. Hold down the printer buttons.
  3. Turn it on while holding the buttons.
  4. Turn it off to discontinue.
- Check the station the printer is connected to. Ensure that the station is functioning.

If you have checked all of the above, redirect printing to another printer (Using the "Printer Manager") and call your PixelPoint Dealer for support.

### If a station is not starting up:

- Check that the station has power and is turned on.
- If you have a UPS, make sure it is on.
- Make sure the monitor is on.
- Make sure all cables are connected properly.
- Check the brightness level on the monitor.
- Try plugging the station into another power source.

If you have checked all of the above, call your PixelPoint Dealer for support. You may find that printers connected to this station are not functioning either.

### If a station is not responding:

1. Attach a keyboard to the station that is not responding.
2. Press [NumLock] a few times to ensure the system is reading the keyboard. If the NumLock light goes on or off when you press [NumLock], then it is reading the keyboard.
3. If it is reading the keyboard, press [Ctrl] [Alt] [Delete] all at the same time.
4. Select [Shut Down] (this step may vary, depending on the operating system you are using —you may need to press another button first).
5. After Windows shuts down, power off the station.
6. Wait several seconds, then turn it back on.
7. Disconnect the keyboard and resume operation.

### If you are unable to cash out an employee:

It is possible that there is an open transaction that needs to be closed before you can cash this person out...

- Check for red tables on the floor layouts (See "Table Layout Screen").
- Select [Transaction View] on the Table Layout Screen to see if there are any saved quick order checks.
- Select [Your Settings] and then [Your Trans]. Look for any open transactions listed there.

## Preventative Maintenance

Here are some tips that will help you to maintain your PixelPoint POS system and help keep your establishment running as smoothly as possible if something goes wrong.

Though this section covers several of the more common applications of preventative maintenance, there may be others you think of that could apply to your establishment. Write them down and document a plan of action for each one. Should anything go wrong, your staff will be able to refer to them and have an emergency plan of action ready for use.

---

### Backup

A backup is your safety net against losing all of your data and programming. Back up your database often and keep at least one copy off-site. An off-site copy will come in handy if something, such as a fire, destroys the on-site backups.

You can back up your database through BackOffice simply by selecting Backup Now! on the General Setup pull-down menu and then selecting [OK].

---

### Contact Information

Say that the system goes down and you need assistance. Who do you call? What is the phone number? Do you have a support contract? Do you need to provide an account number? You should make sure you know all of this information, as you may need it sometime.

After you have checked the Troubleshooting section of this guide and are still unable to resolve your problem, the next step is to call your PixelPoint Dealer for help. Make sure you know all of your dealer's contact information and that you know what information to provide. Post this information somewhere it can easily be found.

---

### Manual Contingency Plan

Today's hospitality operations rely so heavily on electrical devices that the establishment essentially grinds to a halt when the electricity fails or the system goes down for some reason. To prepare for such an emergency, it is a good idea to have a manual ordering system ready.

You should consider acquiring and storing the following emergency supplies:

- Note pads & pencils
- A calculator
- A credit card swipe unit
- An order wheel
- A cash drawer that can be opened manually
- Written instructions on how to take and process orders using this system

When the power goes down, your system should be able to function long enough for you to print all checks, switch to a manual system and properly shut down the system. To make sure that this is possible, every station and printer should be plugged into a UPS.

---

### Remote Support

Arranging to have a support technician on-site is the best possible solution to system problems, but there are two disadvantages to this option. Firstly, it can be a costly solution for something that may turn out to be only a minor problem. Secondly, it takes time for the technician to get to your establishment and your problem will continue until they arrive.

One excellent alternative is to make sure that the support technician can connect to your system remotely. This can be accomplished by connecting your server into a data line (like an internet connection). Two programs commonly used for remote access are PCAnywhere™ and VNC™. By using either of them, the technician will be able to connect into your system from their own PC and troubleshoot your problem right away.

Of course, if the problem is related to your system hardware and not your software, the technician will have to go to your establishment. However, by using remote support first, they can properly diagnose the problem before their arrival. This will help make sure that they know exactly what is wrong and will have the necessary parts and supplies with them.

In most cases, remote support will lessen the impact of a problem by greatly reducing the cost and time needed to fix it.

---

## Server Failure

In case the POSSERVER fails for any reason, and it is critical that the establishment continues operating without interruption, you should consider investing in either a mirrored hard drive or a mirrored server.

A mirrored hard drive is a backup hard drive you can quickly switch to if the main hard drive fails. While this is a cost-effective solution, it only guards against hard drive failures. It will not prevent down-time if the server fails for any other reason.

A mirrored server, on the other hand, is a backup server you can quickly switch to if the main server PC fails. While investing in this solution may be a little more costly, you should weigh this cost against the cost of lost revenue due to down time. In most cases, the cost of a server will be a lot less than the lost revenue.

Contact your PixelPoint Dealer for further information about configuring these solutions.

---

## Station Failure

Stations are generally touch-screen units (meaning that you operate them by touching the screen). However, it is possible for a station to fail to respond to screen input. If one does, a computer keyboard may give you the capability to unlock the station and properly restart it or shut it down. You should therefore make sure that you have a plug-in keyboard on hand and that you know where to plug it in, if you have to.

---

## System Supplies

Always make sure that you have a stock of spare rolls of printer paper and printer ink cartridges. If a printer stops working because it is out of paper or ink, you will not be able to use that printer until it is reloaded.

## Part III: Peripherals and Useful Tools

This chapter is about system components, both hardware and software, that are not part of the core POS. You can run PixelPoint POS without making use of content in this chapter. However, everything included in this chapter will greatly increase the functionality of your system. For example, this chapter talks about things like peripheral hardware devices (such as cash drawers and pole/customer displays), credit authorization, reporting and inventory control.

Specifically, this chapter has the following topics:

- Peripherals
- Integrated Credit Authorization

## Peripherals

For detailed instructions on how to use any of the following devices or for specific information about particular makes and models, see the *Certified Device List* (CDL) on the PAR Partner Center website. This section gives simple descriptions of each type of device and its general function(s). Some sections include very brief notes about what installing each type of device usually includes, but you will need to read the actual installation document included on the CDL in order to successfully install any specific device.

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### Cash Drawers

PixelPoint can accommodate up to three cash drawers per station. They can be connected either through the station printer or by being plugged directly into the station. Many drawers use the first kind of connection. They are activated through the printer. Setup for this requires little more than plugging the drawer in and applying the drawer's code in Printer Code Setup. Plugging the drawer into the station requires installing OPOS drivers. Though PixelPoint will work with OPOS-compliant devices, it is recommended that you select drawers that run off the printers.

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### Pagers

Pagers can be used in conjunction with the Host/Reservation function in PixelPoint POS to page customers when their table is ready. Installation involves enabling the *PagerSystem* policy in BackOffice Policy Setup (or adding "PagerSystem=Y" to "Pixel32.ini") and setting up "PixelPointPageAgent.exe" (attainable through the Certified Device List on the PAR Partner Center website).

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### Pole Displays

A pole display is a hardware device that shows the customer the price of each ordered item and the total amount owing. Configuration essentially involves installing the manufacturer OPOS drivers on the station running the display. Further setup may be needed depending on the type of pole display.

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### Weight Scales

PixelPoint can interface with a scale to weigh items such as food (for when it is sold by weight) or liquor bottles (for checking a bar's inventory). The scale must be configured for ECR serial communication protocol.

Configuration involves specifying a DLL and other settings in "Pixel32.ini" and then setting up products in Product Setup. Weighed products must have the "Weighed Item On Scale" checkbox (on the Advanced tab) enabled. Make sure that weighed items have prices based on a single weight unit. The weight of the item will be treated as quantity and will be multiplied by the price accordingly (weight - tare weight x price).

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### Barcode Scanners

PixelPoint can read UPC barcodes for quick retrieval of transactions, products and coupons. In particular, PixelPoint works with EAN-13 barcodes. If you intend to print barcodes, make sure that the printer make/model supports barcode printing. There is a field in Printer Code Setup (from the

Administrator pull-down menu in BackOffice) that tells the printer to print barcodes. Additionally, PixelPoint requires that barcodes include a carriage return to mark the end of each barcode scan.

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## Order Confirmation Displays / Customer Displays

An Order Confirmation Display (OCD) visually confirms customer orders at the point of purchase while showing advertisements at the same time. OCD devices are becoming increasingly popular as more and more advertising is done digitally.

OCDs can now be anything that shows multimedia, including all LCD monitors or TV screens. PixelPoint's Form Designer enables you to fully customize the content that appears on all of your customer displays.

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## Kitchen Display System

A kitchen display system (KDS) is an alternative to using printers in the kitchen. Printers are replaced with video screens which display the orders to be made. When an order is completed, it can be removed from the KDS using a device called a *bump bar*. Kitchen display systems are typically used in quick service and drive-thru environments.

PixelPoint's PixelKDS program interfaces PixelPoint POS software to third-party kitchen display systems. KDS software can be installed and run in the background on any system in the restaurant, from single terminal to dedicated server. PixelPoint client (station) software has to be installed on the machine running PixelKDS.

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## Liquor Dispensing System

Liquor dispensing systems control the pouring of liquor at bars. They provide complete control and accountability for each drink. PixelPoint interfaces with numerous LDS systems, including Berg, FreePour and Sprint. Installation varies with the type of LDS. See the individual technical information document for each system for more information.

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## Coin Dispensers

Coin dispensers dispense whatever amount and type of coins are needed to give a customer exact change for a transaction. These devices eliminate the problem of giving out incorrect change and can reduce transaction length by an average of 3 to 7 seconds. When PixelPoint calculates the exact change of a transaction, it sends that information to the coin dispenser, which then dispenses the correct money into a coin tray. Installation involves using a particular DLL for the device, and specifying the file name and the com port the device is plugged into in "Pixel32.ini".

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## Caller ID

This function is an incredible time saver in order-taking environments involving members (namely pickup and delivery situations). When a phone call comes in at the order desk, the caller's name and phone number appear on a digital readout. When you select that caller, PixelPoint automatically displays their member record. If there is no existing member record for that phone number, PixelPoint displays a blank member record so member information can be entered quickly.

Installation involves running and configuring "Whozz.exe" (attainable through the PAR Partner Center website) and modifying the QuickMember policy or option so it has the value "1" (this

ordinarily sets the system to automatically prompt for the member's phone number). Note that the establishment itself must have caller ID service in order to be able to use PixelPoint POS's caller ID feature.



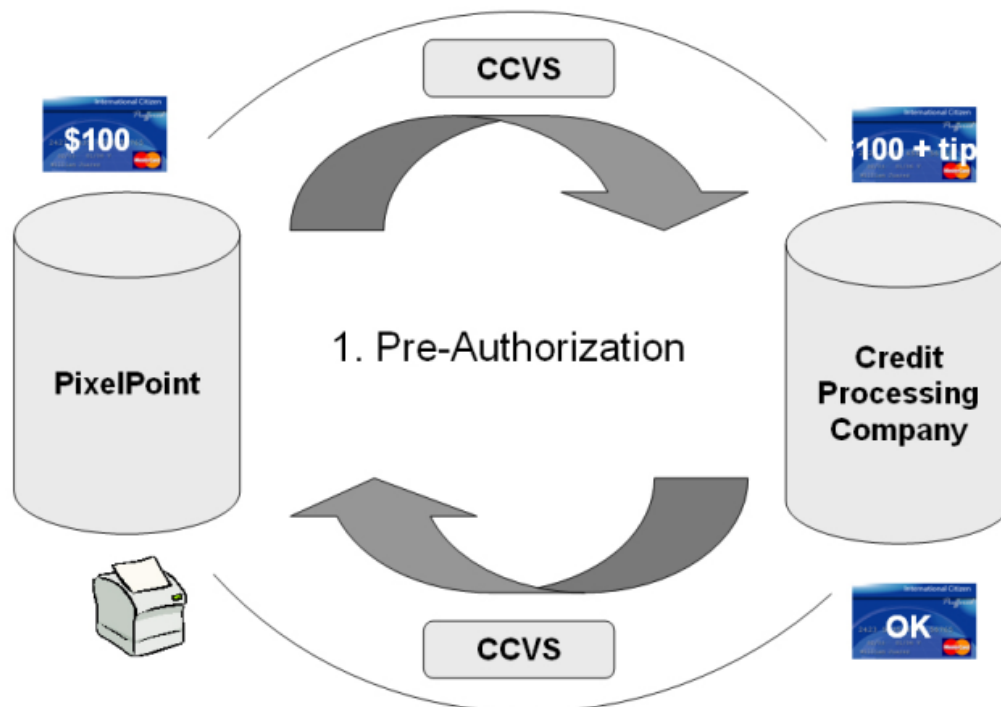
## Integrated Credit Authorization

PixelPoint has an integrated credit authorization program called Authorization Manager (CreditCheck). This program, in conjunction with a credit card verification system (CCVS), enables the processing of credit transactions directly through the POS without the aid of an external banking system. Two steps are required in order to process credit cards - *Pre-Authorization* and *Settlement*.

### Step 1: Pre-Authorization

This is the first of two steps involved in processing credit cards. As an example of a pre-auth transaction, let's say that the check total is \$100.00 and the customer hands you their credit card.

1. You open the check, go to the Finish screen, and swipe the card.
2. PixelPoint recognizes it as a MasterCard. The transaction total and card information is sent to the CCVS. The CCVS connects to the credit processor (via Internet or dial-in) and transmits this information, requesting authorization for the amount. Included in this total is an allowance (generally 20%) for the expectation of a charge tip (the request in this example then, would be for authorizing \$120).
3. The processor company verifies that there are enough funds. If there are, it authorizes the transaction and sends back a confirmation. Those funds will be held in reserve, reducing the card's available credit by the transaction amount. No money changes hands at this point.
4. The confirmation of authorization for \$100 + tip is received by the CCVS which in turn sends that back to PixelPoint.
5. Upon receiving the confirmation, PixelPoint flags it as approved and prints the credit slip (s).



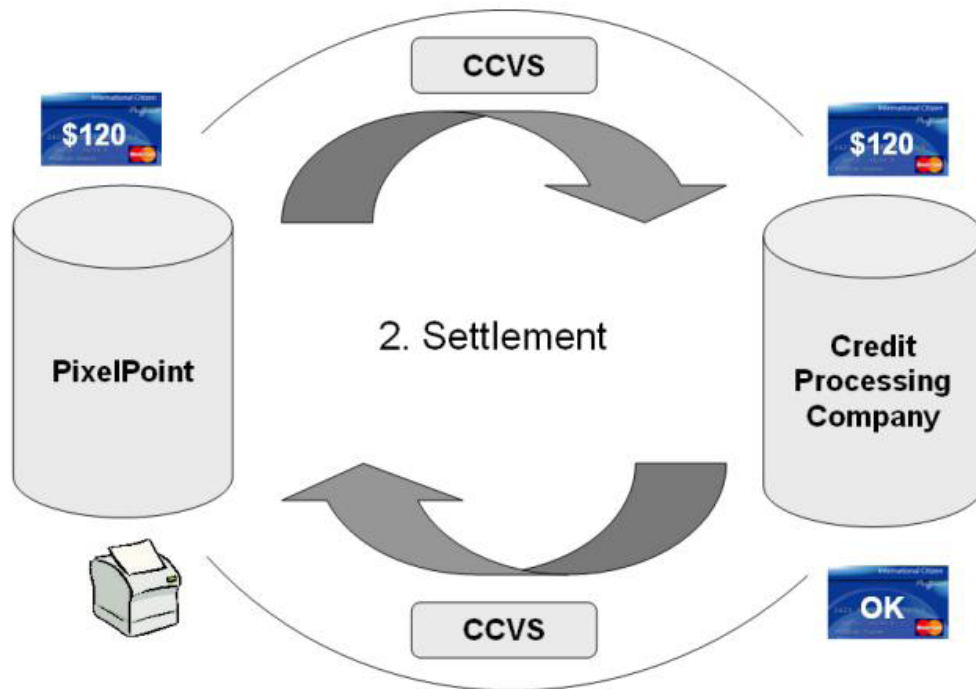
6. At this point, from the user's perspective, the table (or quick order check) is closed. The customer signs the credit slip and leaves, keeping their copy. You keep the house copy

- with the customer signature and charge tip.
7. You apply the charge tip in PixelPoint. This is done through either Your Settings or Manager Functions (by a manager). In either case, the transaction is retrieved through its reference number, which is printed on the credit slip.
  8. With the charge tip applied, the transaction record is flagged as being ready for settlement with the processor. Even if the transaction had a \$0 tip, you would still need to apply the charge tip (that is, "0.00") in order to process the transaction record. For the sake of this example, we will assume the customer gave a \$20 tip.

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## Step 2: Settlement

The second step is the settlement, or "Close Batch" process. Pre-authorized transactions (with tips applied) are sent to the processor as a batch. It is at this time that the transactions are actually settled and funds transferred.



PixelPoint submits all of the approved transactions within the batch for settlement. When this happens, it gets approval from the processor and then transfers the settled transactions from the open batch to the history files. The money (minus any service fees) then gets transferred to the establishment's account. Settlement can be done at any time, and at multiple times, within a day, so long as ALL pre-authorized transactions have had a charge tip applied.

Most merchants go through a single settlement procedure at the end of each day. When a settlement occurs, the software automatically processes all credit cards authorized since the last settled batch. Once settlement has been completed the funds will be deposited in the merchant's account at a time determined by the merchant's agreement with the bank or card company.

Most credit processing companies will retain pre-authorizations for up to 3 days without settlement. Failure to settle within that time may result in cancellation of the transaction's pre-authorization. Check with the processor company to determine how long a batch can stay open. Make sure that the batch is being closed long before the required period so that in case of problems you will have enough time to resolve any issues.

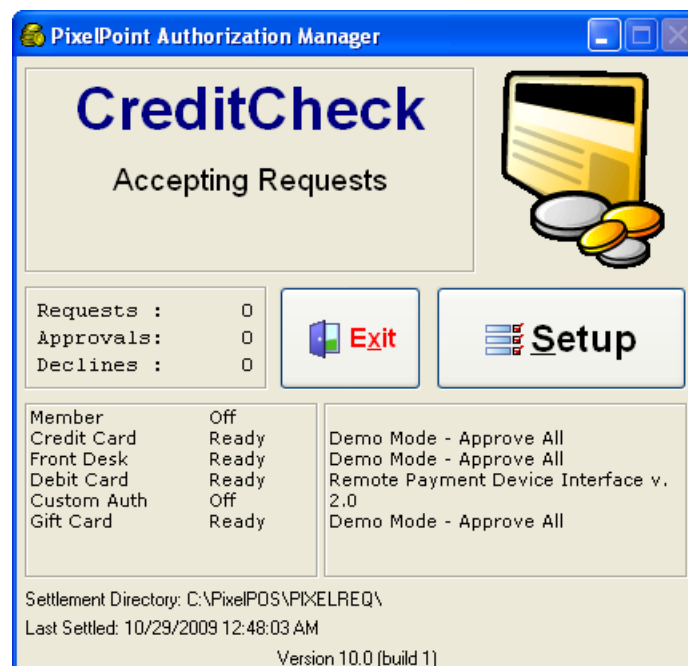
## PCI PA-DSS Compliance

PixelPoint POS is fully PCI DSS and PA-DSS compliant. There are, however, steps that still need to be taken to ensure that the POS system as a whole is compliant, as other third-party software may be in violation of these regulations. Refer to the PixelPoint PCI PA-DSS Implementation Guide found on the PAR Partner Center for more information.

## Authorization Manager Configuration

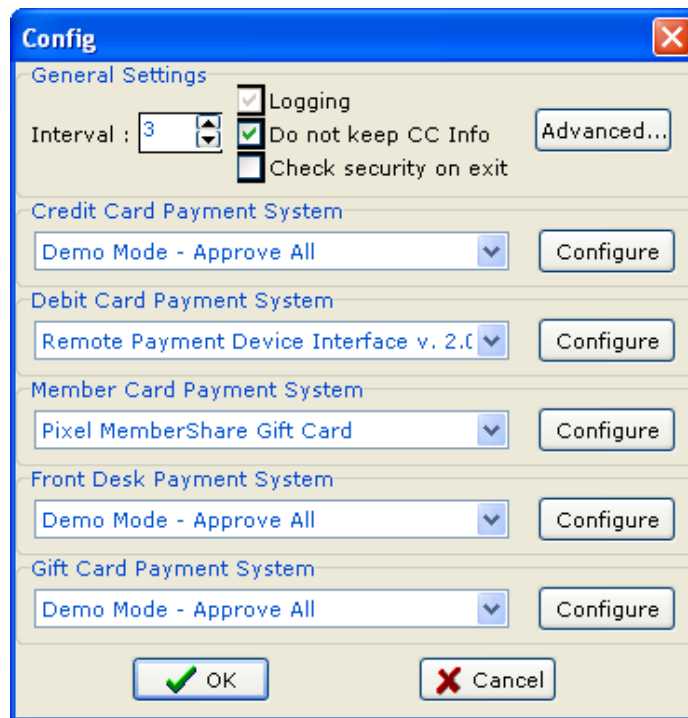
For detailed information on how to configure PixelPoint Authorization Manager to interface to a specific CCVS, refer to documentation on the PAR Partner Center website. If this is your first credit installation, download and read all of the documentation (include the Technical Information document on the PAR Partner Center website) before starting anything. **Do not practice this at a live site.** You should buy the CCVS well in advance so you can stage it in your office using your NFR copy of PixelPoint.

1. In the startup folder of the PC that is running the CCVS, create a shortcut with the following in the "Target" line:  
`\\posserver\pixelpos\pixelauthorizemanager.exe`  
 Make sure that the "Start in" folder is "\\posserver\pixelpos". The Authorization Manager EXE is an agent that should only run on the one PC. All other stations will access it through here.
2. Run "pixelauthorizemanager.exe".
3. Double-click on the spinning coin in the system tray.
4. Click on [Setup].



The main screen shows you what authorizations are in use and what they are set for. Each line represents one of the methods of authorization that can be applied to the system.

5. Click the drop-down arrow under "Credit Card Payment System" to select the CCVS you are using.



6. Click [Configure] next to your selection to apply additional configuration settings. Configuration information for specific interfaces is available in the Technical Information documents posted on the PAR Partner Center site.
7. Click [OK] when completed.
8. Restart Authorization Manager.

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## BackOffice Configuration

The final step is configuring BackOffice to use the settings you applied in the Authorization Manager.

1. Select Payment Method Setup from the Administrator pull-down menu.
2. Choose the appropriate authorization for each method of payment by using the radio buttons in the "Select" box.
  - Cash & foreign currencies - **No Authorization.**
  - Member accounts & gift cards - **Member/VIP Auth.**
  - Credit cards - **Credit Card Auth.**
  - Room charges - **Front Desk Auth.**
  - Debit cards - **Debit Card.**
  - Forms of payment requiring specially programmed authorization - **Custom.**
  - Gift cards through 3rd party software - **Gift Card (third party).**
3. Select System Setup from the Administrator pull-down menu.
4. Check the "Use Authorization Manager" box.
5. Save your changes.
6. Restart the POS system.

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## Testing Authorization Manager Configuration

It is critical that you run a test transaction and batch settlement before going live. Do not go live only to find out that credit card transactions have not gone through or are lost.

Begin by making sure you know how to process credit card transactions in PixelPoint POS. This information is detailed in the PixelPoint POS User's Guide. A good exercise would be running through the following procedure:

1. Start a new day.
2. Process CC transactions.
3. Add tips.
4. Do a batch settlement.
5. Cash out and clock out.
6. Run End of Day.

Verify that the above works properly by running reports in Report Viewer. Confirm your test transactions and make sure that you receive a batch report when you settle the batch. Also cross-reference this information with the End of Day report. They must match up.

Once the installation at the customer's site is complete, perform a test transaction using a real credit card, and process a transaction for \$1. Do not let the customer use the system until you have verified that every part of the installation has been completed successfully. We recommend that you set up the system during regular working hours. This will make sure that CCVS support or the processing center will be accessible if it is needed.

Make sure that the customer notifies you if the batch report is not printed, as that suggests that the batch has not been closed.

If you experience any problems or anomalies, see "Troubleshooting".

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**Note:** Several of the authorization fields in the Authorization Manager have a DEMO MODE in which PixelPoint will automatically approve any card number applied. This is very useful for demonstration and training purposes.

# Glossary

## A

**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.

**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

**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.

## 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, providing 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

**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.

**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).

**POS Server:** 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.

**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.

**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 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.

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