

PAYFIRST User Guide:

- ❖ This user guide outlines basic system functionality such as:
 - ✓ Logging into System
 - ✓ Back Office Setup
 - Setting up Employees
 - Setting up Menu items
 - Setting up Option items
 - Revenue Department Setup
 - Table setup
 - Loyalty Points Matrix
 - ✓ Ticket/Ordering
 - Starting a Check
 - Takeout/Delivery
 - Bar Tab
 - Forms of Payments

LOGIN SCREEN



Figure 1

Enter Your Password

Access system by entering password using the numeric buttons and click on Logon. (Default Password enter 1)

Quick Table View

Brings up the **Table Layout** Screen where a quick view of the Dining Room, Table Layout, shows table availability, and allows you to retrieve/review the current table check.

Logon

Allows access to the system to perform sales transactions, system functions, enter data, and view reports.

Back Office

Access limited to employees with the right to perform and set up the following functions:

Set Up Menus/ Menu Items, Sections and Tables, Discounts for Tickets/Menus Items, Taxes for Menu Items, Void Reasons, Kitchen Printers/KDS, Kitchen Commands, Gift Cards/Loyalty Points, Backup and Restore Database, Employee Information/User Access, Workstation Profile, Company Profile, Messages for Customer Receipts, Credit Card Payment Gateway, Assign Server to Tables, Inventory Management, Backup/Restore Database.

Manager

Access limited to employees with Manager Functions:

Force Close Table, Force Close Ticket, Force Unlock Ticket, Miscellaneous Expense, Merge Loyalty Cards, Retrieve Closed/ Voided Ticket, Re-Assign Ticket, Activate/Print Gift Cards, Item 86, View Employee Shifts, Activity Log, Time and Attendance, Show Open Tickets, Set Business Date, Move Payments, Show Gift Card Activations, Backup/Restore Database, Settle House Account, Reports, and Close Out.

Logon

Allows access to the system to perform sales transactions, system functions, enter data, and view reports.

Lock System

Locks/ disables the system. If the system has been locked, enter password and click on **Lock System** again to unlock.

Open Shift

Calculate the starting cash in the drawer at the beginning of the shift.

Enter the count of each type and the system will calculate the total of *Starting Cash* for that shift.

Close Shift (Open Shift button will convert to Close Shift after the shift has opened)

Calculate the cash in the drawer at the end of the shift.

Enter the count of each type and the system will calculate the total *Cash* at the end of that shift.

Reservation Book

Save reservations, check in guests, and view table assignments/ availability.

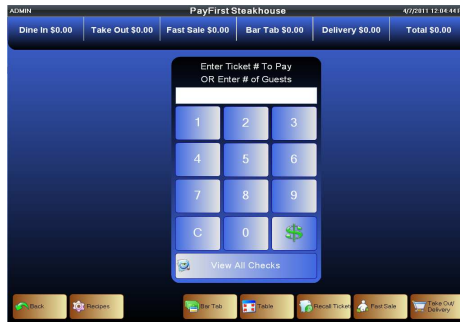
Clock Out

Employees can clock out and print their sales report at the end of a shift.

Exit

Shut Down the Terminal, Reboot Terminal, Exit POS System, or Cancel to return to the Logon Screen

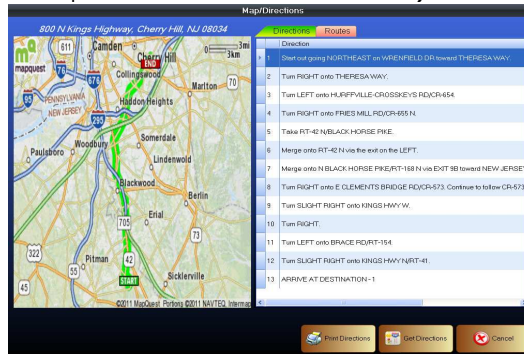
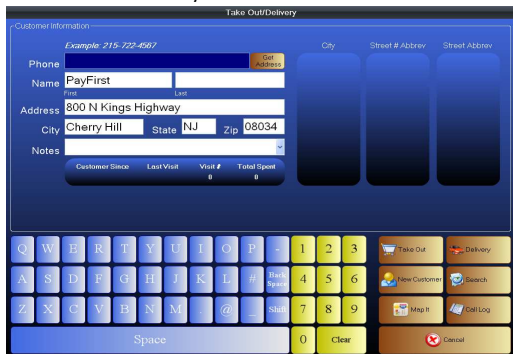
PAYFIRST RESTAURANT POS VERSION 3.3



Logon

Allows access to the system to perform sales transactions, system functions, enter data, and view reports. View at a glance current sale totals for Dine In, Take Out, Fast Sale, Bar Tab, Delivery, and Total of all.

- **Back**- Exit out of the current screen to previous screen.
- **Recipes**- Look up a recipe for a menu item. Recipe must have been entered and stored in the database in order to use this function.
- **Print**- Print a recipe from the database.
- **Search**- Recipe may be searched by full name, partial, or content.
- **Bar Tab**- Allows a sales ticket/tab to be created by name or with a credit card. Credit Card Pre-Authorized amounts are also created in this screen.
- **Table**- Start a ticket/ tab for a table. Start a new table by entering the number of guests and click on Table. Click on selected table icon and click ok.
- **Recall Tickets**- Recall a ticket that is currently open to view, add items, make changes, check on status, or print ticket. Click on **Recall Ticket**, enter the check number in the Search box and click on **Search Tickets**. Tickets may also be searched visually by scrolling thru the tickets on the screen. Click on the << or >> buttons to go back or forward through the list of tickets. Click on the ticket to open, view, or make changes. Click on **Print** to print ticket.
- **Fast Sale**- Quick Sales/transactions made without starting a tab. Click on **Fast Sale**, enter items, click on **Pay**, and close sale.
- **Take Out/ Delivery**- Create a new ticket for a takeout order or delivery with necessary information such as phone, name, address, city, state, and zip. This screen also allows you to retain customer information. Enter the requested information and click on **Delivery** or **Take Out** accordingly.



Take Out

Complete form accordingly (name is a required field), and click on **Take Out**. Proceed with your order entry.

Delivery

Complete form accordingly (name and address are mandatory fields) and click on **Delivery**. A form requesting driver selection will appear on the screen. If **Yes** is chosen, select a driver from the Select Driver list and click **Ok**. Proceed with your order entry.

New Customer

A new customer record can be created in the database. Name, address, city, state, and zip may be entered and stored in the database for future visits or customer contact.

Search

Access returning customer information by clicking on **Search**, a directory will appear. A search may be performed by scrolling through the directory, or by entering complete or partial information in any of the given boxes.

Ok- Click **Ok**, once a customer name has been found.

Clear- Clears any information entered in the boxes (First Name, Last Name, Phone, Notes, e-mail).

Cancel- Exits out of current screen and brings up the previous screen.

Map It

Get driving directions to the delivery address. Enter the address and click **Map It**, a map with detailed driving directions will be provided.

Click on the **Routes** tab, **Deliveries** will appear to the left. Create a delivery route by clicking on the delivery, click on >> to move the delivery to the **Drive To** on the right in the desired delivery order. Click << to remove a delivery from the drive to route.

Remove All moves all deliveries from the **Drive To** side back to the Deliveries side.

Get Directions- will get directions to destination 1, then 2, etc. (in the event there is more than one delivery on the route).

Print Directions- to print out directions.

Call Log-list all calls from the Caller Id.

Cancel- Exits out of current screen and brings up the previous screen.

BACK OFFICE



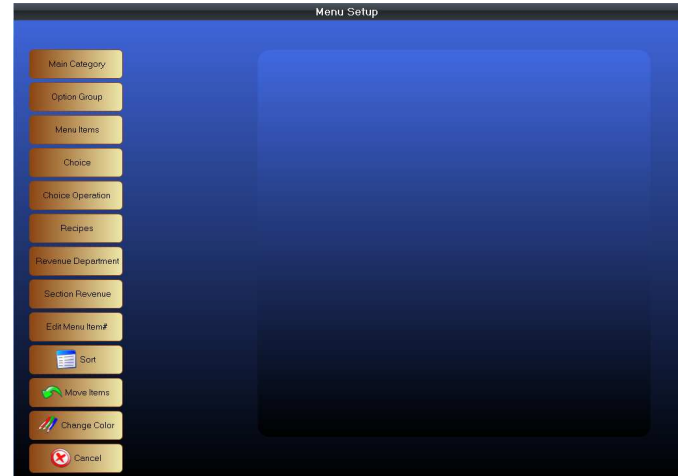
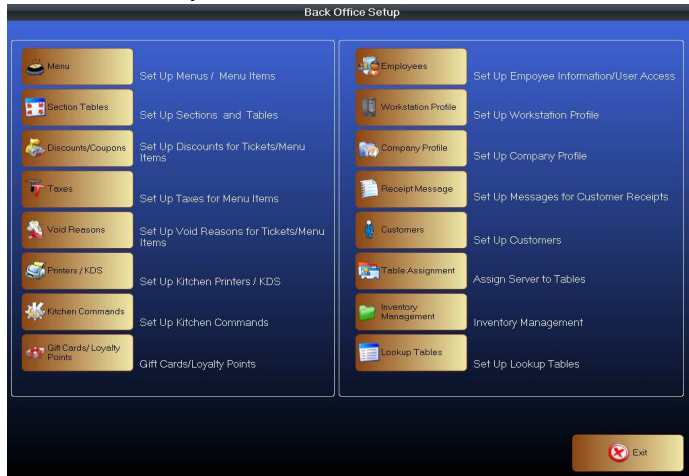
Back Office

Access limited to employees with the right to perform and set up the following functions:

Set Up Menus/ Menu Items, Sections and Tables, Discounts for Tickets/Menu Items, Taxes for Menu Items, Void Reasons, Kitchen Printers/KDS, Kitchen Commands, Gift Cards/Loyalty Points, Backup and Restore Database, Employee Information/User Access, Workstation Profile, Company Profile, Messages for Customer Receipts, Credit Card Payment Gateway, Assign Server to Tables, Inventory Management, Backup/Restore Database.

- **Menu** Set Up Menus/ Menu Items
- **Section Tables** Set Up Sections and Tables
- **Discounts/ Coupons** Set Up Discounts for Tickets/Menu Items
- **Taxes** Set Up Taxes for Menu Items
- **Void Reasons** Set Up Void Reasons
- **Printers/ KDS** Set Up Kitchen Printers/KDS
- **Kitchen Commands** Set Up Kitchen Commands
- **Gift Cards/ Loyalty Points** Gift Cards/Loyalty Points
- **Employees** Set Up Employee information/ User Access
- **Workstation Profiles** Set Up Workstation Profile
- **Company Profile** Set Up Company Profile
- **Receipt Message** Set Up Messages for Customer Receipts
- **Customers** Set Up Customers
- **Table Assignment** Assign Server to Tables
- **Inventory Management** Inventory Management
- **Lookup Tables** Set Up Lookup Tables

Menu Set Up Menus/ Menu Items



Main Category

Categories set up for the Menu e.g. Appetizer, Soup, Salad, Entrée, Dessert, Cocktails, Beer, Beverages, etc. Use << or >> to page forward and page back through the categories.

Option Group

Options set up for an item e.g. Fried, Steamed, Dressing, Temperature, etc.

Menu Items

Menu items are the items within the Main Category e.g. Main Category is Beer. The menu items are Heineken, Corona, etc.

Choice

A choice for your Option Group e.g. Option Group is Dressing-choices offered are House or Vinaigrette etc. *Special requests* for the choices can be made: **Add, Change, Little, Want, Only, On Side, No, Less, Extra, Sub (Substitute)**

Recipes

Add recipes to the database for reference.

Revenue Department

Departments set up to track revenue from each menu item (e.g. Kitchen, Liquor, Beer, Desserts, and Gift Certificates).

Section Revenue

Sections set up to track revenue generated (e.g. Dine In, Take Out, Fast Sale, Delivery, and Bar Tabs).

Edit Menu Item#

Edit a menu item number in the system. (Only applicable if the establishment uses a number ordering system for the menu items).

Sort

Menu choice(s) buttons arranged in alphabetical order on the POS screen.

Move Items

Move item buttons to your desired preference. Simply click on **Move Items** and click on item from current location to the desired location.

Change Color

Customize the appearance and color of the buttons.

Cancel

Exits out of current screen and brings up the previous screen.

Section Tables *Set Up Sections and Tables*



- **Section Tables Set Up Sections and Tables**

Create a visual layout for the establishment according to preference (e.g. Dining Room, Bar, Outdoor Dining, etc.).

1. Click on the **Main Tab**, click on a blank button.
2. **Section Set Up** page will appear.
3. Enter the Section Name
4. Customize the appearance of the button according to your preference
For Appearance: Check off the box for
No Picture, Same Color as Previous Button, Rounded Corner, or Bevel.

For Color Select:

Border Color- the color outline of the button.

Inner Color- the color fill of the button.

Fore Color- the color of the text on the button.

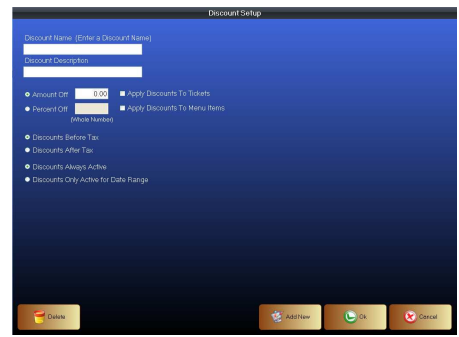
Picture- creating a button with a picture.

1. Click on **Picture**.
2. This will open a window allowing you to select a picture from your computer files.

Ok to confirm the desired change.

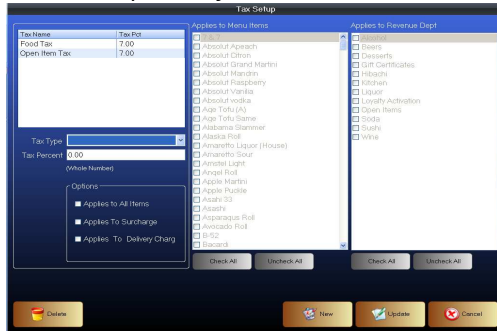
Cancel to disregard changes and revert to original look.

Discount/Coupons Set Up Discounts for Tickets/Menu Items



- **Discount/Coupons Set Up Discounts for Tickets/Menu Items**
Create Discounts offered by the establishment. Time and date constraints may be specified.
Add New
 1. Click on **Add New** to create a Discount.
 2. The **Discount Setup** page will appear. Fill out form accordingly.
 3. Select: Amount Off (a dollar/cents amount e.g. .50, \$1, \$1.50 etc.) or Percent off (percentage e.g. 5%, 10% etc.)
 4. Enter the respective dollar amount or percentage for the selection made.
 5. Select: Apply discounts to tickets**Ok-** Click **Ok** to save and create Discount.
Cancel- Exits out of current screen and brings up the previous screen.
Delete- Remove a Discount by selecting the Item and click on **Delete**.

Taxes Set Up Taxes for Menu Items



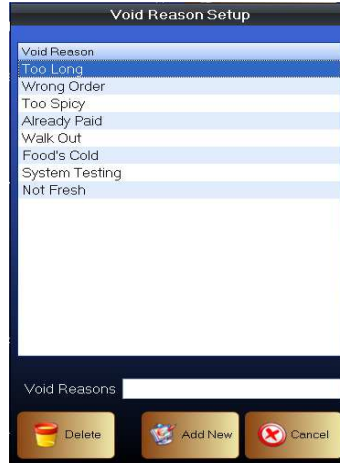
- **Taxes Set Up Taxes for Menu Items**
Set up different taxes applied to the different menu items e.g. food tax, open item tax, and liquor tax.
 1. Click on **New** to add a Tax.
 2. Enter the name of the **Tax Type** (Selection must be made from the drop down).
 3. Enter the **Tax Percent**.

Select/ check the boxes that apply:
Options
 Applies to All Items
 Applies to Surcharge
 Applies to Delivery Charge

Applies to Menu Items
Applies to Revenue Department
 Select the Menu Items that the tax is applicable to.
 Click **Check All** to apply that tax to all the items. Click on **Uncheck All** to clear the tax applied.

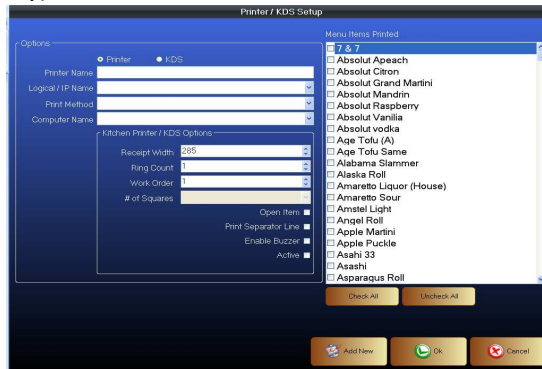
Update- Saves the data created.
Delete- Remove a tax by selecting it and click on **Delete**.
Cancel - Exits out of current screen and brings up the previous screen.

Void Reasons Set Up Void Reasons for Tickets/ Menu Items



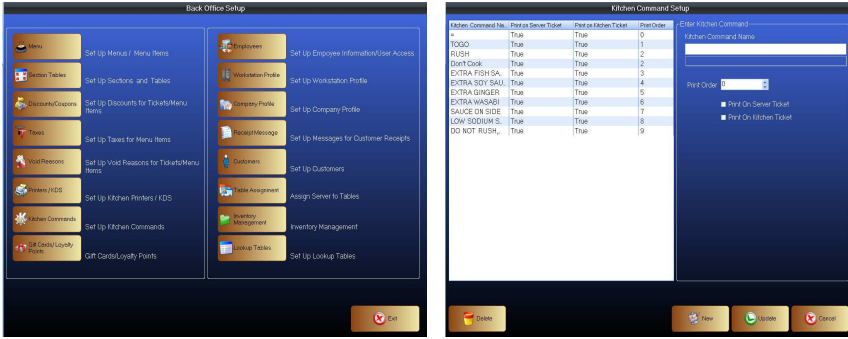
- **Void Reasons Set Up Void Reasons for Tickets/ Menu Items**
Set up reasons for voiding a ticket.
 1. Enter a **Void Reason** in the box and Click **Add New**.
 2. **Delete**- Remove a Reason by selecting it and click on **Delete**.
 3. **Cancel** - Exits out of current screen and brings up the previous screen.

Printers/KDS Set Up Kitchen Printers/ KDS (Internal Use Only)



- **Printers/KDS Set Up Kitchen Printers/ KDS (Internal Use Only)**

Kitchen Commands *Set Up Kitchen Commands*

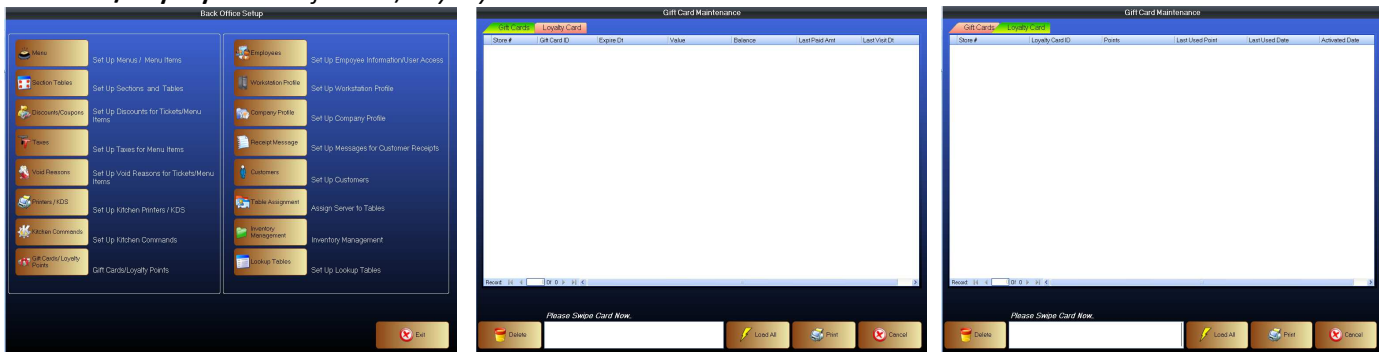


- **Kitchen Commands** *Set Up Kitchen Commands*
Commands for the kitchen work orders.

1. Click **New** to add a Kitchen Command.
2. Enter a **Kitchen Command Name**.
3. Enter a Print Order number. (Enter the next consecutive number e.g. if the last command was #9, then you would use 10).
4. Select: Print on Server Ticket and/or Print on Kitchen Ticket.
5. Click **Update** to save in the database.

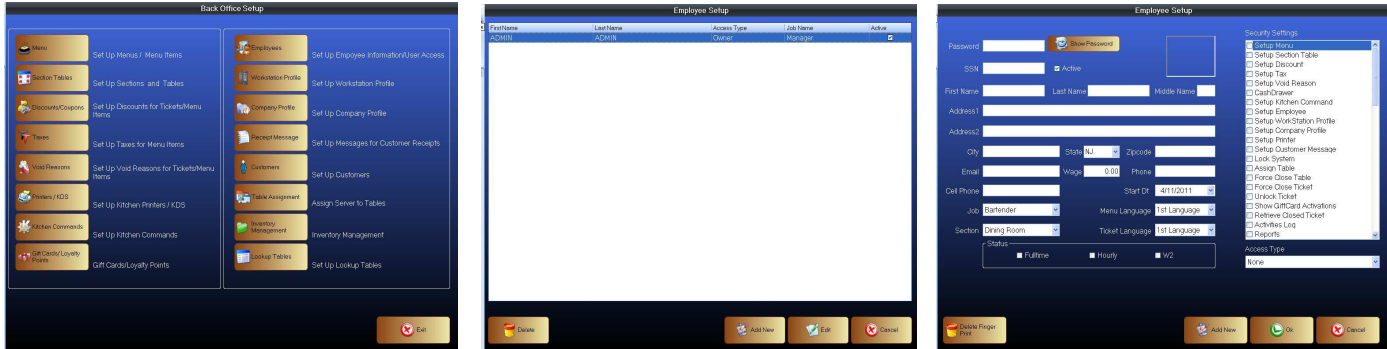
Delete- Remove a Kitchen Command by selecting it and click on **Delete**.
Cancel - Exits out of current screen and brings up the previous screen.

Gift Cards/ Loyalty Points *Gift Cards/ Loyalty Points*



- **Gift Cards/ Loyalty Points** *Gift Cards/ Loyalty Points*

Employees Set Up Employee Information/User Access



- **Employees Set Up Employee Information/User Access**
Setup Employee record, user access, and rights.

1. Click on **Add New** to create an Employee record.
2. **Employee Setup (screen/form)** will come up. Enter information accordingly.

* **Show Password** - allows you to see the password. Only owner(s) and manager(s) have access to this feature.

Security Settings- Rights granted to or held from employees.

Access Type- Access to rights granted based on type. Owner, Manager, and Employee have default access to certain rights.

You can customize rights for each individual employee if necessary.

Delete Finger Print- only applicable to establishments that use a fingerprint reader.

Cancel- Does not save what was entered. Exits out of current screen and brings up the previous screen.

Edit

Change Employee information by selecting the employee, and click the **Edit** button.

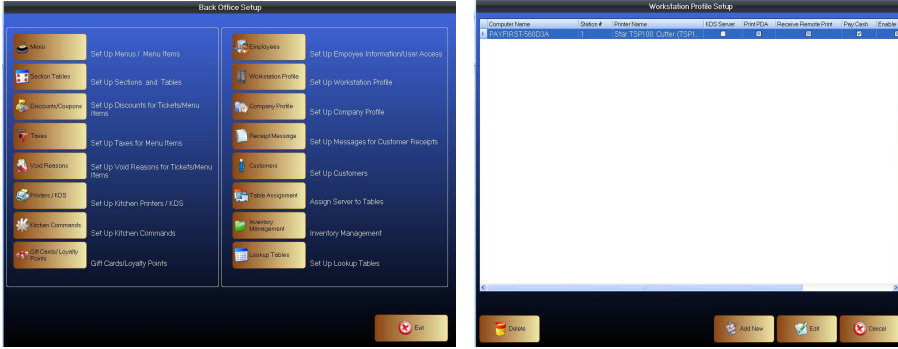
Delete

Remove an employee record by selecting a name, and click **Delete**. Confirm **Yes** or **No**. Click **Ok** when complete.

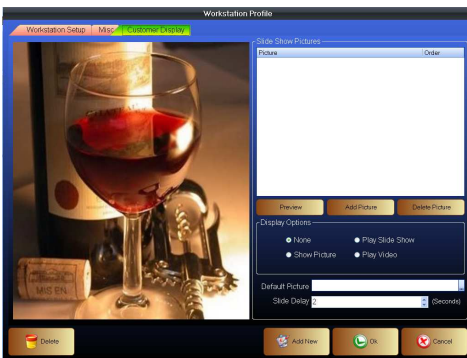
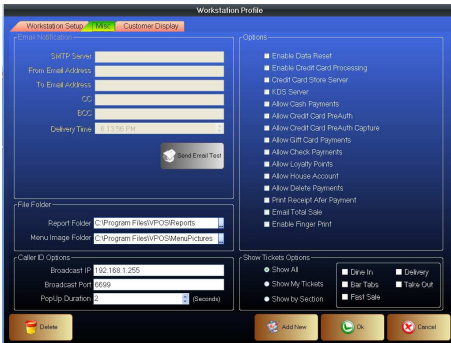
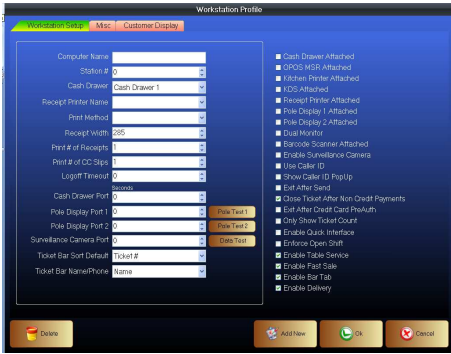
Cancel Exits out of current screen and brings up the previous screen.

PAYFIRST RESTAURANT POS VERSION 3.3

Workstation Profile Set Up Workstation Profile



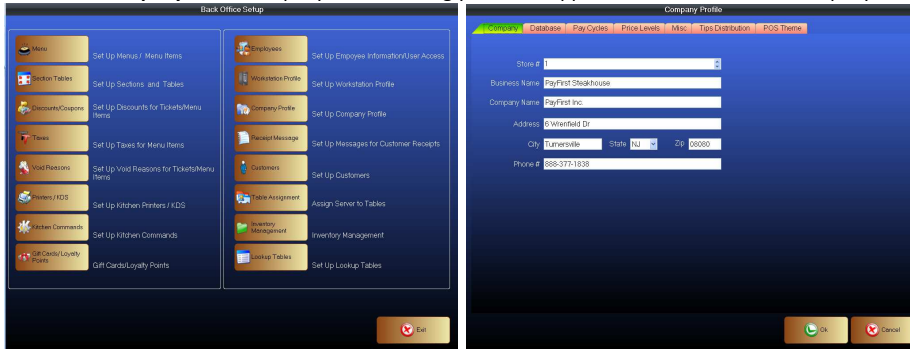
- **Workstation Profile Set Up Workstation Profile**



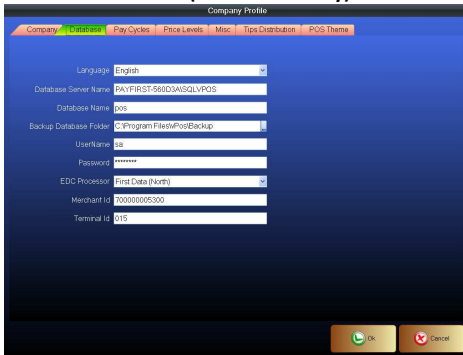
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Company Profile Setup Company Profile

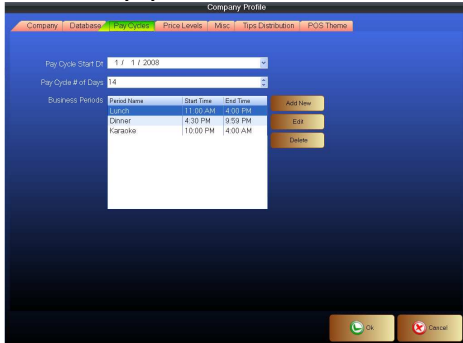
Company- Fill in company info accordingly Store# if applicable, Business Name, Company name, Address, City, State, Zip, and Phone #.



Database (Internal use only)



Pay Cycles



Pay Cycle Start Date- Enter the date that the establishment begins a pay cycle.

Pay Cycle # of Days- Enter the days (e.g. 7, 14, 21 etc.)

Business Periods- Enter in the periods (e.g. Lunch, Dinner, Happy Hour, and etc.)

Add New- Add a new Business Period.

Fill out **Business Period Setup** form accordingly. Click **Add New** to create a new Business Period. Click **Ok** to save. Click **Cancel** to exit and not save entered data.

Edit- Make changes to an existing Business Period.

Select a Business Period, click **Edit** and make changes on the **Business Period Setup** form. Click **Ok** to save. Click **Cancel** to exit and not save entered data.

Delete- Remove a Business Period.

Select a Business Period, click **Delete** and make changes on the **Business Period Setup** form. Click **Ok** to save. Click **Cancel** to exit and not save entered data.

Price Levels

Prices may vary on different days or times throughout the day. Price Levels are set to accommodate these differences. (i.e. Regular price for Wings are \$4.95, during Happy Hour \$3)

Select the day that the price levels are being set for.

Enter the **From Time** (start time)-**To Time** and the **Level Name** (i.e. Breakfast, Lunch, Dinner, Happy Hour Etc.)

Check off the boxes for the levels if applicable on that day. (Happy Hour might be on Mon.-Fri. but not on Sat. & Sun.)

Price Round Up

Menu Items Price Level Options

Choices Price Level Options

Misc (Internal use only)

Tips Distribution

Section Formula

Employee Formula

POS Theme

Customize the color appearance of your **Default Item(s)**.

Default Item(s): Screens, numeric buttons, function buttons, fast sale, take out, delivery, bar tab, and dine in buttons.

Customize the colors by selecting an item from the Default drop down, and select the desired color from the color chart.

Use the Color Property drop down to select Back Color (Main), Border Color (the Button Border), Gradient Color (the contrast only applicable to Screen), and Fore Color (Text).

- **Receipt Messages** *Set Up Messages for Customer Receipts*
Create a message to promote specials, events, hours, etc. to be printed at the bottom of each receipt. Message is limited to four lines. Click the **Ok button** to save message.
- **Customers** *Backup/ Restore Database*
 - New**- Add customers to the database by filling out the form accordingly.
 - Update**- Save the customer information entered.
 - Delete**- Remove a record by clicking and selecting the name, click on **Delete**.
 - Cancel**- Does not save what was entered. Exits out of current screen and brings up the previous screen.
- **Credit Card Gateway** *Set Up Credit Card Payment Gateway (Internal Use Only)*
- **Table Assignment** *Assign Server to Tables*
- **Inventory Management** *Inventory Management*
Organize and keep track of vendors, inventory, and invoices.
 - Vendors**
View a directory of vendors at any time
 - Vendor Setup Screen**
 - New**- Click on **New** to add a vendor. Fill out *Vendor Information* box accordingly.
 - Update**- Click on **Update** to save Information entered in the Vendor Information box.
 - Delete**- Remove a vendor by clicking the vendor in the directory and click delete.
 - Cancel**- Exits out of current screen and brings up the previous screen.
 - Inventory Products**
View a list of all the products in your inventory at any time.
 - Inventory Products Screen**
 - Add New**- Enter *Product Name* in the box and click **Add New** to save to the list.
 - Delete**- Remove a product by clicking on the item and click **Delete**.
 - Cancel**- Exits out of current screen and brings up the previous screen.
- **Products Management**
Track and view inventory/products purchased by date, vendor purchased from, the quantity, price, and the date.
 - New**- Add a new product management record by clicking on the **New** button, and fill out the **Product Information** form accordingly.
 - Product**- Select the product from the drop down menu that is being tracked (*the product needs to be saved in the inventory products directory to be in the drop down*).
 - Vendor**- Select the vendor from the drop down menu that the product is purchased from (*the vendor needs to be saved in the vendor directory to be in the drop down*).
 - Unit**- Enter unit amount.
 - QTY**- Enter quantity purchased.
 - Price**- Enter the price product was purchased for.

Create Date- Enter date the record is being created.

Business Date- Date the transaction took place.

Update- Saves the information entered. Make sure to click **Update** or the information entered will not be saved.

Delete- Remove a *Product Management* record by clicking on the item and click **Delete**.

Cancel- Exits out of current screen and brings up the previous screen.

Invoices

Record and view invoices by vendor, invoice date, receive date, invoice #, amount, business date, and view if it's been paid.

Load Invoices- Loads all invoice records for viewing.

New- Create a new *Invoice Information* record by clicking on the **New** button, and fill out the *Invoice Information* form accordingly.

Vendor- Select the vendor from the drop down menu that the product is purchased from (*the vendor needs to be saved in the vendor directory to be in the drop down*).

Invoice Date-Select a date from the drop down menu calendar.

Receive Date- Select a date from the drop down menu calendar.

Invoice #- Enter the invoice number.

Amount- Enter the invoice amount.

Business Date- Enter the business date.

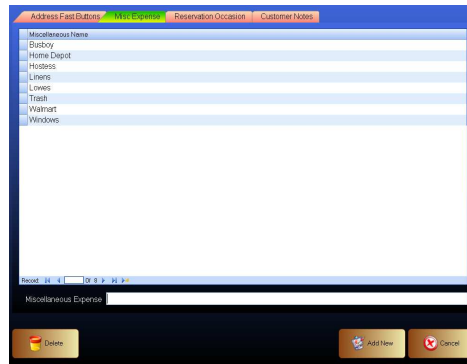
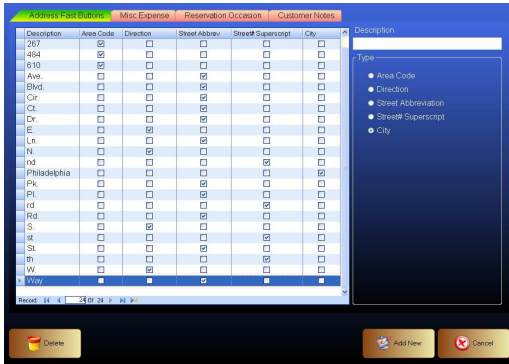
Invoice Paid- check off the box if the invoice has been paid.

Update- Click on **Update** to save the invoice information entered.

Delete- Remove an Invoice record by clicking on the item and click **Delete**.

Cancel- Exits out of current screen and brings up the previous screen.

- **Backup/Restore Database** *Backup/Restore Database (Internal Use Only)*
- **Lookup Tables** *Set Up Lookup Tables*



Address Fast Buttons-Set up Area Codes, Direction, Street Abbreviations, Street# Superscripts, and City.

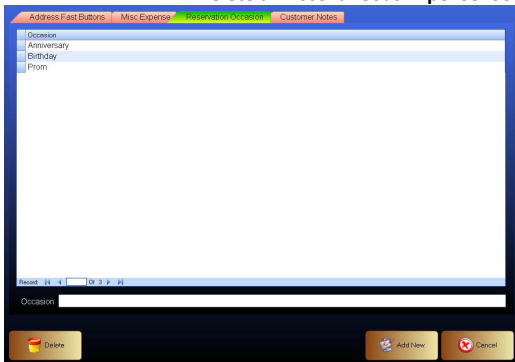
Add a Description- Enter the **Description** and select type. Click on the **Add New** button to save.

Delete a Description- Select an item from the list, and click on the **Delete** button.

Misc Expense- Set up Miscellaneous Expense Descriptions such as Windows, Hostess, Trash, Home Depot, etc.

Add a New Miscellaneous Expense- Enter the **Miscellaneous Expense**. Click on the **Add New** button to save.

Delete a Miscellaneous Expense- Select an item from the list, and click on the **Delete** button.

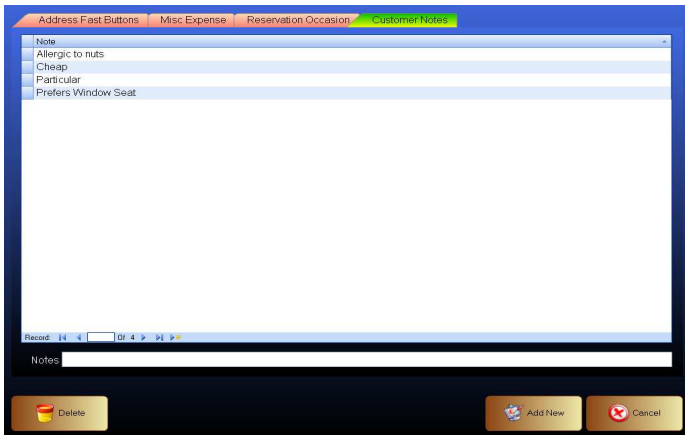


Reservation Occasion- Set up Occasion Descriptions such as Prom, Birthday, Engagement, Anniversary, Memorial, etc.

Add an Occasion- Enter the **Occasion**. Click on the **Add New** button to save.

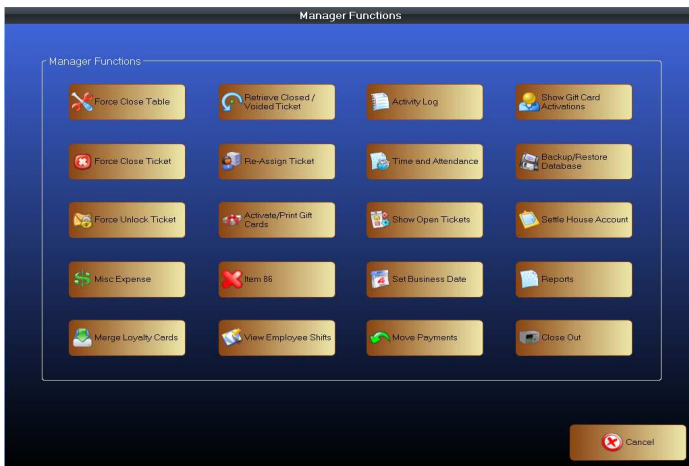
Delete an Occasion- Select an item from the list, and click on the **Delete** button.

PAYFIRST RESTAURANT POS VERSION 3.3



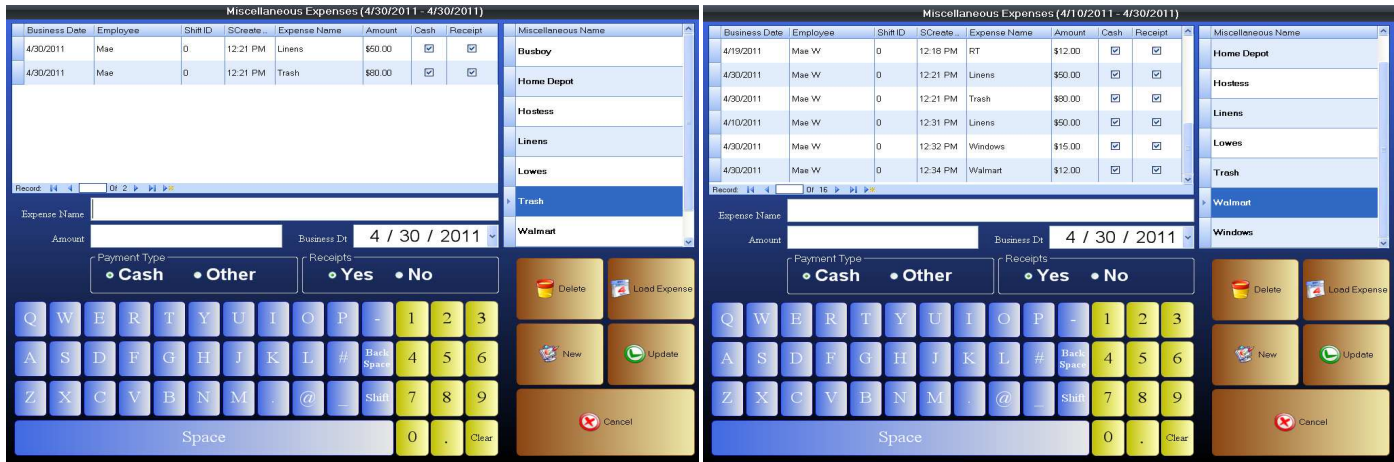
Customer Notes- Set Up Customer Notes such as Allergic to Nuts, Particular, Prefers Window Seat, etc.
Add Note- Enter the **Note**. Click on the **Add New** button to save.
Delete a Note- Select an item from the list, and click on the **Delete** button.

MANAGER



Manager Functions

- **Force Close Table-**
- **Force Unlock Ticket**



- Miscellaneous Expenses-** Keep track of daily expenses.
 - New-** Click on the **New** button and enter an **Expense Name** or select from the expenses on the right. Enter the Amount, select a current or prior business date from the pop up calendar or drop down calendar. Select payment type. Check off if a receipt is available or not.
 - Update** – Click on **Update** to record the expense.
*This will allow it to print on your report at the end of the night.
 - Load Expense-** View miscellaneous expenses for Prior business date(s). Click on **Load Expense**, and select the date(s) on the pop up calendar for the date of the expense(s) to be viewed. Enter the information accordingly.
 - Delete-** Delete a Miscellaneous Expense by selecting and click on the **Delete** button.
 - Cancel-** Exits out of current screen and brings up the previous screen.

- Merge Loyalty Cards**

- Retrieve Closed/ Voided Ticket**

Retrieve a closed or voided customer ticket. A list of closed and voided tickets will be listed on the screen as *colored bars*. The colored bars will have ticket #, customer name if available, server, total, paid, seated time, time elapsed (time stayed), and type of sale. Select from the colored bar list or enter ticket # using the numeric keypad and click on *Search Tickets*.

Ticket List (ALL)

Print – Click on the print button to print a copy of that receipt.

****Re-open a ticket or remove a payment error by clicking on the colored closed ticket bar.** In the Payment/ Receipt box to the right of the screen click on the cash/ or credit box that shows the payment made. Click on that payment and a Remove Payment box will ask “Are you sure you want to delete this payment Cash/ Credit \$amt”

Click on Yes to remove payment and re-open ticket. Click on No to cancel. If there is more than one payment that needs to be removed, repeat the steps above.

Show Bars-The option to view list of closed tickets in a colored bar format.

Show List- The option to view list of closed tickets in a spreadsheet list format.

Print Ticket- Select the ticket from the list and click *Print Ticket* to print a copy.

Open Ticket- Select the ticket from the list to be viewed and click *Open Ticket*.

Cancel- Exits out of current screen and brings up the previous screen.

- Re-Assign Ticket-** Assign a ticket from one server to another. E.g. Server #1 might be leaving early and the table is not done yet, the ticket can be reassigned to Server #2 to finish up.

Re-Assign Ticket- select and a pop up will request the ticket # to be transferred. Enter the ticket# and a list of employees will appear. Click on the employee name that the ticket is to be assigned to.

- Activate/ Print Gift Cards**



- **Item 86**
This “Blacks Out” a menu item that is currently not available from being ordered. Select and click on the menu item that is not available. The item will be “Blacked Out” on the screen. Reactivate button click on “Blacked Out” item. Click on the **Cancel** button to exit screen at anytime.
- **View Employee Shift**
- **Activity Log**
Keeps track of actions performed such as void ticket, price changes, remove tax, discount tickets, data reset, reporting, unlock/retrieve closed tickets, item 86, and transfer items/ tables. Tickets are listed in numeric order, the Action Date, Business Date, Time, and name of the Individual performing the action will be shown.
 - **Print Check**
Print a copy of the check that appears to the right of the screen.
 - **Load by All**
All activities will be loaded for viewing.
 - **Load by Date**
Limit the search by selecting dates. Click on **Load by Date**, select the Date Range of the preferred search. Click on the preferred start date on the calendar to the left, and click on the end date in the calendar to the right. Click on **Ok** to begin search.
Cancel to return to previous screen.
- **Time and Attendance**
Track and view all employee attendance on a spreadsheet. View employee, clock in/out time, total hours, minutes, sales, and tips.
Load Attendance- Retrieve attendance reports for any date by simply selecting dates using the pop up calendars on the screen. Click **Ok** to perform search for the selected dates. Click **Cancel** to return to the spreadsheet for the current date.
- **Show Open Tickets**
A quick spreadsheet overview showing Open Ticket #, Business Date, Create Time, Table Name, Total, and Payment Total.
 - **Force Close All Tickets-**Force close all tickets
 - **Force Close Ticket-** Force close a ticket
 - **Cancel** - Exits out of current screen and brings up the previous screen.
- **Set Business Date**
Transactions from prior business dates can be retrieved. Simply select the date from the pop up calendar and click **Ok**.
- **Move payments**
- **Show Gift Card Activations**
View all gift card activations for the day.
Load Attendance- Retrieve gift card activation reports for any date by simply selecting dates using the pop up calendars on the screen. Click **Ok** to perform search for the selected dates. Click **Cancel** to return to the spreadsheet for the current date.
- **Settle Deliveries**
Settle and view outstanding tickets for delivery/drivers. Select the driver and click on **Settle Ticket**. A message will pop up stating that the ticket has been closed out successfully.
- **Reports**
Reporting made simple. Track sales, transactions, and activities efficiently.
 - **Thermal Report**
Reports that print out on your POS receipt printer.
(Total Sales, Employee Revenue, Credit Card Transactions, Section Sales by Type, and Sales Item by Group).
 - **Laser Report**
Reports that prints to a Standard laser printer on 8 ½ X 11 paper.

Select date from the pop up calendar.
Quick tip: e.g. Today is 2/18/11 and the establishment operates 3pm -3am. Make sure to select the date 2/18/11 on the calendar to the left, and 2/19/11 on the calendar to the right.
 - **Options**
 - **Business Period**
*The period of the day you are running the report for. If you are doing a report for the entire day, select **All Periods**.*
 - **All Periods** (lunch, dinner, and karaoke).
 - **By Period** (select from the drop down menu).
 - **Report Type**
 - **Summary Roll Up**
 - **Detailed by Day**
- **Settle House Account**
This feature allows you to record and save tickets/tabs for customers that may have inadvertently left/ “walked out” of the establishment without paying. The ticket can be saved to the database. Start a record for the “walk out” ticket by clicking **Pay** on your ticket screen. This will take you to the payment screen, close out the sale and click on **House Account**
- **Close Out**
- **Cancel**

Lock System

Locks/ disables the system. If the system has been locked, enter password and click on **Lock System** again to unlock.

Open Shift

Calculate the starting cash in the drawer at the beginning of the shift.

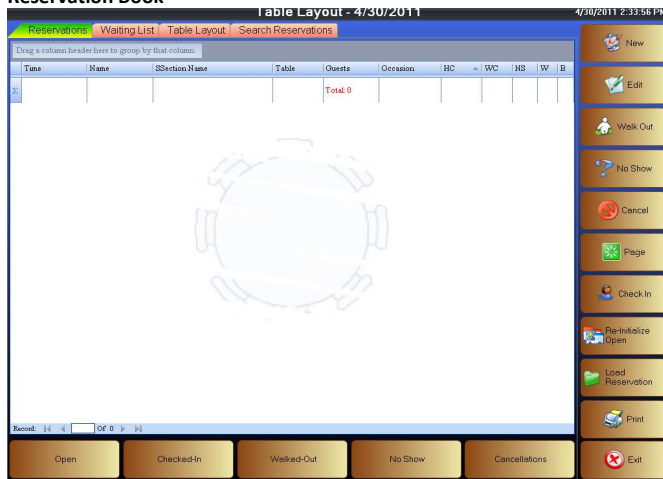
Enter the count of each type and the system will calculate the total of *Starting Cash* for that shift.

Close Shift (Open Shift button will convert to Close Shift after the shift has opened)

Calculate the cash in the drawer at the end of the shift.

Enter the count of each type and the system will calculate the total *Cash* at the end of that shift.

Reservation Book



Reservations/ Waiting List/Table Layout/Search Reservations

Reservations Tab

- **New**- Enter a new reservation.
First & Last name (or click on **Customer** to select a name from the list)
Number of guests - Enter manually
Phone number – Enter (will auto fill if the customer was selected from the list)
Date /Time- Select a date from the drop down calendar, and select time by clicking on **Time & Table**
High/ Wheel Chair- Enter the number needed if applicable to the reservation.
Occasion – Select form the drop down if applicable, select note, and add an e-mail address.
Preference - Check off the box for No Smoking, Window, or Booth.
Start Over-Clears form.
Assign Pager- When guests arrive, pagers may be assigned if used by the establishment.
Done- Saves the reservation in the system.
Cancel- Exits out of current page and returns to previous screen.
- **Edit**
 Make changes to an existing reservation. Click on the reservation, and click on the Edit button. The reservation will come up on the screen for necessary changes to be made. Click the **Done** button when complete. Click **Confirm** to save the changes.
- **Walk Out**
 When a reservation walks out, select the reservation and click on **Walk Out**. This removes the reservation from the list.
- **No Show**
 When a reservation does not show up, select the reservation and click on **No Show**. This removes the reservation from the list.
- **Cancel**
 When a reservation cancels, select the reservation and click on **Cancel**. This removes the reservation from the list.
- **Page**
 Customers can be paged, if the establishment has the paging system in place.
- **Check In**
 When a reservation arrives, click on the reservation and click on the check in button. The reservation screen will appear with a list of wait staff to assign the table to. Select the employee, and click **Done**.
- **Re-Initialize Open**

A reservation that was marked as a Walk Out or No Show can be re-opened by using this button.

- **Load Reservation**
View reservations for any date, by selecting the date parameters from the pop up calendars and click **Ok**. Reservations will be displayed for the dates selected.
- **Print**
Print a list of the reservations.
- **Exit**
Logs out of the reservation module and reverts to *Logon Screen*.

Buttons on the Bottom of the Screen

- **Open**- Quick View of all the reservations that are still *Open* (have not checked in yet).
- **Checked-In**- Quick View of all the reservations that have *Checked-In*.
- **Walked-Out**- Quick View of all the reservations that have *Walked-Out*.
- **No Show**- Quick View of all the reservations that were *No Shows*.
- **Cancellations**- Quick View of all *Cancellations*.

Waiting List Tab

- View all the guests on the Wait List.

Table Layout Tab

- View the Table Layout for all the sections in the establishment. Select the section you would like to view by selecting from the drop down box to the top right of the screen.
- In this screen table assignment and reservation times are selected when prompted to this screen.

Search Reservations Tab

- Search for a reservation from the drop down menu. Search by: **First Name, Last Name, Phone #, Guest #, Section, Table, or Date**. Enter information, and click **Go** to search. Click **Clear** to erase and re-enter info.

Clock Out

At the end of a shift, employees can clock out by entering their password and click on **Clock Out**. A pop up box will ask "Do you want to print your sales report?"

Yes- a sales report for that employee will print out.

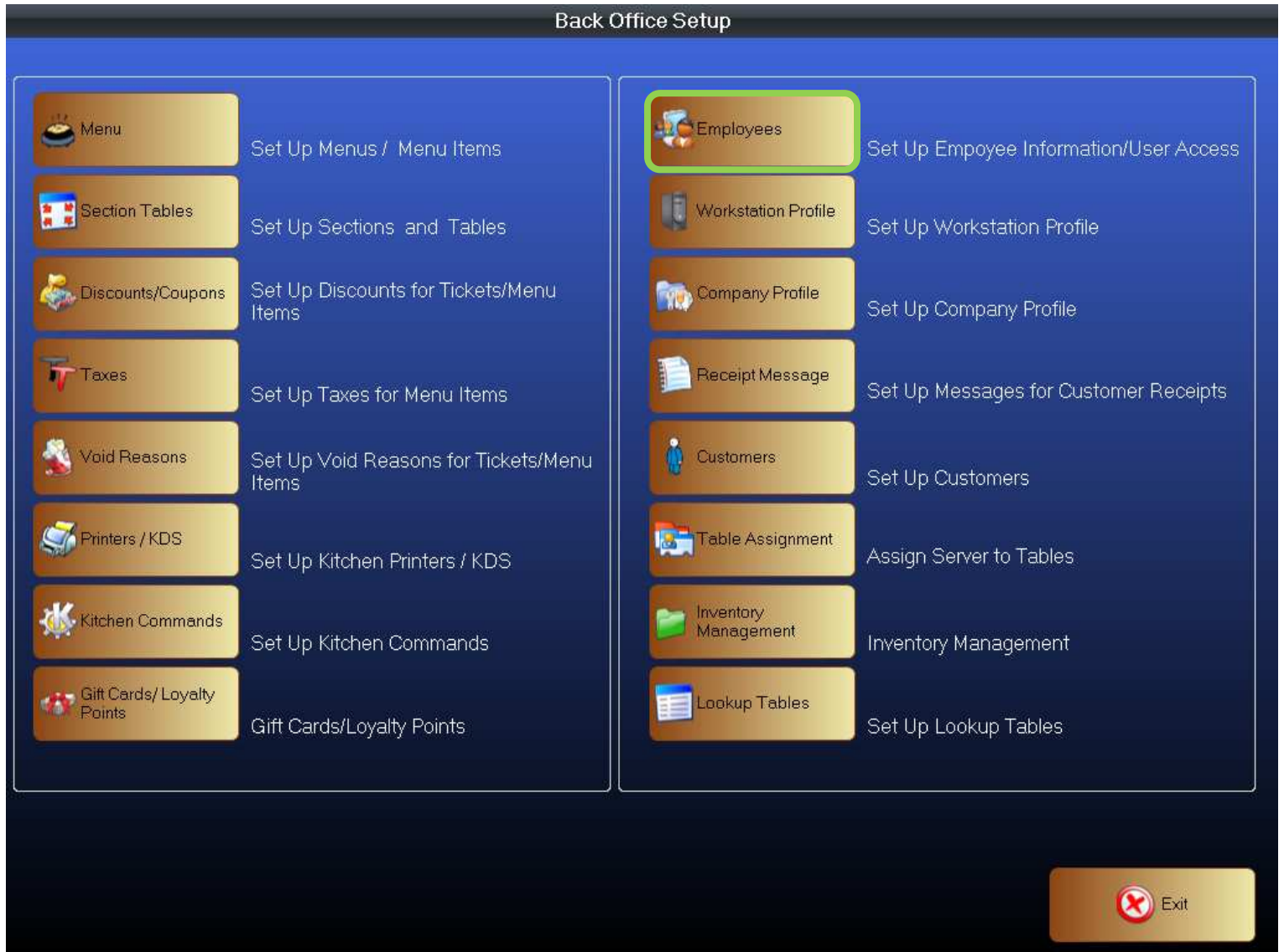
No

Exit

Allows you to:

- Shut Down Terminal**
- Reboot Terminal**
- Exit POS System**
- Cancel- Return to the Logon Screen**

MANAGER



Figure

Click on **Employee** to access the employee setup page. This will take you to the employee setup screen.

Employee Setup

Employee Setup				
First Name	Last Name	Access Type	Job Name	Active
Mae	W	Manager		<input checked="" type="checkbox"/>
Melissa	Lee	Employee		<input checked="" type="checkbox"/>
Elaine	Rodriguez	Employee		<input checked="" type="checkbox"/>
Loc	Nguyen	Employee	Waiter	<input checked="" type="checkbox"/>
Sarah	Bell	Employee	Waiter	<input checked="" type="checkbox"/>
Thang	Nguyen	Employee	Bartender	<input checked="" type="checkbox"/>
Ali	Baba	Employee	Bartender	<input checked="" type="checkbox"/>
Vince	Dang	Employee	Cashier	<input checked="" type="checkbox"/>

At the bottom of the window, there are four buttons: **Delete** (trash icon), **Add New** (plus icon), **Edit** (pencil icon), and **Cancel** (red X icon). The **Add New** button is highlighted with a green border.

Figure

Click on **Add New** located on the bottom of the page. This will take you to the employee setup information page.

Employee Information

Figure 2

1. In this step you will create the employee database.
2. Enter the password for the employee that the file is being created for.
3. Password may be alphabetic, numeric, or alphanumeric up to 15 characters.
4. Complete all boxes accordingly.

Security settings:

Business owners or management can decide what functions each employee is allowed to perform. This provides security to the business by allowing you to limit access to certain functions and capabilities.

- ❖ In Under *access type* click on the drop down box to select the default system access for Owner, Manager or Employee.



To customize security access for a specific employee, in the Security Settings review each item, check/uncheck an item to give or restrict access to the system.

- When form is completed click **Ok**

Menu Setup Hierarchy:

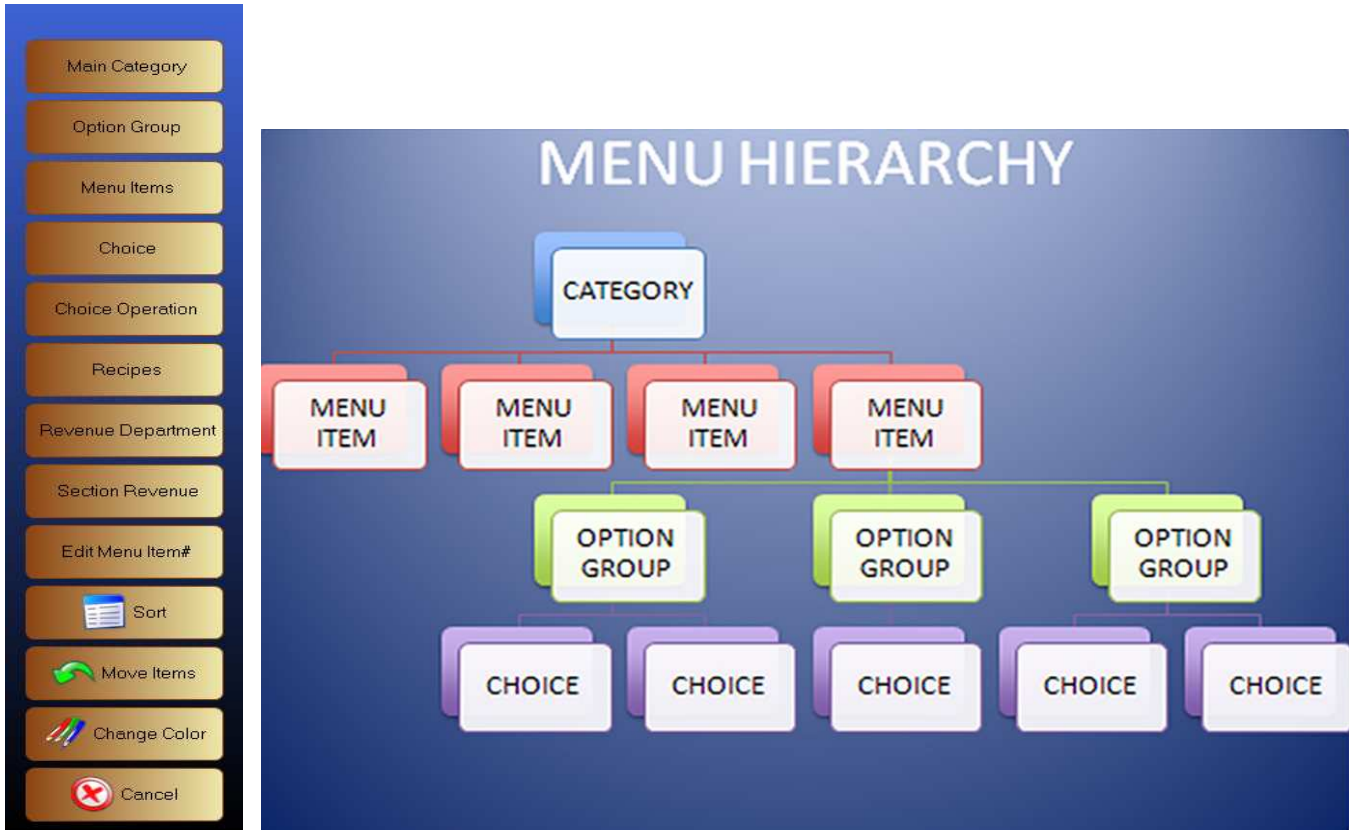


Figure 3



Before setting up menu items, review Figure 5 above, this menu hierarchy will help in visualizing the appropriate categories. It is recommended to begin by setting up the *Option Group* first, followed by *Choice* (ex. Med, well done, fried, steamed, spicy, on the rocks) and lastly setting up the *Category* and *Menu Item*.

Option Group Setup



Figure 4

1. Login to **Back Office** click on **Menu** then **Option Group**
2. Create an Option Group by clicking on an Empty Button under option group. This will bring you to the option group setup screen. (Figure 7)

Option Group Setup Screen



Figure 5

1. Enter the name of an Option Group that you wish to create (ex. Temperature).
 - a. NOTE: If your establishment has a second language, enter that information in 2nd language.
2. Customize the button to suit your needs.
3. Select the options that apply to this option group.
4. Modify the choice layout as needed (ex. Number of buttons to display on a page).
5. Check all menu items that is applicable to this Option Group.
6. When completed click **Ok** or **Add New**, this will save the information for this button.
7. To create additional option buttons select **Add New** repeat the steps above.

Once the *Option Group* items are created, next setup the *Choices* by going back to the menu setup page (Figure 8).

Choice Setup



Figure 6

1. Click on the **Choice** button. A series of buttons will appear next to your option group buttons
2. Click on a blank choice button to create your choice. This will take you to the *Menu Choice Setup* screen (Figure 9).

Choice Setup Detail

Menu Choice Setup

Choice Item (Enter a Choice Item Name)

2nd Language

Sample

- No Picture
- Same Color as Previous Button
- Rounded Corner
- Bevel

Border Color

Inner Color

Fore Color

Picture

Receipt Line 1 Print Print Asian Fonts

Receipt Line 2 Print Print Asian Fonts

Kitchen Name 1 Print

Kitchen Name 2 Print

Price Update Matrix Request Price

Price Matrix:

	Price	To Go	Delivery
Level 1	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Level 2	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Level 3	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Level 4	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Level 5	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Level 6	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Option Groups

- Kitchen Options
- Modify Drinks
- Temperature
- Shakes & Frozen Drink
- Vodka & Gin
- FRUITS
- Styles
- Rum
- BOX

Delete

Add New

Ok

Cancel

Figure 7

1. Enter your Choice Item Name.
2. Enter 2nd language if applicable to your establishment.
3. Modify button according to your preference.
4. Enter your Choice Item Name in *Receipt Line 1* if you want it on customer receipt (make sure print box is check off).
5. Enter your Choice Item Name in *Kitchen Line 1* if you want it on work order receipt in the kitchen (make sure print box is check off).
6. If the choice item has a price enter it in the *Price* box then hit the update matrix button. (if there are different level pricing for each level enter it accordingly. *Price Matrix* is a feature in the system that allows establishment to charge different prices for different times of day).
7. Check off all Option Group that applies to this Choice.
8. Click **Ok** or **Add New** when finished.

Revenue Department



Figure 8

- ❖ Go to the menu setup and Click **Revenue Department** button this will bring you to the department setup screen (Figure 11).

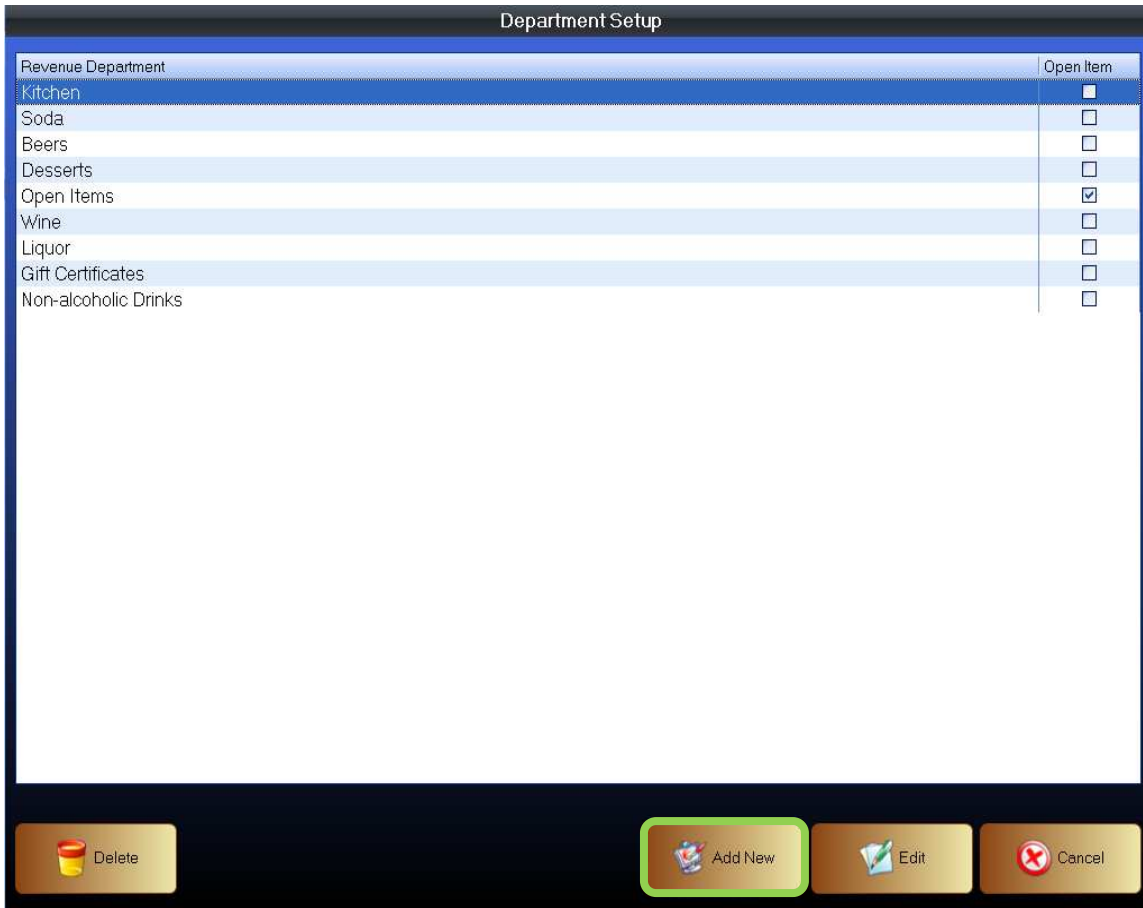


Figure 9

Click on the **Add New** button to begin this will bring you to the revenue department Setup screen (Figure 12).

Revenue Department Setup

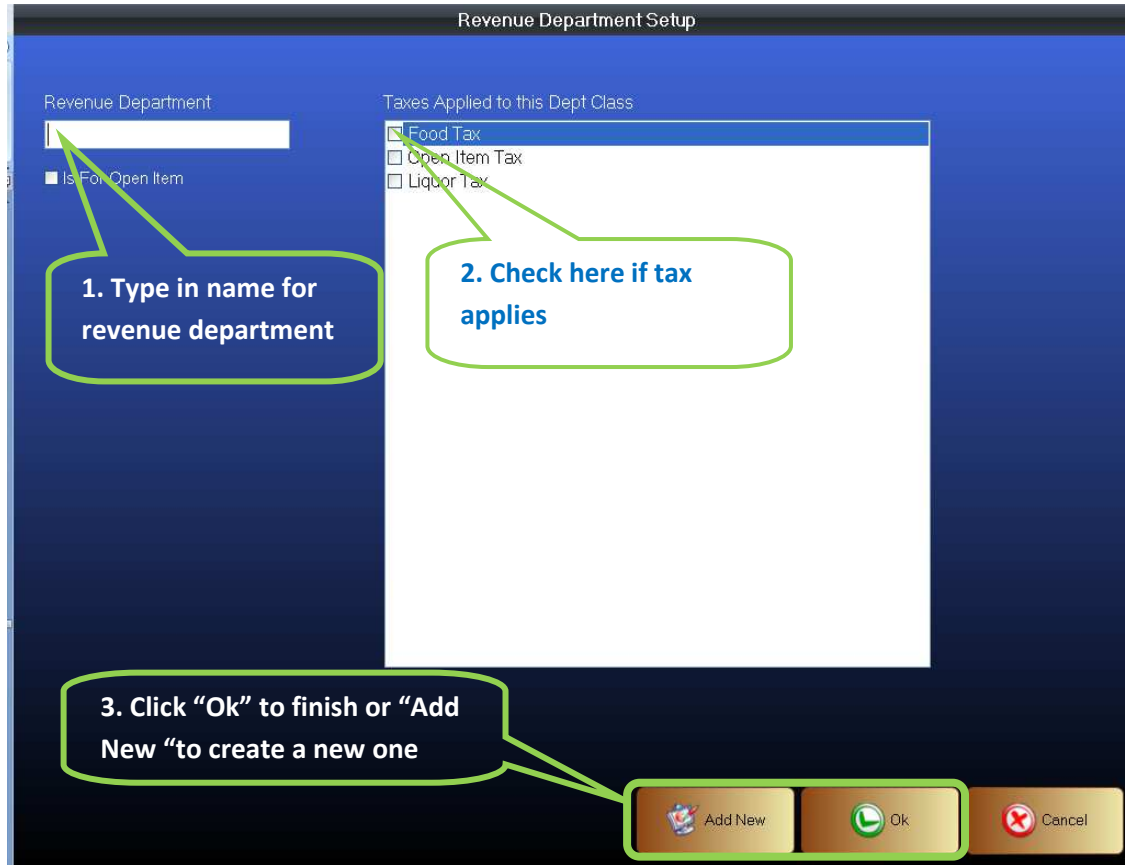


Figure 10

1. Enter the name of the revenue department.
2. Select the tax which is applicable to the department.
 - o Open Item: an open item is an item that is not in the system (ex. It might be a special request or just was not stored in the system or new arrival).
3. After completing the form click on **Ok** button to save the department in the database.
 - o Click the **Add New** button to continue creating additional department.

Main Category Setup

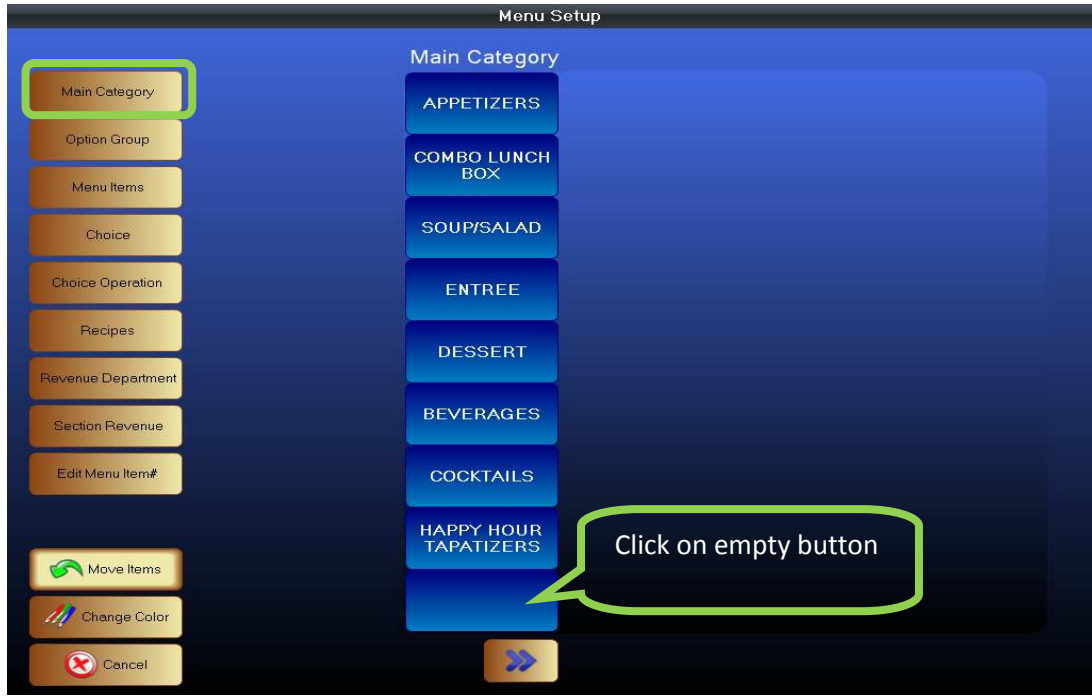


Figure 11

In the main menu setup screen Click on **Main Category** button, look for an empty button to create new category (Figure 13).

Category Setup Screen

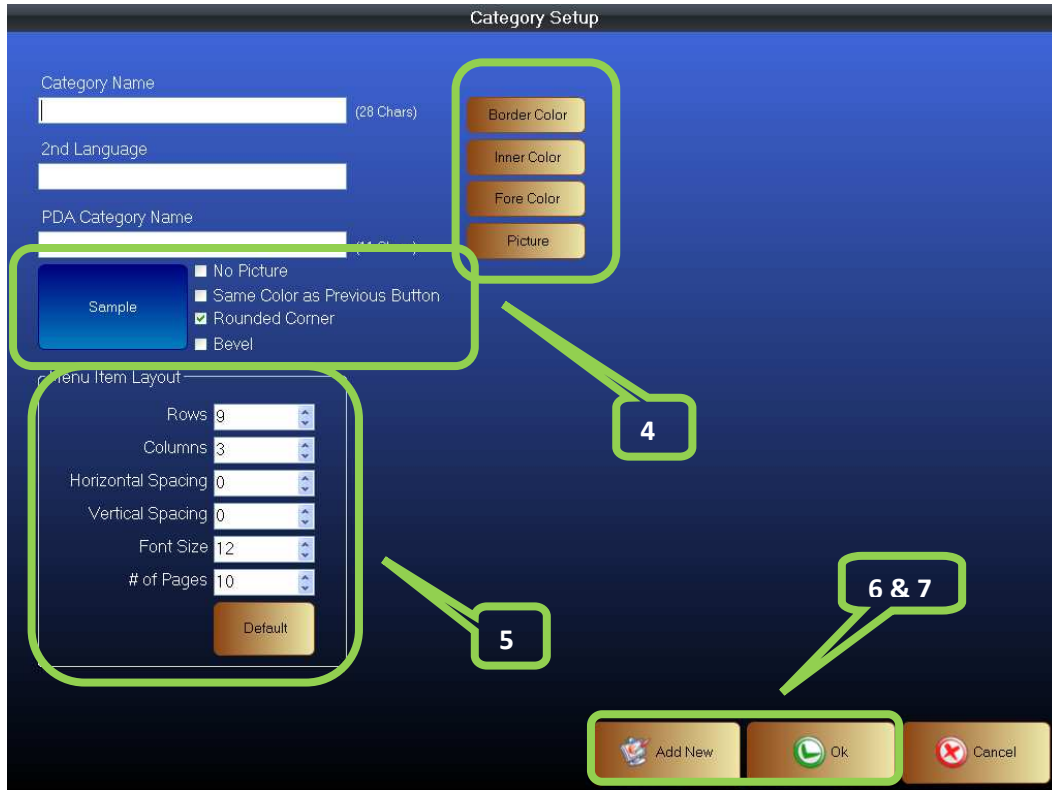


Figure 12

1. Enter name of the category you are creating (up to 28 characters long).
2. Enter category name in 2nd language if applicable to your establishment.
3. Enter category if your establishment will be using a PDA compatible system.
4. Customize the button shape and colors.
5. Customize number rows and columns for this category under *Menu Item Layout*
6. After completing the form click on **Ok** button to save the category in the database
 - o Click the **Add New** button to continue creating additional category

Menu Item Setup



Figure 13

Creating menu items in the menu setup screen:

1. Click on **Menu Item** button this screen will show all the main categories that have been created in the database.

Next create menu items for the main category:

2. Click on the **Main Category** button that we will be creating items for. There will be a series of blank buttons to the right.
3. Click on one of the blank button under menu items (Figure15).
4. This will bring you to the menu item screen. Where detail information of each item will be entered (Figure 16)

Menu Item Details

	Price	To Go	Delivery
Level 1	0.00	0.00	0.00
Level 2	0.00	0.00	0.00
Level 3	0.00	0.00	0.00
Level 4	0.00	0.00	0.00
Level 5	0.00	0.00	0.00
Level 6	0.00	0.00	0.00

Figure 14

1. POS Menu Item Name: Enter the name of the menu item.
2. 2nd Language: Enter if applicable to the establishment.
3. Menu #: Enter menu # if establishment uses #'s for ordering.
4. PDA Menu Item: Enter if applicable to the establishment.
5. Recipe: Recipes of a menu item may be stored by clicking on the pull down form button. This will bring up the select recipe form screen. Select the item recipe that you want the recipe to be used. (These recipes are created in menu setup under recipes).
6. Price Group: Select a price group from the drop down menu only if applicable to your establishment menu. (Price group would be for example: \$1.00 menu).
7. Unique Price: Check off unique price a box will pop up for price entry.
8. Revenue Dept: Select a revenue department from the drop down for the menu item.
9. Kitchen Line 1: Enter the name of the menu item as it would appear on the work order print out (for kitchen, bar, or station) Make sure to check off the print box or the menu item will not sent to printer.
10. Kitchen Line 2: If one line is not enough for your item you can choose to continue on this line.
11. Receipt Line 1: Enter the name as it should appear on the customer receipt. Make sure to check off the print box.
12. Receipt Line 2: You can use this for Asian language. Make sure to check off both print boxes.

Menu Item Type

Menu Item: Set on default

Combination: Check all items that apply to this combination (Figure17).

Gift Card: Check if creating a gift card menu item

Surcharge: Check if creating surcharge menu item

	Price	To Go	Delivery
Level 1	0.00	0.00	0.00
Level 2	0.00	0.00	0.00
Level 3	0.00	0.00	0.00
Level 4	0.00	0.00	0.00
Level 5	0.00	0.00	0.00
Level 6	0.00	0.00	0.00

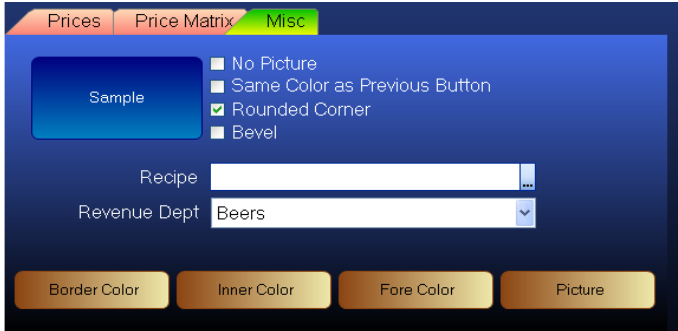
Options

Auto Show Option Group: Used for menu items that requires option choices before an order is completed

Price Round Up: Use for rounding up price to whole numbers (ex. Round up for \$4.95 is \$5.00)

Item Count Down: System will pop up a message once you are sold out for the night

1. Select any option group that may apply to this menu item by checking off the options previously created.
2. Select the printer that the work orders for this item should be sent.
3. *Price Matrix* is use for setting up different level of pricing for different times. Setting up the levels and time is in the **Back Office Setup** company profile.
4. After completing the form click on **Ok** button to save the menu item in the database.
5. Click the **Add New** button to continue creating additional menu item.



Change the look of the buttons according to preferences.
 Add a Recipe to the item.
 Add a Picture to the button if desired.
 Revenue Dept- Select a dept. that the item belongs to.

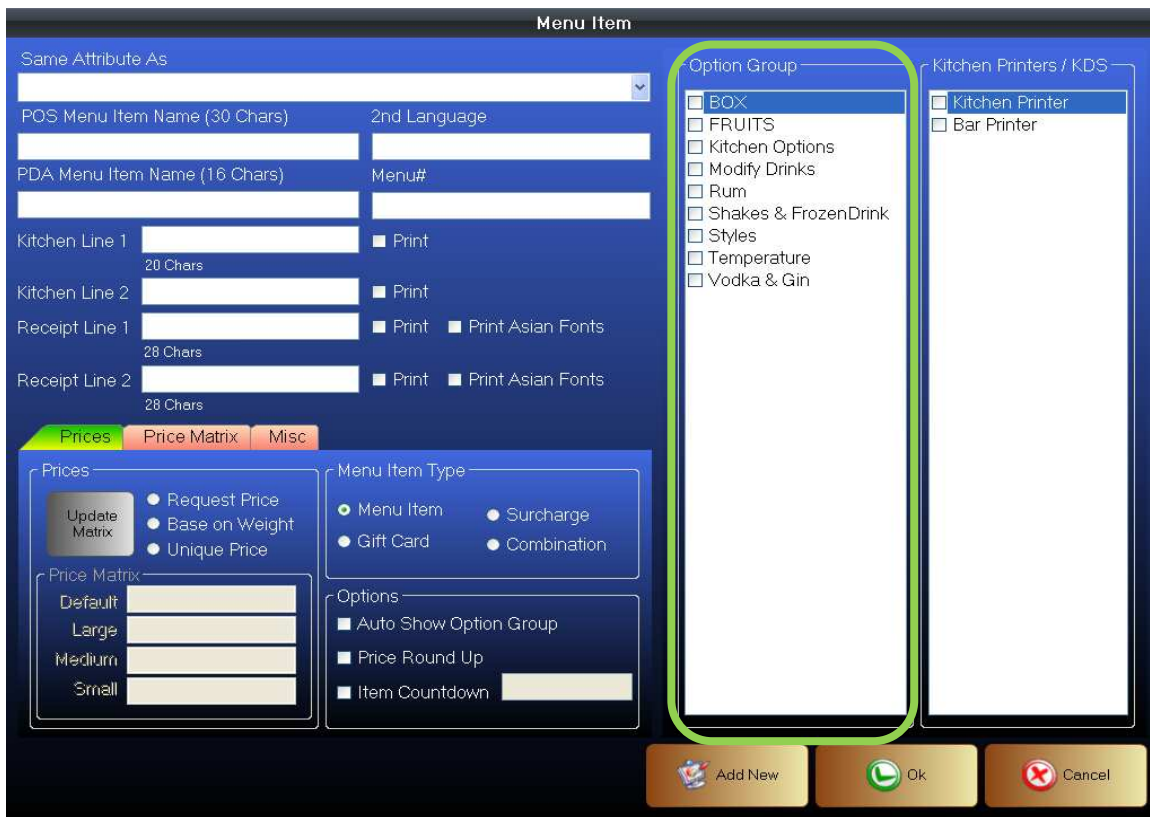


Figure 15

Setup Sections and Tables

Login to **Back Office** click on **Section Tables** in the Back Office Setup screen (Figure 18) this will take to the Tables/ Sections Setup screen (Figure19).



Figure 16

Tables/Sections Setup

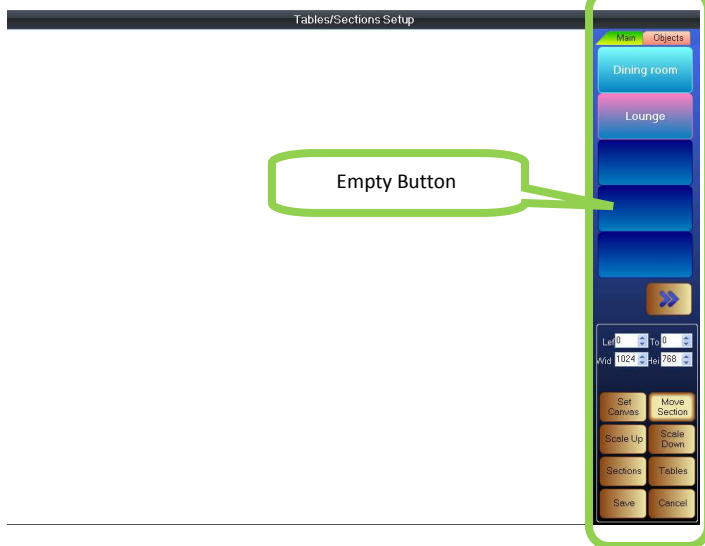


Figure 17

Click on a blank button to create a new section, this will take you to the Section Setup screen (Figure 20).

Section Setup

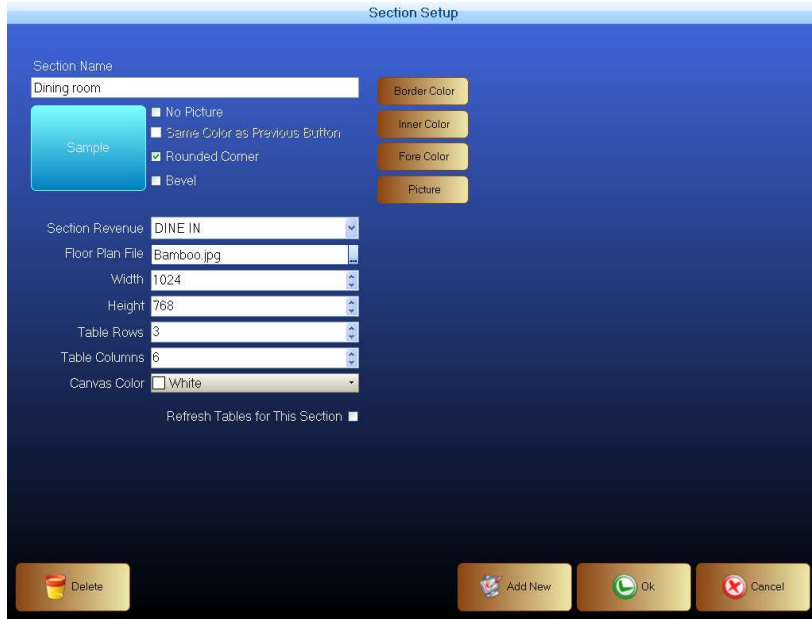


Figure 18

1. Enter Section Name **Dining Room**.
2. Customize button to your preferences.
3. Click on the drop down for Section Revenue and select the appropriate revenue department.
4. Enter the number of tables and rows according to your section layout.
5. After completing the form click on **Ok** button to save the section in the database.
 - o Click the **Add New** button to continue creating additional section

Tables Setup

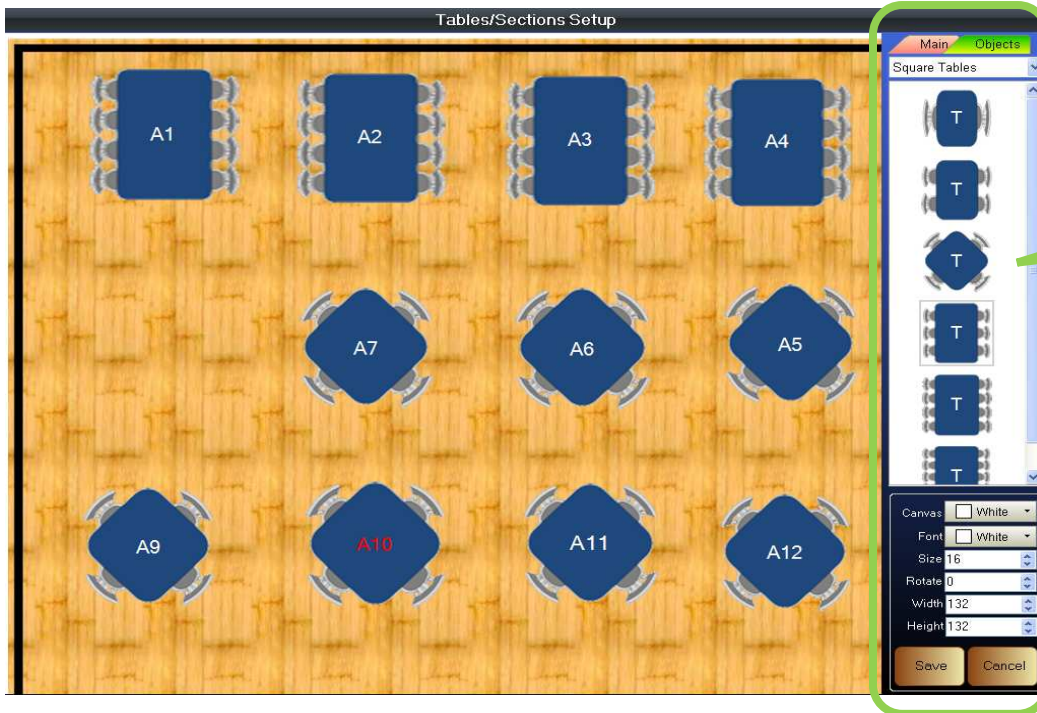


Figure 19

1. Click on the **Objects Tab** (Figure 21)
2. Click on the section *Dining Room* created earlier
3. Click on a blank button in the table layout section, this will bring up the table setup screen (Figure 22)

Table Setup

Figure 20

1. Enter a Table Name *e.g. Table A1*.
2. Select a table Shape and color.
3. Check off the appropriate table description (window, booth, and private).
4. Max Allowed Guest- Select the maximum number of guests to be seated for the specified table.
5. Click **OK** to save Table in database (Figure 23).

Main Dashboard

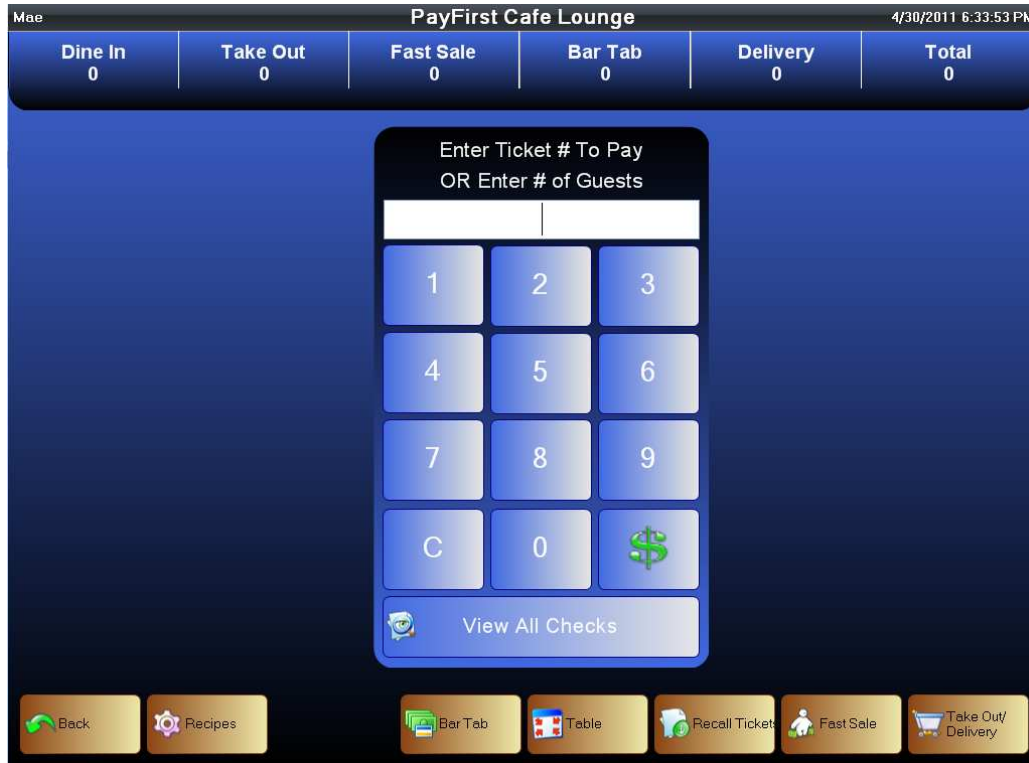


Figure 21

Starting a Check



1. Enter your password and click the **Log On** button.
2. Enter the number of guest(s) and select **Table** button.
3. The table layout screen will appear.
4. Click on the section that the guests are seated. A seating chart screen will appear (Figure 25).
5. Click on the table that the guest(s) are seated. Enter number of guests if prompted.
6. Once a table has been chosen click **Ok** button and the ticket screen will appear (Figure 26).

Table Layout

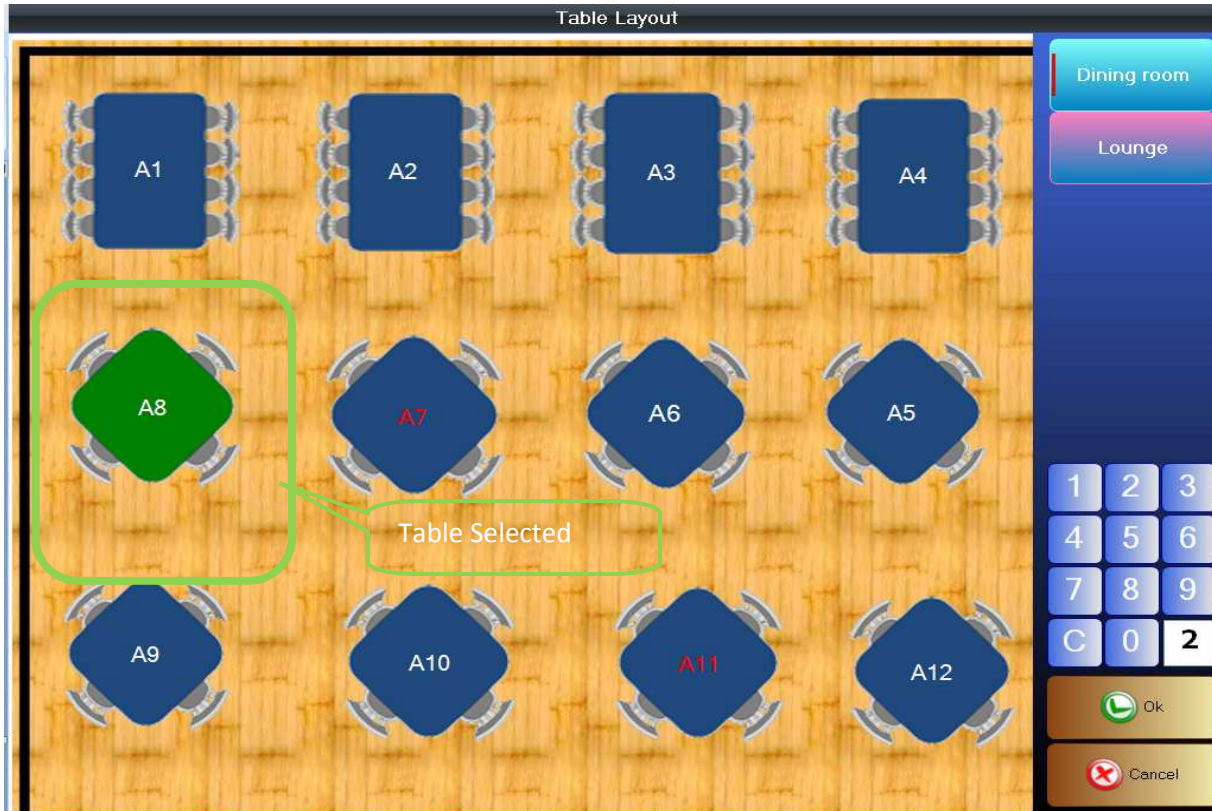


Figure 22



1. Enter your password and click the **Log On** button.
2. Enter the number of guest(s) and select **Bar Tab** button.
3. Bar Tab form will pop up on the screen (Figure 27) asking for customer name and credit card information.
 - o Information may be manually entered or swiped (if a card reader is installed). It is not necessary to have a credit card or credit card number to start a tab. You can just enter a name and click **Ok**.
4. The table layout screen will appear.
5. Click on the section that the guests are seated. A seating chart screen will appear (Figure 25).
6. Click on the table that the guest(s) are seated.
7. Once a table has been chosen click **Ok** button and the ticket screen will appear (Figure 26).

Ticket/Ordering



Figure 23



The *Fast Sale* button is for a sales made immediately, it does not require a tab or table to be created. Click on the **Fast Sale** button. In *Sales Ticket* Screen Enter the Order in the same procedure as a Bar Tab or Table. Close the ticket in the same procedure as a Bar Tab or Table.

Bar Tab

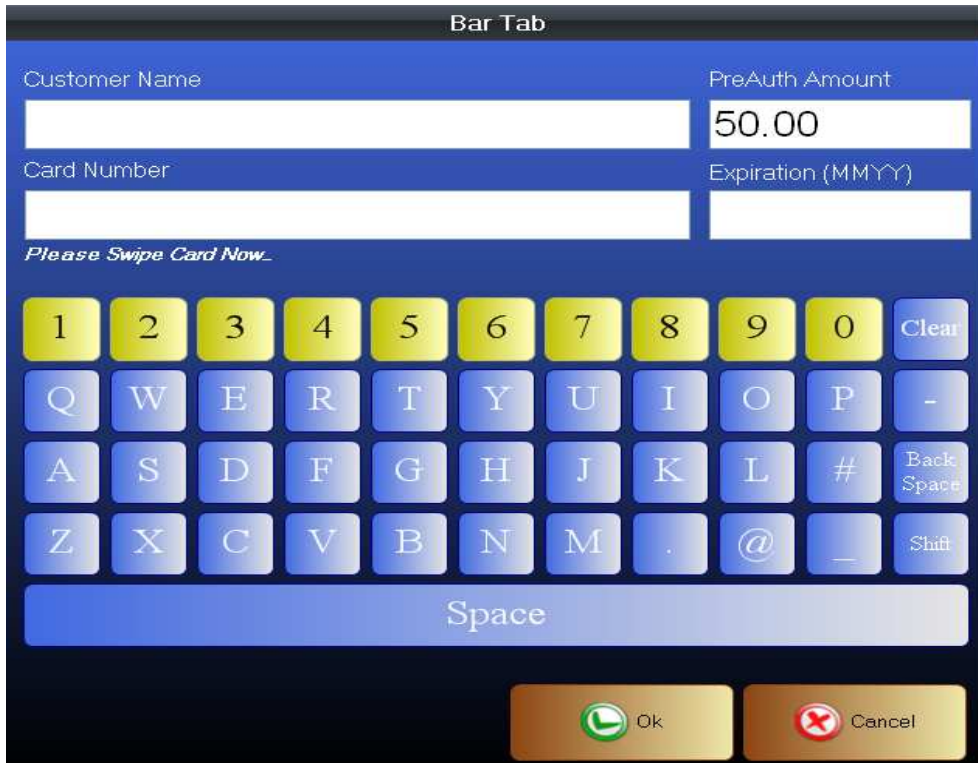


Figure 24

Ticket/Ordering

Server: Mae | Section: BAR TAB | Cust: YOU | Guest#: 1 | Ticket#: B114 | Type: Bar Tab | 0

P1	1 Organic Edamame	\$3.50	APPETIZERS				C
	1 Sashimi	\$4.00	COMBO LUNCH BOX				0
	1 Pot Stickers	\$4.00	SOUP/SALAD				1
			ENTREE				2
			DESSERT				3
			BEVERAGES				4
			COCKTAILS				5
			HAPPY HOUR TAPATIZERS				6
			HAPPY HOUR DRINKS				7
							8
							9

Tips: \$0.00
 Ticket Discount: \$0.00
SUBTOTAL: \$11.50
TAX: \$0.92
TOTAL: \$12.42

Change Guest#
 Discount Ticket | New Person | Print Check & Send | Previous Order
 Open Item | Split Ticket | Taxes/Tips | Pay | Double | Triple | TOGO | Don't Cook | RUSH | Cancel | Send

Figure 25

TAKE OUT

Click on the **TAKEOUT/DELIVERY** button. The Takeout/ Delivery Screen will come up. Enter the Customer Information. (Name is required on TAKEOUT order, if a name is not known you can enter a letter, TOGO, something but name must not be left blank) (Figure 29)

DELIVERY

1. Click on the **TAKEOUT/DELIVERY** button. The Takeout/ Delivery Screen will come up. Enter Name, Address, City, Sate, and Zip (Figure 29). This information is required for Delivery orders. A form will appear asking if you would like to select a driver now.
2. Make your selection **YES** or **NO**. If you select "Yes," it will bring up the SELECT DRIVER FORM...
3. Select driver by clicking on the individual and click **OK** (Figure 30). This will bring you to the Sales Ticket Screen

Take Out/Delivery



Figure 26

Select Driver



Figure 27

Order Entry (Figure 31)

1. Select the Main Category menu item called *e.g. Appetizer*.
2. All Menu Items associated to the Appetizer category will be displayed.
3. Select a Menu Item *e.g. Organic Edamame*



To order multiple quantities of a menu item, click on numeric button on the right hand side of the screen before selecting the menu item.

The screenshot shows the POS interface with the following elements:

- Header:** Server: Mae, Section: FAST SALE, Cust, Guest#: 1, Ticket#: F100, Type: Fast Sale, 0
- Order List (Left):**
 - P1: 1 Organic Edamame \$3.50
 - 1 Sashimi \$4.00
 - 1 Pot Stickers \$4.00
 - P2: (empty)
- Menu Grid (Center):**
 - APPETIZERS: Organic Edamame, Sashimi, Pot Stickers
 - COMBO LUNCH BOX
 - SOUP/SALAD
 - ENTREE
 - DESSERT
 - BEVERAGES
 - COCKTAILS
 - HAPPY HOUR TAPATIZERS
 - HAPPY HOUR DRINKS
- Control Panel (Bottom):**
 - Navigation: Left/Right arrows, Change Guest#
 - Order Management: Discount Ticket, New Person, Print Check & Send, Previous Order
 - Payment: Open Item, Split Ticket, Taxes/Tips, Pay
 - Modifiers: Double, Triple, TOGO, Don't Cook, RUSH, Cancel, Send
- Summary (Bottom Right):**
 - Tips: \$0.00
 - Ticket Discount: \$0.00
 - SUBTOTAL: \$11.50
 - TAX: \$0.92
 - TOTAL: \$12.42

Figure 28

1. If a Menu Item selected has Options, option categories will come up on the screen or click item on ticket to show options
2. Click the Option Group *e.g. Kitchen Option*
3. Option Choices will then appear for the Option Group Selected
4. Click on a Option Choice *e.g. Extra Sauce*
5. If an Option Choice is not available but has been requested, you can do a REQUEST

If there are more than 1 person at the table click on **New Person** button. There will be a P2 (person 2) that will appear on the ticket. This creates another person on the ticket so that orders can be entered for each individual (Figure 31) (use this button to create as many individuals that are needed to represent the table, they will be incremented as e.g. P3, P4, P5, etc.) Enter an order for each person when completed click on the **Send** button. Work orders will be sent to the designated areas (e.g. food to kitchen drinks to bar)

Options – Split Ticket

Item	Price	Category	Item	Item	Item	Qty
1 Organic Edamame	\$3.50	APPETIZERS	Chicken Lo-Mein	Chicken Pad Thai	Crab Cake	0
1 Sashimi	\$4.00	COMBO LUNCH BOX	Crispy Duck	Crispy Sea Bass	General's Chicken	1
1 Pot Stickers	\$4.00	SOUP/SALAD	Jumbo Lump Crab Fried Rice	Lamb Lollipops	Pad thai	2
1 Calamari	\$5.00	ENTREE	Pan Seared Scallops	Petite Filet Mignon	Salmon Thai Red Curry	3
1 Wings	\$5.00	DESSERT	Siamese Basil Chicken	Soft Shell Crab	Tangerine Shrimp	4
1 Chicken Satay	\$5.00	BEVERAGES	Teriyaki Chicken	Teriyaki Salmon	Vegetable Fried Rice	5
1 Vietnamese Wok Tossed Filet	\$21.00	COCKTAILS	Vegetarian Lo Mein	Vegetarian Pad Thai	Vietnamese Wok Tossed Filet	6
		HAPPY HOUR TAPATIZERS	Wild Boar			7
		HAPPY HOUR DRINKS				8

Tips:	\$0.00
Ticket Discount:	\$0.00
SUBTOTAL:	\$47.50
TAX:	\$3.80
TOTAL:	\$51.30

Discount Ticket	New Person	Print Check & Send	Previous Order	Split Ticket	Taxes/Tips	Pay	Double	Triple	TOGO	Don't Cook	RUSH	Cancel	Send
-----------------	------------	--------------------	----------------	--------------	------------	-----	--------	--------	------	------------	------	--------	------

Figure 29

To begin click on the **Split Ticket** button: (Figure 32)

- ❖ There are 3 ways to split a ticket(Figure 33)
 1. Split All People To New Tickets
 - a. This will split all people to their own new ticket
 2. Split Select People to New Tickets (you must first select the people to use this option)
 - a. This will split the people you selected to their own new ticket
 3. Split Selected people To ONE New Ticket (you must first select the people to use this option)
 - a. This will split the people you selected to ONE new ticket

Server/Waiter	Section: Dining Room	Table: C	Select an Option
P1			<div style="border: 2px solid yellow; padding: 10px; margin-bottom: 10px; text-align: center;">Split All People To New Tickets</div> <div style="padding: 10px; margin-bottom: 10px; text-align: center;">Split Selected People to New Tickets</div> <div style="padding: 10px; text-align: center;">Split Selected People To ONE New Ticket</div>
1	Chicken Negimaki (A)	\$6.25	
P2			
1	Edaname (A)	\$3.95	
P3			
1	Negimaki (A)	\$7.25	
P4			
1	Pepper Tuna (A)	\$8.95	
P5			
1	New York Steak (H)	\$19.75	

	Tips: \$0.00 Ticket Discount: \$0.00 SUBTOTAL: \$46.15 TAX: \$3.24 TOTAL: \$49.39
--	---

Change Guest#	Discount Ticket	New Person	Print Check & Send	Negate Choice
Open Item	Split Ticket	Taxes/Tips	Pay	Split and Print Split Cancel

Figure 30

PAYFIRST RESTAURANT POS VERSION 3.3



Figure 31

Change Guest #:

If a party size changes, click on **Change Guest #** button and enter new number of guests, click **Ok**.

Discount Ticket:

Applying discounts to ticket. Click on **Discount Ticket** button and select the applicable discount.

Note: This function may not be available to all employees

Remove Discount:

Once a discount has been applied to a ticket the button will be replaced by **Remove Discount** button. In the event the discount needs to be removed, click the **Remove Discount** button to remove discount.

New Person:

Create a new person/guest on a ticket, items/orders can be referenced for each individual on the ticket.

Print Check & Send:

This option allows a ticket to print simultaneously to the designated areas when a work order is sent.

Negate Choice:

Negate Choice allows guest(s) to fully customize their order to taste. Use when needed for taking ingredients included in a dish (e.g. NO Onions or NO Garlic)

Open Item:

For items that are not listed on the menu. Click on **Open Item** button, enter name and price select the associated tax. Click **Ok** when finished. Person placing the order must take the print ticket to the appropriate department (ex: Kitchen or Bar).

NOTE: Open item does not get sent to any remote printers.

Split Ticket:

When a party/guest(s) request to split a check at the end of their visit; Click on the **Split Ticket** button and all checks will be split according to split option you select. See Figure 33.

PAYFIRST RESTAURANT POS VERSION 3.3

Taxes/Tips:

Add or Remove taxes and tips on a ticket. If taxes/tips exist on the ticket, an option will be available to remove it. If taxes/tips does not exist on the ticket, an option will be available to add it.

Payment:

When a ticket/tab is ready for payment, recall the ticket/tab. Click on the **Pay** button. The payment screen will appear (Figure 35). Enter the amount being paid and click on the **Cash** button to close out the ticket/tab. A change screen will pop up specifying the change amount due to customer click **Done** to successfully close out ticket and complete sale transaction.

Payment



Figure 32

Forms of payments:

For all other payment types click on the *Tender Amount* button then payment button a screen will pop up for you to enter information. See below for all of the payment pop up screens (Figure 35 & 36).

[Credit Card Payment](#)

[Gift Card Payment](#)












Credit Card Payment			Gift Card Payment		
Name on Card (Optional)	Payment Amount	Invoice	Card Number	Payment Amount	Invoice
<input type="text"/>	9.58	862	<input type="text"/>	9.58	108
Card Number	Expiration (MMYY)		Card Value	Card Balance	Expiration (MMDDYY)
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Please Swipe Card Now.</i>			<i>Please Swipe Card Now.</i>		
■ Calculate Partial Tips					
Keypad	Ok	Cancel	Search	Keypad	Ok Cancel

Figure 33

Check Payment	Loyalty Card Payment
Enter Driver's License #	Loyalty Card Payment
<input type="text"/>	Card Number
<input type="text"/>	Payment Amount
1 2 3	<input type="text"/> \$9.58
4 5 6	Required Points
7 8 9	Available Points
0 C	150 <input type="text"/>
Ok Cancel	<i>Please Swipe Card Now.</i>
	Search Keypad Ok Cancel

Figure 34

Menu Item Options Controls

 Show Menu	Returns to menu view.
 Transfer	Transfer an item to another ticket or table. Also transfer table-to-table.
 Quantity	Change the quantity of an item.
 Price	Change the price of an item.
 Void Item	Void or delete an item.
 Move Item	Move item to new person.
 Request	Special instructions send to the kitchen or bar.
 Add/Remove Discount	Add/Remove Discount on an item.
 Repeat	Repeat an item on the ticket.
 Commands	A set of commands in the system that provides instruction send to the kitchen or bar.
 Hold	Use to Hold/Fire Up items instead of sending the whole work order to kitchen or bar.

Setting Loyalty Points

Company Profile

Company Database Pay Cycles Price Levels **Misc** Tips Distribution POS Theme

KDS Port 8888

Auto Tip # Guest 100

Auto Tip # Percent 18

Ticket Start # 100

Close Time 4:00:00 AM

Table Maximum Minutes 59

Pole Message 1 Thank you for coming

Pole Message 2 Have a nice day!!!

Print Payments on Receipt 2

Enable Loyalty Program

Enable Gift Card

Allow Manual Gift Card/Loyalty Card Entry

Employee Table Assignment

Print Employee Sales on Clock Out

Assign Table for Reservation

Assign Table for Check In Reservation

Calculate Tips Before Ticket Discounts

Print Zero Price Choices On Receipt

Allow Duplicate Choice

Notify Tickets with Payments

Prompt for Zipcode After Payment

Show Description on POS

Show Description on Ticket

Loyalty Points Matrix

	From Amount	To Amount	Points
Level 1	0.00	5.00	100
Level 2	5.01	10.00	150
Level 3	10.01	25.00	300
Level 4	25.01	45.00	500
Level 5	45.01	100.00	1000

Delivery Charge

Delivery Name h

Delivery Amount 0.00

Enable Delivery

Taxable

Liquor Shots Savings

Double Shots Savings 1.00

Triple Shots Savings 2.00

Main Category Layout

Rows 9

Columns 1

Horizontal Spacing 0

Vertical Spacing 0

Font Size 13

of Pages 10

Default

Option Group Layout

Rows 9

Columns 1

Horizontal Spacing 0

Vertical Spacing 0

Font Size 13

of Pages 10

Default

Ok Cancel

Figure 35

1. Login to **Back Office**
2. Click on the **Company Profile** button, this will bring up the *Company profile* screen Figure 38.
3. Click on the *Misc* tab
4. Fill out the *Loyalty Points Matrix* section according to the establishment requirements.
5. Click **Ok** to save.

Issuing Loyalty Cards



Figure 36


1. Click on the **Pay** button on the ticket screen.
2. Click on the **Issue Loyalty** button Figure 39. This will bring up the *Issue Loyalty Points* screen Figure 40.
3. Swipe or enter card number.
4. Click the  button to save Figure 40.



Figure 37

Activate/Print Gift Cards in Manager Functions

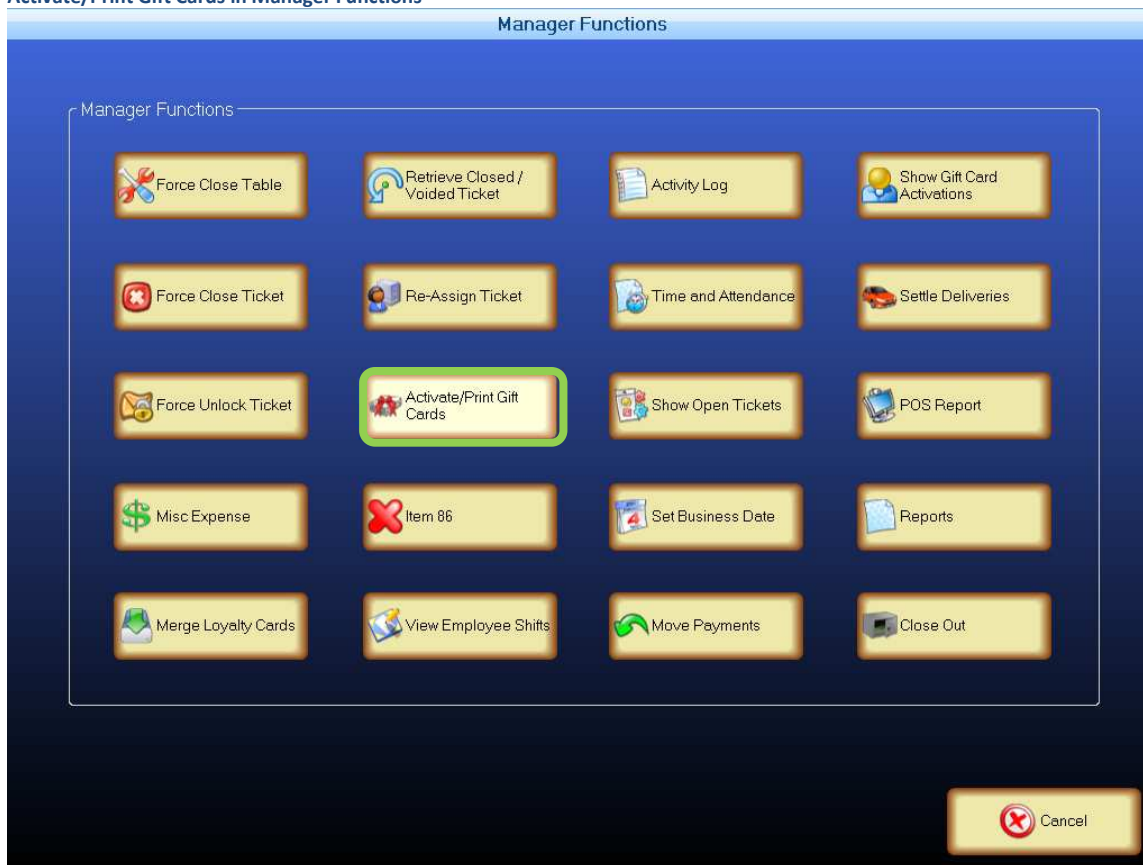




Figure 38

Click on **Activate/Print Gift Cards** button. This will bring up the *Activate Gift Cards* screen Figure 40.

Activate Gift Cards



Figure 39

1. Swipe or enter card number.
2. Click on the *Value* box to enter the amount purchase.
3. Click the  button to save.
 - o Click the **Add To** button, if adding to an existing card.
 - o Click the **Print** button, if a print out is requested.
 - o Click the  button to cancel.