Volume

1

VALUEPOS OPERATIONS GUIDE

EZManager Backoffice Functions

Value Computing
13615 S. Dixie Highway # 525
Miami, Fla 33176
305-278-2543 (p)
305-513-5885 (f)
www.valuepos.com

TABLE OF CONTENTS:

Table of contents page 2

PREFACE	**Pages**	**3-4**	**LICENSE MANAGER**
Chapter 1	Pages	5-11	Introduction/ FILE Information
Chapter 2	Pages	12-40	System Information
Chapter 3	Pages	41-55	System Closeout
Chapter 4	Pages	56-64	Staff Information
Chapter 5	Pages	65-95	Ptoduct Information
Chapter 6	Pages	96-112	POS Inventory
Chapter 7	Pages	113-115	Customer Delivery
Chapter 8	Pages	116-117	VPOS Reports
Chapter 9	Pages	118-124	Windows Glossary
Chapter 10	Pages	125-131	Point Of Sale Terminology
Chapter 11	Pages	132-133	Index

EZTOUCH LICENSE MANAGER:

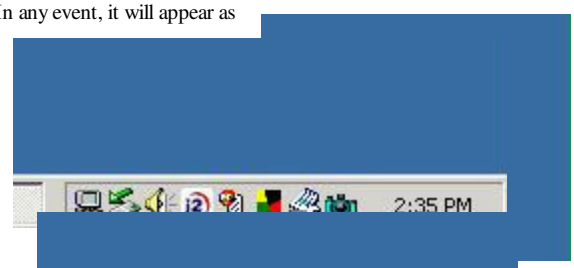
Your VALUEPOS system is controlled by the EZTouch License manager. This utility is what is used to count the number of licenses which you have purchased in your establishment. The license manager controls several functions. First, it authorizes each terminal to operate outside of Demo mode. Second, if you are on a release system (usually in-house financed establishments), it allows the user to automatically, through the internet, renew their licenses on a monthly, semi annually, or annual basis. Third, it controls the distribution of all new upgrades in an automated way, and finally, fourth, it communicates messages from our company to you, the user, of certain information that may be deemed important from time to time.

Many users do not know about, or, understand what this License Manager is. This short instructional manual will train you on this very important program and how to keep from having interruptions in your business when the license manager is not running. All managers, owners and other supervisors should be trained on this functionality so they know as well what the license manager is, and how it works.

THE ICON:

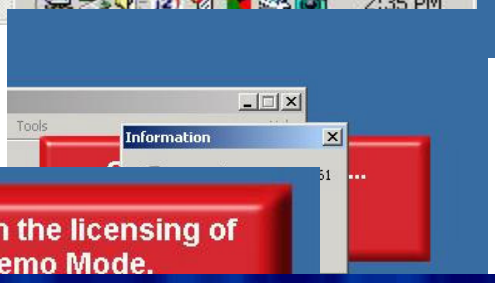
The icon for the license manager looks as follows and is located on the desktop of the server on those installations that have more than one workstation, or, on the workstation itself if there is only one terminal in your establishment.

When the license manager is running, it will be located at the bottom of the screen on the right hand side next to the time of day. There may be other icons there as well, especially if you are running credit card processing as well. In any event, it will appear as follows:

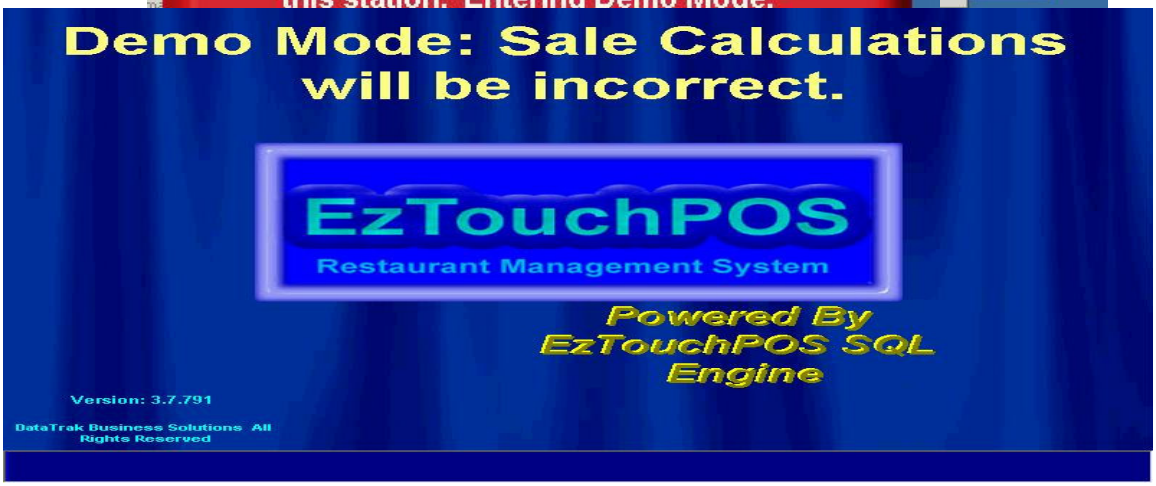


The icon is the same as the desktop icon except smaller. When it appears at the taskbar as the image to right demonstrates, it means the license manager is engaged and is active.

When engaged, the other terminals will all load the software perfectly and will be operating in real mode. If, however, the license manager is not engaged, when you attempt to start the software from any workstation, you will see the following:



This socket error message you will see such as the example here, means that the license manager is disengaged on the server and needs to be turned on. If you simply ignore the message, another message will appear when the system begins to load as shown below:



If you ignore the above message, the next screen will open (shown below). Note that the screen will clearly indicate to you while loading that the system in Demo Mode and that sales calculations will be incorrect. In fact, all sales you make will total only $5.00 when you try to pay it out. When you see this DEMO MODE message, immediately exit the software and once again, engage the license manager as described on the previous page. Then restart the software on each terminal. There will be no demo mode message.

If you miss the loading warning, you will still know you are in DEMO MODE when you see the DEMO LOGIN CODE 555 message on the top right hand corner of the screen indicating that your system is definitely in demo mode.

NOTE: If you have more than one terminal and you accidentally shut down the license manager, those terminals already logged into the system will continue to operate as if in normal mode until such time they exit to windows. That is why sometimes, you will notice that only one terminal is in Demo mode while others are not. Immediately restart the LICENSE MANAGER and then restart the program on that terminal that indicates it is in DEMO MODE. You need not shut down the other stations that are operating in normal mode.

NOTE: Old versions of the software were released without a software dongle(adaptor) . These license records were kept with the software on the hard drive of the server. New versions of the software are being released with a software dongle. This dongle allows the software to keep its license within the adaptor thus virtually eliminating any licensing corruption that would occur.

Chapter 1

AN INTRODUCTION:

ABOUT VALUEPOS:

VALUEPOS is a software program designed to help manage your restaurant. From taking and managing customer orders to tracking sales and labor, ValuePOS is a high level software system that runs on standard Windows PC based hardware

You are now using one of the most versatile Point of Sale Systems available on the market today using touch screen technology and the features of an SQL database platform. Using this database, POS stations communicate with the SQL Server software when they then make the appropriate changes to the database file. Therefore a separate software program is installed and run on the computer that acts as a server whether that computer is a standalone station or computer available on the network.

GETTING HELP: Please refer to this user's guide as much as possible. We have tried to make this manual as user friendly as possible. Each chapter has been designed to give you step- by- step instructions to each screen's functionality.
Please e-mail us at valuepos@earthlink.net ; or contact us by phone at 305-278-2543 with any suggestions and/ or ideas to improve on the manual or for items you might want to see in more detail.
You can also reach tech support at 305-345-9329.

GETTING STARTED

EZManager is the back end software to the ValuePOS system. It allows you to manage your system from just about anywhere on your local area network or on a Wide Area Network.

TCP/ IP Interface: EzManager, like ValuePOS uses the TCP/ IP protocol to communicate with the Database Server. The database server stores information and data about your sales activities but also holds information about settings you set in order to determine how your system will operate.

EZMANAGER BACK OFFICE SOFTWARE OVERVIEW:

The EZManager Back Office Main Screen is the MDI (Multiple Document Interface) application that you see below. EZManager 's Main Screen allows you to access different parts of the application from the menus in the top portion of the window or by using the Outlook style Quickbar on the left. The Quickbar allows access to the most commonly used parts of the application for easy and quick access.

Setting Up EZManager: When you run EZManager for the first time, you will be asked to specify the following parameters:

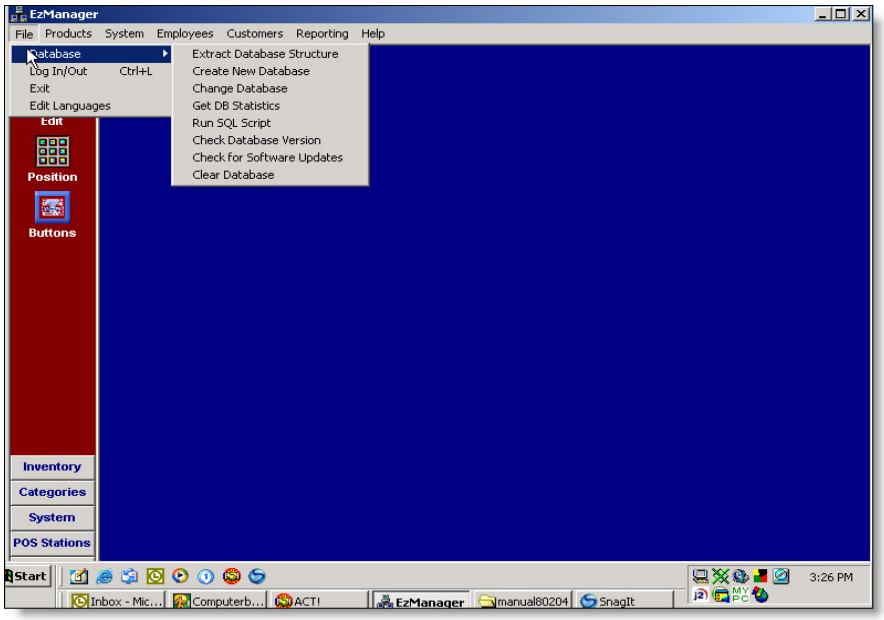
Updates Folder: This folder is where the EZManager software will look for updates when it starts up. When updates are found, EZManager will automatically update itself. Do not specify the same directory where the actual Manager software was installed which is by default C:\ Program Files\ EZTouchPOS.

Database Path: This is the path to the database, relative to the computer where the database server software is running. Usually the default path (as shown) is sufficient. The point to remember is that you are telling the database software where to find the database on its hard drive. So, if the database server software is running on another computer on your network, you are saying "on your hard drive, this is where the database file is located.

Many people get confused and think they are supposed to indicate how to get to the database from the computer they are on such as using a name as \\ ServerName\ Shared Folder which is incorrect because with an SQL database, software applications do not communicate with the database file directly. They do so through the database server software and that is why you enter the database file path relative to the computer that is running the database server software.

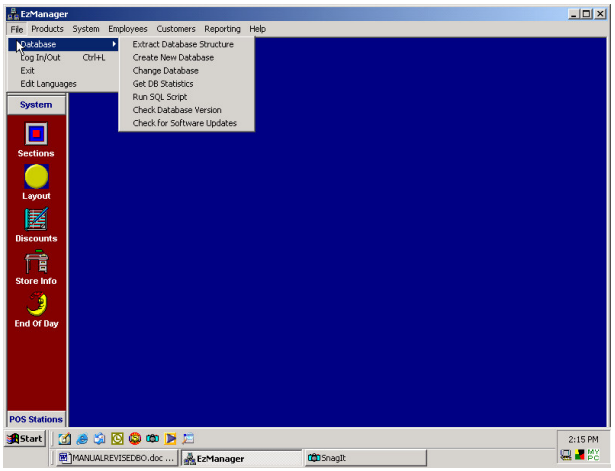
Database Server: This is the computer that is running the database server software. You can enter either the name of the computer on the network (in which case EZManager will attempt to resolve the name into an IP address) or you can enter an IP address directly.
If you are running the database server on the same computer that you are running EZManager on(such as when you are running the demo) then you can by default which is localhost as shown in the picture below. Localhost is a loopback address that means the computer you are on (local computer).

FILE



DATABASE:

This part of the program deals with the SQL generators and database structures. We recommend that if you are not fluent in SQL language that you contact us before you use this feature. The database menu offers commands that you can use to manipulate your SQL database.



Extract Database Structure:

This command allows you to export the structure of your database (the metadata) to a text based file that can be used to recreate the database on another computer.Click the extract database structure command. Choose a location to save the file to.

Change Database:

The Change Database command allows you to change the current database that you are connected to.
Click the Change Database command menu. The following dialog will be displayed.
Type in the name of the Database Server Computer. Type in the Path to the Database File relative to the computer on which the database server software is running. Click the OK button.

Get DB Statistics:

DB(Database) Statistics allow technical services to better diagnose how your EZTouchPOS SQL Database is running, its efficiency and speed. You will never have to use this command on your own and should really only have need to if asked by a technical services person to use it.

When you use this command you are prompted for a name to save a text based file to. EZManager will save all pertinent database information to that file which can be viewed with Notepad.exe or sent as an email attachment using your favorite email client to technical services.

Run SQL Script:

Use this command when directed by a technical services person in order to make changes to either the structure or data in your EZTouchPOS SQL Database.
If technical services should send you a file, use this command to locate the.sql file and execute it.
Please only use this command when specifically directed by Technical Services.

Check Database Version:

This command allows you to see which version of the EZTouch POS SQL Database you are running.

Check For Software Updates: This command will check for updates to the following software:

- **EzTouchPOS**
- **EzManager**
- **EzTouchPOS SQL Database**.

In order to use the Software Update Module, you must have an active connection to the Internet.

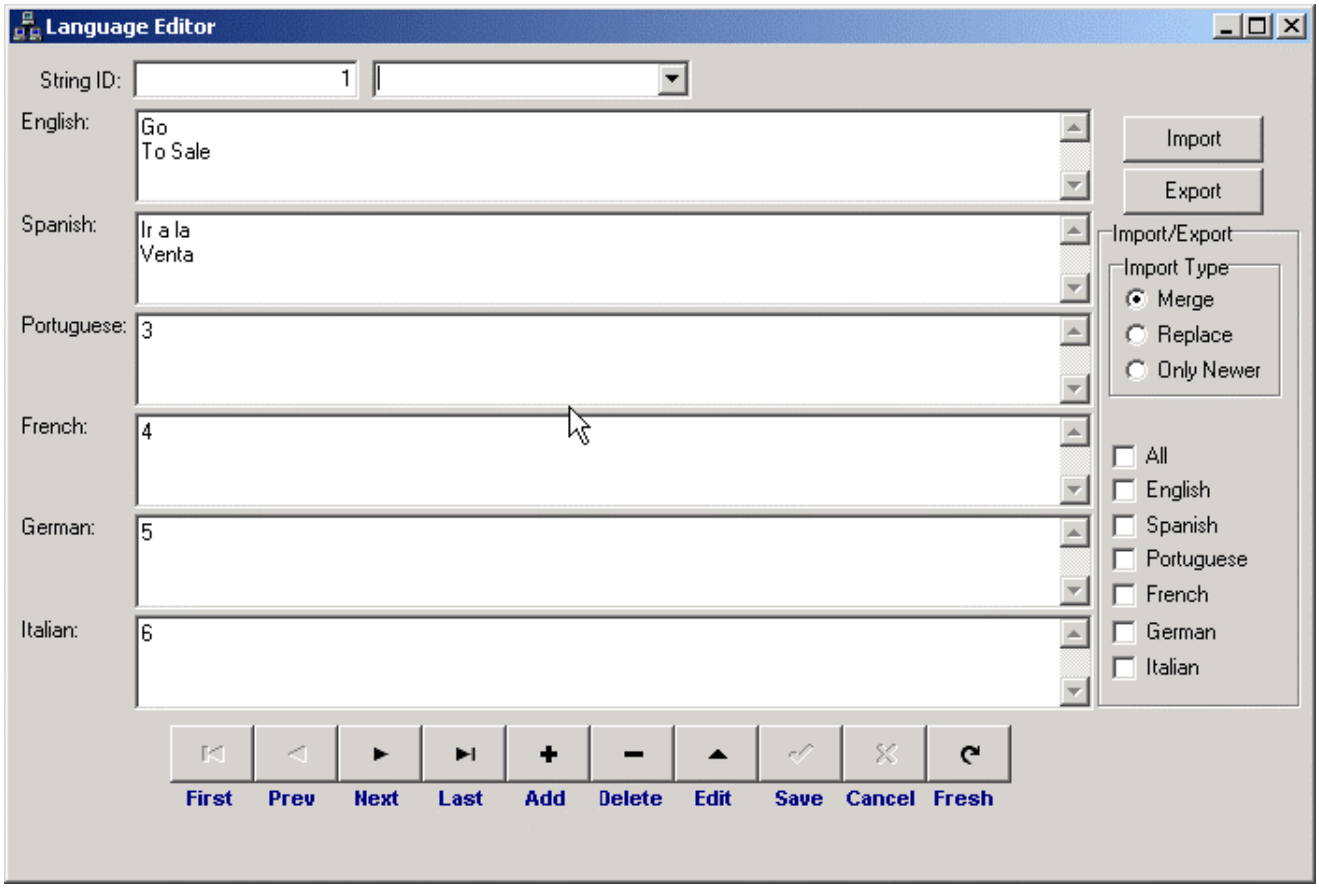
The Software Update Module will check for each software component in turn and if a newer version is found on the Web, that version will be downloaded to the folder that you chose when you started EZManager for the first time.

LOGIN/ LOGOUT:

This menu option can be used to log into and out of the EZManager software. You can also access this function by using the Keyboard combination CTRL-L. If you are logged in at the time this command is called, you will logged out. If there is no one logged in when you call this command, you will be prompted for your PIN number to log in. The default user PIN numer is "5" either as the first time you are using the system or if you are in the demo mode.
To LOG IN: 1) Type the number that you would like to use to log into the system. 2) Click the ENTER Button.

CLEAR Database

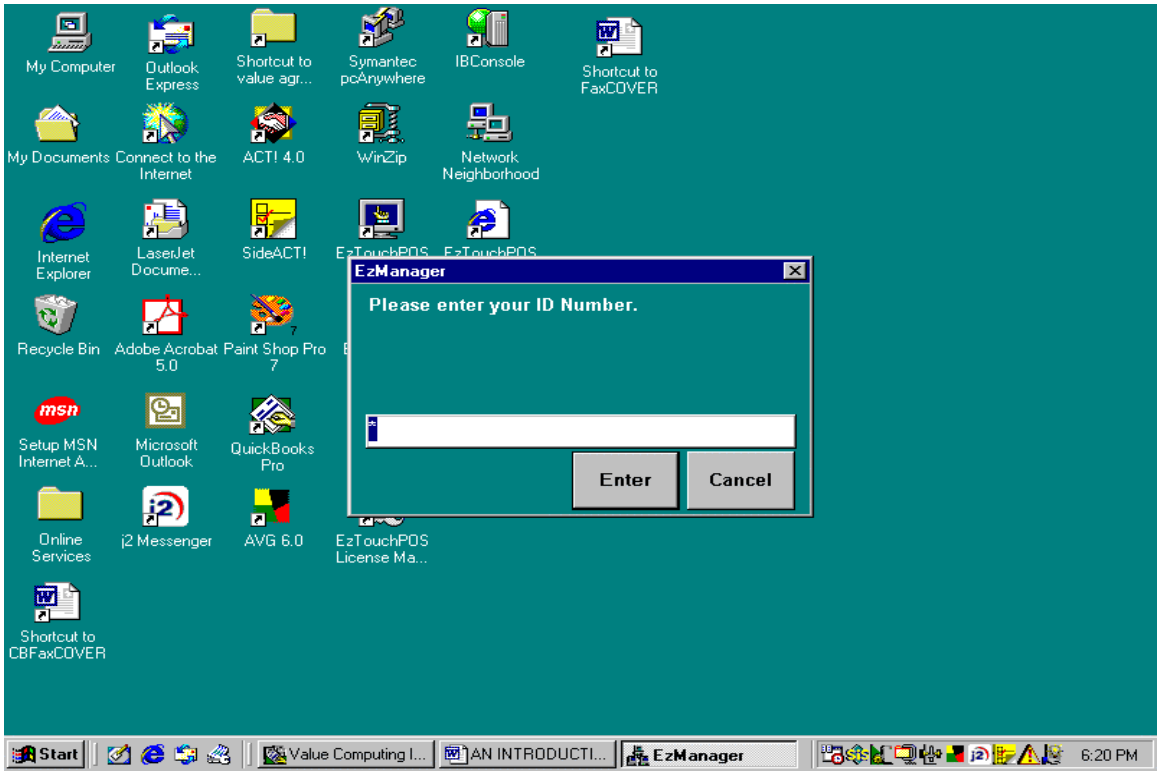
Edit Languages:



This section allows the user to implement the language of their choice-English, Spanish, French, German or Portuguese You must download a file allow default English translations to the database. You do this by :

1) Open EZManager
2) Go to File>Edit Languages
3) Click Import button and choose file that you have downloaded(languages.bin)
4) Close Edit Languages screen and restart ValuePOS software for each terminal.
5) Note: A selective merge capability has been added to the Language Edit screen to allow users to restrict which languages are updated
   From the languages.bin file when importing.

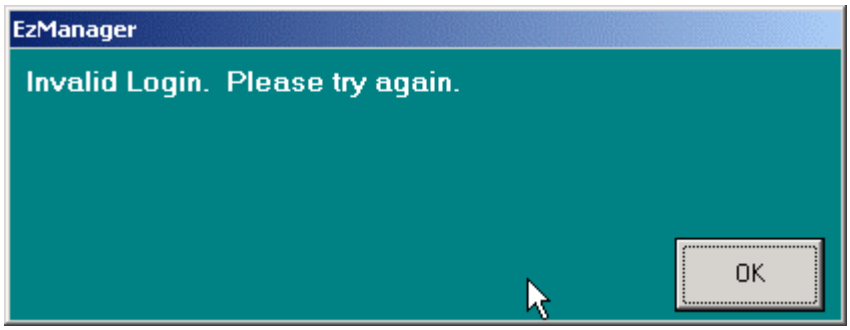
LOGGING IN TO VALUEPOS EZMANAGER:



In order to access the EZManager program, you must supply a login ID(PIN #) that uniquely identifies you. Usually only management personnel are provided with the correct permissions to access the EZManager program.

To Login:

Enter you unique ID number(passcode) in the text box provided in the Login Dialog.
Click the enter button. EZManager will validate the number that you provided and allow entry if validation is successful.
If you provide an invalid login number, you will receive the following message.



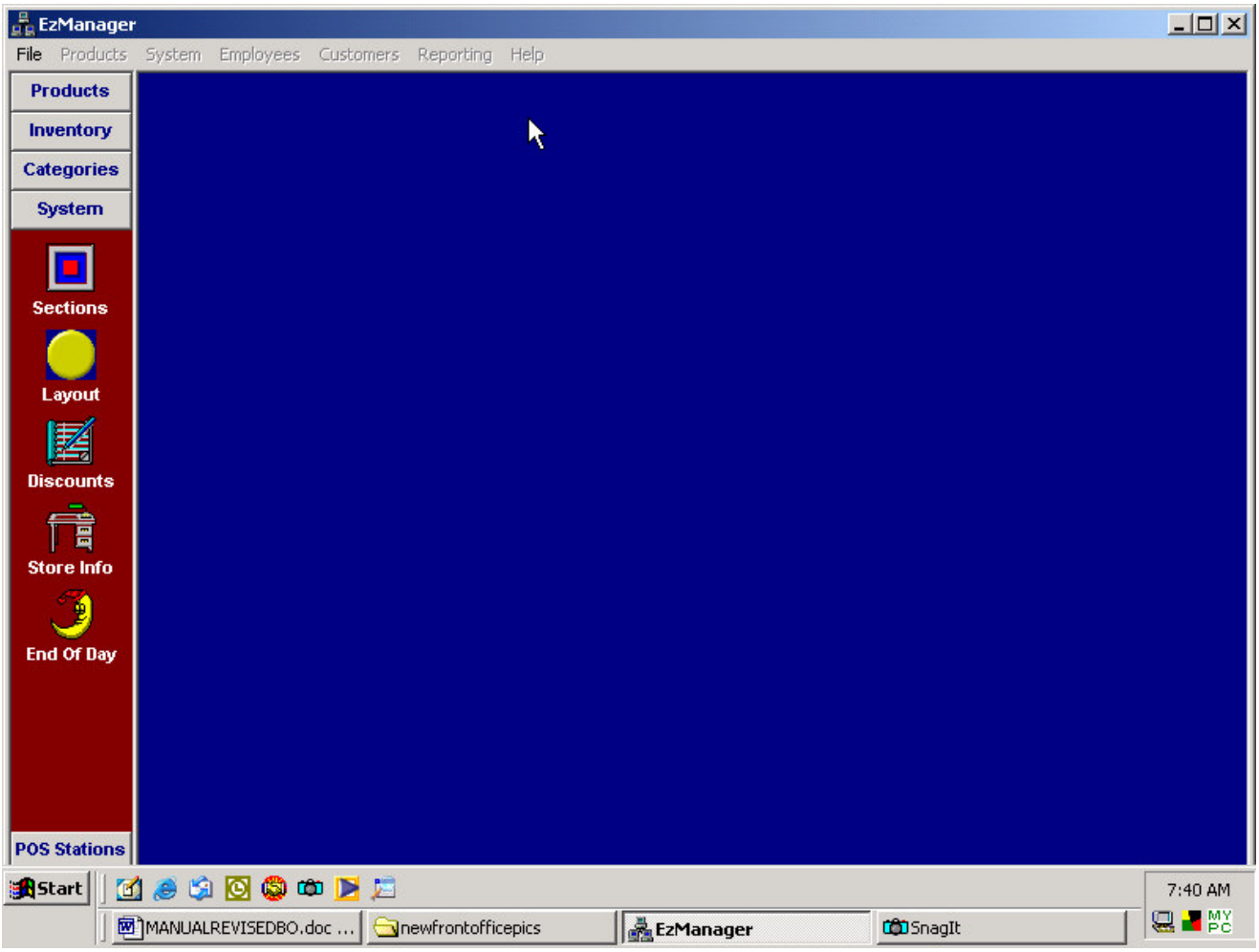
Alternative Login:

You can also login and out of EZManager (while the EZManager Main Window is open by pressing CTRL-L.

NOTE: If this is the first time that you are accessing a brand new database or you are attempting to access a demo database, you should use the number "5" to enter the system. This is the default user PIN #

Menus :

In EZManager, all functions and activities are performed from here. The top portion of the screen shows Menus. The menus are where you access functions and perform activities in EZManager. This screen is the MDI (Mulitple Document Interface) application that you see below. This screen allows you to access different parts of the application either from the menus in the top portion of the window or by using the Outlook style QuickBar on the left. The Quickbar allows access to the most commonly used parts of the application for easy and quick access.



Status Bar:

Current Date and Time:
Current Sales sold for Current Work Day
Number of Employees on the Clock
Current Working Day
Path to Database Source

Modification Bar:

At the bottom of the screen in most modules, you will notice a status bar that gives you the functionality of adding, deleting, saving, editing, and updating information related to the section you are working in.

First / Prev	Next / Last	Add / Delete	Edit / Save	Cancel / Fresh

STARTUP PROCEDURES:

There are several procedures that must be implemented before you can start using your software.

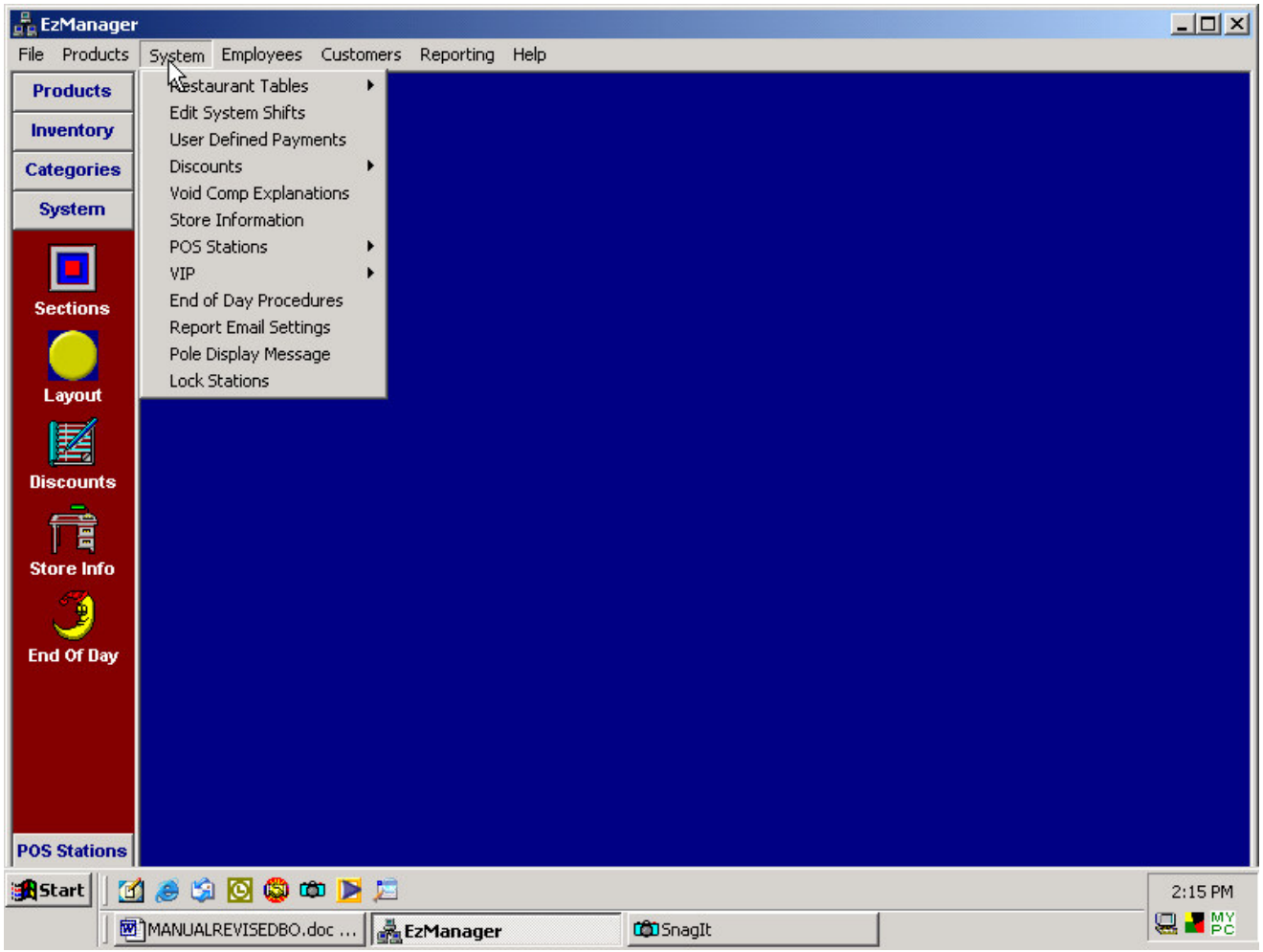
1) **You must input your menu items**
2) **All employees must be entered into the system, assigned positions and permissions.**
3) **All payment methods must be defined.**

CALCULATOR:

This button is located on the id screen on the lower right hand Screen and allows you to perform calculator functions.

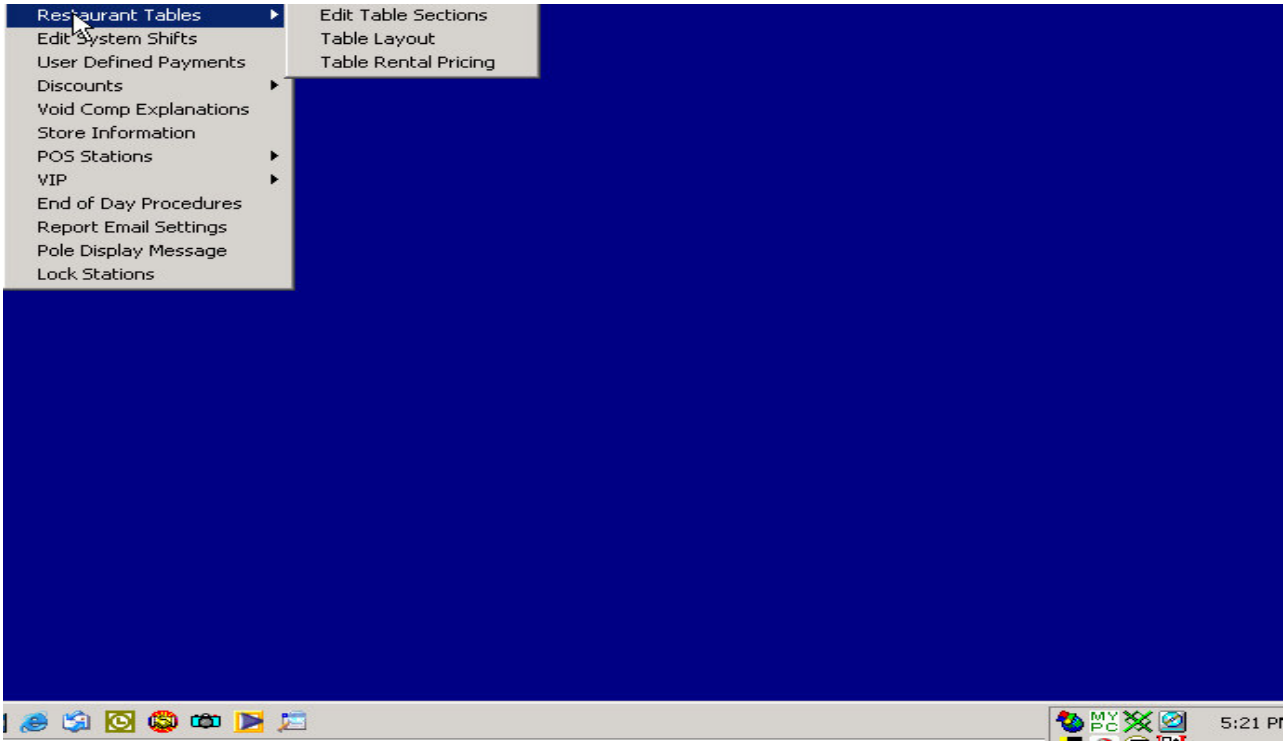
Chapter 2

SYSTEM INFORMATION



This section allows you to set up your tables and rooms; edit the times of the shifts in your establishment; define the payment methods you accept; define the discount methods that you will use; define explanations for voiding and comping checks; set up your specific store information; set up information specific to your POS installation; set up VIP information if you have this module; and learn information regarding End of day procedures.

RESTAURANT TABLES:



This section will show you how to edit table sections and build your table layout.

Edit Table Sections:

This screen allows you to input the Section Name of the rooms that you have in your establishment. They can be actual rooms or specific areas within your establishment that constitute a room to you.

Table sections are different areas of your restaurant. This feature is used when the restaurant is using Table Service. ValuePOS allows you to enter up to 10 different Table Sections. For instance, you may have a patio section that you would like to show up as a separate section on the stations to differentiate it from other sections. Although you can enter more than ten sections, the program will only show the first ten that it finds in the database.

BUILDING GRAPHICL TABLE LAYOUTS FOR YOUR RESTAURANT:

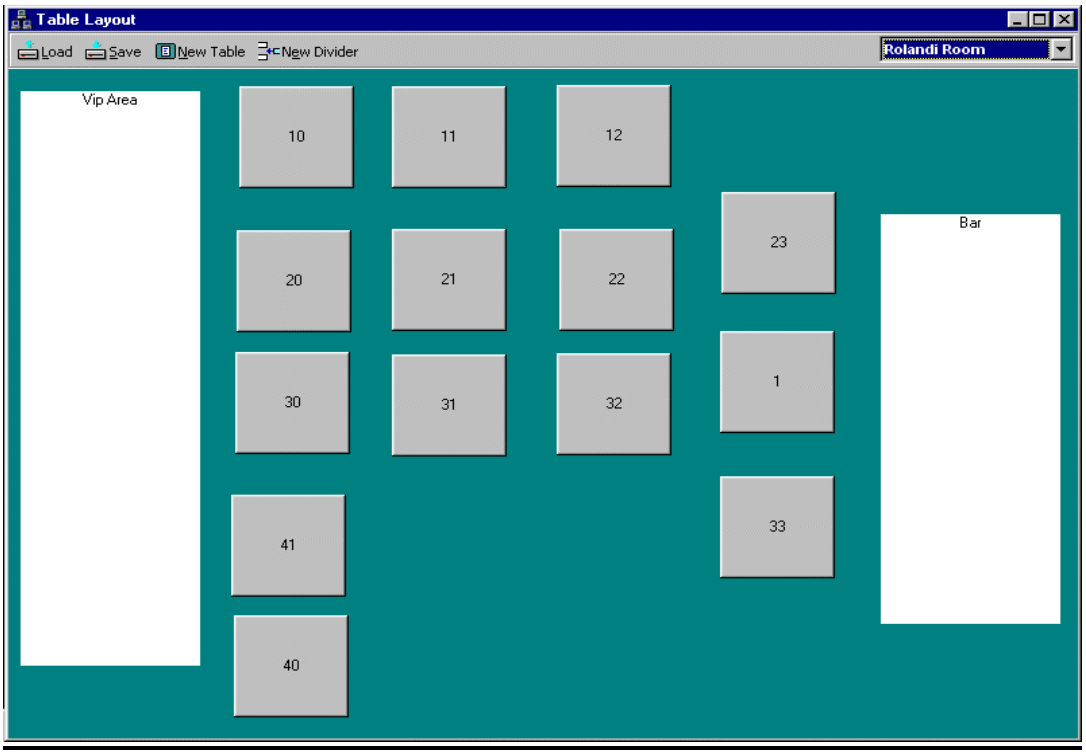
EZManager allows you to graphically build tables that resemble your restaurant table layout. Before you can design your table layout, you must first create Table Sections.

The Table Sections Management Dialog provides two different fields. Unlike other data entry forms in EZManager, this one requires you to indicate a unique ID number as well as a name for the Table Section. Simply fill in the required (2) fields and click the **Save** button.

Repeat this for each Table Section that you'd like to create (maximum of 10).

Check the Tables Rented Box if you are using the option of Renting Tables.

TABLE LAYOUT:



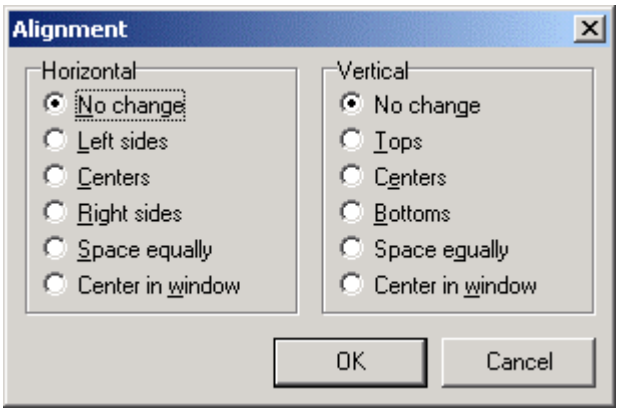
Graphical Table Layout: **ValuePOS** allows you to create a Graphical Table Layout or GTL to represent the Tables in a Section of your Restaurant. If you do not offer Table Service in your restaurant, you can skip this topic.

Loading a Table Section: Use the Table Section drop down box (upper right hand corner of the screen on the toolbar) to select a Table Section to load. Once you have selected a Table Section, click the load button on the toolbar.

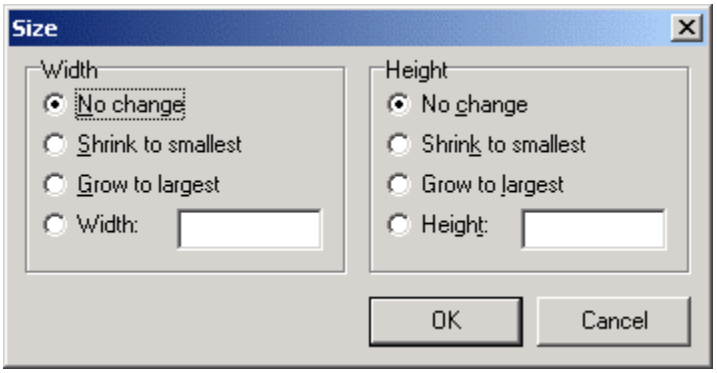
TABLE DESIGNER SHORT CUT MENU:

When you right click on an object, you will see the following short cut menu displayed.

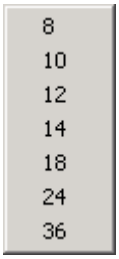
Delete	deletes the object or objects
Align to Grid	aligns the selected objects to the current grid
Align Objects	align objects according to options from dialog box (see picture)



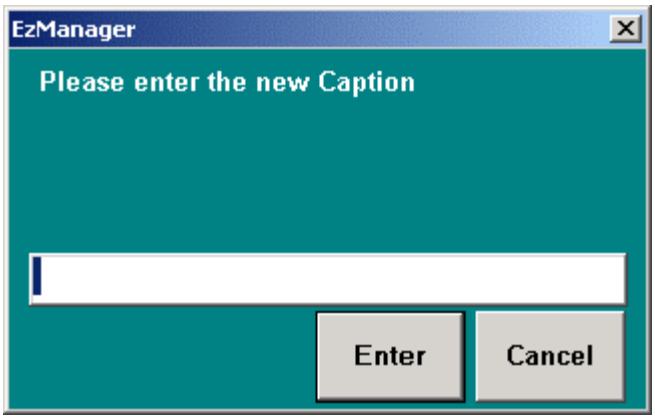
Size	allows you to size objects by parameters you select (see picture)



Set Font	set font size of Divider Objects

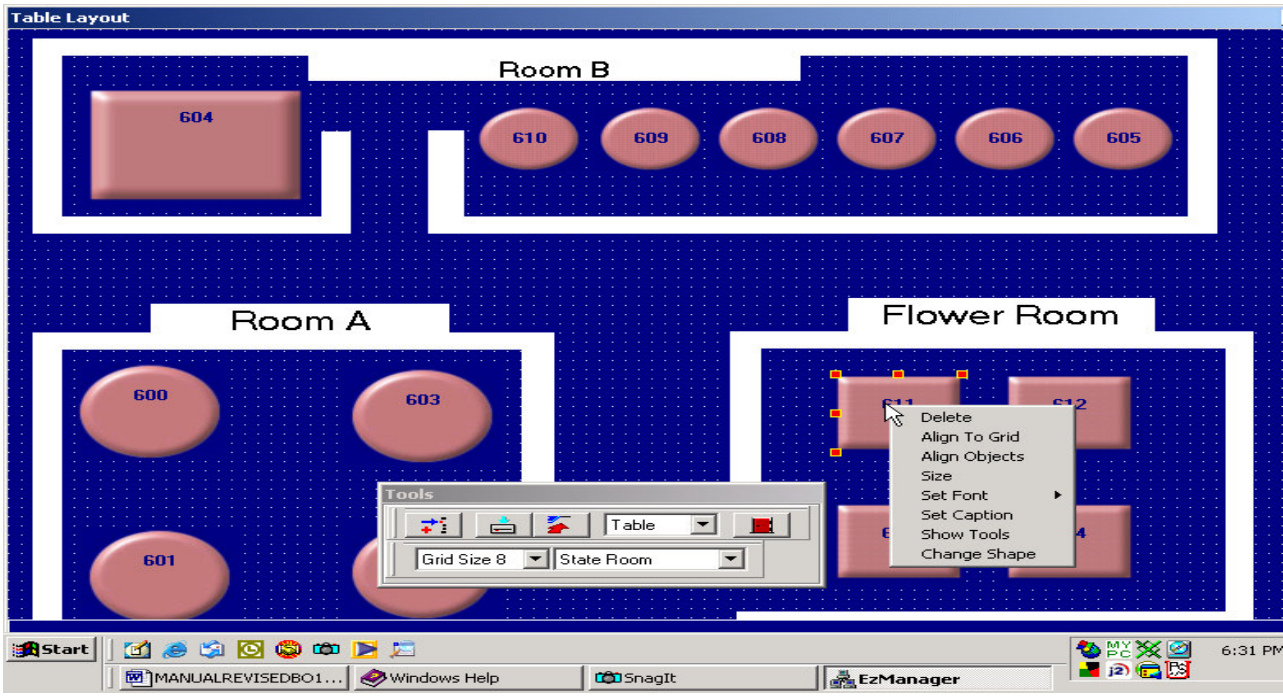


Set Caption sets text caption of selected Divider Objects



Show Tools displays Table Layout Toolbox (select blank area on Blue Background)

Change Shape changes shape of object from either round to square or square to round



There are 2 components to the Graphical Table Layout (GTL):

DIVIDERS:

Dividers are generic objects that you can use to represent walls, partitions, bar counters, etc. Dividers, unlike Table Objects, can have a caption that you assign. Table Objects cannot because their captions are assigned a runtime on ValuePOS stations to indicate the Table Number, Number of Orders at the table, and Number of Guests at the Table.

To Add a Divider:

(1) Click the New Divider button located on the toolbar.
(2) Enter a caption (optional) in the dialog that will be displayed.

The new divider will be displayed in the upper left portion of the GTL screen. You can easily drag it to any location on the Section area(green area).

To Change Aspects of the Divider:

Hold down the shift key and Right click the Divider and a popup menu will appear providing the following options:

Delete:

Delete the Divider:

Set Height:

Allows you to specify a height (in pixels) for the Divider.

Set Width:

Allows you to specify the width (in pixels) for the Divider

Set Caption:

Allows you to set the caption that is displayed on the caption at runtime.

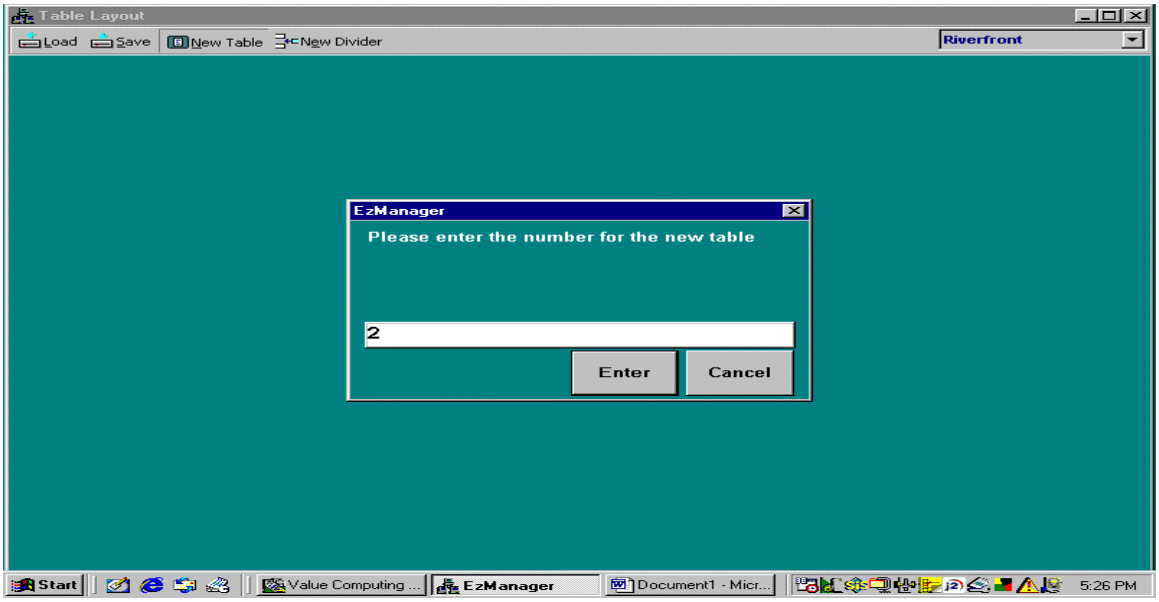
HELPFUL HINT

Remember that ValuePOS stations operate at 800 X 600 pixel screen resolution. If your monitor is set to either a higher or lower resolution, the resulting display on ValuePOS stations could be unpredictable**.**

You can also align both **Table Objects** and **Dividers** by holding down the Shift key and highlighting several objects, one at a time. The first object selected (**the Master Object**) will have a yellow and red dotted border shown around it while additional objects you highlight will have a plain yellow border drawn around them. After holding down Shift and highlighting several objects, you can align them according to the Left and Top priorities of the **Master Object.** For example, if you highlight several object (while holding down the Shift key) and then Right Click on one of them, a popup menu will be displayed allowing you to either Align Lefts or Align Tops. Clicking one of these options will align all of the selected objects according to the Left or Top position of the **Master Object.**

You must keep the Shift key held down while both selecting multiple objects as well as Right Clicking one of them to show the popup menu.

TABLE OBJECTS:



To Add a New Table Object:

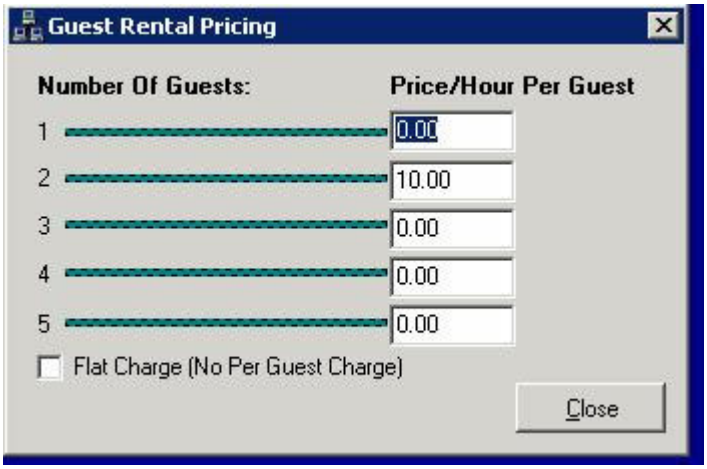
1) **Click the New Table button located on the toolbar.**
2) **Enter a Table Number for the new Table Object. (Table Numbers must be Unique throughout the system).**

HELPFUL HINT :

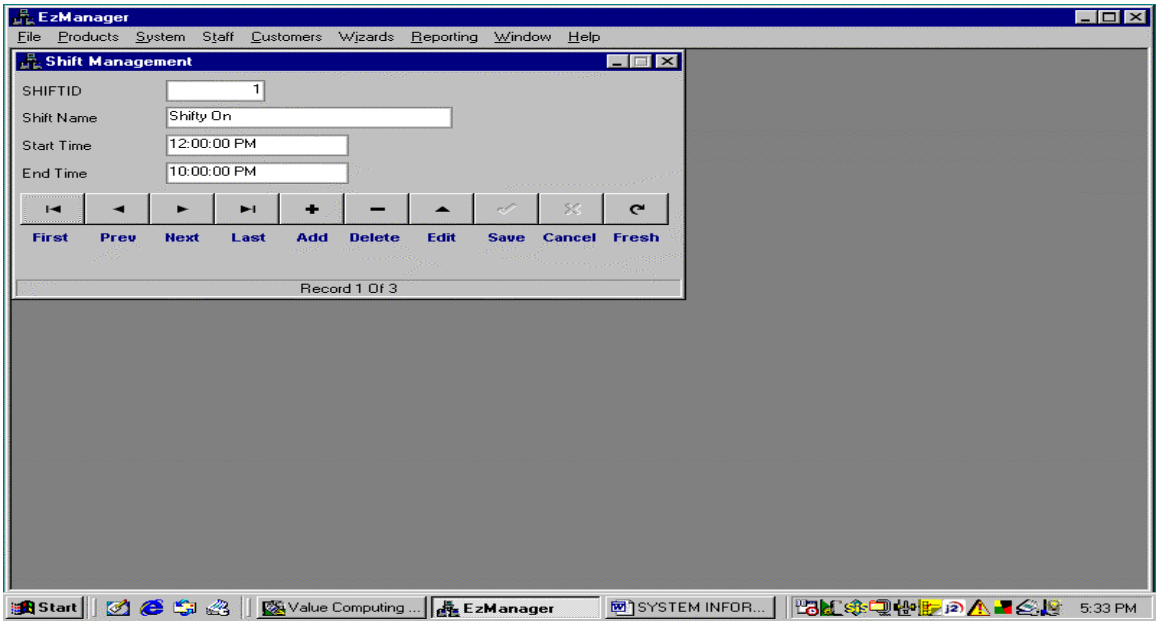
Like Dividers, Table Objects provide a popup menu that you can access by holding down the Shift button and Right Clicking the Table Object. You can also align the Table Objects along with Dividers in the same manner explained above for Dividers.

REMEMBER TO SAVE YOUR WORK BY CLICKING THE SAVE BUTTON ON THE TOOLBAR BEFORE CLOSING THE SCREEN OR SWITCHING TO A DIFFERENT TABLE SECTION.

TABLE RENTAL PRICING:



EDIT SYSTEM SHIFTS:



SHIFT MANAGEMENT

What are Shifts:

Shifts are a way to tag certain types of records with shift names based on a starting and ending time range. In other words, each Shift that you create contains both a starting and ending time. Sales Records and Time Clock Records are examples of data that get tagged with a Shift. When you create a new sale on a ValuePOS station for instance, ValuePOS will check to see if the current time is between the starting and ending times for Shift and if so, will tag that piece of data(record) with that Shift. Shifts are important for things like determining which parts of the day are responsible for particular amounts of sales, etc. Shifts should be entered sequentially and should never overlap. If Shift One ends at 3:00:00 pm, then Shift Two should start at 3:00:01pm. Better yet, Shift One should end at 2:59:59 pm and Shift Two would start at 3:00:00pm exactly.

Shift ID:

Unlike most data entry forms in EZManager, Shift Management requires that you enter your own unique ID number to identify a Shift. Enter any whole number in this field that has not been used to identify a Shift. This field is required.In addition to using an ID number to identify a Shift, you must also supply a unique name for the shift to be used in reports, etc.

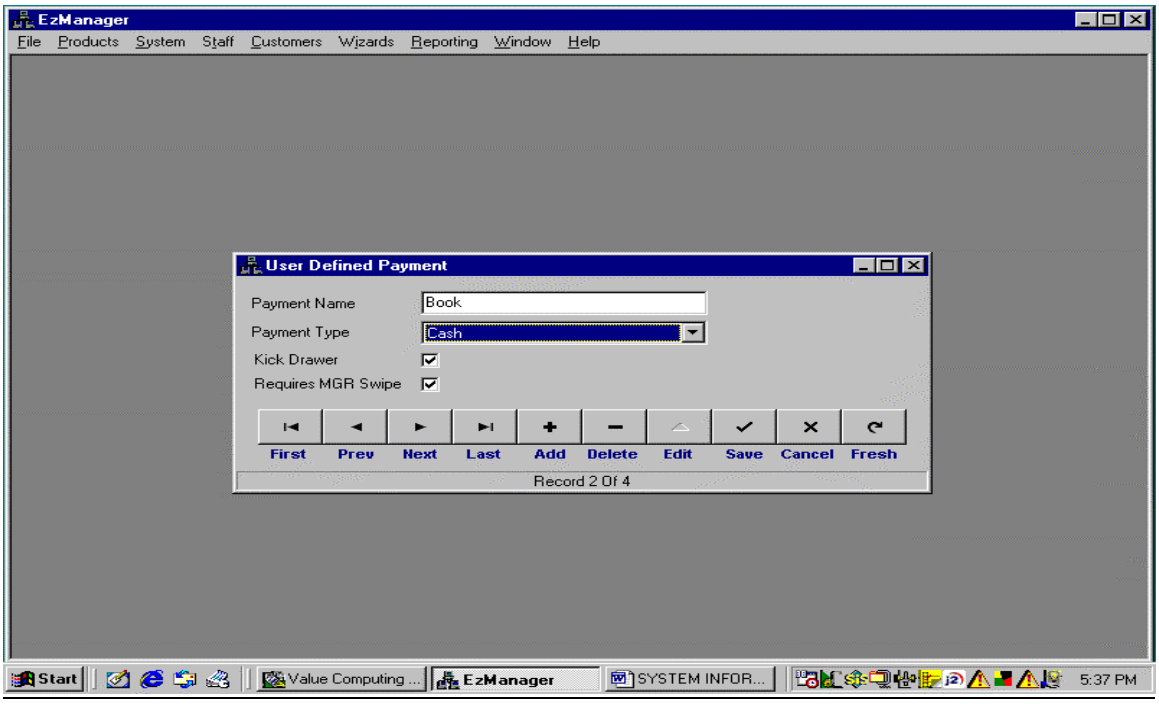
Start Time:

This is the beginning of a shift. You must be careful to use a Start Time that does not overlap with another shift. For instance, if "Shift 1" starts at 12:00 pm and ends at 4:00 pm, then the next shift should start at 4:00:01 PM

End Time:

Enter the time that the current shift will end. Again, keep in mind that shift times should never overlap.

USER DEFINED PAYMENTS:



What are User Defined Payments:

User Defined Payments allow you to specify custom payments method made by the customer for the sale of your products. Current(as of 2/ 1/ 2002) only Cash Type user defined payments are supported. We are currently working on support for House Credit accounts.

Payment Name: Enter a unique name to identify this Payment.

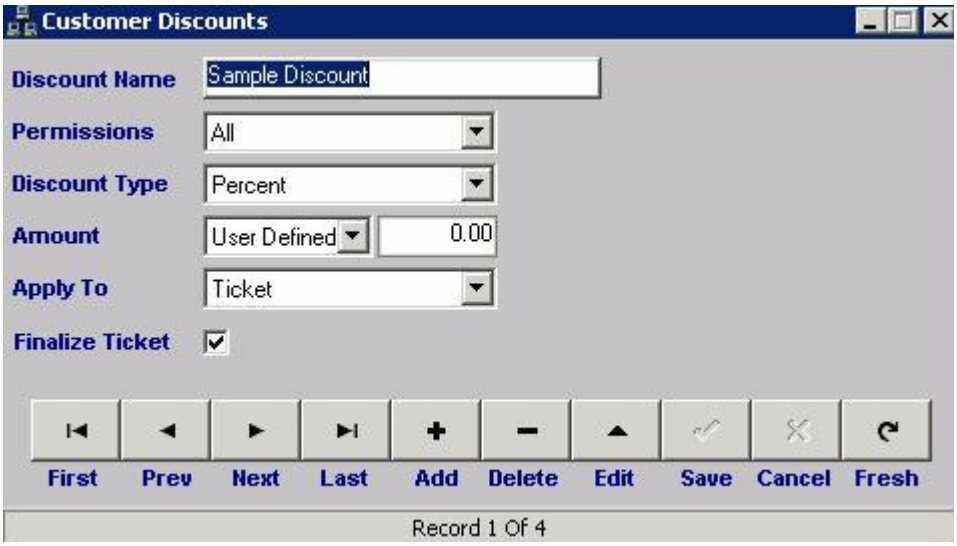
Payment Type: Currently only the Cash Payment Type is supported. Select Cash.

Kick Drawer: If you would like to have a cash drawer opened when this User Defined Payment is used as tender for a sale, then check this box. You must have a Cash Drawer attached to the ValuePOS station for this to work.

Requires Manager Swipe: If you would like the User Defined Payment to be accessible only by the Managers, then check this box. When this box is checked and someone that is not logged into ValuePOS with manager permissions tries to use this User Defined Payment, ValuePOS will prompt for a Manager to swipe his/ her Manager Swipe Card. Managers logged into ValuePOS will not be required to swipe a Manager Card.

DISCOUNTS:

Custom Discounts:



WHAT ARE CUSTOM DISCOUNTS:

Custom Discounts are pre-defined discounts that can be applied to a your customers (and employees) that make the process of offering discounts both easy and flexible. Customer Discounts in ValuePOS are very Customer Discounts powerful and flexible.

Discount Name: Enter a Unique name for the discount here

Permissions:

All: Allows anyone to use the Discount

Manager: Must be either a Manager or have a Manager swipe a card to use it.

Discount Type:

Discount can be applied as either an Amount or as a Percentage. Use the Discount Type drop down box to choose the method you would like to use for this Discount.
Amount: Deducts a specific amount
Percentage: Deducts a percentage

Amount:

Pre-Set:
When you select this option, you enter the amount and this amount is automatically charged. You must enter the Amount as a decimal.

User Defined:

If you select User Defined, then the user will be asked to enter the amount of the Discount at runtime when using ValuePOS stations. (can be an amount or a percentage)

Apply to:

You can apply a Discount to the following options:

Line:
The Discount will be applied to a specific line item on the Order Ticket

Ticket:
The user will have a choice as to whether to apply the Discount to the Entire Ticket

Either:
Allows the user to choose either ticket or line at run time.

Finalize Ticket

Checking this option will "Finalize" the ticket, preventing any more Products from being added to the Order Ticket after the Discount is applied.

SERVER TIP ADJUSTMENTS:

What are Server Tip Adjustments?:

Server Tip Discounts are potentially one of the greatest revenue savers available in ValuePOS. Server Tip Discounts allow you to specify a percentage of a Server's (or Driver's) tips to keep that are paid by credit card from a customer to help offset the charges that you incur from your Credit Card Processor for processing credit transactions. If, for example, you charge a Server Tip Discount of 1%, then ValuePOS will automatically keep that percentage of tips that employees receive from customers in the form of credit card payment. Enter percentages as a decimal. For instance, to enter a VISA Tip Discount of 2%, enter .02(point zero two)

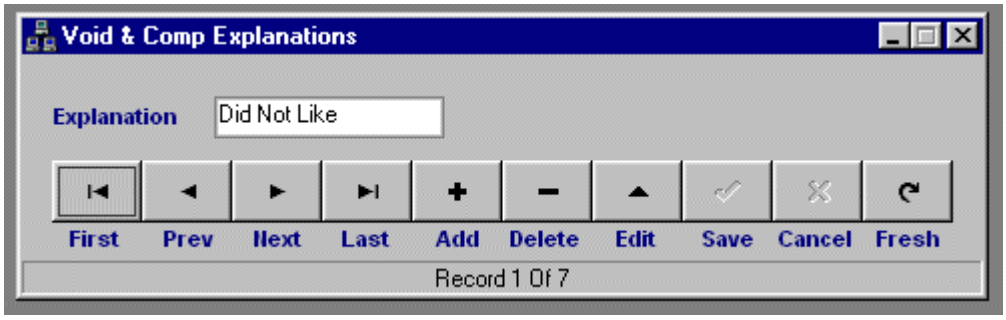
LEGAL NOTE:
KEEP IN MIND THAT SOME STATE AND OR LOCAL LAWS MAY NOT ALLOW YOU YO LEVY CHARGES ON EMPLOYEE TIPS(SERVER TIP ADJUSTMENTS).
CHECK WITH YOUR ACCOUNTING AND/ OR LEGAL PROFESSIONALS BEFORE USING THIS FEATURE.
DATATRAK BUSINESS SOLUTIONS, CO. ; VALUE COMPUTING; COMPUTERBANC; AND ANY OF THEIR AFFILIATES AND DEALERS ASSUME NO RESPONSIBILITY CONCERNING THIS FEATURE AND IT IS YOUR RESPONSIBILITY TO ENSURE THAT YOU MAY LEGALLY USE THIS FEATURE.

Server Close OUT Reports (from ValuePOS stations) disclose the amount of money that is kept from employees when using this feature.

VOID AND COMP EXPLANATIONS

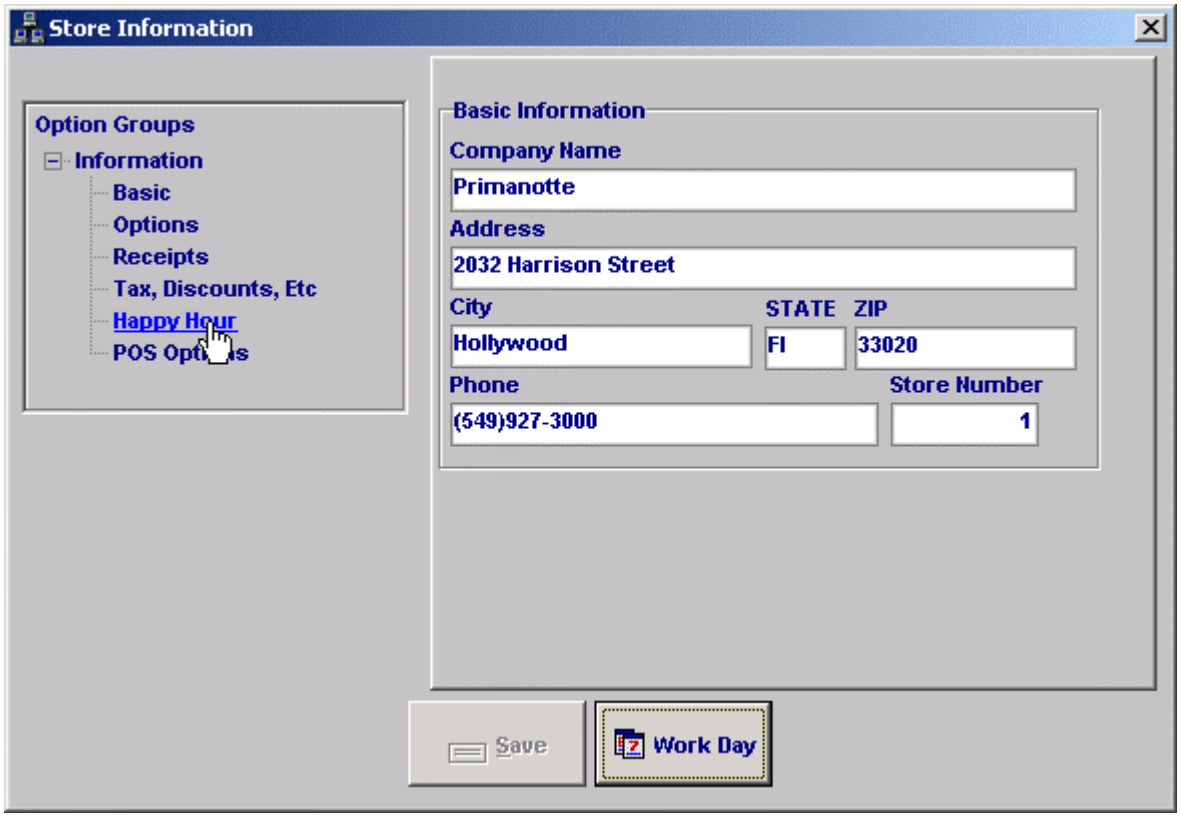
Void and Comp Explanations: When a manager performs an action such as voiding an Order, ValuePOS will require that a reason be entered as to why the void is being executed. This information along with other information such as the amount, who executed the void, the time the void was executed, etc is logged to the VOIDComps table to provide an audit trail for these types of actions. Most actions that require an explanation require a Manager to execute the action. (See Permissions for more information on providing and restricting permissions for these types of actions.

Entering Void and Comp Explanations: There is only 1 field required. Enter the Explanation for each VOID and comp entered.



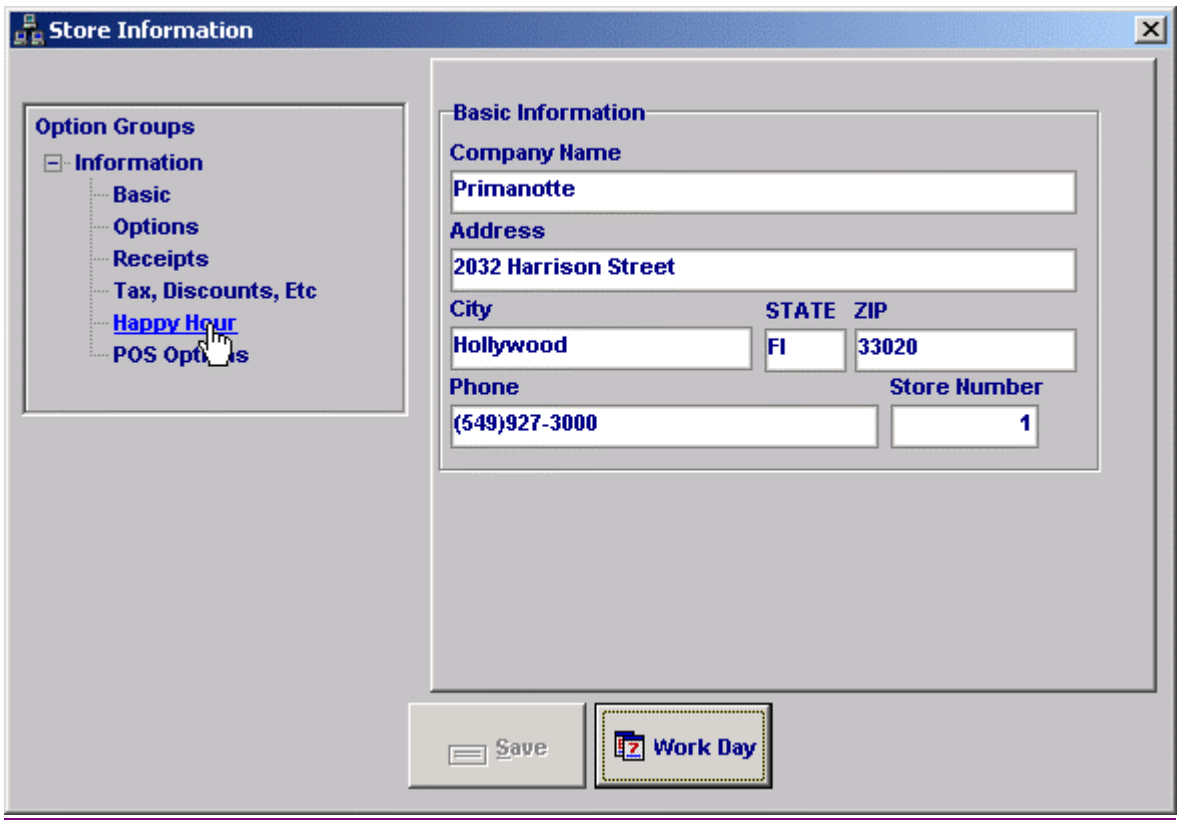
STORE INFORMATION:

The Store Information Screen



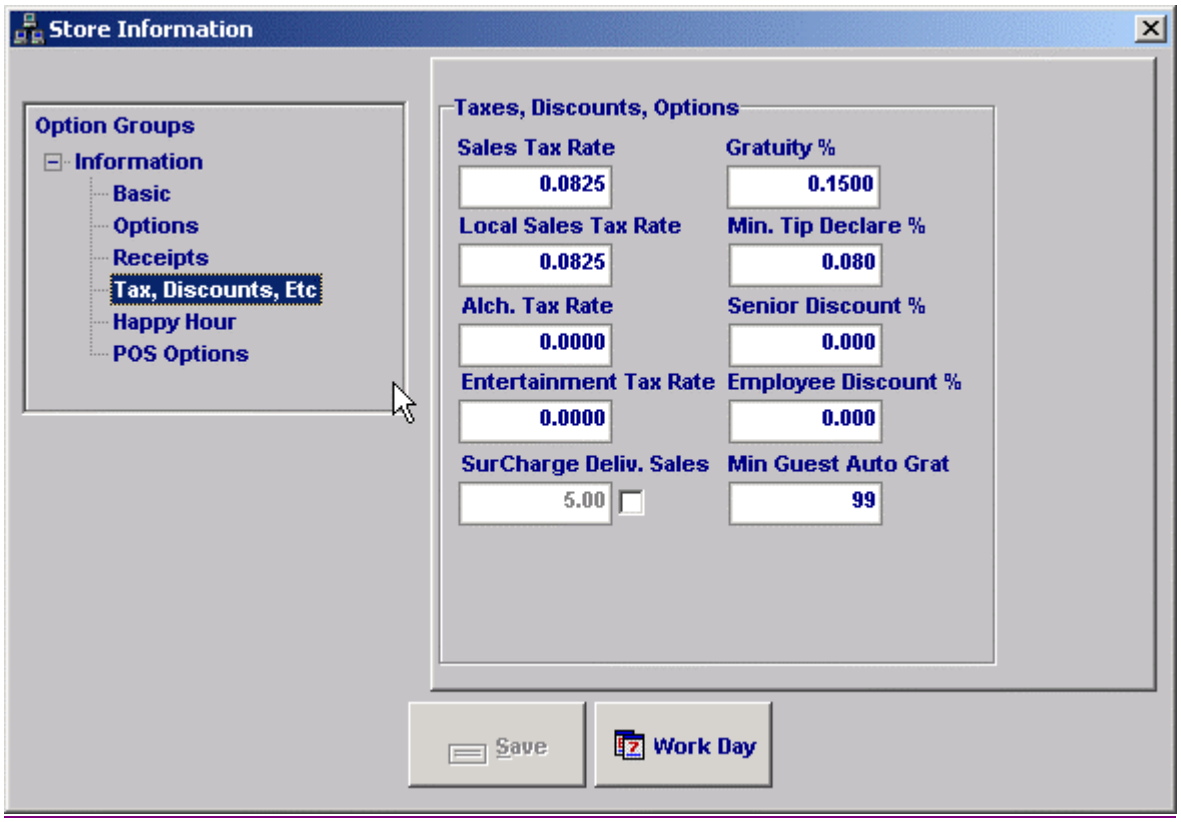
The store information screen allows you to enter basic information required for your ValuePOS system to operate correctly as well as options for other features.

Basic Information Panel:



The Basic Information Group allows you to enter basic information such as the Name of the restaurant, address, city, state, zip, phone, etc. This information is required and will show up on customer receipts, etc. Be sure to enter a Store Number. If you are operating a multi-store operation, enter the applicable Store Number, or else enter a 1 for only one Store/ Location.

Taxes, Discounts, Options Panel:



Sales Tax Rate: This is the sales tax rate that will be charged on taxable items added to a customer Sale ticket. If you are required to charge a State Sales Tax, then enter the amount as a decimal in this space.

Local Sales Tax Rate: If you are required to charge a Local or Municipal Tax, then enter the amount as a decimal in this space.

Alcohol Tax Rate: If you are required to charge a separate Alcohol Tax, then enter the amount as a decimal in this space. Alcohol Tax is charged only on those Products that have been marked as Bar Items. If you will not be charging Alcohol Tax, then this value should be zero.

Entertainment Tax: Some States and Counties and local Provinces require that you charge a separate Entertainment Tax (also known as Amusement Tax) This tax is normally charged when you provide live bands If you are required to charge this tax, enter the amount as a decimal here. ValuePOS allows you to selectively turn Amusement Tax on and off.

SurCharge Delivery Sales: If you are running a Delivery Establishment , then you may wish to charge a flat fee for deliveries. If so, enter the amount here.

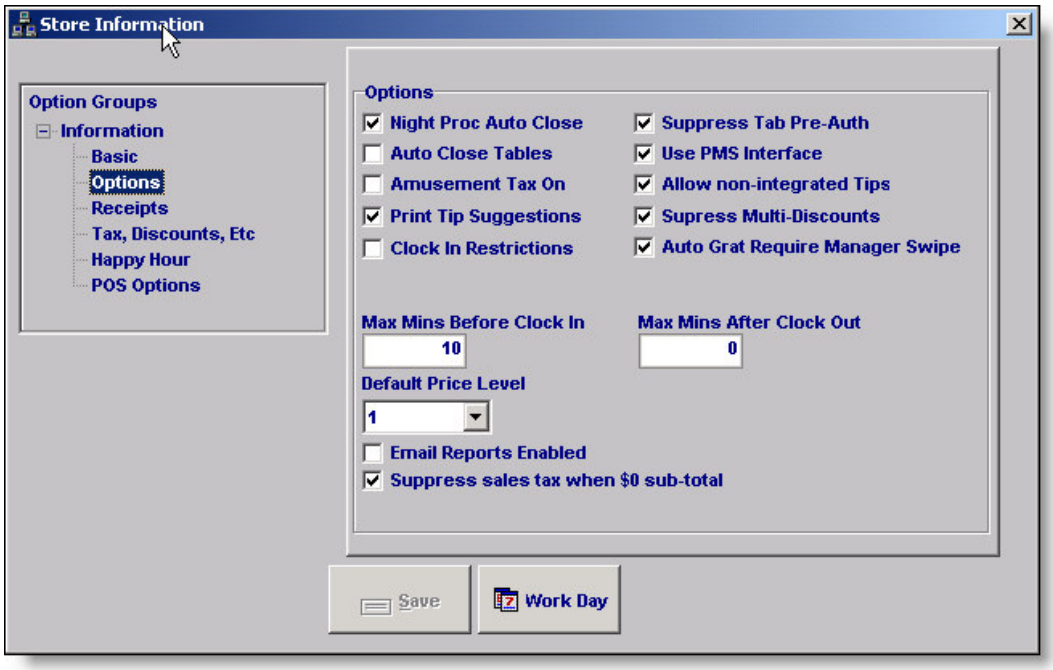
Gratuity %: ValuePOS allows you to charge Auto Gratuities(AutoGrats). Many restaurants choose to do this, especially for parties or groups of a certain number or higher. Enter the percentage as a decimal in this space. See Min Guest Auto Grat for more info on setting the guest count to activate. (Auto Grat name can now be set to a user defined name)

Minimum Tip Declare%: For serving staff and delivery drivers, you can choose to require that they enter an amount that is equal to a certain percentage of their sales. Enter this amount as a percentage.

Minimum Guest Auto Grat: Determines the number of guests that will trigger the Auto Gratuity addition feature.

.

Options Panel:



End of day procedures Auto Close: Wnen EZManager runs End of day procedures, you can tell EZManager to close out automatically any orders that were left open (not settled) Check this box to do this. EZManager will also free up any tables that were not un-assigned by those using them.

Auto Close Tables: Some restaurants prefer that any tables assigned to a server be freed when the last order at that table is settled out. If you would like to use this option then check this box. Otherwise leave it unchecked and the table will stay in possession of the person it was assigned to until that person(or a manager) un-assigns it.

Amusement Tax On: You can turn the Amusement Tax on and off using this check box.

Print Tip Suggestions: When Credit Card Integration is used, tip suggestions are printed on customer receipts for 15%, 20% and 25%.

Suppress Tab Pre Auth: Determines if you can or cannot run credit card tabs from the POS stations.

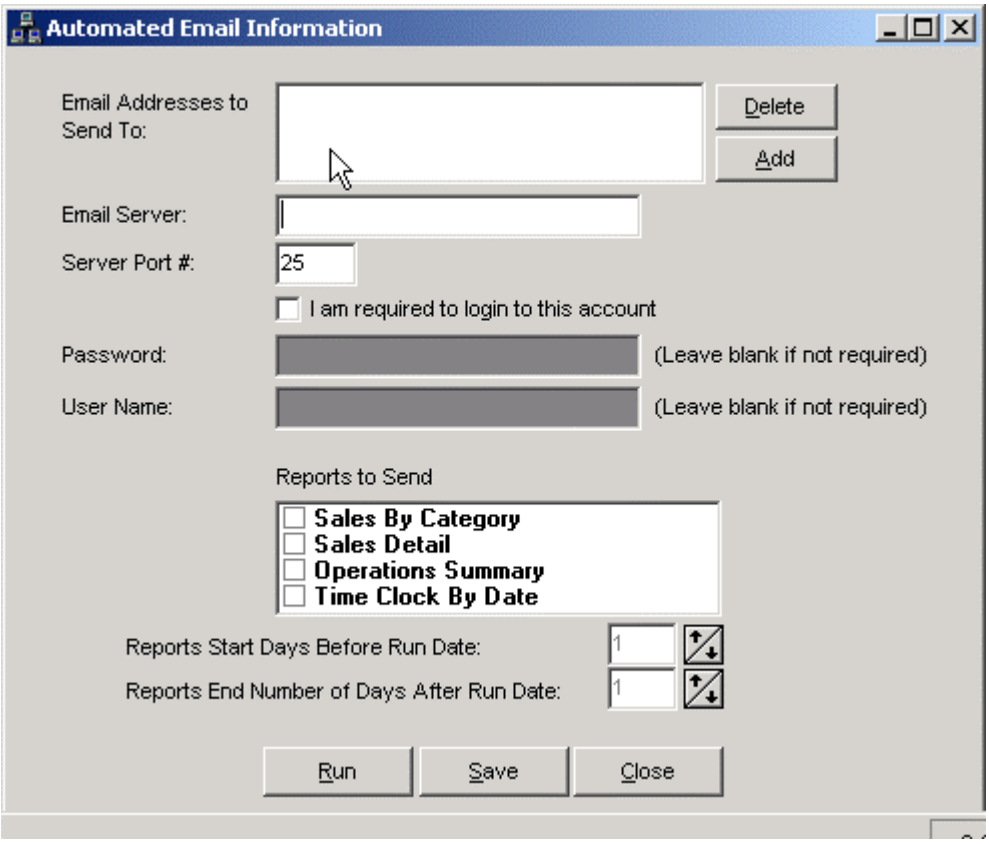
Clock In Restrictions: Enables Clock In Restriction where employees cannot clock in before a specified number of minutes before the scheduled work time of an employee. **Max Mins Before Clock In:**Maximum Minutes an employee can clock in before scheduled time when Clock In Restrictions is enabled.**Maximum Mins After Clock Out:**Maximum Minutes an employee can clock out before scheduled time when Clock In Restrictions are enabled.

Default Price Level:

As described in the Product Management Section, ValuePOS can charge one of 3 different Price Levels at any given time. Here you can set the Default Price Level used when ValuePOS stations are started.

Email Reports Enabled:

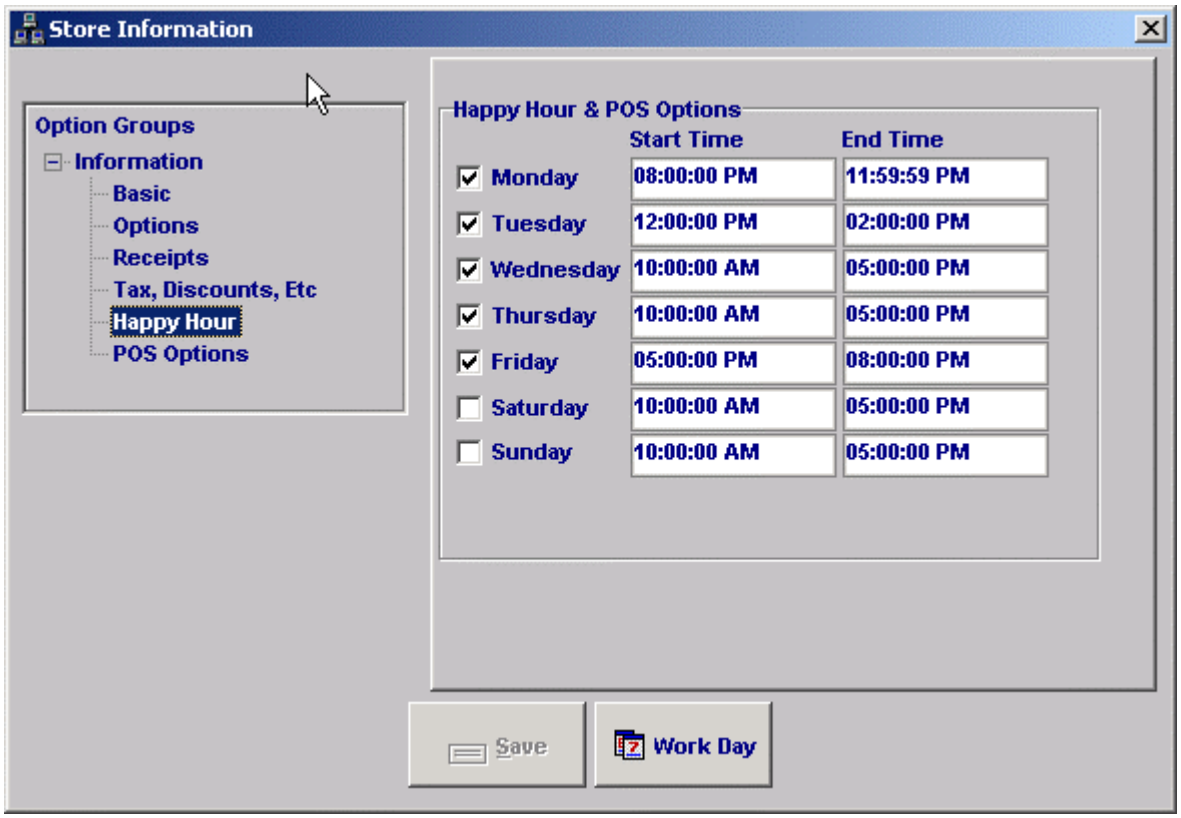
EZManager allows you to email reports to any number of recipients when END of Day is run. These are reports that are converted to .pdf (Acrobat Reader) format and are sent as file attachments to emails sent to everyone in the recipient list.



Suppress Sales Tax when $0 Sub Total:

Ensures that no sales taxes are charged when the sub total is reduced to zero as a result of applying discounts.

Happy Hour Panel:



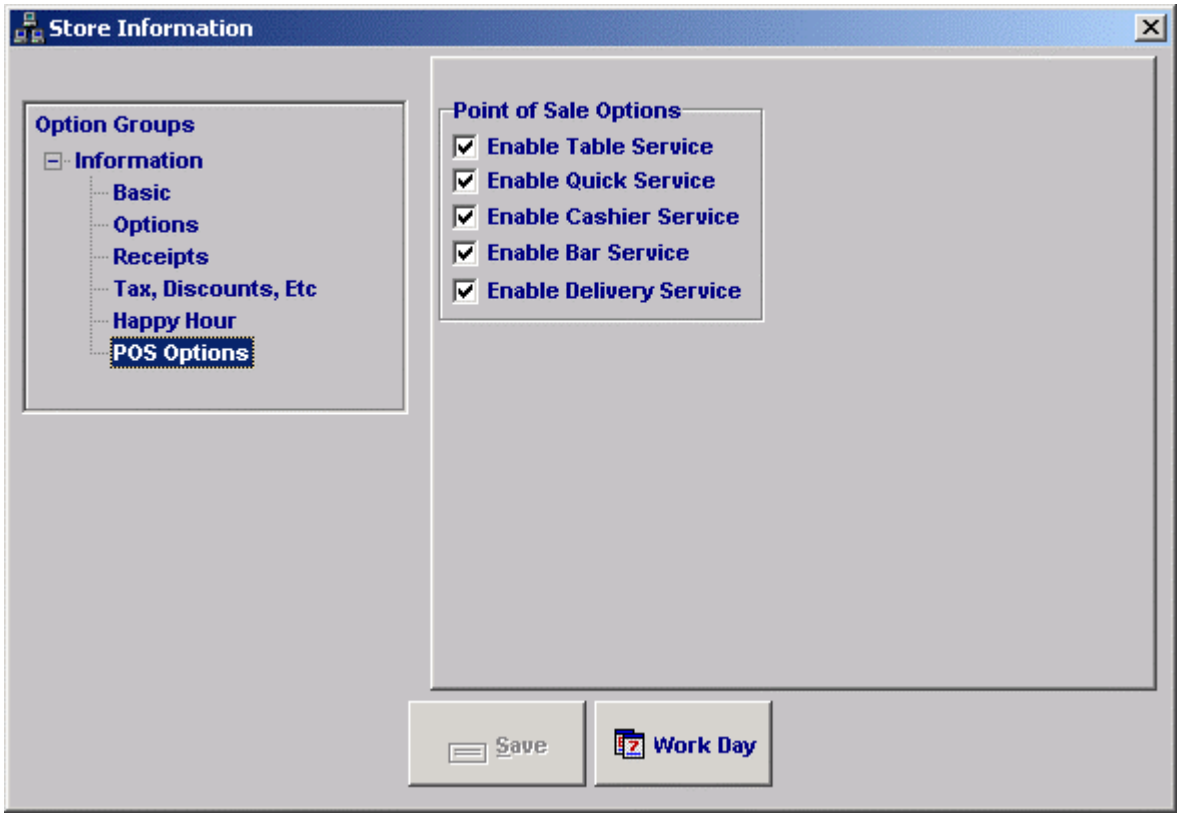
Happy Hour:

Happy Hour times can be set to charge Happy Hour Prices during those times and days that Happy Hour is scheduled. It is partially set here. Enter the Starting and Ending times for Happy Hour as well as those days that Happy Hour will be in effect.

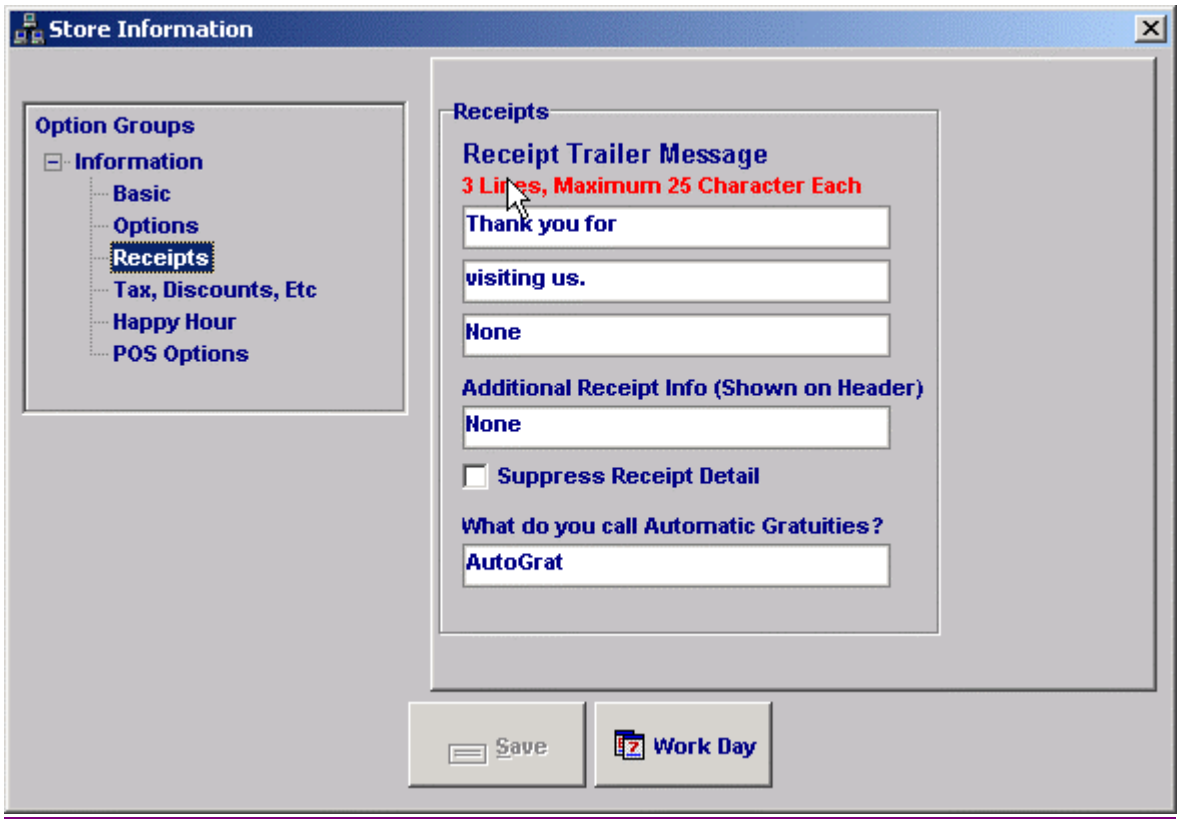
Note: When setting up Products in your system to be a Happy Hour item, you must indicate that an item is a "Bar" item in order for it to participate in Happy Hour Pricing.

POS Options Panel:

You can selectively enable or disable certain Order Entry Screens in ValuePOS by either checking or unchecking these checkboxes. If a Screen is disabled, the button to activate that screen on ValuePOS stations will be grayed out and unavailable.



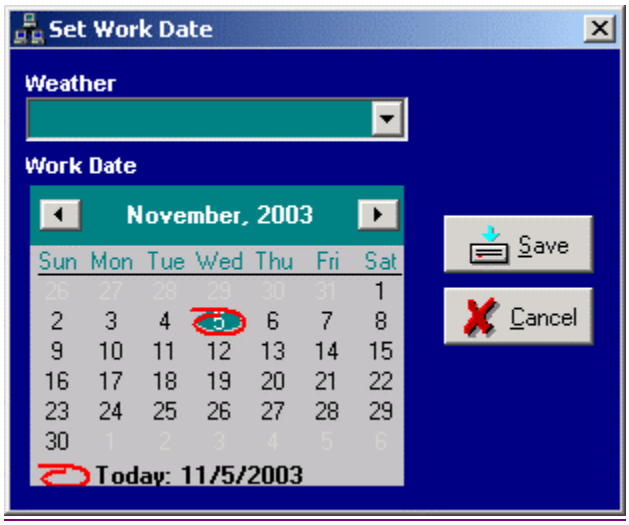
Receipts Panel:



Here you can enter receipt trailer messages that show up on Customer Receipts when printed out as well as other discretionary information.(up to 3 lines) If line has "none", no output to the printer.

Suppress receipt detail : Used with credit card signature receipts and suppresses the line by line description of items purchased by customer.

Work Day Button:



ValuePOS works on the premise of a User Defined Work Date. The reason for this(aside from good accounting practices) is that many restaurants, bars and nightclubs operate past midnight. If ValuePOS used the internal clock of the computer it is running on, then when the day changed after midnight, sales and other important information would show up on two different days when in fact it should show up for one day.

Everyday you are required to enter a current Work Date. When logging into ValuePOS stations, ValuePOS checks to see if a Work Date is set. If one is not, ValuePOS will prompt the user for a Manager Swipe and upon a successful validation, prompt for a new Work Date. You can also set the Work Date from EZManager by clicking this button.

WARNING:

You should never set the Work Date to a date that has already been used. This can cause problems and inconsistencies when running reports.

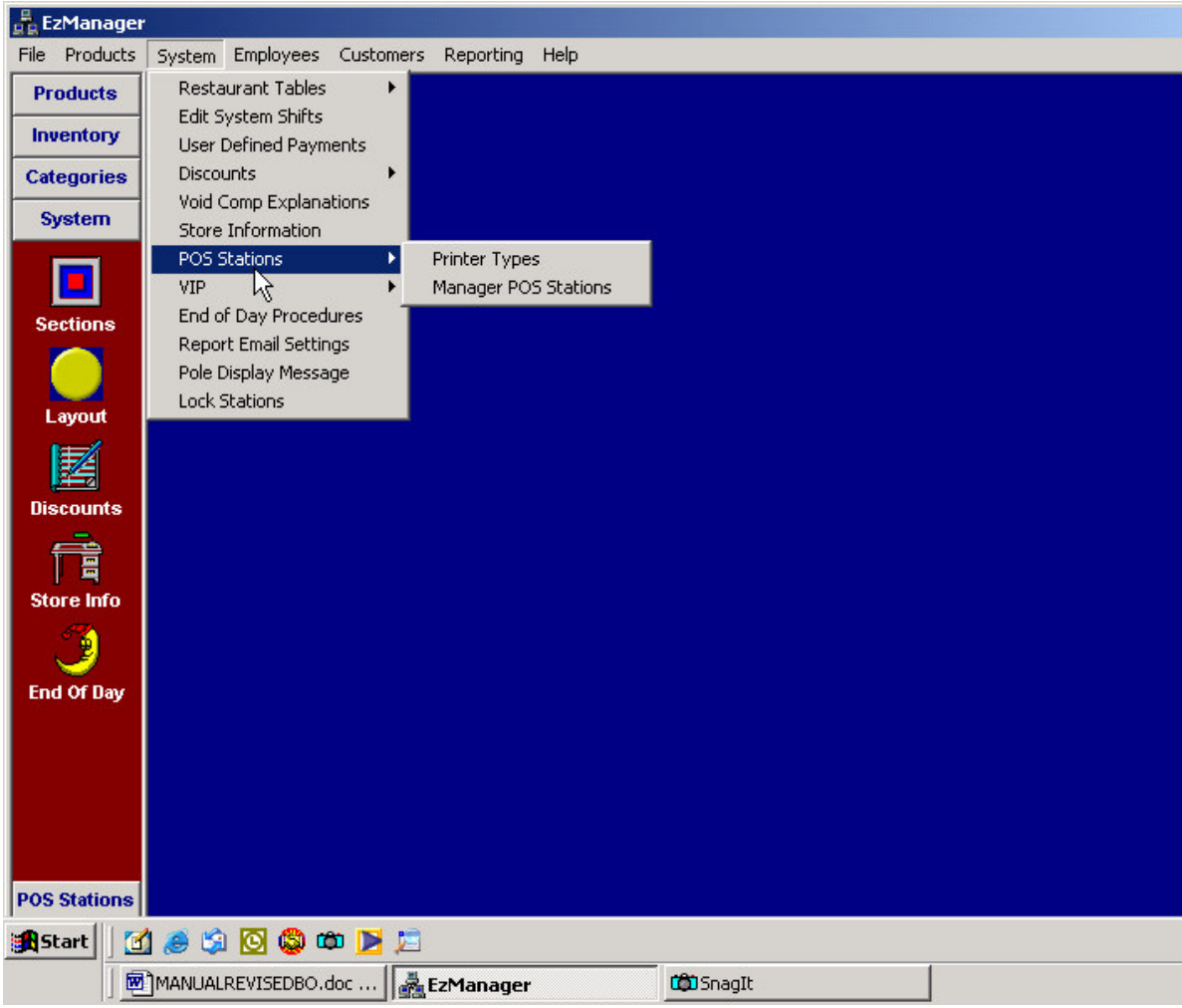
To set New Work Day:

1) **highlight date on calendar**

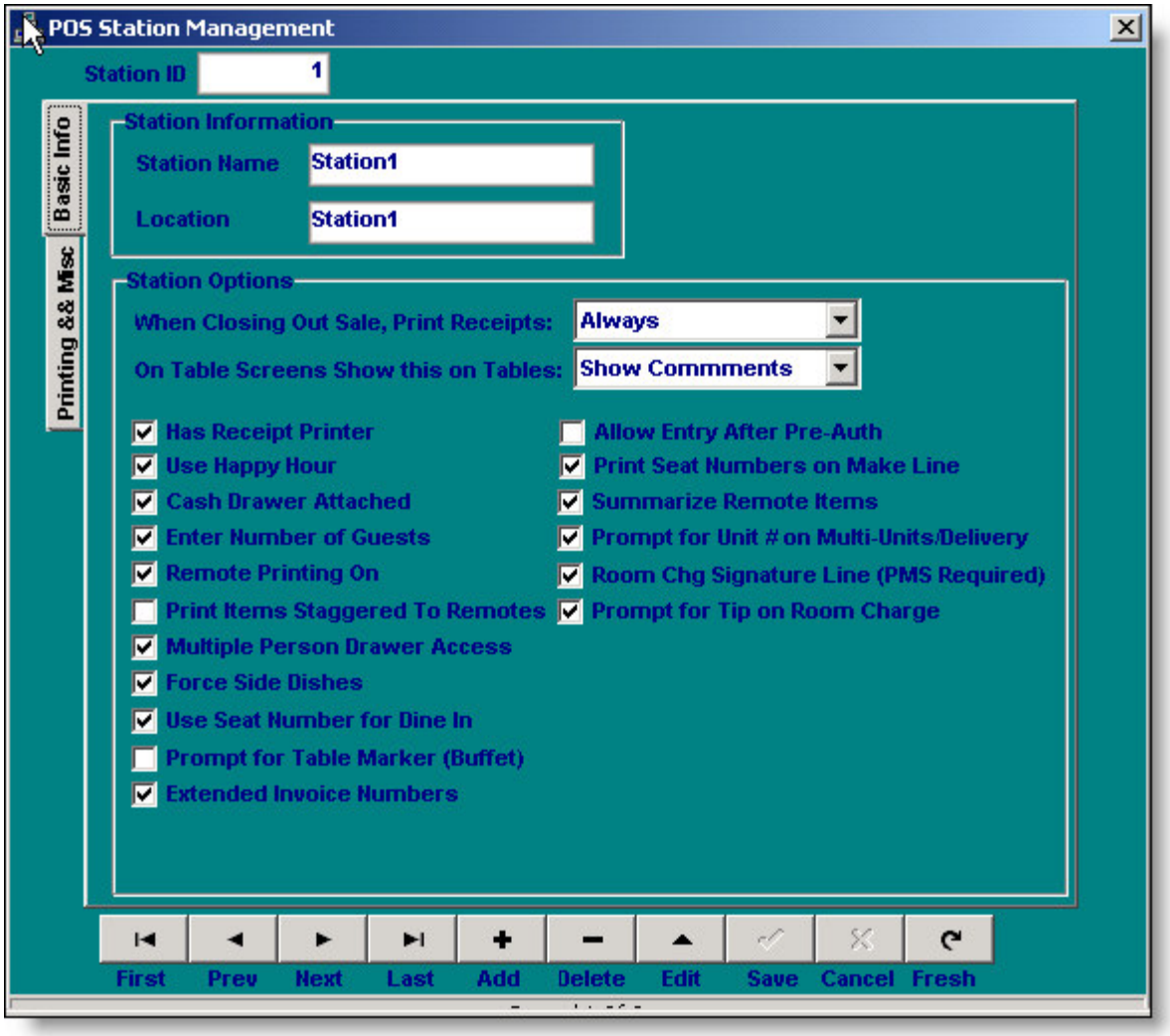
2) **Select a weather type from the weather drop down list**

3) **Click save.**

POS STATION SETUP



POS Station Management:



For each POS station that you will use in the ValuePOS system, you must have a corresponding record in the ValuePOS database. These records contain information that the stations require to determine how they should operate and perform. When you run the software for the first time, it will ask you specific questions about where the database is located, what station number it should act as, etc. This information is stored in a text file named EZTouchPOS.ini on the local POS station. When the software is started, it looks for information in this text such as the station number it should act as, as well as the location of the database server.

ValuePOS uses this information to connect to the database and retrieve operational information for the station number that it is supposed to act as. The information that you supply in the Manage POS stations screen in EZManager is the information that ValuePOS retrieves during startup.

Basic Station Information Panel Tab:

Station ID: Please provide a unique Station number for this field to identify this station.

Numbers should normally start with 1 and increase by 1.

Station Name and Location: Enter a unique Station name for reports, etc.. Enter a location for station for your reference.

Use Happy Hour: Determine if this POS station will participate in Happy Hour pricing when Happy Hour is active.

Cash Drawer Attached: Lets the POS Station know that a Cash Drawer is attached. When this checkbox is checked, the Station will send a "Kick Code" to Kick the drawer open through the local receipt printer. In order to perform sales, the cash drawer will need to be initialized before sales can be entered and paid out at the station.(ValuePOS only supports Printer Driven cash drawers at this time(those cash drawers that are plugged into a local receipt via an RJ-12 (Modular Phone Plug) into the back of local receipt printer)

Has Receipt Printer: Lets the POS Station know that there is a receipt printer attached. The Station will attempt to print receipts when necessary as well as Time Clock receipts, etc.

Enter Number of Guests: When checked, ValuePOS will require that the number of guests be entered on Dine In Sales when new sales are created.(**For Table Service Only**) When this option is checked, ValuePOS will prompt the user for the number of guests when creating a new order Ticket. This information is used for reporting and tracking of sales vs. customers, etc.

Remote Printing On: Lets the POS Station know that it should send print jobs to various remote makeline printers where applicable to handle prep notifications.

Print Items Staggered to Remote:

When this option us checked, the program will print a separate ticket for each item sent to a remote printing location instead of printing all items on the same ticket for that remote printing location.

Multiple Person Drawer Access: If there is a Cash Drawer attached, ValuePOS requires that a Drawer be initialized before sales can be settled at this station. ValuePOS also offers two modes of Drawer Access. When this checkbox is checked, the program will allow anyone who has permission to access cash drawers access this cash drawer. When this checkbox is unchecked, EZManager will only allow access to the drawer by the person who the drawer was assigned to as well as Managers.

Force Side Dishes: When this option is checked, ValuePOS will force all side dishes of a Product to be entered before continuing. If a Product has, for instance, 2 side dishes, ValuePOS will require that both be entered before allowing the user to continue.

Print Receipt After Tender: When this option is checked, ValuePOS will print a receipt automatically whenever an Order Ticket is settled. Otherwise, you must explicitly tell ValuePOS to print a receipt. This option is most useful for those restaurants where customers pay at a cashiers station on the way out and do not need to keep printing receipts. Credit card receipts are always printed.

Use Seat Numbers for Dine In: When this option is checked, POS stations will prompt for a seat number when products are entered onto the customer ticket. **For Table Service Only:** Checking this option will cause ValuePOS to ask for a seat number before entering a new Product on an Order Ticket. ValuePOS will popup a graphical seat screen to allow the user to choose a seat number. When seat numbers are used, ValuePOS prints the Seat Numbers on makeline receipts.

Output Receipts to Screen: This option will cause ValuePOS stations to print customer receipts etc, to the screen instead of to the intended printer.(used for testing purposes)

Prompt for Table Marker (Buffet): This option is designed for Buffet style restaurants where customers choose where they sit. After paying a cashier, the cashier gives the customer a Table Marker (table tent) so that staff bringing food out to customers can easily locate the correct customer.

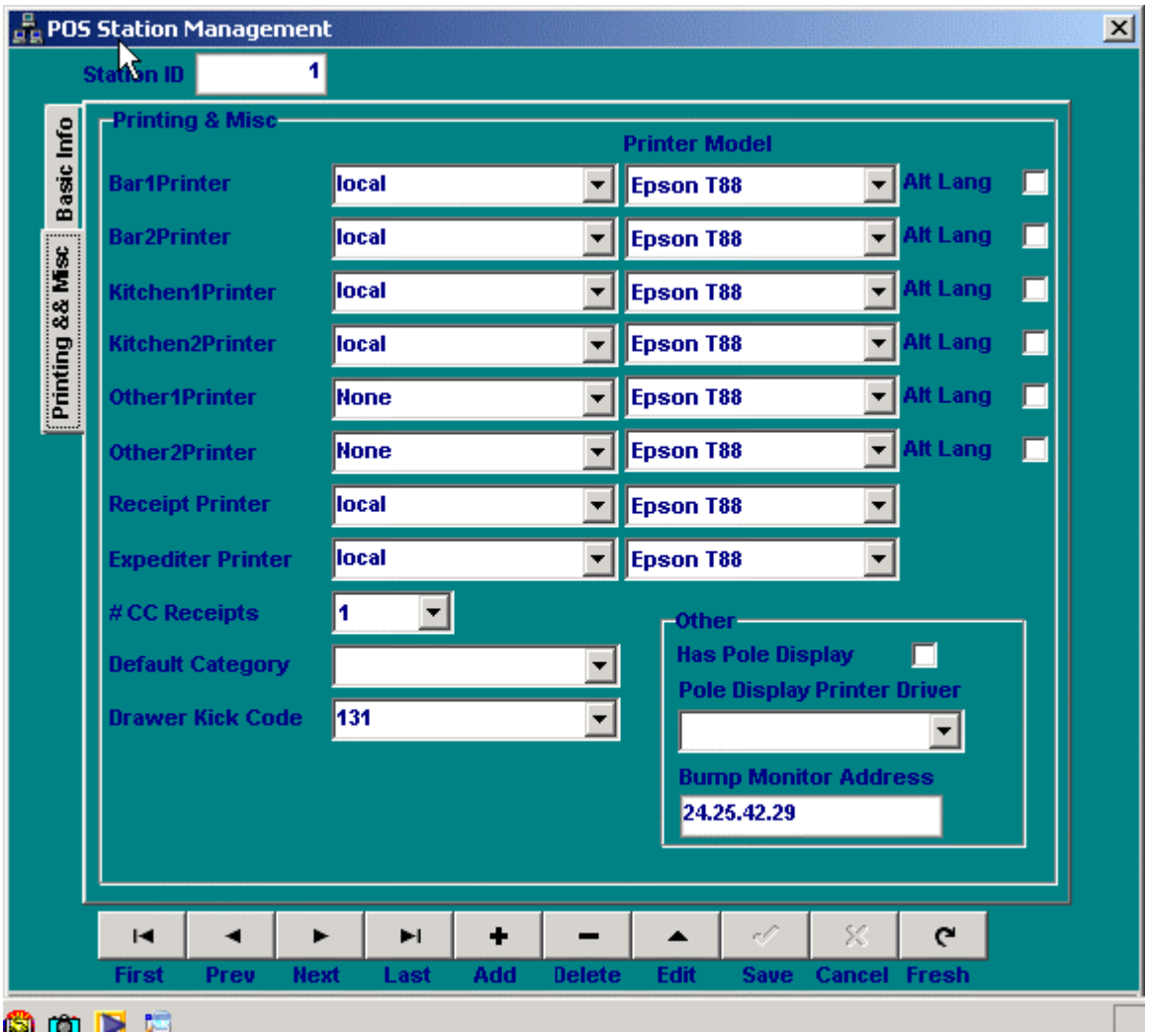
Extended Invoice Numbers: Some locations (and counties) require that a separate invoice be maintained for each individual POS station and printed out on customer receipts. Checking this box enables this feature. This feature is used mostly abroad.

Print Seat Numbers on Make-Line: If Use Seat Numbers for Dine in is checked, this option determines if seat number should also be printed on remote Make Line printers to help with delivery of orders to customer tables.

Allow Entry After Pre-Auth: By Default ValuePOS will not allow further entry of Products once an Order Ticket has been Pre Authorized with a credit card. Checking this box overrides this behavior, allowing an entry of additional Products after a Pre-Authorization.

NOTE: This is only applicable if using integrated Credit Card authorization.

Printing and Misc Tab:



This tab is where you specify parameters that determine how ValuePOS uses local printers as well as remote make line printers as well as other information.

NOTE: Printer names are case sensitive so be sure to use both the correct capitalization as well as spelling if typing the printer in directly.

Expediter Printers are used to print an entire ticket's items so that an expeditier can work to get food out to customers quickly and efficiently. Select a printer that you are using as an expediter printer or leave as None if not using one.

Print # Credit Receipts:

If you are using integrated Credit Card Processing with ValuePOS, you can choose to have 2 receipts print for credit and Pre-Auth sales. If you are not using NCR paper or are using a Thermal Receipt Printer, this option is most useful so that a copy can be printed for both store records and for the customer.

Default Category:

This drop down box contains a list of all the Categories defined in the system. Choosing one from the list will cause that Category to be the default Category shown when a new Order Ticket is created or an existing Order Ticket is opened for modification.

Drawer Kick Code:

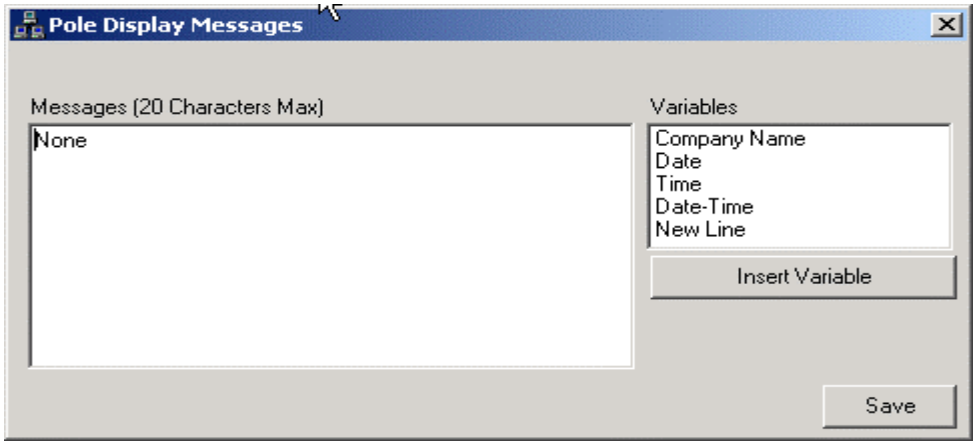
This determines the special code used to kick open a cash drawer. Consult your Cash Drawer's manual for more information on which code to use. (no longer used-see Printer Commands for information on setting up your cash drawer to open)

Default Start Screen:

This list shows different Order Entry screens available in ValuePOS. If you select a screen from this list, that screen will be displayed automatically upon a successful login to this ValuePOS station.

Has Pole Display:

If you are using a Customer Pole Display, then check this box. You need to set up a phantom printer on your computer using the Generic Text Driver and specify the COM Port number that your Pole Display is attached to. These parameters allow you to indicate that a pole is attached and which Printer on the system to use to send data to the printer. Pole displays must support the Epson Command Set or emulate the Command set. Using the Windows Add Printer Wizard, add a printer using the Generic text Driver on the COM Port that you plugged the Pole Display into and name the new "printer" like "LOCALPOLEDISPLAY". Use the drop down box to select the printer driver that you setup for the pole display and make sure that Has Pole Display check box is checked.



Use This Com Port:

Select the Com (Serial) Port that your Customer Pole Display will use, if applicable.Using the Windows Add Printer Wizard, add a printer using generic Text Driver on the COM port that you have plugged the pole display into and name the new "printer" to identify that the pole display is attached-"LocalPoleDisplay"

Use the drop down box to select the printer driver that you setup for the pole display and make sure that Has Pole Display check box is checked.

Bump Bar Address:

If you are using a Bump Monitor, then enter the Network IP address of the Bump Monitor here.

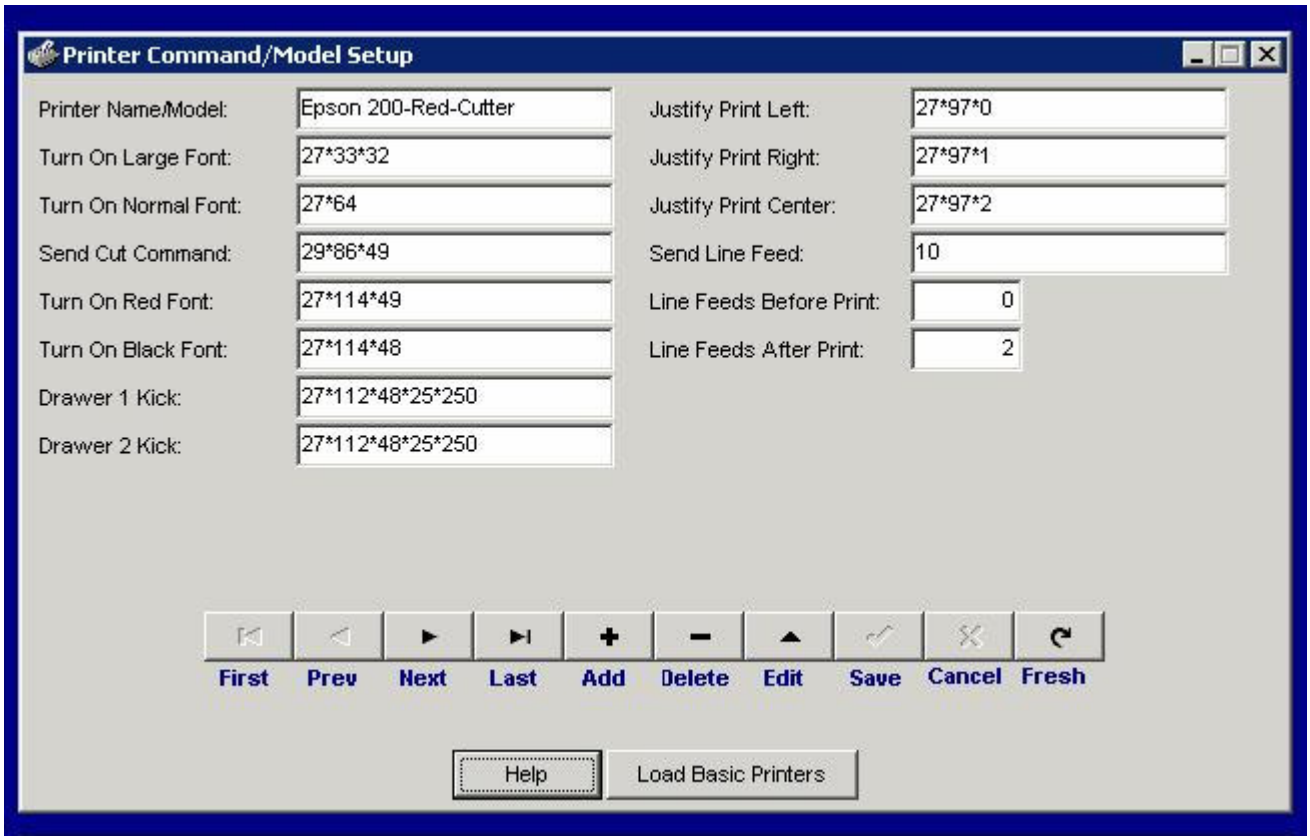
POS Station SetUp Summary:

As a reminder each POS Station will need to have a record in the database. Click on the Add button ion the Navigator control located at the bottom of the Station Setup Screen. You will be in edit mode and all fields will blank out. Enter the necessary information and click Save to commit the new record to the database.

Hint: While you are setting up and testing your POS Stations, it is a good idea to turn off remote printing and have receipt printer output go to the screen.

Printer Types:

ValuePOS can print to any printer that is available to the computer/ station on which it is running. However the program uses a naming systems that needs to be explained for remote printing (make line)



Printer Types Explained:

When it comes to receipt printers, each manufacturer may use different control codes (also called escape codes) to control the various functions of the printer such as printing in bold or red, cut the paper, and determining the size of fonts. So that ValuePOS can use a wide variety of receipt printers, ValuePOS allows you to specify the control codes for the printer that you are using. ValuePOS can use any printer that supports ASCII based control codes.

You can load the default command set for Epson receipt printers by using the Load Basic Printers button located at the bottom of the screen. If you are not using Epson receipt printers, then you will have to locate the appropriate control commands through your printer's documentation. The following printers support ASCII based codes: Epson, Star, Ithaca, Citizen, Samsung. They also support Epson emulation.

Control Codes: These are numbers that represent ASCII (keyboard) characters that are sent to the printer. Control codes need to be entered as Integer(Numeric codes) separated by an asterik. The asterik separate each ASCII code. When the printer receives these codes, instead of printing, the printer changes a certain aspect of its functionality. Each number that is part of a control code must be followed by an asterik(*). For instance , one particular code to kick open the cash drawer attached to an Epson receipt printer is 27*112*48*25*250. Each number represents a

character that is sent to the printer in succession and must be separated by an asterik as shown in the example.

Remote Printers locations are:

As explained in Product Management, ValuePOS maps generic printer names (Assigned to Products) to actual printers available either on the local POS Station or via the network. Here is where those printers are actually mapped.

Bar1Printer

Bar2Printer

Kitchen1Printer

Kitchen2Printer

Other1Printer

Other2Printer

Local Printers are:

Receipt Printer

Expediter Printer

Each of these drop down boxes contains a list of all printers available to the POS Station.For each of these printers, simply select the correct outside printer to use. For instance, if the products that you assigned to print to Kitchen1printer should be forwarded to a printer on your network named Kitchen1, then either select that printer from the drop down box or type it in directly.

NOTE: Printer names are case sensitive so be sure to use both the correct capitalization as well as spelling if typing the printer in directly.

Each of the Make line Printers has 3 attributes associated with them and they are:

Printer Name: This is the name of the printer as it is called in the operating system. Use the drop down box to select a printer that is installed on the local machine to print to. You can also type the name of the printer directly into the drop down field.

Printer Model: These are the printer types(with control codes) that you set up. The station needs to know how to operate the printer through the control codes that you specified. Choose it from the drop down box.

Alt Language: Alternate Language will print (if available) when sending jobs to the printer.

Local Receipt Printer: Select the local receipt printer from the drop down box or type it in directly.

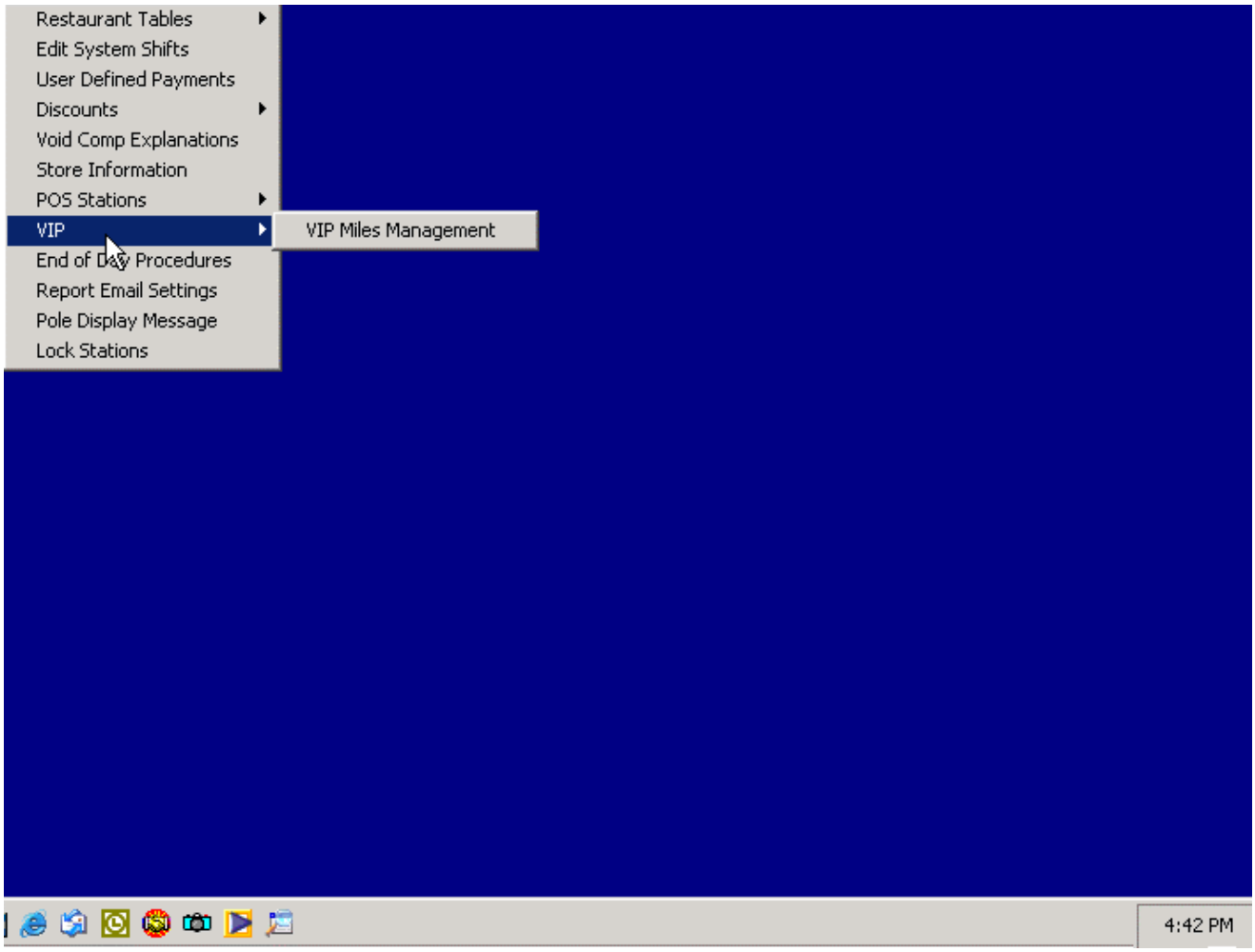
Expediter Printer: Expediter Printers are used to print an entire ticket's items so that an expeditier can work to get food out to customers quickly and efficiently. Select a printer that you are using as an expediter printer or leave as None if not using one.

VIP MILES MANAGEMENT

ValuePOS offers functionality for real-time VIP and also for Gift Card Processing using custom logo magnetic stripe cards. This screen allows you to determine which actions earn VIP miles for customers and how many miles will be earned.

NOTE: Gift Card Processing has a special transaction fee attached for its implementation.

.



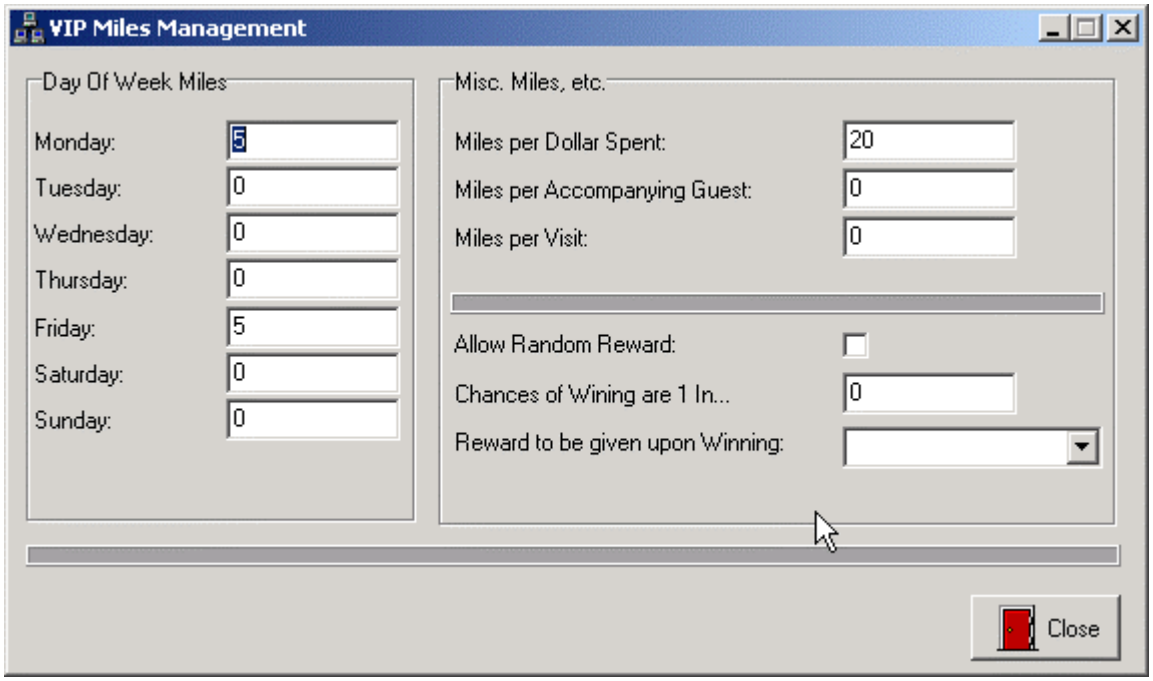
Day of Week Miles: This section allows you to forward VIP points to customers for visiting your restaurant certain days of the week. This is useful for increasing business on those days of the week where business is not usually very brisk.

Misc Miles, etc: Miles Per Dollar Spent: This field allows you to give a certain number of points for each dollar that a customer spends in your restaurant.

Miles Per Accompaning Guest: This field allows you to set the number of points that a customer earns for each guest that accompanies them.

Miles Per Visit: This field allows you to set the number of points that a customer earns for just visiting your restaurant on any given day.

Random VIP Rewards: You can use this feature to award gifts or prizes to customers based on the odds that you set.



VALUEPOS DGS GIFT CARD / VIP SERVER

ValuePOS Gift Server and VIP server is a revolutionary service provided to ValuePOS customers to enhance value to your customers and boost profits by increased customer patronage.

The 1-2 Punch for Greater Profits:

The Gift Card Server provides a 1-2 punch for profits and ease of use for your customers because it provides both Gift Card and VIP (Frequent Diner) services to your customers. Gift Card and VIP services work together to bring you more profits by increasing customer patronage through rewards.

HOW IT WORKS:

The Gift Card Server works just like a Credit Card Merchant Account. The only difference is that the servers are hosted by ValuePOS that relieves you of the burden of hosting sophisticated transaction processing servers. All you need is an internet connection.

Let's say that one of your customers "John" has a sister, "Jane" who is having a birthday and John wants to treat his sister to a night out at your restaurant. John would purchase a gift card from your restaurant that is magnetically encoded just like a credit card (which can also have your restaurant logo) that he gives to his sister for her birthday.

Jane comes to the restaurant with her husband and they have dinner at the restaurant. When it comes time to pay, Jane presents her gift card to the cashier/ wait person. The cashier then swipes the DGS Gift Card as they would any credit card and the card is validated with our servers in real time. The amount of the payment is taken from Jane's account and the card is returned to her.

WHAT ELSE DOES IT DO?

DGS services provide a Frequent Diner System (FDS) for your customers as well. As a matter of fact, when a Gift Card is issued, the customer is automatically enrolled into the FDS system as well. With this system, you can determine how points are awarded to customers for various activities such as :

- Separate VIP points for each day of the week.
- Points Per Dollar Spent
- Points for Accompanying Guests
- Points Per Visit
- Random Awards presented at time of tender according to your odds of winning.

You can also determine VIP points to dollar ratio for your customers as well. For instance, you can specify a 50:1 ratio (50 points to $1.00 and how you award those points is up to you.

TAKING FULL ADVANTAGE OF THE POWER OF THE INTERNET:

The Gift Card Server takes full advantage of the Internet and the power it brings to businesses just like yours. All transactions with the Gift Card Server are TCP/ IP based (same protocol that your web browser uses) and they are protected by 128 bit industrial strength strong encryption. Processing takes as little as 1-3 seconds.

The Gift Card Server allows you to create/ activate customer Gift/ VIP cards directly from your business using a standard web browser. Simply fill in the customer information and specify the card number that you issued to the customer, click Save, and the card is activated.

NOTE: There may be a $.30 transaction fee per transaction involved for transactions hosted by the gift card server. Gift Cards cost between $4.00 per card without logos to about $6.95 per card with logos. Volume discounts may apply. Please ask us to quote you.

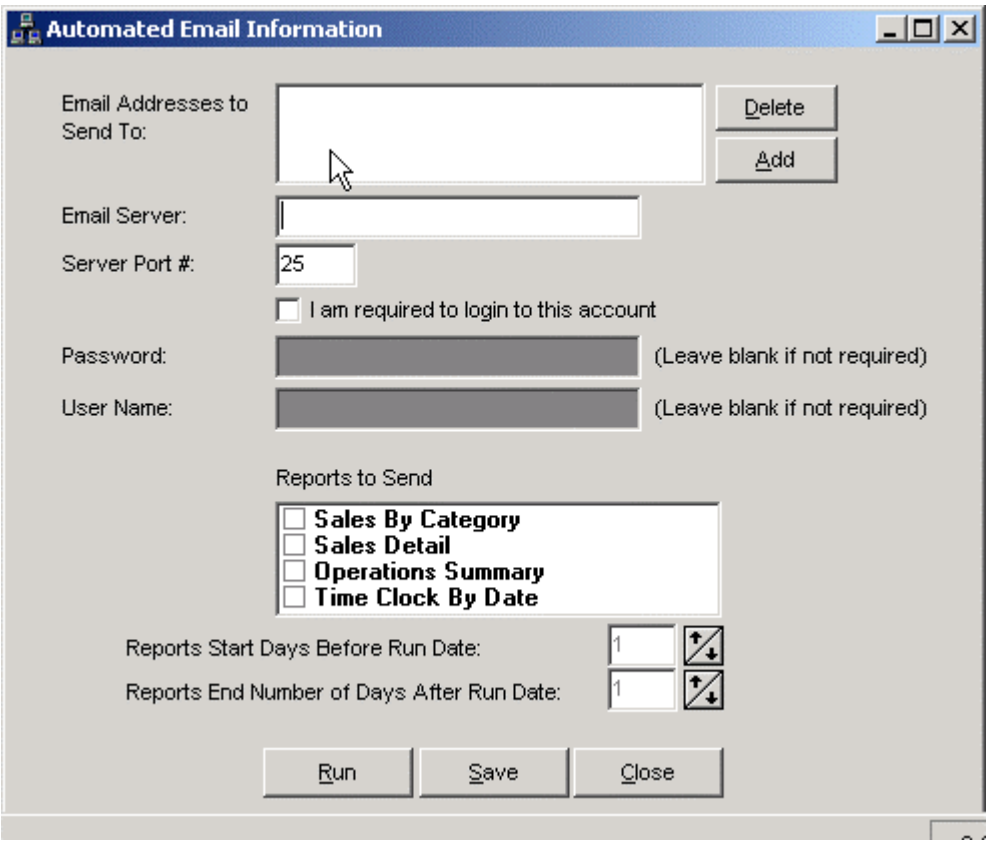
BENEFITS:

- **Increase profits by rewarding customers for their business every time they visit your restaurant, bar, club, diner, etc.**
- **Offer customers the benefits of the Gift Cards that automatically enroll the recipient in the Frequent Diner System.**
- **Display a professional image to your customers with attractive Gift and VIP cards or simply create your own and enter the number manually.**
- **Multiple unit operators get the benefit of Universal Gift cards and VIP tracking from a single central source, so your customers can use the cards at any of your locations or businesses just like national chains.**
- **You get complete control over card issuance and management though our state of the art web based management tool.**
- **Use DGS for Gift Card Service, Frequent Diner Service or both.**

Report Email Settings:

Another nice feature of the manager software is that you can email reports to yourself or any number of people automatically at a set time each day. The program will generate and email to everyone on the list and add attachments for each report that you send. These reports are generated as .pdf.

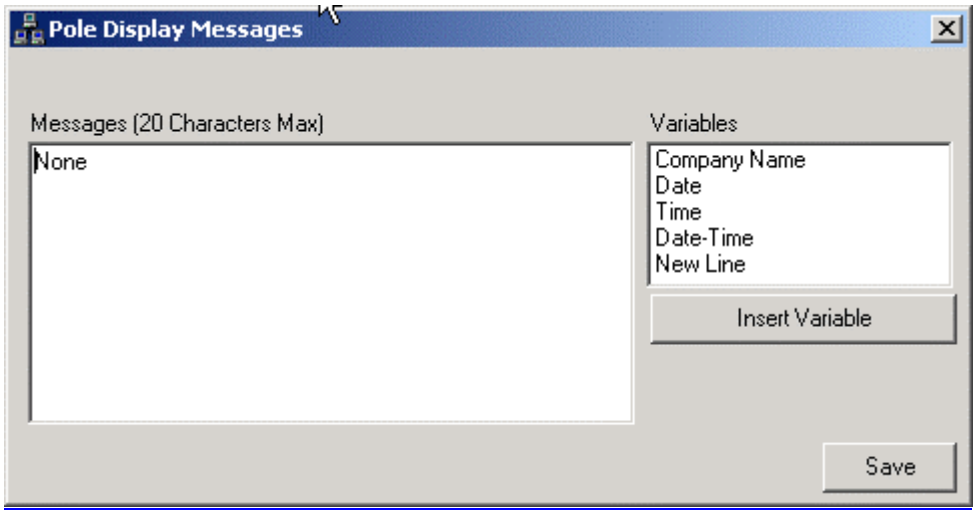
Fill in the information about the email account that you will use to send the emails and choose the reports that you would like to have sent.



Lock Stations

You can effectively lock down ValuePOS stations from the EZManager Software when using this option. If a user is entering a sale at the time you lock down stations, they will be allowed to finish what they are doing. Stations will remain locked down until you unlock the stations from EZManager..

POLE DISPLAY MESSAGES:



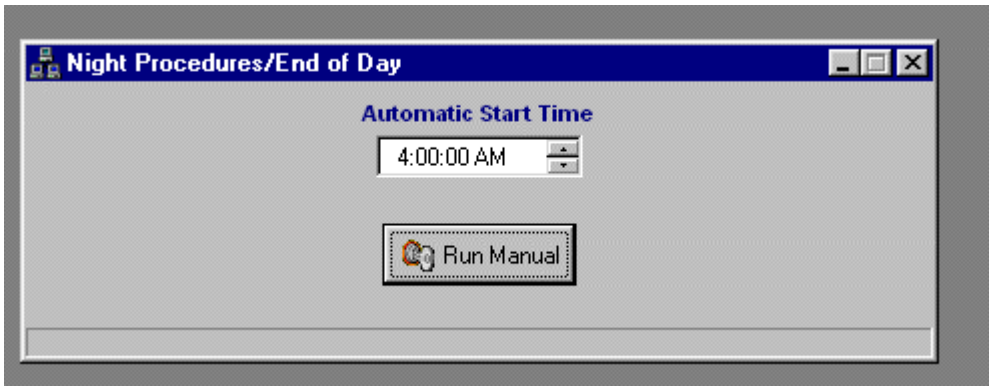
EZManager allows you to customize the messages that are displayed on an optional Customer Pole Display when the system is idle. For instance, when EZManager defaults to the built in screen saver, ValuePOS will cycle through the messages that you enter using the Pole Display Messages dialog.

MESSAGES: Each line that you create in this text area represents a single message that will be displayed on the customer pole display when the POS station is in screen saver mode. ValuePOS cycles through messages every 15seconds. If you programmed Your company name first, it will be displayed first and then whatever else you have programmed 15 seconds later.

Each line should be no longer than 20 characters because that is the standard number of characters that a pole display will show at any given time.

VARIABLES: The Pole Display Messages dialog includes built in variables that you can include in your messages. Variables take the form of <Variable> where the name of the variable indicates what will show up in the message. For instance, if you insert the variable <COMPANYNAME>, at run time, VALUEPOS will replace that placeholder with the actual name of the company that is found in the VALUEPOS database.

END OF DAY PROCEDURES



Night/ End of Day Procedures Explained:

Night/ End of Day Procedures is an important part of your daily routine in the operation of your ValuePOS system.

Value POS works on the premise of a "Work Day". The date is set manually for each day of business to ensure that the correct date is selected.

During the "Day", ValuePOS holds much of your sales information in temporary database tables. Why?

Let's say that you create a new Order Ticket, add a few items to it and then close it. Now, let's say you come back to that Order Ticket, add a few items to it and then close it. Now, let's say you come back to that Order Ticket and want to add a few more items. It is much faster and more efficient for ValuePOS to look through a few hundred or even a few thousand records than it is to look through the 10's of thousands of records that you'll eventually accumulate over time.

When Night/ End of Day Procedures is run, many things happen. Ezmanager takes all of your sales data, formats it and moves it from temporary tables to permanent tables to be reported on and analyzed. EZManager also performs Inventory Explosion, resets database generators(auto increment fields) among other maintenance chores.

Note: A 24 hour mode has been added to this setting. In Store Information-Options, you can check the box and enable this feature. EZManager will "rollover" any sales that were left open to the next Work Date. The Work Date will be incremented automatically as well.

MANUAL VS AUTOMATIC END OF DAY CLOSEOUT:

Although, you can perform end of day automatically or manually, we suggest you use manual end of Day closing . Sometimes, for whatever reason, you may not close at your normal time and if oyu have automatic end of day turned on, you will have a closeout during the time you are still open.

IT IS IMPORTANT THAT YOU RUN END OF DAY PROCEDURES AT THE END OF EVERY BUSINESS OR WORK DAY

On Running Reports:

Many reports included with the program require information that is not present in permanent database tables until End of day procedures are performed. For this reason, you may find it convenient to run End of day procedures manually at the end of the day. Of course, ValuePOS provides up to the minute reporting from ValuePOS stations. If you do not need to have these reports that are generated from information in permanent database tables right away, you may find it more convenient to have EZManager run End of day procedures for you at a prescribed time when the store is closed.

WARNING:

Make sure that Night/ End of Day Procedures Start Time (for automatic running of End of day procedures) is never set to a time when you will be conducting business. If this happens, you will lose all of your sales Tickets because it will be transferred to permanent tables.

HELPFUL HINT

YOU CAN DISABLE END OF DAY PROCEDURES BY ENSURING THAT END OF DAY PROCEDURES START TIME IS SET TO 12:00:00 AM EXACTLY.

Accessing End of day procedures:

End of Day Procedures can be accessed by going to:

SYSTEM>End of Day Procedures

NOTE: Added functionality to allow manual end of day procedures to be performed even if there are open drawers. This sets the status of the drawers to closed.

Before you run End of Day, there are a number of things that must be checked.

Open Sales: **There msust be no open (un-settled sales)**

Employees Still Clocked In: **You must ensure that all employees have clocked out**

Finalize All Credit Card Sales: **You must perform finalization of all credit card transactions**

Close All Cash drawers: **You must close all cash drawers that have been initiated.**

CHAPTER 3

SYSTEM CLOSEOUT

Your ValuePOS system must be closed out each day on order to begin the day on the next day.

Since foodservice establishments can operate beyond midnight on many nights, it becomes necessary to define what a "day" is to the computer so that all reports can balance for each "day" regardless of whether
Midnight has passed or if the date has passed into the next day. As far as ValuePOS is concerned, a day is one operating cycle and that operating cycle is determined at the start of each day with a fixed date being established as the operating day. The system, therefore, will prompt you to enter the "Start Day" each time it senses a closeout (end of day procedures) has been performed. Therefore, as far as the software is concerned, a day can have fewer than 24 hours, or can have 48 hours, or 72 hours, etc. A day is from the moment you do the Start Day Procedure to the moment you do your End of day procedures.

This section of the manual will provide step-by-step details on closing out your system each evening and then starting the system the next morning, or that same evening. The only differences in procedures will be if you have a credit card processing option installed in your establishment. If you have that option, please refer to the additional section in the back of this chapter.

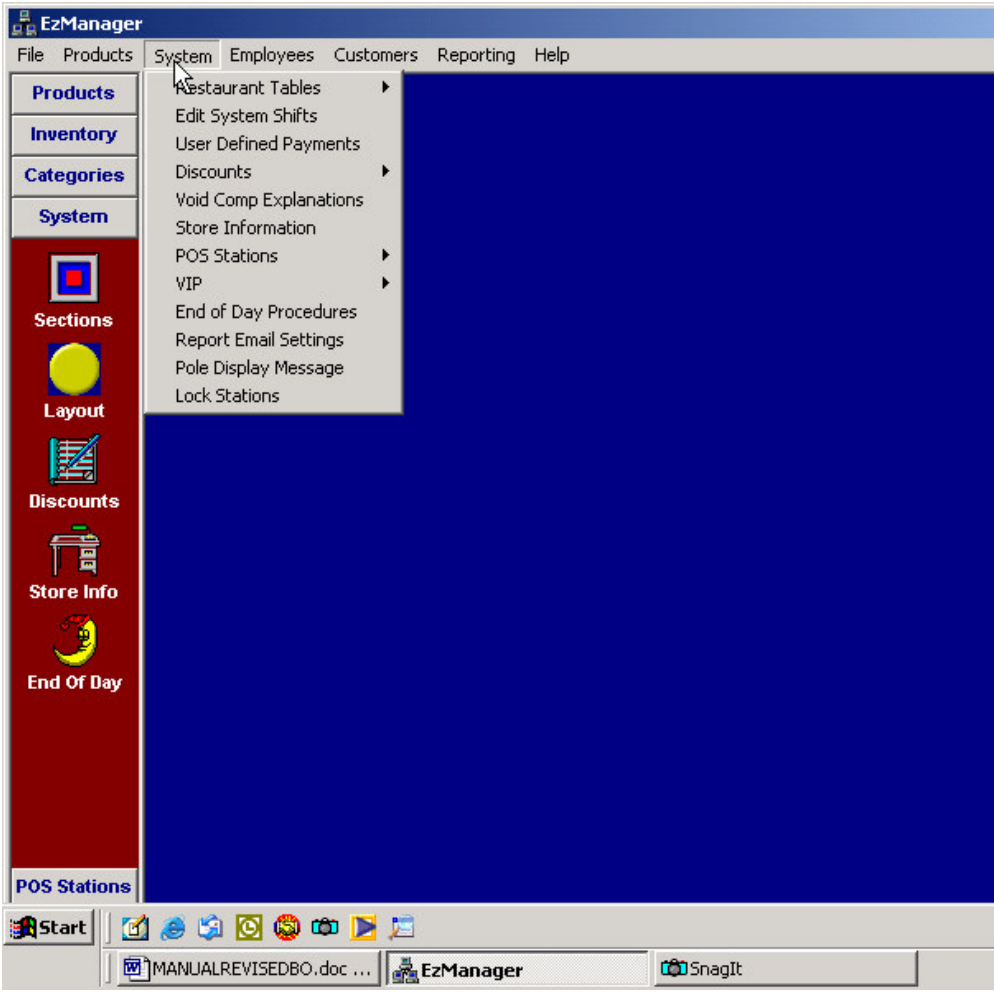
Let's begin with the Start Day Procedure since; you can't have a Night Procedure closeout if you do not have a Start Day.

START DAY PROCEDURES:

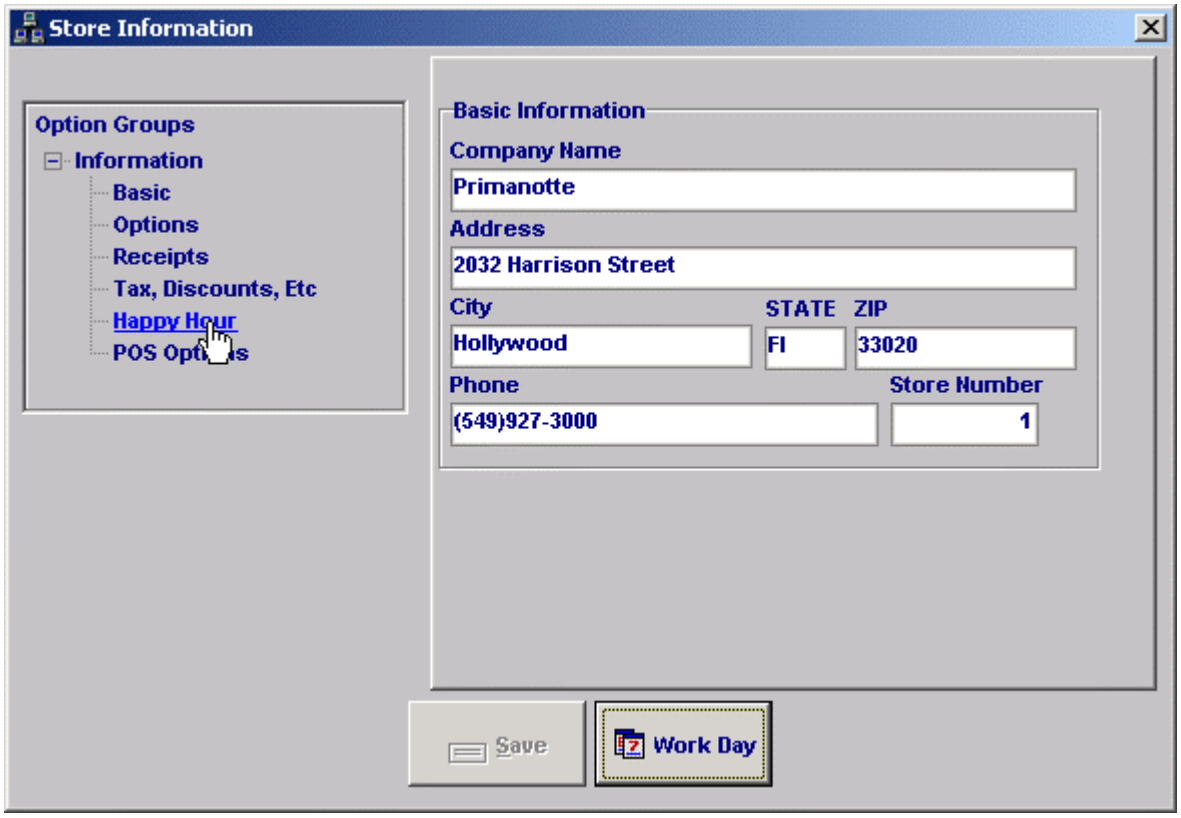
To Start the day you have two different places where you can actually define the start day. You can do this from any touchscreen terminal running the front of the house directly from the keypad (note: you will need a manager card swipe), or you can perform the same function from the back of the house application.

From the front of the house, simply enter your employee code, if the system has been closed out or was closed out the night before, the system will indicate that NO START DAY HAS BEEN SET and will prompt for a manager swipe. Swipe your manager card. A keypad will appear prompting you to enter the start date. Enter it in the standard date format xx/ xx/ 200x. Press OK. If you are directed into the system, you have successfully started the day. Please be very careful when entering the date. If you enter the wrong day, month, or year, the system will still operate, but you will be operating on a different day, month, or year. If no year is entered, the system defaults to the year, 1899. BE VERY CAREFUL.

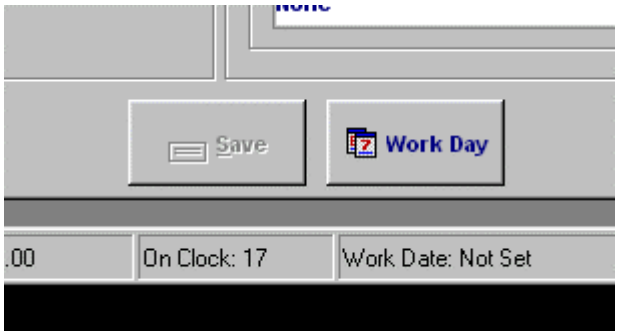
You can also set the system date from the back of the house application. Simply choose System Menu and Proceed to store information. Double click and open up this part of the application.



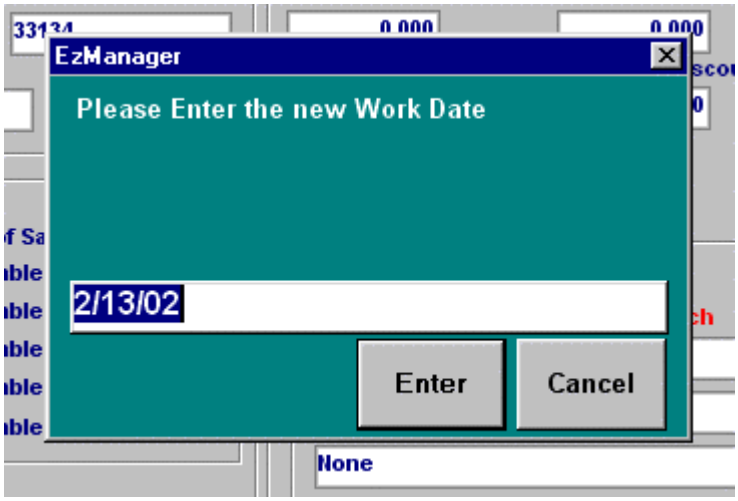
You will see a screen that looks like this.



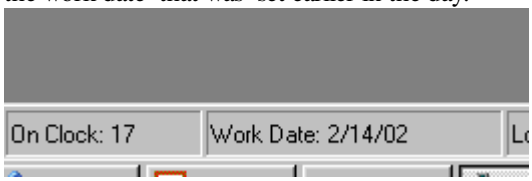
Select the button at the bottom of the screen called Work Day



It will pop up a screen prompting you to enter the workday. Enter the date and press enter to confirm. The workdate has now been set properly. You will be able to work in the front of the house system at all workstation terminals.



Note that at the bottom of the back of the house application, you will be able to confirm the work date that was set earlier in the day.



Use this to confirm that the workdate was set correctly. If your system still says closed in this area after you have entered the workdate, exit the application and re-start it. It will refresh and display the current work date.

SYSTEM CLOSEOUT

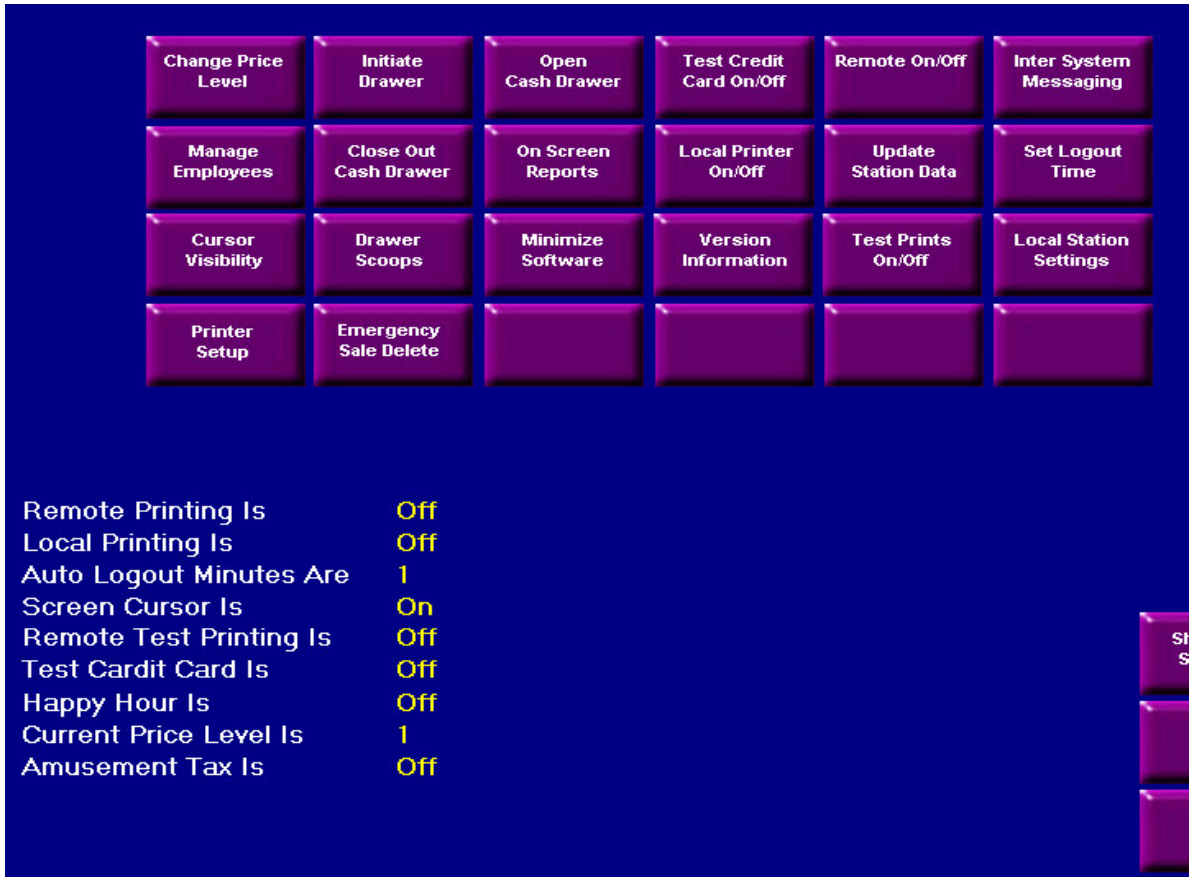
END OF DAY PROCEDURES

(Non Credit Card Systems)

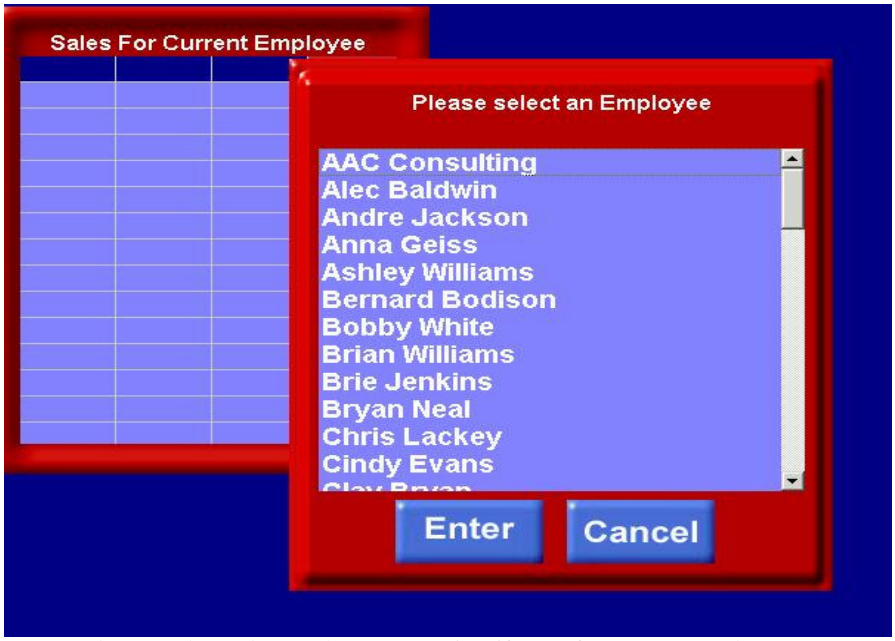
At the end of each day, you must perform several procedures in order to close the system in such a way that you have all transaction information printed for your accounting personnel and to make sure you can balance the day's transactions accordingly. Follow these steps.

1) From the Front of the House, enter a manager code or swipe your manager card to enter the system. Proceed to the manager area. Double click Manager menu.

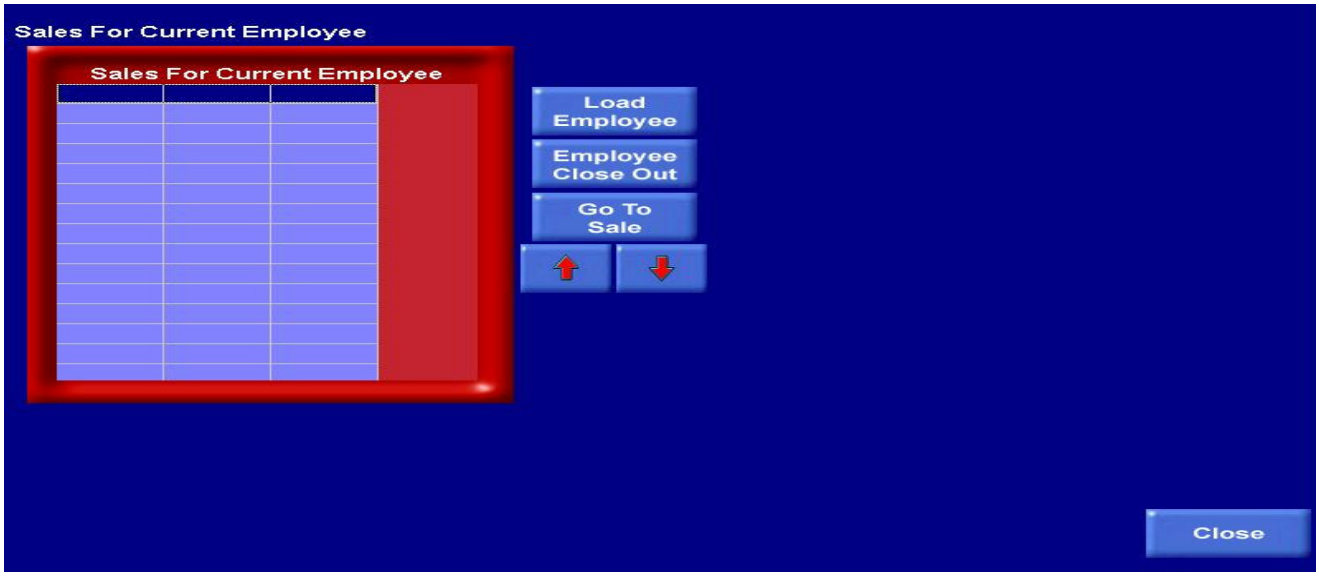
You will get a screen that looks like this:



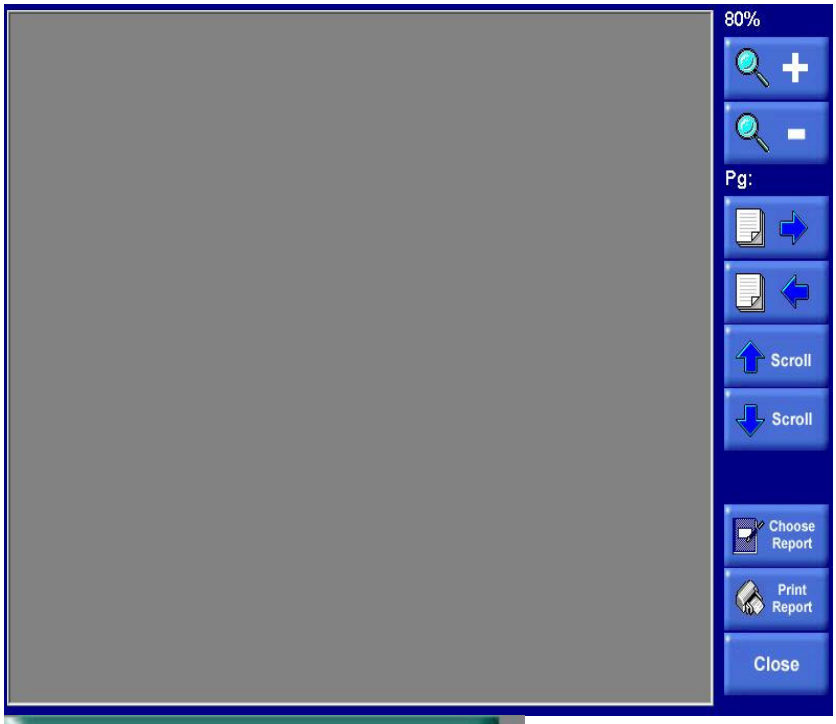
2) Proceed to select the Manage Employee Button . You will see a screen that looks like this.



3) Press the Load Employee Button and proceed to select each server to view if any of your servers have any open Tabs. You cannot close the system if there are any open tabs or tables. Otherwise, active tables or tabs will be destroyed should a closeout be performed.



4) You want to make sure that all transactions indicate that the procedure is closed. If any transaction is open, you must instruct the server to close the transaction, or the manager should close it accordingly. Simply highlight the order and press GO TO ORDER button. Proceed to close the transaction.
5) Another way to be able to view open transactions is to print a transaction report. Proceed to manager menu , ONSCREEN REPORTS, REPORTS, and press Sales Detail Report.



6) This report called The Sales Detail Report displays all the transactions including closed transactions, open transactions, and void/ comp transactions. It makes this report very versatile for seeing any open tabs, who owns those tabs, and for finding lost tickets/ tabs. For closing out the system, it makes life easy to find out who has existing open tables. View the report and instruct those with open tables/ tabs to close them all in preparation for your system closeout.

Sales Detail By Sales Status, then Sale #
(These sales reflect all sales that have been created and are either open or closed)

Sales that are Closed

Order #	Sub$	Sales Tax	Alc.Tax	Ent. Tax	Local Tax	Total	Auto Grat	Employee
8	14.64	0.74	0.00	0.00	0.00	15.38	0.00	Jason Franklin
9	6.00	0.30	0.00	0.00	0.00	6.30	0.00	Jason Franklin
10	33.00	1.65	0.00	0.00	0.00	34.65	0.00	Jason Franklin
11	5.50	0.28	0.00	0.00	0.00	5.78	0.00	Jason Franklin
12	8.25	0.42	0.00	0.00	0.00	8.67	0.00	Jason Franklin
13	5.50	0.28	0.00	0.00	0.00	5.78	0.00	Jason Franklin
14	5.50	0.28	0.00	0.00	0.00	5.78	0.00	Jason Franklin
15	51.76	2.59	0.00	0.00	0.00	54.35	0.00	Jason Franklin
16	5.50	0.42	0.00	0.00	0.00	5.92	0.00	Jason Franklin
18	11.98	0.90	0.00	0.00	0.00	12.88	0.00	Jason Franklin
20	18.88	1.42	0.00	0.00	0.00	20.30	0.00	Jason Franklin
21	25.17	1.89	0.00	0.00	0.00	27.06	0.00	Jason Franklin
22	14.28	1.07	0.00	0.00	0.00	15.35	0.00	Jason Franklin
23	10.98	0.83	0.00	0.00	0.00	11.81	0.00	Jason Franklin
24	5.90	0.30	0.00	0.00	0.00	6.20	0.00	Lindsay Wilson
25	0.70	0.04	0.00	0.00	0.00	0.74	0.00	Lindsay Wilson
26	0.20	0.01	0.00	0.00	0.00	0.21	0.00	Lindsay Wilson
27	1.45	0.08	0.00	0.00	0.00	1.53	0.00	Lindsay Wilson
28	0.20	0.00	0.00	0.00	0.00	0.20	0.00	Lindsay Wilson
29	3.05	0.16	0.00	0.00	0.00	3.21	0.00	Lindsay Wilson
30	0.18	0.02	0.00	0.00	0.00	0.20	0.00	Lindsay Wilson
31	1.10	0.09	0.00	0.00	0.00	1.19	0.00	Jason Franklin
32	1.00	0.08	0.00	0.00	0.00	1.08	0.00	Lindsay Wilson
33	1.70	0.13	0.00	0.00	0.00	1.83	0.00	Jason Franklin
34	0.20	0.02	0.00	0.00	0.00	0.22	0.00	Lindsay Wilson
35	0.20	0.02	0.00	0.00	0.00	0.22	0.00	Lindsay Wilson
36	0.10	0.01	0.00	0.00	0.00	0.11	0.00	Jason Franklin
37	1.40	0.11	0.00	0.00	0.00	1.51	0.00	Lindsay Wilson
40	0.10	0.01	0.00	0.00	0.00	0.11	0.00	Lindsay Wilson
41	0.70	0.06	0.00	0.00	0.00	0.76	0.00	Lindsay Wilson
42	0.10	0.01	0.00	0.00	0.00	0.11	0.00	Lindsay Wilson
43	0.10	0.01	0.00	0.00	0.00	0.11	0.00	Lindsay Wilson

Servers should perform their own server closeout and clock out of the system prior to you performing the system wide closeout.

7) Once you have determined that all servers have closed out all tables, all voids have to be recorded, and the system is ready to be closed out. Print the Sales Detail Report.

8) Next locate the Current Sales Status Report from the same list of reports and print this report to your wide printer as well.

Sales By Shift Then Employee
(Sales figures include sales taxes and reflect only those sales that have been settled)

Shift	Employee	Sales
Shift Four		
	Jason Franklin	150.80
	Lindsay Wilson	16.41
Total For This Shift:		167.21
No Shift		
	Jason Franklin	82.34
Total For This Shift:		82.34
Total Sales for All Shifts and Employees:		249.55

Payment Collected By Payment Type & Purpose
(Includes all payments made, regardless of sales status)

Payment Type	Purpose	Payments
Visa		
	Credit Tip	5.00
	Order Payment	75.14
Total For Visa		80.14
Total Payments for this Report:		80.14

Sales By Department/Category/Product
(Does NOT include Sales Taxes. Product sales only on Settled Sales.)

Department/Category		Product	Count	Sales
Beer Wine	Beer	1.75 Smirnoff Ice	1	5.00
		Corona	9	24.75
		Heineken	1	2.75
		House Wine	1	2.75
		Killians Red	9	24.75
		New Castle	3	8.25

9) You will also want to print the Snapshot Report

Snap Shot Report

Printed: 11/07/2002 2:28 PM

Sales By Section, Shift
(Shows only sales that have been settled)

Table Section	Shift	Guests	Sales	% Of Sales
Patio	Shift Four	33	127.72	51.18%
	No Shift	14	82.34	33.00%
Garden Flo	Shift Four	4	24.69	9.89%
Pool Table	Shift Four	2	5.92	2.37%
	Shift Four	2	5.92	2.37%
Total Shift Sales:			246.59	
Total Guests:			55.00	

Labor Costs Calculated By Position
(Time Clock records where the employee has not actually clocked out are calculated using the current time of this report as the "Time Out" value to provide more accurate information.)

Position	Hours	Labor Cost	% Of Sales
Server	51.23	0.00	0.00
Total for Section:	51.23	0.00	0.00

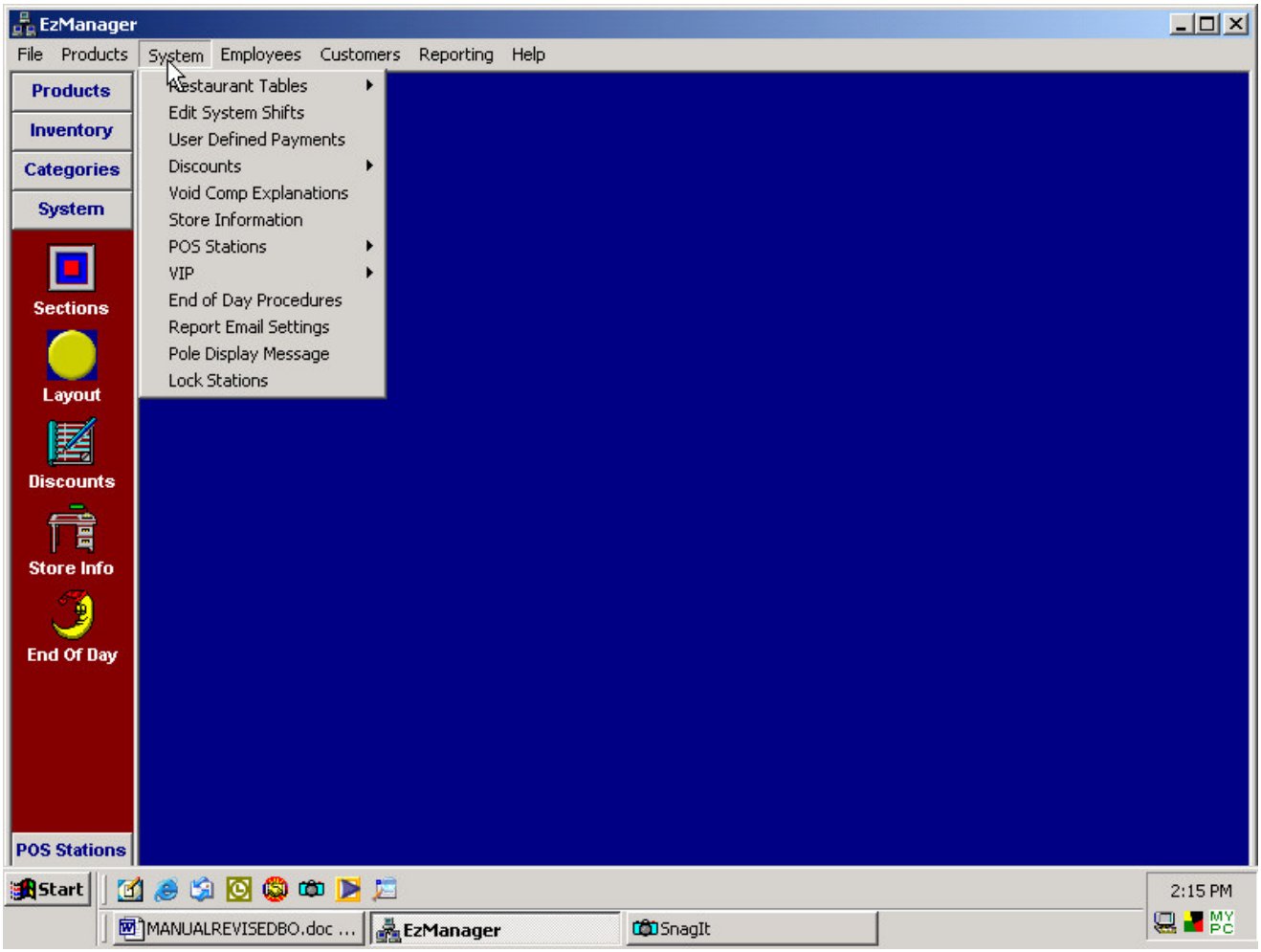
Sales By Department
(Shows only product sales from sales that have been settled)

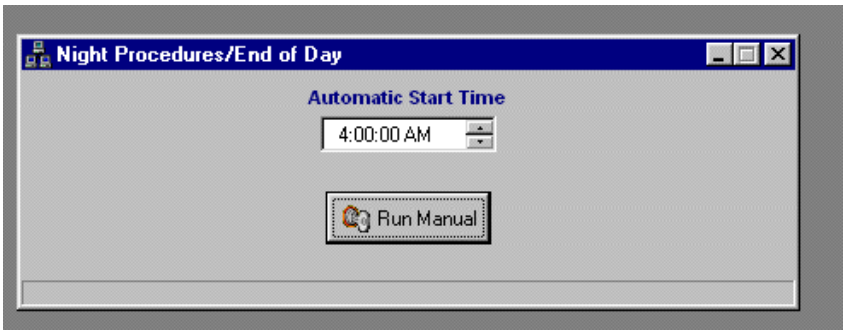
Department	Sales	% of Sales
Beer Wine	87.50	35.06 %
FOH	39.84	15.96 %
Beverage	95.98	38.46 %
Modifier	12.00	4.81 %
Total Department Sales:	235.32	

10) Now, you are ready to closeout the system.

11) Proceed to the EZManager Backoffice Software
12) . Double click the icon. Enter User ID and press Enter. Choose SYSTEM Menu. Proceed to End of day procedures area. You will be running End of day procedures manually.

(Note: Some establishments may have a separate server machine that houses this program. Some have a terminal that also functions as a server.)
WE HIGHLY RECOMMEND THAT YOU RUN END OF DAY PROCEDURES MANUALLY, however; some establishments may elect to have End of day procedures run automatically at a certain hour when no one is in the restaurant. NOTE: Be very careful. As stated before, this procedure will wipe out any open orders/ tabs that are open. To do this, you can go to Store Information and check the box that says End of day procedures Auto Close or you can set it in End of day procedures by clicking the Automatic box and setting the time.





Press the Run Manual button. This procedure will take about 4 seconds to complete from beginning to end. The system is now closed out. You will see a STATUS BAR moving across the screen. You will then see a message saying Formatting Data, Transferring Orders and finally, Finished End of day procedures.

Close the box by pressing the x in the right hand corner. You have finished End of day procedures.

13) Now go to back to Store Information Menu screen and hit Work Day. A information box will come up saying Please enter the new work date. Enter the date(be very careful) xx/ xx/ xx and confirm by pressing enter. A message will pop up saying the workdate has been set to xx/ xx/ xx. Confirm by pressing OK
14) Now proceed to the Reporting drop down menu and you will see a listing of reports grouped by Products and Inventory, Employees, Misc. and Sales Reporting.

15) The most commonly printed reports are the DAILY ACTIVITY REPORT, SALES BY CATEGORY REPORT, SALES BY DEPARTMENT REPORT(all in sales section) ; SUSPICIOUS TIP REPORT(in Employee section). Run each report by highlighting the report and clicking on it. Most reports will prompt you to enter a date or date range. Enter the date or date range and press ok. In most cases the report will be for yesterday if you are running this procedure the next morning or today's date if you are running the procedure at night.
16) Once the report is displayed on the screen, press the PRINTER on the top left of the screen. This will print your report. A printer list screen will appear. MAKE SURE YOU ARE PRINTING TO YOUR REPORT PRINTER(WIDE). If the printer does not appear, press the drop down menu in the printer dialog box and search for your report printer. When you find it, select it, and it will appear. Then press OK to print the report
17) Repeat steps 13 through 15 for each report you wish to print.
18) Exit the EZMANAGER program by pressing FILE, EXIT. You will get a Dialog box that says QUIT EZMANAGER? Press OK.
19) You have completed all the CLOSEOUT PROCEDURES.

END OF DAY CLOSEOUT PROCEDURE
(With CREDIT CARD MODULE)

Those of you who have the integrated credit card processing modules must settle your credit cards on your server before you can do your End of Day Procedure routine.

1) Go to your Network Server Machine.

2) Locate the RED U Icon at the bottom right hand portion of your screen next to the system clock. Double click on the RED U Icon. A blue box will open up.
3) Proceed to click on REPORTS. Print the current batch report for the day. This contains all the credit cards that were processed through the system.
4) Look for any credit card that says SALE instead of POST AUTH. If you see any, these reflect sales that had no credit tip posted. Typically all sales must have a credit tip posted, even it is zero. If this was a server mistake., then you should post the tip manually using the CC FORCE REFUNDS icon located on the desktop. Otherwise begin your settlement.
5) To settle Credit Cards, simply press the settle button once. You should hear the modem dialing out. You will get a prompt confirming the batch was successful.
6) Press finish. MAKE SURE THAT YOU DO NOT CLOSE THE APPLICATION COMPLETELY. In the event that you do accidentally close the application completely, simply press the ICON for CREDIT CARD PROCESSING(the big RED U) on the screen. The credit card processing icon will drop to the bottom of the screen (right lower bottom) next to the clock.
7) Now you can go to EZMANAGER and perform the End of day procedures functions explained in the previous chapter.

CHAPTER 4

STAFF INFORMATION

The STAFF MENU choices are staff records, staff positions, and employee hours, and schedule employees as shown below.

These records allow you to enter the names and information of your staff, assign them Positions and Permissions, and schedule their time for work.

An important part of entering new employees into the database is deciding what they can and cannot do. Staff Positions allow you to create different positions that your employee can assume when they clock in which determines which permissions they are given, which in turn determines what they can and cannot do within the program.

ValuePOS comes with a default user called Default User. Default User is entered automatically for you so that you have a way to get into the system when you are first setting up your database.

In staff records, you will enter basic employee information, select a user level, and assign a position from Positions Available listing.

User Level determines the level of accessibility the employee has when it comes to accessing the EZManager software. 3 is the highest level and 1 is the lowest. Regular employees would have User Level 1 because they typically don't need access to the Manager software. Mid Level managers should have Level 2 while senior level managers and owners should be given a User Level of 3.

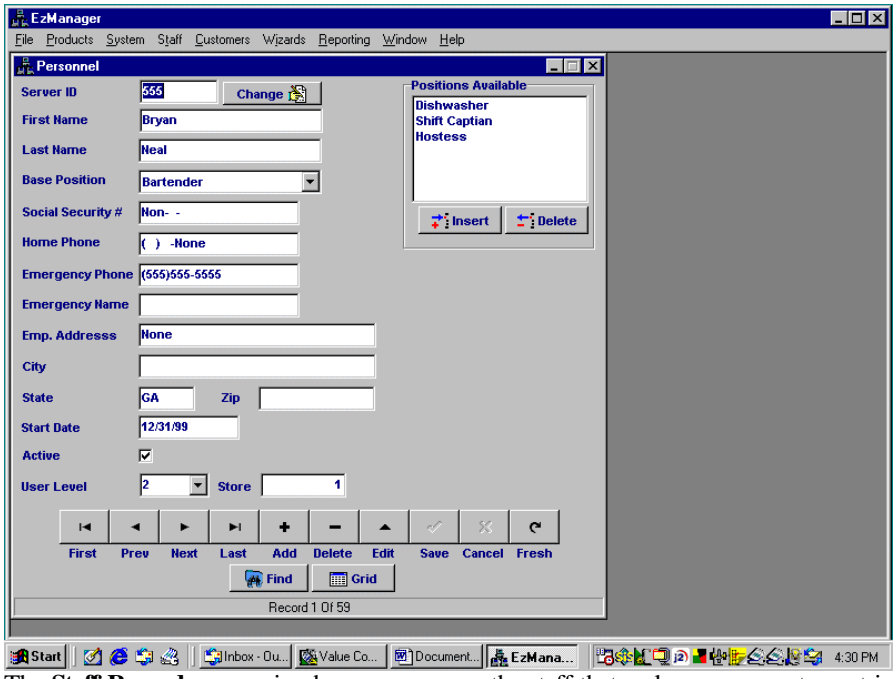
Positions Available is the section where you make available to employees specific positions that you have created. Depending on how you set your system up, employees can choose between the different positions valuable when initially clocking or logging in for the day/ shift.

You may want to create a chart outlining the positions that your business will require and the permissions you want to grant to those positions.

For instance, if your business is a Delivery business then more than likely you'll want to create a Position called "Driver" that has permission to create order and payout sales. If you have a "Dine-In" environment, then "Server" or "Wait Person" may be a position that you would create.

In almost all cases, you will want to create a position called "Manager" and optionally one called "Owner"

STAFF RECORDS:



The **Staff Records** screen is where you manage the staff that make up your restaurant including managers. It is important that you follow certain rules when creating new employees. It is also a good idea to read the Staff Positions topic first.

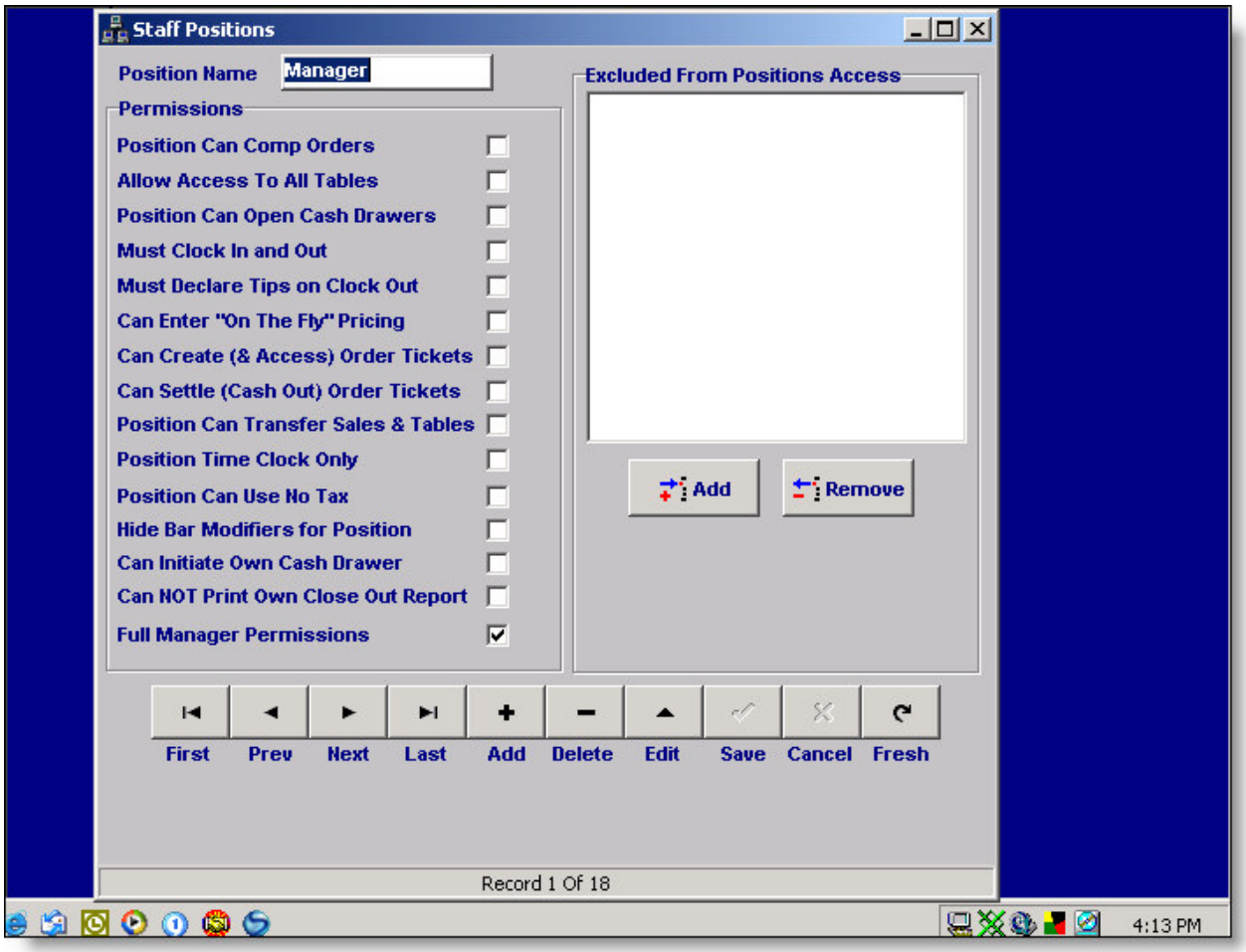
Server ID:

The server ID actually applies to everyone and would be more accurately described as Employee ID. This is the ID that you will use to log into ValuePOS stations. Optionally you can use **Employee Swipe Cards** to gain access to ValuePOS stations, which will use the same ID. Always use unique ID numbers for all employees. **Do not change this number manually.** Use the change button located to the right of server ID field. It will prompt you for a new ID and will check to ensure it is not already being used and then update all current sales and time clock from the Old ID to the New ID. This ensures that the data still points to the correct employee.

EMPLOYEE INFORMATION:

First Name: Enter the first name of employee in this field.
Last name: Enter the last name of employee in this field.
Base Position: Base Positions are left over from earlier versions of ValuePOS with the exception of one, the Manager position. In order to access EZManager software, you must first have a Base Position of Manager and have a security level of 3. All other Base Positions are self explanatory.
Social Security Number: Enter the employee's Social Security Number here
Home Phone: Enter the employee's home phone number here.
Emergency Phone: Enter an Emergency Number for the Employee.
Emergency Name: Enter an Emergency Contact for the employee.
Employee Address: Enter the employee's address.
City, State, Zip: Enter the appropriate information for the employee.
Start Date: Enter the applicable Start Date for the employee.
Active: If the employee is Active, then check this box. Uncheck the box if they are inactive. It is a good idea not to delete inactive employees. Just keep this box unchecked if they are.
User Level: For Managers, enter a User Level of 3(highest). For all others, enter either 1 or 2 (1 is lowest)
Store Number: Enter the number of the store that the employee is assigned to. Enter one if you have only one location.
Positions Available: This list shows Positions that are available for the selected employee to assume when they log into the system for the day/ shift. The employee should choose from this list the position they will assume for the duration of that shift. Note: Employees may have more than one Position that can be assigned to but only one per shift.

STAFF POSITIONS:



Staff Positions: ValuePos offers a very flexible approach to managing employees and the permissions that they are given to access different functionality in the program and higher level actions. ValuePOS uses what we call **Position Name.** Management creates Positions with varying degrees of permissions and **Requirements** to fit certain "Jobs" that must be performed by employees. Each of the permissions that can be assigned to a Position are explained next.
For instance, when you log into the system for the first time of that day, you will be asked to choose a Position to use. The Position you choose determines the permissions and requirements that will be enforced or allowed within the system.

Position Name: The unique name that describes this position.

Position Can Comp Orders: This permission allows the Position to make changes to a sale such as Voiding Orders and changing the price(comping) orders or deduct amounts for line items.

Allow Access to All Tables: This Permission allows the Position to access any Table in the restaurant, even if it's not assigned to them. Normally, if the Position doesn't have Full Manager Permissions) employees will have to first, assign Tables to themselves before they can create Order Tickets associated with those Tables. **It's very good practice to allow only Managers(who can access any Table by default) and Positions that must have access to all tables(like Cashiers) to have Access to All Tables.** All other serving staff should be required to first "TAG" Tables before using them. As a matter of fact, the main purpose of giving Access to All Tables is to give access to Order Tickets already created on Tables, not to create Order Tickets without first tagging a Table.

Positions Can Access Cash Drawers: This permission allows the Position to Access (open) cash drawers to settle Order Tickets, make change, etc. In order to pay out a ticket on a station that has a cash drawer attached, the user must have permission to access the cash drawer that is attached. If there is no drawer, it is assumed you are using server banking. You can have access to cash drawers with or without Multiple Person Access (see POS Station Setup).

Must Clock In and Out: This is more of a requirement than a Permission. When this box is checked, the Position will be required to clock in and Clock out before conducting any activities. This is useful for managers who are not salaried employees but who you would like to give full manager permissions to.

HELPFUL HINT

Positions that you create for jobs such as dishwasher, maintenance, etc that don't need to create Order Tickets should only have this box checked. This way, the only thing that they will be able to do is Clock In and Clock Out, but not create Order Tickets or anything else.

Must Declare Tips on Clock Out: Use this Requirement for Positions that you create such as Serving Staff or Delivery Drivers where you must track tips as part of their wages to meet Federal, State, or Local requirements.

Can Enter "on the Fly" Pricing: For those Products that you create that have **Open Pricing,** checking this Permission will give the Position permission to access and enter these Products. Otherwise, a **Manager Swipe** will be required.

Can Create and Access Order Tickets: If you want the Position to be able to Create and edit Customer Order Tickets, then check this box.

Can Settle (Cash Out) Order Tickets: Some Positions you may want to give the ability to create Order Tickets, but not allow to actually settle them because they should be settled by one person (maybe a Cashier) or for some other reason. Leave this box un-checked if you do not want the Position to be able to settle Order Tickets.

Position Can Transfer Sales and Tables: If an employee is preparing to clock out for the day, but still has Order Tickets and Tables assigned to themselves, giving their Position this permission will allow them to assign those Order Tickets and Tables to another employee or Manager on duty.

Full Manager Permissions: With the exception of **Position Must Clock In and Out,** this Permission overrides all other Permissions and requirements, giving the Position the full gambit of Permissions. The exception, as mentioned is Clocking In and Out. If **Position Must Clock In and Out** is checked then even if **Full Manager Permissions** is checked, the Position will still have to clock in and out. This is useful for hourly paid managers where you still need to track their hours, but want to provide Manager Permissions.

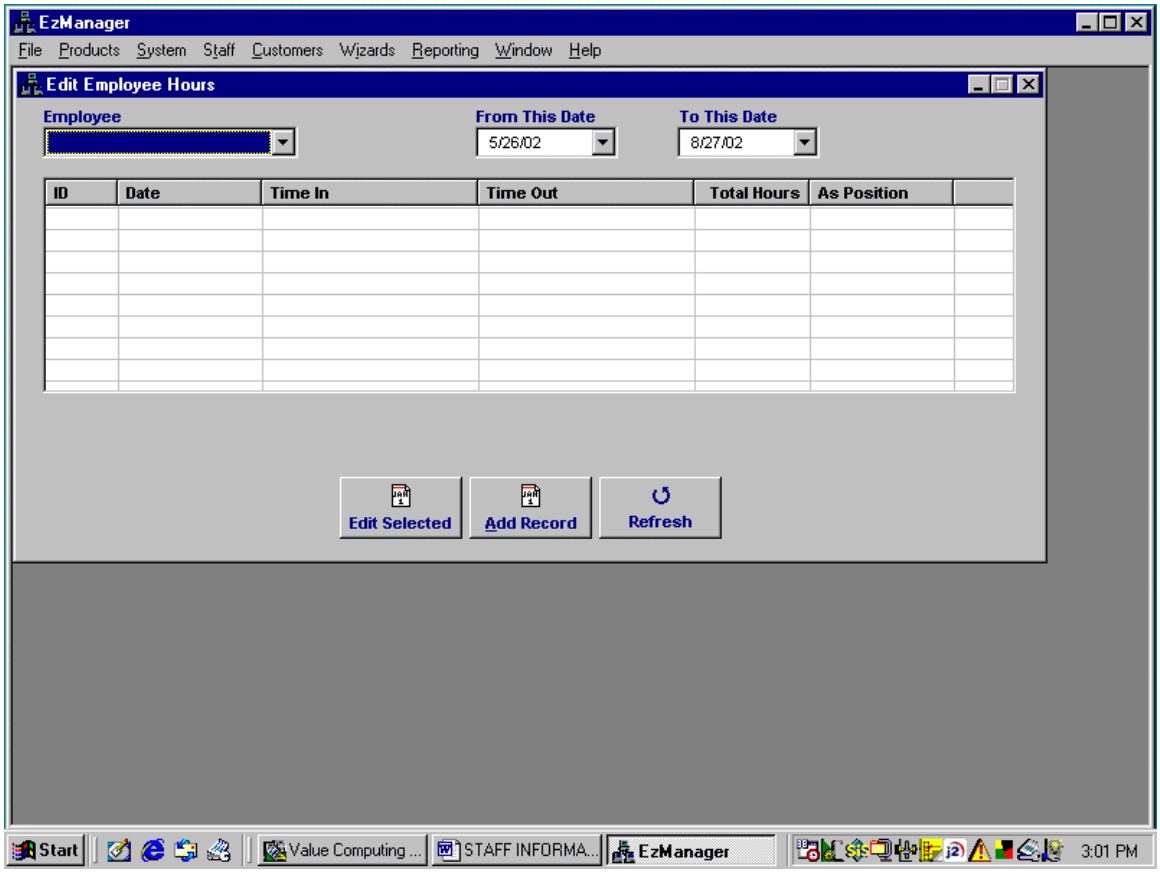
Position Time Clock Only: Use this permission by itself for employees who only need to clock in and out such as hostesses, cooks, dishwashers, etc.

Position Can Use No Tax: This permission allows the user to make sales non-taxable in the payment screen when you close out a sale. Good for transactions involving diplomats or for products you sell that may be non taxable.

Excluded From Positions Access:

You can restrict Positions from having access to any Category of Products in your menu. For instance, for Bartenders, you can disallow access to all but Alcohol and Liquor related Products. On the same token, if you have underage employees you can restrict them from having access to those same Alcohol products. Use the Add and Remove buttons to add and remove Categories of Products that will be excluded from the Positions' access.

EDIT EMPLOYEE HOURS:



Employee:

Select the employee whose hours you would like to edit from the drop down list

From THIS Date. To THIS Date:

Use these drop down calendars to specify a date range to display employee clock in records. Highlight the record you would like to edit

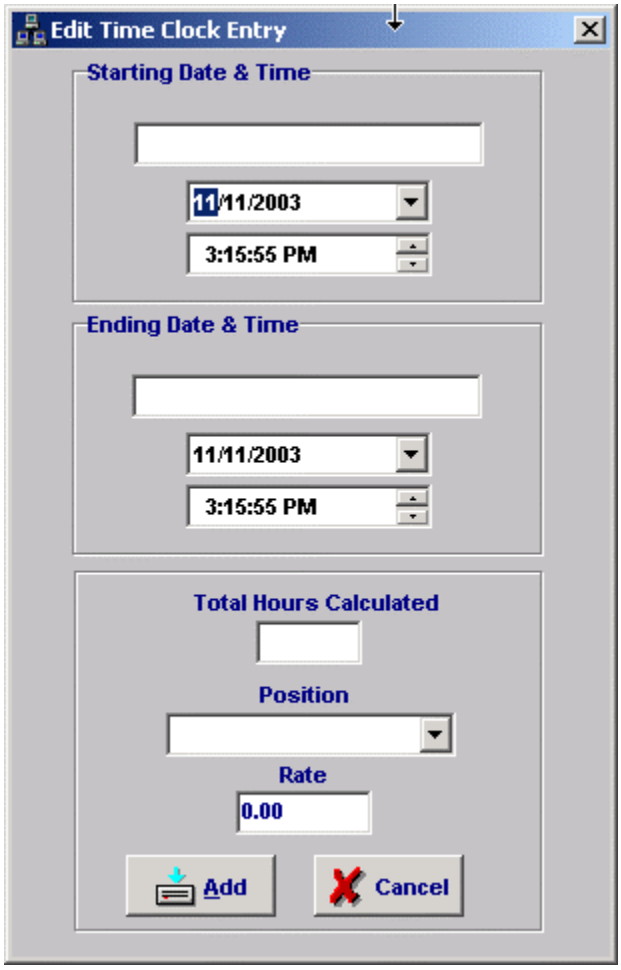
.Edit Selected:

Any Clock records that meet the criteria that you have specified (see above) will be displayed in the main grid of this screen. By selecting a line item (highlighting it) and pressing this button, the Edit Hours dialog box will be displayed, allowing you to edit both the Starting and Ending times of the Time Clock record, thus affecting the number of hours worked.

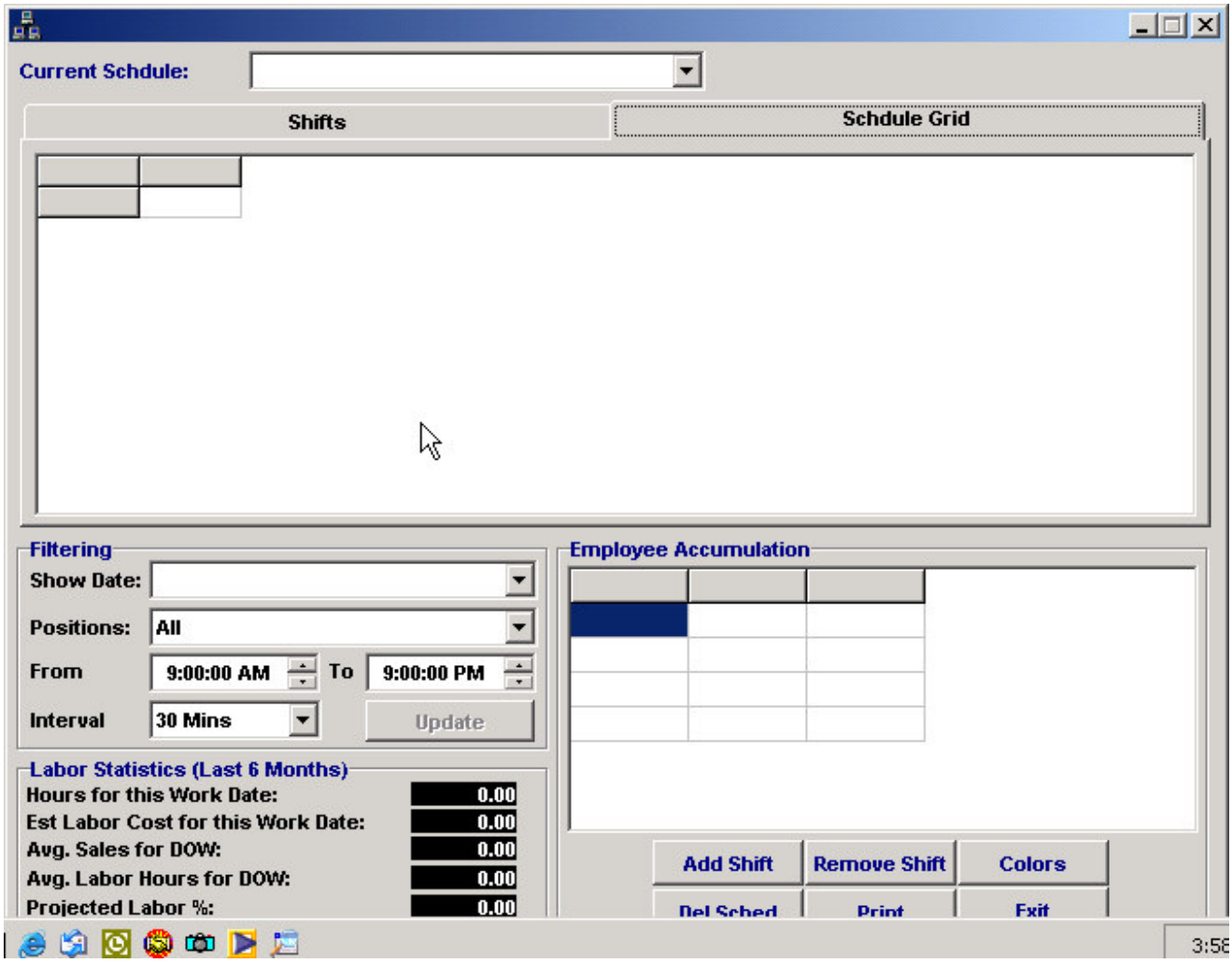
You can change both starting and ending times. They are made up of a date/ time/ pair resulting in a date/ time value. By editing either the date or time portion, you change the date time value and that field is automatically updated. See picture below of edit time clock entry dialog.

Edit Time Clock:

The Edit Time Clock Entry dialog allows you to change the starting and ending times of the Time Clock Record by manipulating the starting and ending times. The Starting and Ending times are made up of a Date-Time pair, resulting in a Date-Time value. By editing either the date portion or the time portion, you change the Date-Time value and that field is updated automatically.



SCHEDULE EMPLOYEES:



The Scheduler: The Scheduler screen allows you to take a slightly graphical approach to scheduling employees. By using the Scheduler, you can easily create daily schedules for employees and see first hand, your total hours, etc.

The Timeline: The Timeline is a sequential row of time blocks broken down into half hour increments at the top of the Scheduler window. If your Timeline shows "No Time" in the time slots, select a beginning time from the **Time Range** drop down box.

Work Date: Use this calendar drop down to select a Work Date to add schedules to.

Employee: The Employee drop down box allows you to select an employee to add a schedule for.

Total Hours for Date: This field shows the total hours scheduled for the current work date.

Total Hours Shown: This field shows the total hours of schedules currently visible in the Scheduler window.

To Add a Shift to the Scheduler: Select a Work Date that you would like to create a Shift for from the Work Date Calendar drop down box. Select a beginning time from the Time Range drop down box. (Time blocks will be populated along the top of the scheduler pane).Select an Employee from the Employee drop down box. On the Timeline (block), right-click (with your mouse) the time that you would like to start the shift and select ADD SHIFT from the popup menu when it appears. The Time Range Selection dialog will appear. From the Time Range Selection dialog, select the starting and ending times for the Shift (Start Time will already be entered for you) and click the OK button. A red box will appear in the first available row inside the Scheduler window at the Start Time you selected and ending at the End Time that you selected. From Choose Position dialog, Choose Position that employee will act as for that shift. A new schedule shift will be added to the scheduler Pane showing employee name, and number of hours they are scheduled to work for. Right- click on shift that you would like to edit. Select that appropriate option from the popup menu that appears.

To Delete a Shift from the Scheduler Pane: Right Click on Shift and select Delete from Pop-Up Menu

To Print Schedule: Click Print Schedule button. Choose a Time Range from the Time Range dialog that is displayed.

CHAPTER 5

PRODUCT INFORMATION

MANAGE PRODUCTS:

This section is divided into Edit Products, Manage 86 items, and Product Positioning.

We will first address

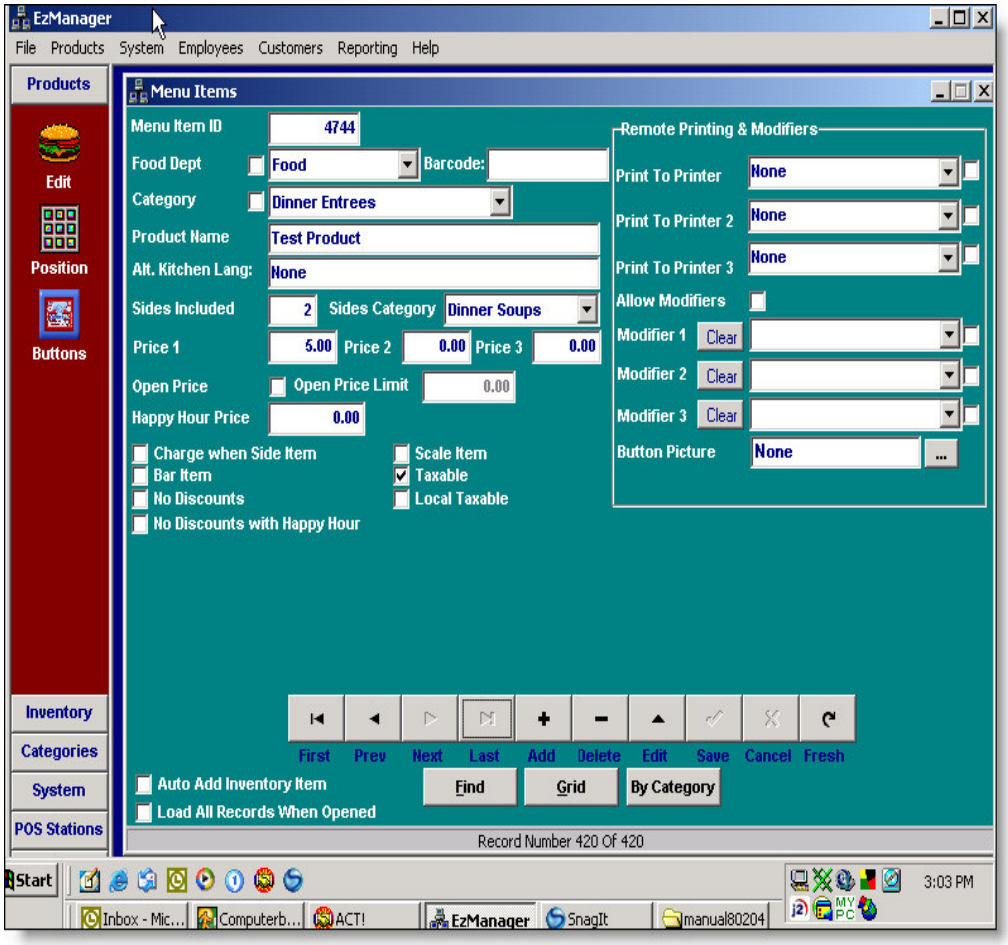
EDIT PRODUCTS :

Your menu structure is probably the most important part of your point of sale system. Since your entire Point of Sale system revolves around your menu, it is a good idea to start your menu creation by preparing a flow chart to use as a guide.

HELPFUL HINT: To allow changes to appear in this module, you must exit the screen you are working on and reopen it. For example if you are updating your prices, you have to exit the product screen and reopen the manage products module.

PRODUCT SCREEN:

The Product Screen allows you to create new products (Menu Items) to add to your restaurant's menu as well as manage and edit existing products that may already be a part of your restaurant's menu. Each element of the Product Screen is explained in detail next.



HELPHFUL HINT:

STICKY BUTTONS:

Here's an easy way of entering menu items with characteristics that are applicable to many items. See the small check boxes near Food Department, Category, Printer Destinations, and Popup Modifier fields? If you are entering many new Products of the same Food Department, Category, or that need to be printed at the same

printer, you can check these boxes to make the fields "sticky". Existing values in these fields are made sticky and any new records that you add will use these sticky values by default whenever you add a new record.

LOAD ALL RECORDS BOX:
Checking this option in the box allows the database to open all available records containing your menu items when you open the Edit Products window. If you do not check it , each record opens as you scroll through the records.

BARCODE BOX:
ValuePos now includes the capability of accepting barcodes. You must have a keyboard wedge type scanner plugged and barcode type programmed.

FOOD DEPARTMENTS:

(This information is located under manage Products>Edit Food Departments)

What are Food Departments:

Food Departments are used to group sales of Products in your menu. Food Departments are a lot like Categories except that most restaurants will not have nearly as many Food Departments as they will have Categories. Common Food Departments used by restaurants are: FOH, Food, Beer, Wine, Liquor, Alcohol, Beverages, Retail, Impulse, Gift Certificates.
Food Departments allow you to run reports that show sales by Department and Category.
Food Departments let you organize information so that you pay the appropriate tax for each department. Wine tax is different than Liquor which is different than Food.

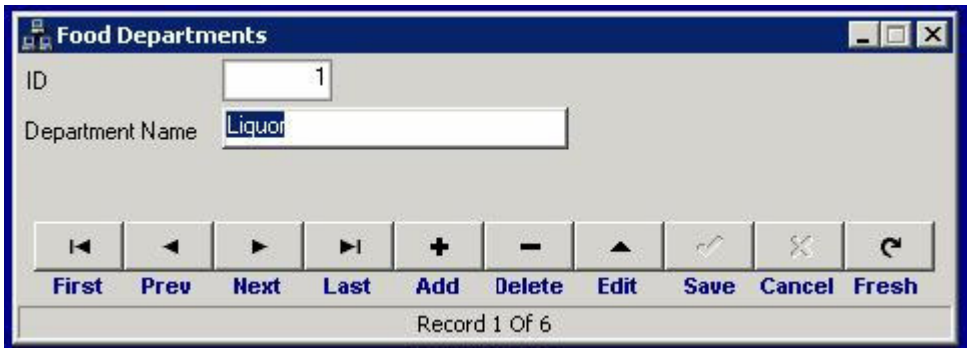
Food Department Screen:

The Food Department Screen has only field that must be filled in and that is **DEPARTMENT NAME**
As with most data in the ValuePOS system, Food Departments are given a Unique Identifier when you enter a new record in the Database. When you indicate a Food Department when entering a new Product, EZManager shows you the Department Name, but behind the scenes, it actually tags that Product with the ID number assigned to the Food Department. This is because databases work much more efficiently with numbers than they do with Strings(text). However, people work much more effectively with Strings (names) than they do with numbers like the one assigned to Food Departments.

Modifier Departments:

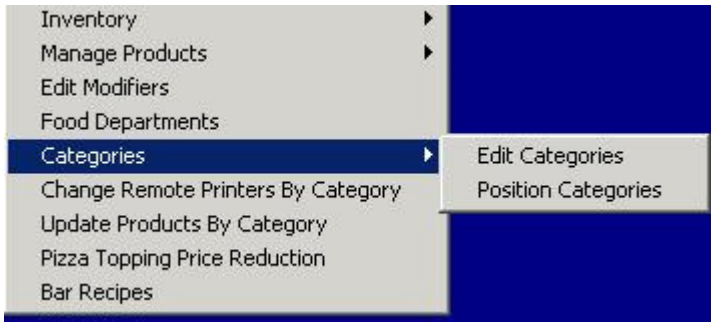
The Food Department screen also provides a small section to indicate a global Food Department to assign to all Modifiers that are used in your ValuePOS system. Click the button with "…" to display a list of Food Departments that you can assign to all Modifiers. This function has been taken away and put into regular departments.

From the drop down list, select the Food Department that you would like to organize your Products under.



Food Department Item ID:
This value is supplied by EZManager (actually the database that the program is connected to) to uniquely identify this product and cannot be changed.

CATEGORY:



(This information is located under Edit Categories)

What are Categories?

Categories are used to organize your menu not only for reporting purposes (very important) but for display on ValuePOS stations. They provide a way to organize the products in your menu so that they can be easily and efficiently selected on ValuePOS stations as well as helping to provide more readable organized reporting sales and product usage. Examples of categories are Mixed Drinks, Cordials, Rum, Gin, and Vodka that can all be classified under the department Liquor.

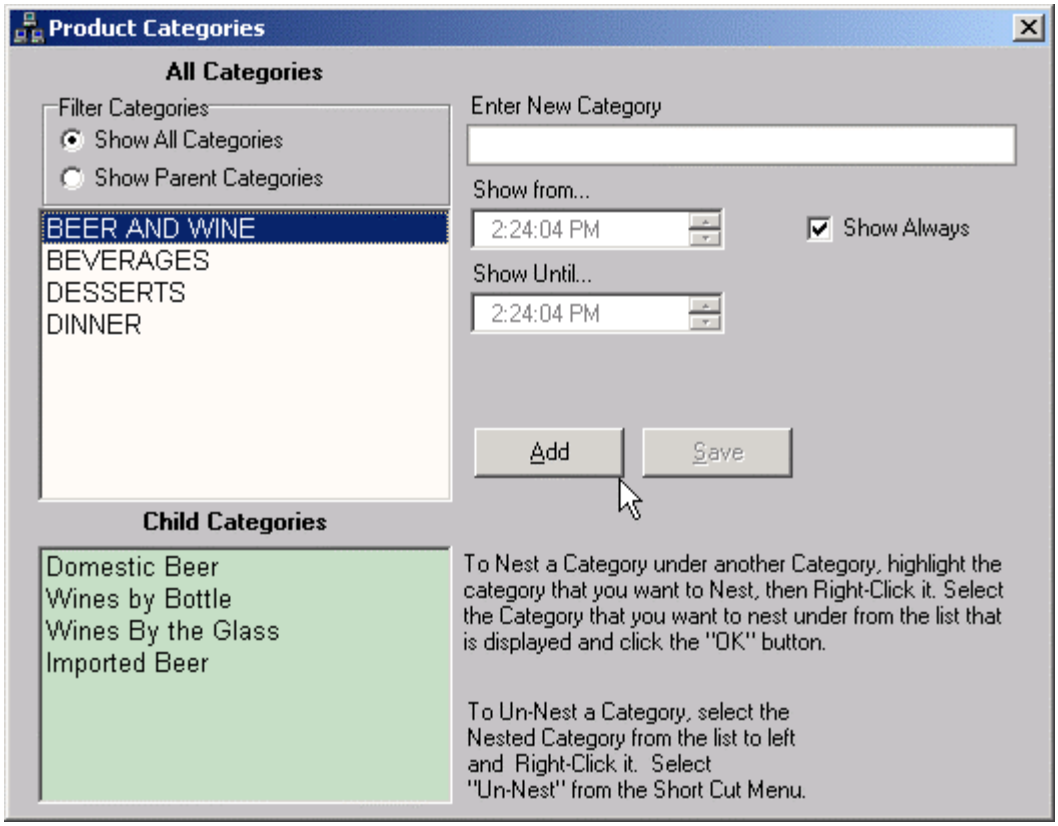
The category selector allows you to view 9 categories at a time.
As you see above, the light blue buttons represent Products that are organized under a particular Category. The yellow buttons represent different Categories that a user can choose from when entering Products that a customer has ordered. When a user presses one of the yellow buttons, ValuePOS populates the Product Grid with Products that have been tagged for that Category.

There are Three (3) Different Types of Categories:

The software allows you to define three different types of Categories, all serving different purposes.

Product (Regular) Categories:

Product categories are used to organize your Products into groups of Products for easy display on POS stations and for grouping data on reports. They are usually the subtitles on your menu such as Sides, Salads, Desserts, Beverages, Pizza, Steaks and More, etc. They are usually yellow in color



Parent Categories:

Parent Categories are used for "NESTING" Products Categories underneath them. As an example, lets say that you had a Parent Category called "Dinners". You nest different Product Categories underneath this Parent Category to better organize the display of categories on your stations. For instance, you might have Product Categories called "Seafood Dinners", "Steak Dinners", and "Vegetarian Dinners". You could then nest each of these under the Parent Category "Dinners" so that only one button would be shown on the stations with the caption Dinners. **Parent Categories are Green., instead of Yellow)** Now when you pressed the Dinners Category Button on the stations, instead of showing any Products, the Product Categories that you nested underneath the Dinners Parent Category would be displayed. Pressing one of these, would then display the appropriate Products on the Product Grid.
A Category can hold either child categories or Products. Make sure that you decide what you will use because if you put both categories and products under a category , only the nested categories will be displayed.

Child Categories:

These are the categories that have been placed underneath a Parent Category.

An example of the relationship of categories would be the following:
Suppose that you sell many different brands and types of beer in your establishment.
You might have categories as the following:

1. Bottle-Domestic
2. Bottle-Import
3. Draft-Domestic
4. Draft-Import
5. Lagers

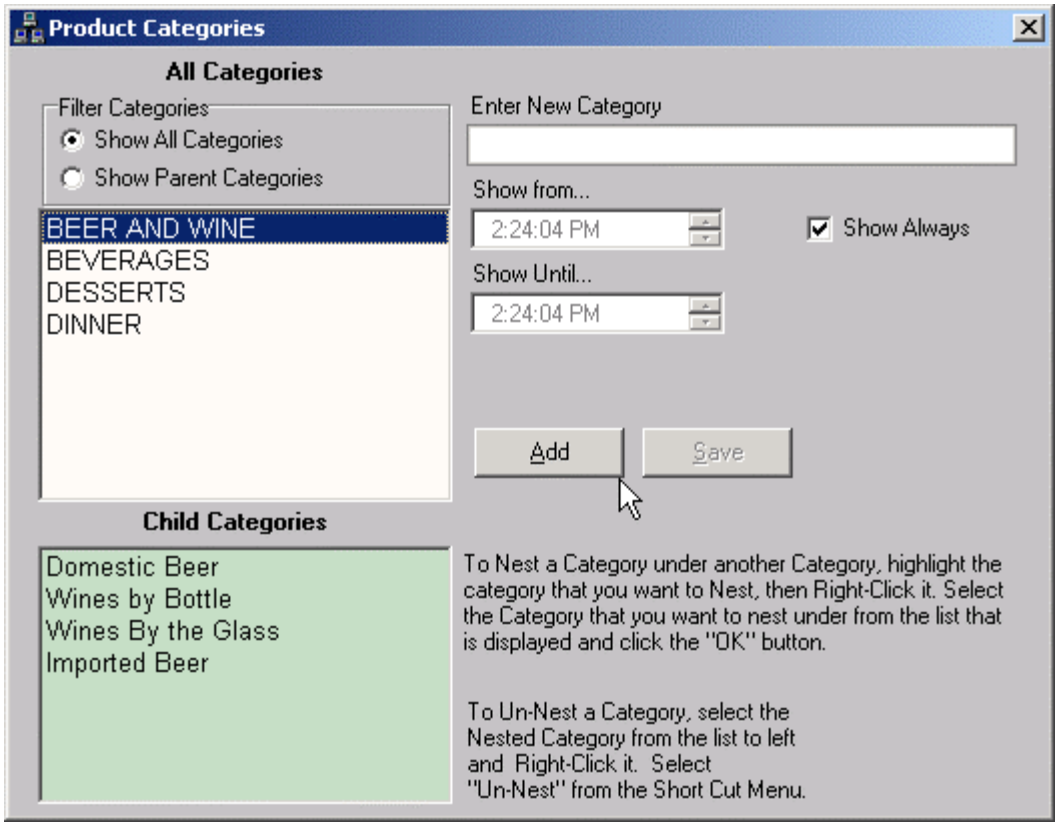
6. Seasonal

Since the Category Selector on the ValuePOS stations allows you to view 9 categories at a time, you would be using 5 separate slots on the Category Selector, if you listed them this way. This would take up valuable real estate.
There is a better way to list them.

First, create a Category called Beers. Then you could assign each of the above Categories to the Beers Category. This would make the different types child categories and the common type (Beers) the parent category. Parent categories are green indicating they have categories underneath them. When you click the Beers category button, the Category Selected will repaint showing the Child Categories assigned to Beers. Selecting one of these will display the appropriate Products that you can choose from to add to the Customer Ticket.

The Categories Screen:

There are 2 lists on the Category Screen



All Categories: This list shows Categories that have been created previously. It does not show Categories that have been nested under another Category. You can switch between displaying All Categories or just Parent Categories using the radio buttons marked as such. When you highlight a Category in the All Categories list that is a Parent Category, the Child Categories will be displayed in the box that is directly below it.

Nested Categories: When you select (highlight) a category that has Categories nested underneath it, those Categories will be displayed in this list.

Hidden Categories: Many times you might find that you would like to provide a choice of side dishes that may be chosen with a particular Menu Product. If the Products that you create to choose from only pertains to one, or just a few Products, you may not want that Category of Products to show up on your stations as choices unless displayed on purpose to choose sides from. In other words, you may not want that Category to show up unless needed. If this is the case, then you can mark a Category for NO SHOW on stations and it will not show up in the list of categories to choose from, but can be displayed if called by another Category to c

Creating a New Category: Enter the name of the new Category in the **Enter New Category** field.

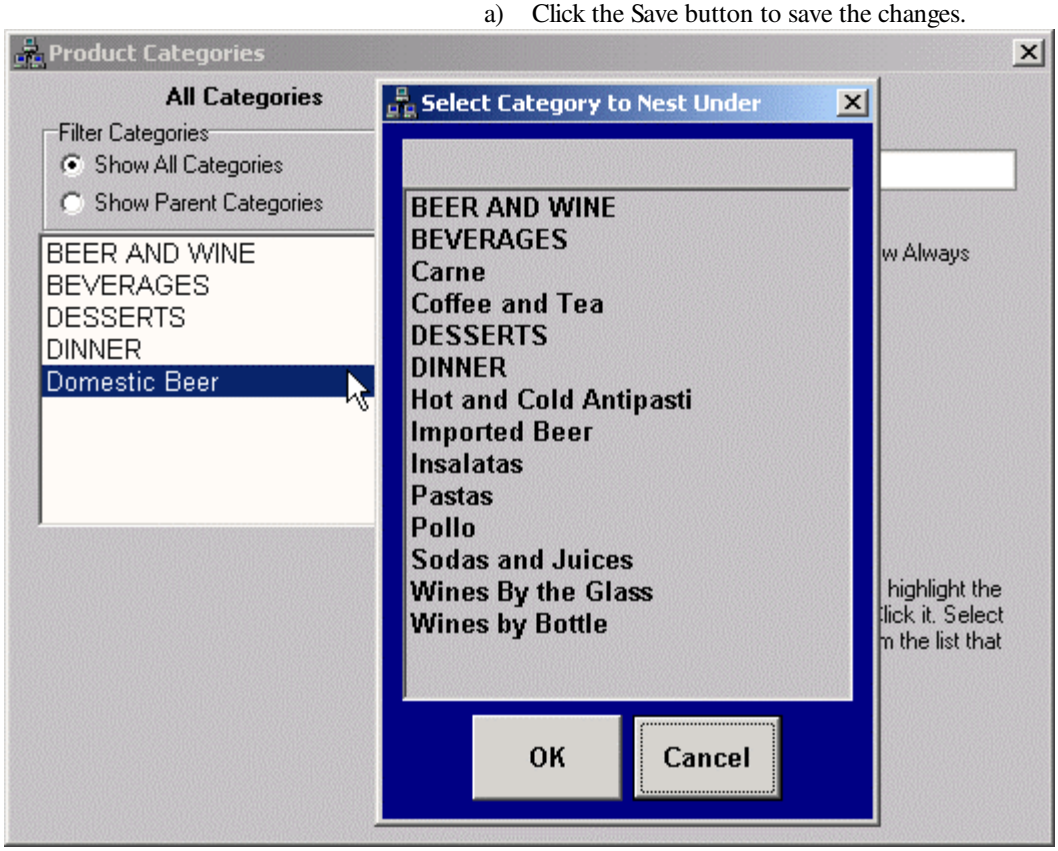
a) Check the Show Always or check the starting and ending time to make the Category available when you want it to appear. If you want it only to appear at select times, select a time range to display using Show From and Show Until time pickers. Uncheck the Show Always box.

b) Click the Add Button. The new Category will be added to the **All Categories** list.

Changing an Existing Category:

Either check or uncheck the Show Always checkbox . If you uncheck it, indicate the starting and ending times for the Category to appear.

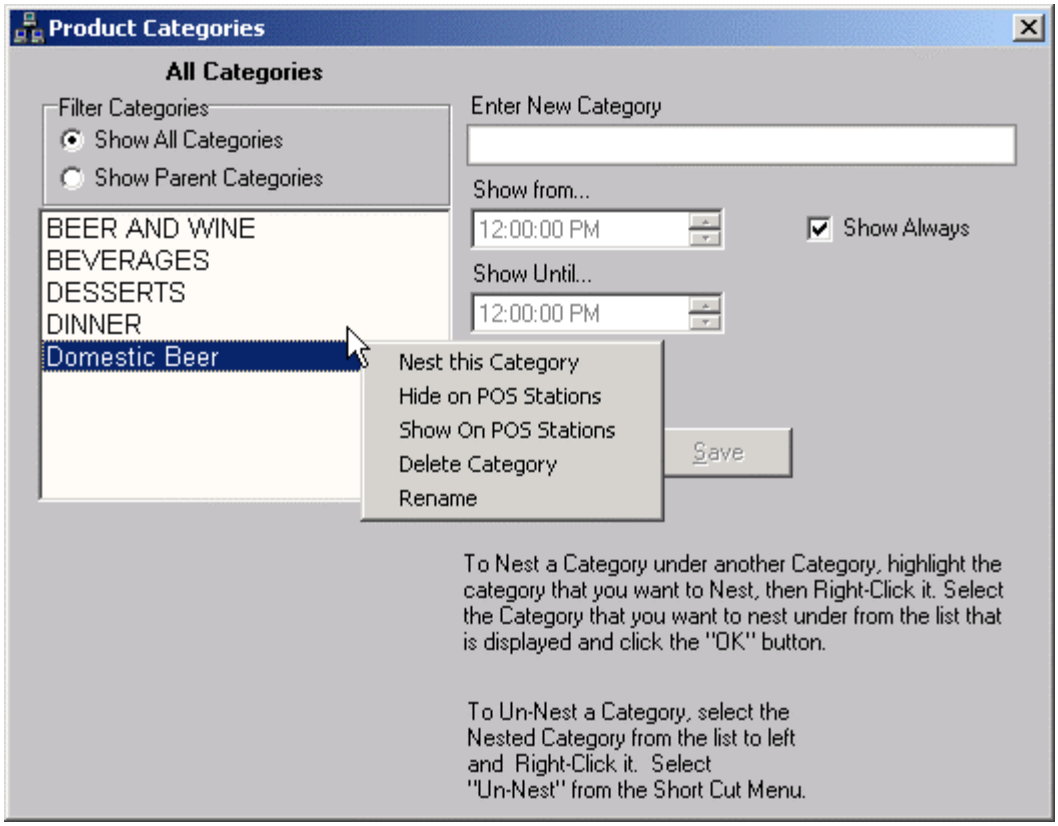
a) Click the Save button to save the changes.



Nesting Categories:(Creates a Parent/ Child Relationship):

a) Select the Category from the All Categories list that you would like to nest under another Category.
b) Right Click your selection. A popup menu will be displayed.
c) Select the Nest this Category choice and a list of available Categories will be displayed.
d) Select the Category from the displayed list that you want to nest under and click OK button.

WARNING: You cannot nest a category that has products underneath it, under another category with products underneath it,(double nesting) Nothing will show up.
You can nest all your Lunch categories under Lunch or all your Wine Categories under Wines but you can't take a nested Wine category and then nest it under Lunch.



To Un-Nest a Category:

If you wish to "un-nest" a Category, follow these simple steps.

a) Select nested Category from the Nested Categories list. (You may have to select the Parent category first).
b) Right Click the nested Category you want to disassociate and select Un-Nest from the Pop-Up Menu. This will make it a regular Category again.

Delete a Category:

Select the Category that you would like to delete.

a) Right Click it and select Delete Category from the popup menu that appears.
b) You cannot delete a Category that has other Categories nested under it. You must first un-nest those nested Categories.
c) You cannot delete a Category that has products assigned to it.

Rename Category:

Select the category that you would like to rename.

a) Right Click it and highlight rename. A box will appear to type in a new name for that category without having to recreate it.

Hide on POS Stations:

This function allows you to hide categories that you may be working on for new menus or for liquor menus that you have not implemented or don't want everyone to see.
Select the Category in the Left List box that you want to suppress from displaying and highlight it. Right Click on it in Categories list and select Hide on POS Stations. An X will appear in front of the Category name to denote that it is Hidden and will not appear unless called for by a Menu Item.

Show on POS Stations:

This function allows you to show categories that are ready to be seen on the POS station.
Right Click on Category in the Left List box that has an X in front of it that you want to show on the stations. Click Mark for Show on POS stations.

Show Always Box:

Check the box if you want your categories to show all the time on your POS stations. If not they will show for times you have selected.

All Categories List:

This list shows all the Categories in your database that are not Child categories. You can switch between displaying ALL Categories or just Parent Categories using the radio buttons marked:

Show All Categories
Show Parent Categories
When you click(highlight) a Category in the All Categories list, if that Category is box below it.

The Child Categories List shows categories that are assigned underneath the Category selected in the All Categories list above.

POSITIONING CATEGORIES:

On ValuePOS stations, you can have up to 45 categories that can be displayed. The 45 categories are divided into 5 pages of 9 Categories each. Instead of listing the Categories alphabetically for you (as in the older versions of the software) this new version gives you more flexibility by allowing you to determine the position of Categories yourself through the Position Categories Screen. You can drag and drop Categories from the Categories List onto buttons that determine which page they will be displayed on when users scroll from page to page on the Category Selector on ValuePOS stations.

There are 3 basic areas of the Position categories screen:

1) Category Type Selector: this allows you to select either Main (Regular and Parent) Categories or Sub (Child Categories) that will be displayed in the Category List.
2) Category List
3) Category Page Buttons

SHOW MAIN CATEGORIES:

Choosing this radio button filters the available Categories to show only those that are either regular Categories or Parent Categories (those Categories that have Child Categories underneath them)

SHOW SUB CATEGORIES:

This option filters the available Categories to show only those that have been "Nested" or positioned underneath other Categories. When this option is in effect, you must select a Parent category from the Parent Category drop down list. When you select a Parent Category and Sub Categories, the Sub Categories will be displayed in the Category Box directly beneath the Parent Category box.

HOW TO POSITION A CATEGORY:

Select a Category from the Category List.
Using your mouse, highlight the Category in the Category List that you would like to position.
Holding down your left mouse button, drag the Category over the next available Category Page.

REMOVING A CATEGORY FROM THE CATEGORY PAGE:

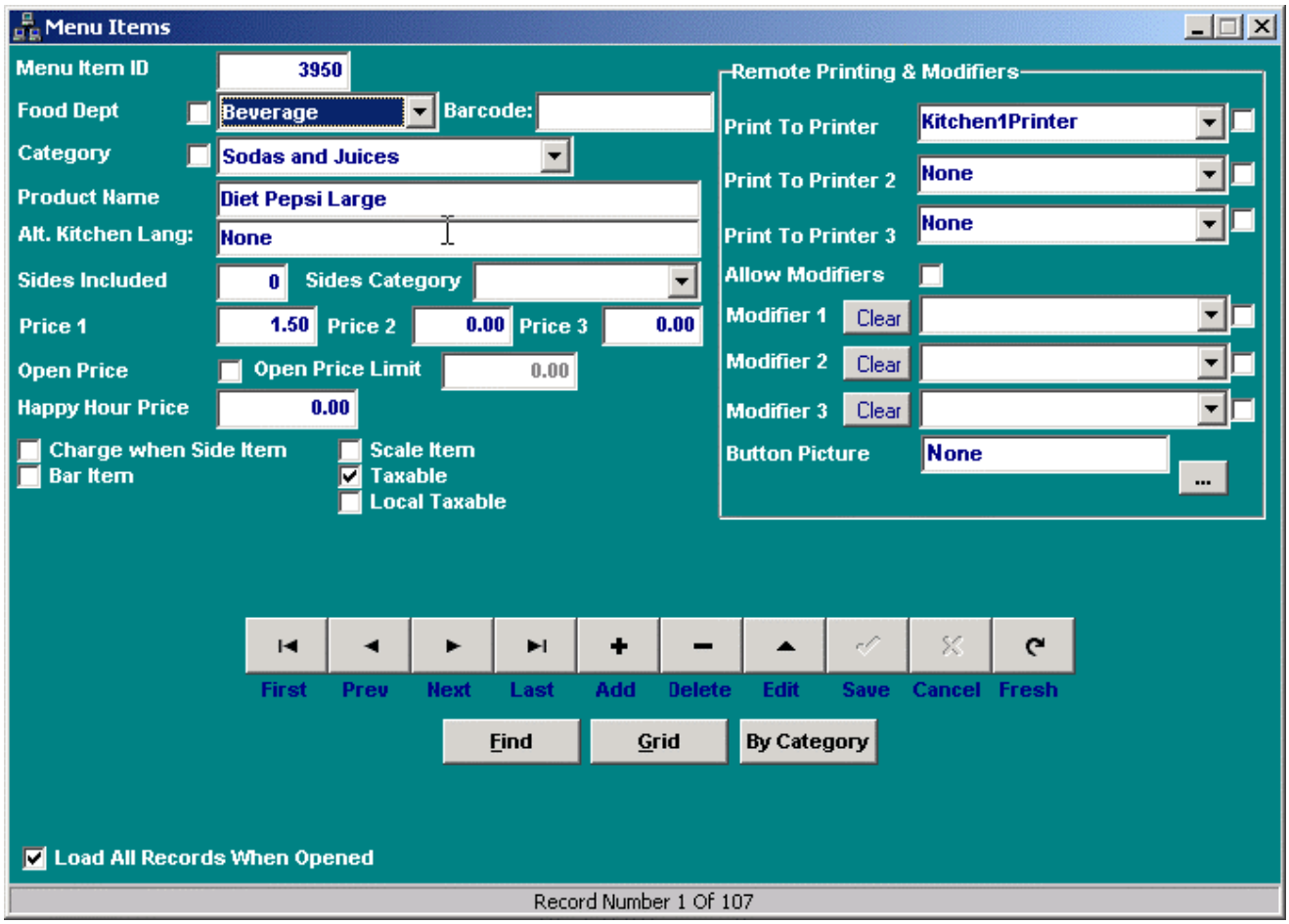
Right Click on Categories in the Yellow button grid to REMEMBER: You must distribute the Categories to the Category Page Buttons in sequential order. In other words, you cannot leave blank spaces between Categories. They must be one right after another.

Use the Category Type Selector to switch between Regular/ Parent Categories.

Once you have placed Categories on the yellow button grid, you can drag and drop them from page to page and they will be resorted automatically for you.

NOTE: Remember to press the SAVE button on the bottom of the page to save your entries.
PRESS EXIT when you are finished to move onto another area of the program.

Entering Product Information:



This screen is where you name the Product as it will be known by throughout the system for displaying sales, reporting, etc. This value should be a unique value throughout your system (database). For instance, you cannot have 2 different Menu Items with the same name such as "Fries", even though those two Menu Items may be located under completely different categories. If you need to have two products with the same name, you should name them slightly differently. For instance Fries-Lunch and Fries-Dinner. This way you do not have naming conflicts and can easily distinguish your Products in reports, etc.

This rule also applies if you have two items that are at different prices; lunch might be named L Penne Pasta for $6.95 and Dinner's selection might be just Penne Pasta for $9.95.
HELPFUL HINT: It is very important to not use certain characters when entering product names, no exclamation points, no question marks, no apostrophes, no and signs, etc. This is because in a SQL database, those characters are not understood.

Alternate Kitchen Language:

This field must say **NONE** unless you are using this function. For example, if your Button says scrambled eggs with toast, you can use this feature to have it print something different in the kitchen such as : adam and eve on raft, wreckum

STANDARD FIELDS AND ATTRIBUTES:

Menu ID: This is a unique identifier number supplied by the database system and cannot be edited.

Food Dept: This is where you choose a food department to assign the Product to from the list you have already made. Choose the appropriate department from the drop down list.

Category: Choose a Category from the list you have already made to assign the Product to. Using the drop down box, pick the appropriate category.

Product Name: This is the name of the product (and description) that is shown on the VALUEPOS stations when choosing the Product to add to SALES tickets.

Barcode: This box is where the barcodes are stored when a bar code is initially swiped into the system. If it is a unique number, it is given a separate product id and is put in the system. Thereafter, when a barcoded item is swiped, it is automatically put on the sales ticket.

Sticky Boxes: These are the small boxes located next to various fields on the Menu items screen. Fields such as Food Dept, Print to Printer, Category, Modifier 1. 2 And 3 all have sticky boxes next to them. Sticky boxes make entering menu items easier when you are entering many items at the same time. Let's say that you enter a new Menu item. When you check the Sticky box, the values that you gave the current item (record) will be assigned to each new item that you add as long as the Sticky Boxes are checked.

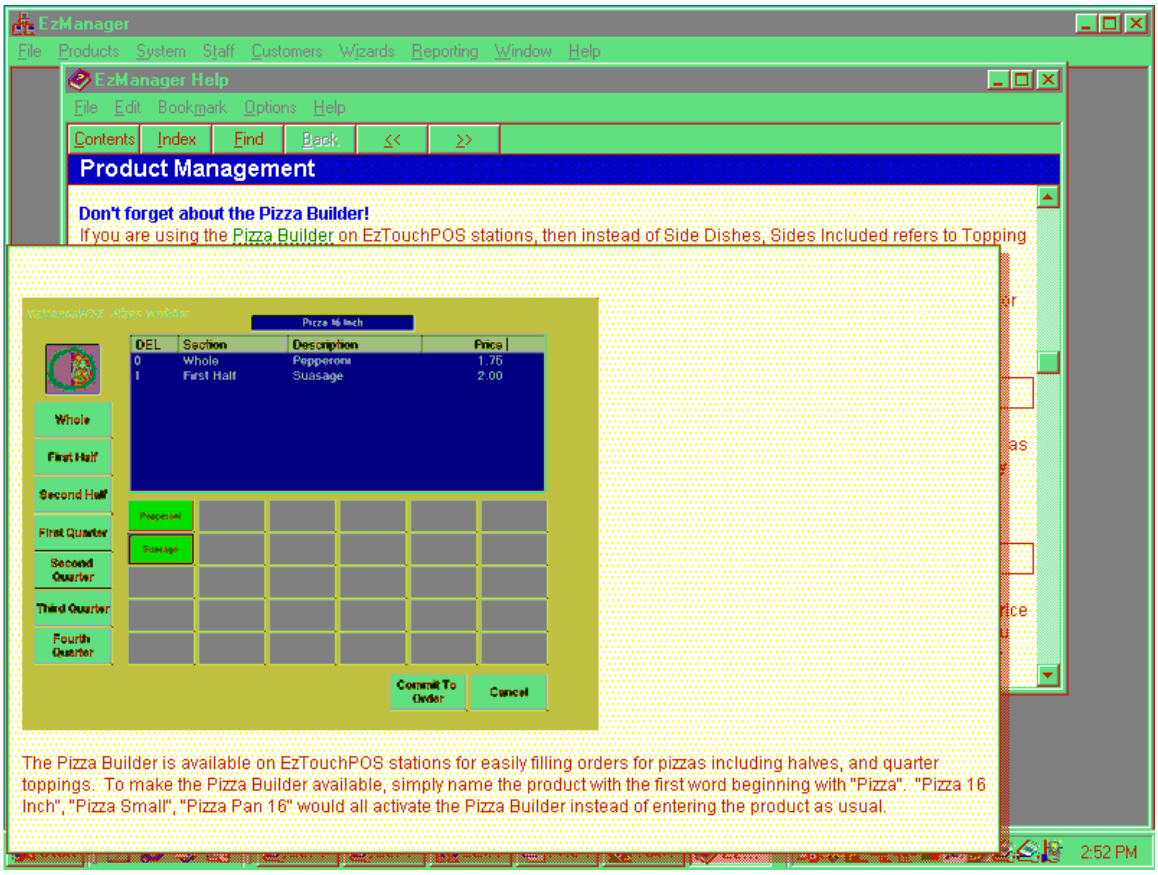
Alternate Kitchen Language: This box lets you print the Product to the Remote make Line printer with an alternate name. You must use the word NONE if you want nothing else to print. Otherwise the alternate description will be printed.

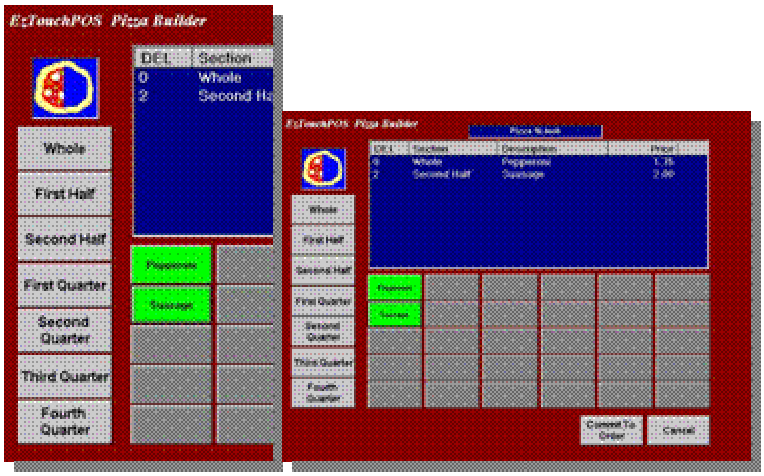
Sides Included: Sides Included is a numeric field indicating that side dishes may be chosen with the current product and how many side dishes can be selected. This field works in conjunction with the Sides Category explained cnext. If you enter the number 2 in this field, then you will be able to choose up to two side dishes to include. A good example of this functionality would be a steak dinner that has choices like baked potato or fries, choice of vegetable.

If the current product is a Pizza and has the word PIZZA anywhere in the name, then choosing that product at runtime will activate the Pizza Builder. For the Pizza Builder, Sides Included acts differently. It indicates the number of sides (Pizza Toppings) that can be chosen before being charged for. For instance, if you indicated 2 for the Sides Included and the Product is a Pizza, ValuePOS will allow you to enter 2 Toppings before charging for toppings. If you want to charge for any toppings, leave Side Included at zero (0).

PIZZA BUILDER

If you are using the Pizza Builder on the stations, then instead of side dishes, sides included refers to Topping Included and the Sides Category is the Category where you will select toppings. For example, you could create a Category of Products called Topping 12 inch, and create different products for toppings like Pepperoni, Onions, Ham. Whenever that Pizza is sold, the Pizza Builder would be activated and those toppings would be available choices for that pizza's toppings.





Sides Category:

This is a drop down list showing available Categories that you can choose from for Side Dishes. If the value of Sides Included is greater than zero (0) when the current product is chosen on ValuePOS stations, you will be able to choose side dishes from this Category up to the amount that you indicated in Sides Included.

Price 1, Price 2, Price 3:

You can indicate up to three (3) different prices for each of the Products in your menu. While they are called Price 1,2, and 3, there are no rules saying you must use them in any particular order. Although most establishments will use Price 1 as the main and sometimes only price for a product, **all prices must have at least a zero value. Current price in use by POS stations can easily be changed from any POS station by going into the Manager Menu in the Front of the House, going to the Change Price Field and entering what price level you want to use. This feature may be useful if you would like your product to have different price levels for different locations in your restaurant or at different times.**

Open Price and Open Price Limit:

Some products in your menu must be priced on a daily basis and it may not be practical to enter a new menu price for Products frequently. For this reason, you can use Open Price and Open Price Limit. While Price 1, Price 2, and Price 3 must always have at least a zero value, using Open Price, you are prompted for a price at the time the product is entered on a station. By checking the **Open Price Checkbox** you will also be required to enter an **Open Price Limit** that is the highest amount that can be charged for that Product.

IMPORTANT NOTE:

You must have permission to use Open Price Products by logging in as a Manager or by using a position that has permission to use Open Price products.

Happy Hour Price:

Happy Hour pricing occurs in response to Happy Hour Times that you have setup in the Store Information Screen. If the product is marked as being a **Bar item, (only bar item products participate in Happy Hour pricing)** then at the time the product is entered into the ValuePOS system, the current time is between the hours that you have specified as being Happy Hour Times and the current day is a Happy Hour Day, then instead of using Price 1, Price 2, or Price 3, ValuePOS will use the Happy Hour Price that you indicate here.

NOTE:
1) You must include a Happy Hour Price for each menu item included in Happy Hour. It must be checked as Bar item.
2) You must check the Happy Hour Day and times in the Back of House System Info section under store information.
3) In the Front of House Manager Menu, you must go into Change Price level and turn Happy Hour prices on or off

Charge When Side Item:

As mentioned in the section Sides Included, you can allow a choice of one or more additional Products as side dishes for a particular Product. Normally when a Product is included with another Product as a side dish, the Product that is included as the Side is not charged for. This check box overrides that , ensuring that if the current Product is included with another Product as a side dish, then the correct price will be charged for it even though it is a side dish.

Bar Item:

The Bar Item checkbox serves two purposes. First, it indicates if a particular Product should participate in Happy Hour (by specifying a Happy Hour Price). Secondly, it indicates that the product is in fact a Liquor or Alcohol Product. The significance is that if you have Alcohol Tax setup in your store information screen, then that tax will be charged in addition to any regular sales taxes you may have setup in Store Information. This is true of any Product where the Bar Item checkbox is checked. The tax is charged when the Alcohol tax rate set in Store Information is greater than zero.

Taxable:

Check this checkbox to indicate that regular sales tax should be charged for the current Product.

Local Taxable:

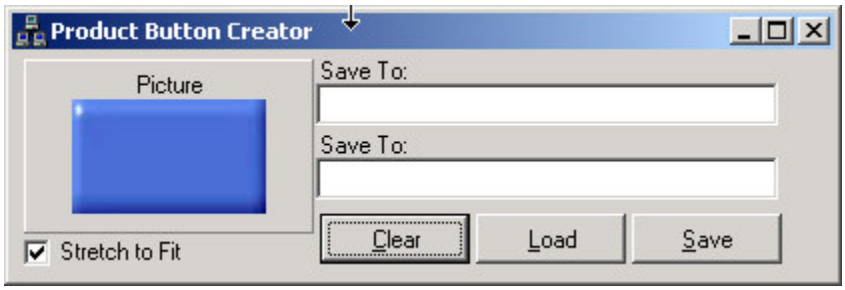
In addition to State or Regional Sales Taxes, some local governments require that you change a Local Sales Tax. Check this box to charge a Local sales Tax on the current Product.

Scale Item:

This flag assumes that the Menu item price is based on weight and will prompt the user to enter the weight of the item in pounds and calculate the price based on the weight and whatever price is in effect. For example if Price 1 is set to $2.99 and the Product weighed in at 1.75 pounds, then the total that would be charged for that item is $5.23.

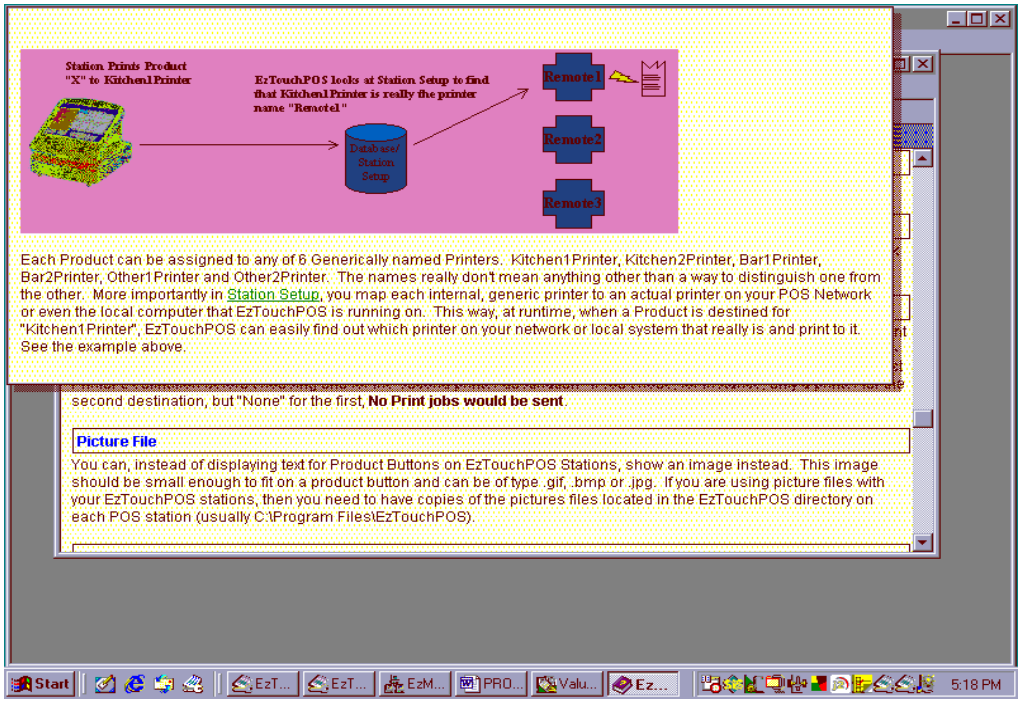
Button Picture:

You can show an image or logo for your Product by using Product Buttons instead of displaying text. This image should be small enough to fit on a product button and can be of type .gif, .bmp, or .jpg. If you are using picture files with your ValuePOS stations then you need to have copies of the picture files located in the ValuePOS directory on each POS station (usually C:\ Program Files\ EZTouchPOS). You can create these buttons using the Make Product Buttons Utility. (Located on side of button description)



Remote Printing: Print to Printers 1, 2, 3

Each Product in your Menu can have up to three different remote Make Line destinations. Not all Products require 3 different destinations, but some do and it is important to understand how the Remote Printing Model works in ValuePOS. Remember you should choose printer destinations in sequence. For instance, choose the first Printer Destination before choosing one for the second printer destination. If you chose, for instance, only a printer for the second destination but None for the first-**No Print jobs would be sent. You can choose from Kitchen1 Printer; Kitchen 2 Printer; Other1 Printer; Other2 Printer; Bar1 Printer and Bar2 Printer. (You set up these printers in the POS Station setup screen.)**



Allow Modifiers:

This flag allows modifiers to be assigned to food items so that they PopUp automatically to display information when the item is selected. Use these only when a modifier is required. They can slow down the process and modifiers are still accessible from the sales screen.

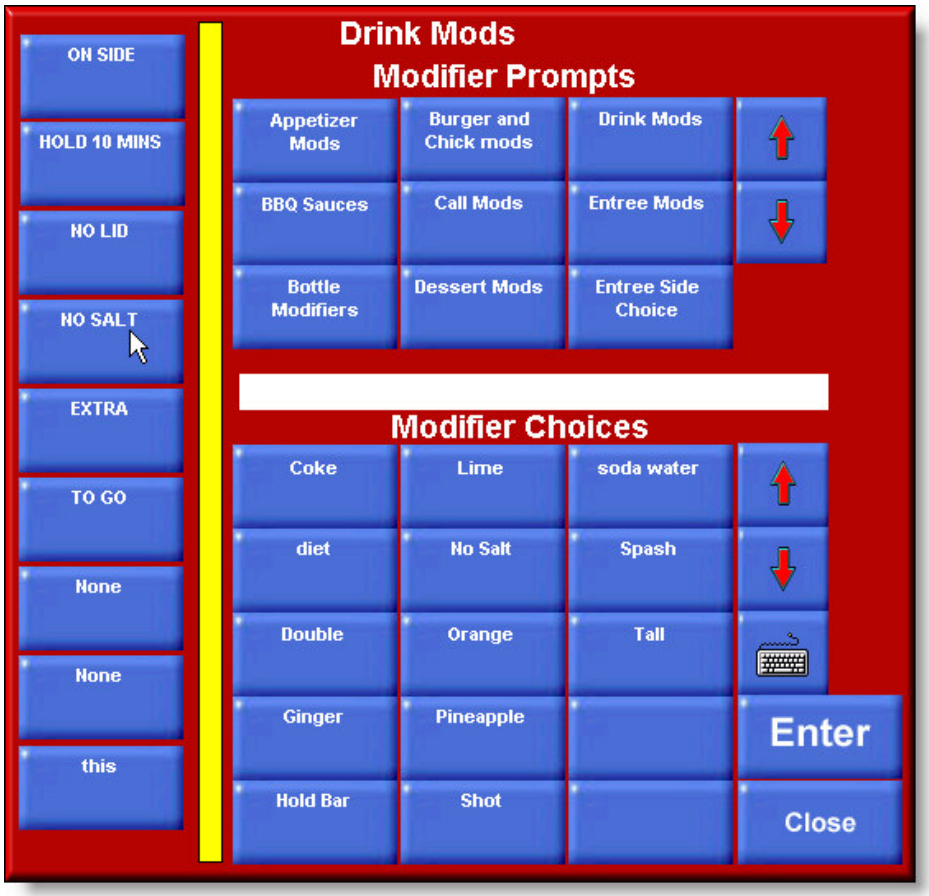
A good candidate for a POP UP Modifier would be a Steak product where the chef would almost always need to know how it should be prepared (Medium, Medium Well, rare, etc)

Modifiers:

Modifiers are special instructions that let those who are preparing food (cooks, chef, expediter) for customers, know exactly how they should prepare those products so that the customer's wishes are met and preparation of food is also timely and efficient.
There are two different types of modifiers: Pre Built (Pop Up or commonly used –charged for) and Manual Modifiers, created on the fly . This uses the onscreen keyboard to send instructions that are not very common or that are used only once in response to special requests by customers.

PopUp Modifiers:

PopUp Modifiers can be created by using the Modifier Setup. Some systems all PopUp Modifiers Compulsory Modifiers, but ValuePOS does not use that term because PopUp Modifiers are not compulsory, meaning that you can dismiss the PopUp screen when it is displayed on ValuePOS stations without selecting anything from the Modifiers presented. A good example of a PopUp Modifier would be when a customer orders a steak and you want the kitchen to know that the customer wants it prepared medium well or rare. These Modifiers are shown automatically when a Product has been assigned that particular Modifier.



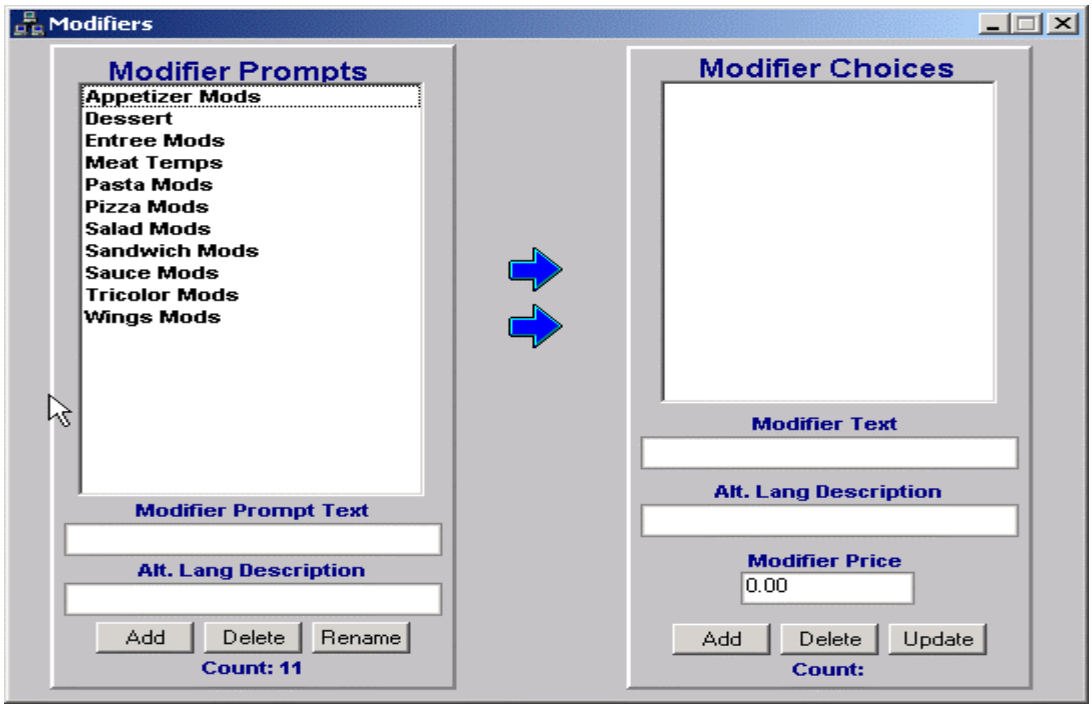
You can choose up to three different PopUp modifiers which will be displayed successively on ValuePOS stations. For instance, if you have 3 PopUp Modifiers chosen for a product, when that product is sold, the first modifier will be displayed. When it's dismissed, the second modifier will be displayed, and when it is dismissed, the third modifier will be displayed. For this reason, many restaurants choose to only use PopUp modifiers for those instructions that are very necessary because all

Modifiers can be accessed manually on all stations if needed. In general, use PopUp Modifiers for instructions that are necessary and use manually selected modifiers for those instructions that are not as common to promote fast entry on stations where the least number of clicks necessary a task is an important goal.

Manual Modifiers:

These are modifiers that you add by clicking a product and after doing so, highlight that item in the Order Ticket. This will bring up a list of all Modifiers and choose from among those entered as well use custom instructions that can be entered via an On-Screen Keyboard. In this case you must take action for the Modifier to be indicated.

.



A modifier is not really a single object. It really is two objects based on the same Parent/ child type of relationship as explained in the category section.

Modifier Prompt:

A Modifier Prompt is the question that will be posed to the user of a station when a PopUp Modifer is displayed. For example, "Meat temperatures?" "What Kind of Hot Sauce?" , "Condiments for Potato?", are all good examples of Modifier Prompts. These are the prompts the user sees when a modifier is either required or available.

Modifier Choices:

Modifier Choices are the choices that are made available to the user of a ValuePOS station to answer the questions posed by the Modifier Prompt.

Example:

Modifier Prompt: "Meat Temperatures"
Modifier Choice: Medium Well, Well, Rare, Medium

Modifier Prompt: "What Kind of Hot Sauce?"
Modifier Choice: Chernobyl Hot, Buffalo, Mild

The Modifiers Screen:

The Modifier Screen is made up of two primary sections, both corresponding to the building process of Modifiers: **Modifier Prompts and Modifier Choices.**

Modifier Prompt List:

This list shows all Modifier Prompts that have been previously entered into the system. By selecting **any** item in this list, its Modifier Choices will be displayed in the **Modifier Choice List.**

Modifier Choice List:

This list shows all previously entered Modifier Choices for each Modifier Prompt. When you select an item from the Modifier Choices List, the name will appear in the Modifier Text field so that you can change it as well as the Modifier Price, if any.

NOTE: You must always indicate a price in this field. If there is no price for the modifier, enter a zero (0) for the Modifier Price.

To Create A New Modifier:

1. You must first create the Modifier Prompt. In the Modifier Prompt text field, enter the text for the Modifier Prompt and click the Add button. The new Modifier Prompt will be added to the Modifier Prompt List. Find it in the list and select it or highlight it.
2. In the Modifier text Field, enter a Modifier (answer to a prompt) and don't forget to include a price even if it is zero (0). After you have entered the Modifier Text and the Modifier Price, click the Add button under Modifier Choices section of the screen. The Modifier that you created will be added to the Modifier Choices List. Repeat step 2 for every choice you would like to have available for the selected Modifier prompt.

Rename a Modifier Prompt:

You can rename a Modifier Prompt easily by performing the following steps.

1) Highlight the Modifier Prompt that you want to change the name of.

2) Click the Rename button and enter the new name in the dialog box and click ok.

Deleting Modifiers Prompts and Modifier Choices:

Each section of the Modifier Screen provides a Delete button that you can use to delete either a Modifier Prompt or Modifier Choice respectively. **Deleting a Modifier Prompt will automatically delete any associated Modifier Choices.**

Alt Lang. Description:

is an alternate description that will be sent to the kitchen instead of the regular description when Alt Language is enabled. If none, type none.

FIND, GRID, BY CATEGORY:

These are listings enabling you to:

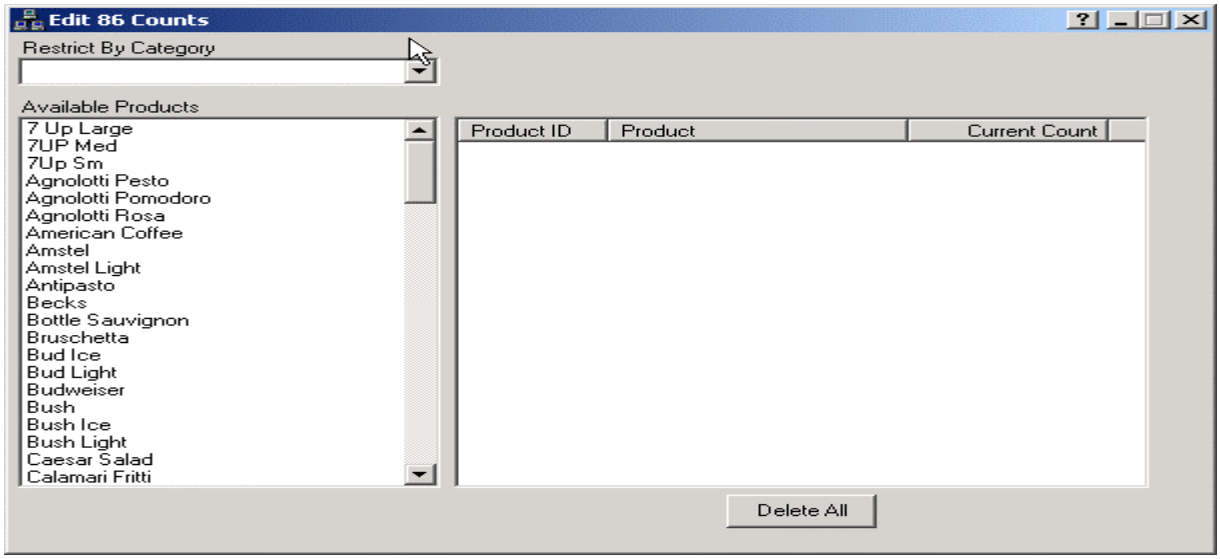
1) **Find a particular product in your inventory**

You can search for a menu item and go to its record instead of moving record by record to go to the particular record you need.

2) **List all products in a Grid formation.**
3) **List Products by the Category that they are in.**

This filter allows you to see available records for a specific category of your choice.

MANAGE 86 ITEMS



Managing 86 items in ValuePOS is very straightforward and easy. Basically what this is used for by most ValuePOS users are for specials and Products such as Daily Specials or Seafood purchased that day. 86 items allows you to count down the number of these Products that you have to sell. When this value reaches 0, you will not be able to sell that product any longer.

Restrict by Category:

When you first load the 86 counts screen, the Available Products list is populated with all products from your menu. You can restrict by category which products are available in the Available Products list by selecting a Category from this drop down box.

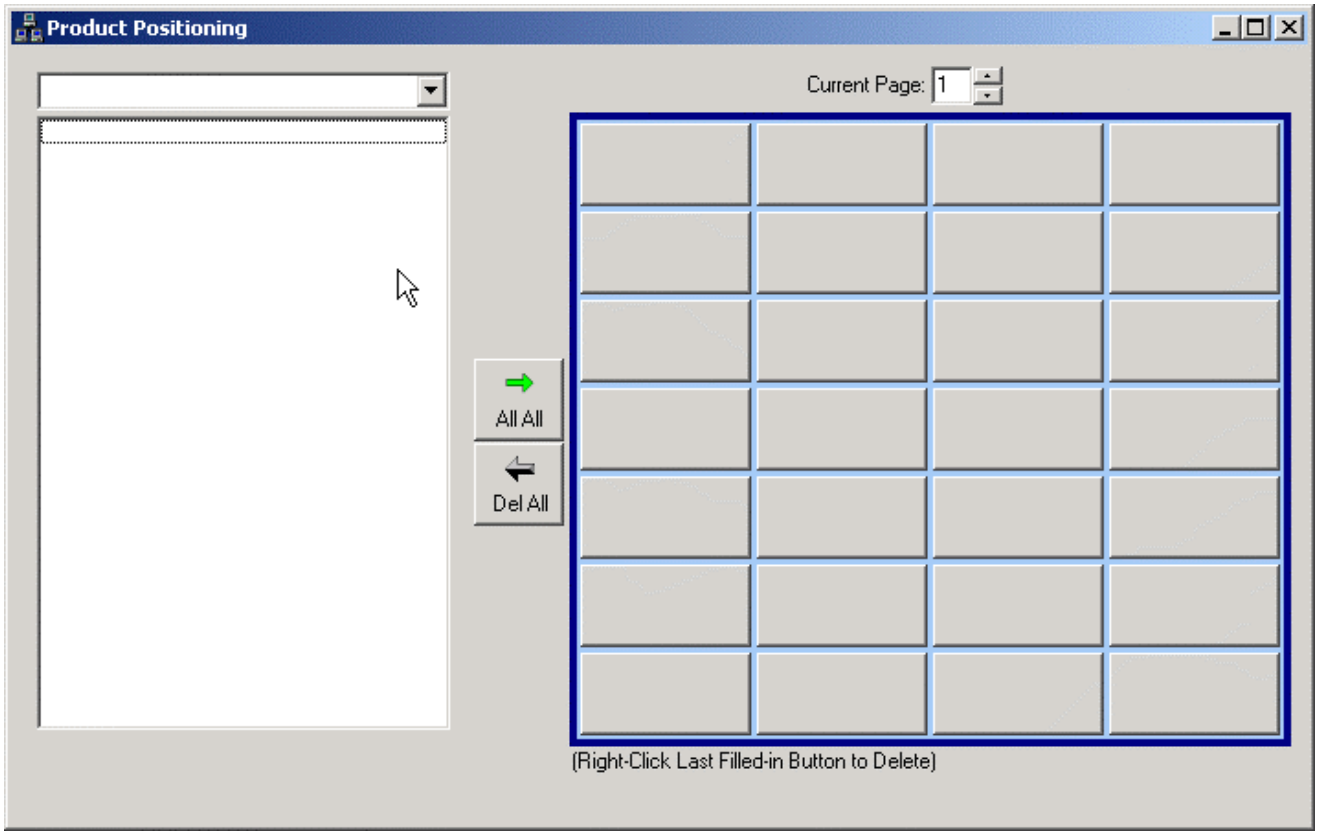
Available Products:

This is a list of Products in your Menu that you can choose from to add to the 86 Items List. To add a Product to the 86 items list, highlight the Product that you would like to add, then right click and select Add to 86 Count from the short cut menu that appears. You will be asked to enter the Quantity to use for the 86 item list (default is 10) . Enter that amount and select Enter button from the dialog that is displayed.

86 Items List:

This is a list of Products that currently belong to the 86 Items List. You can delete an item from the list at anytime by first highlighting the item, right clicking and selecting Delete from the short cut menu that appears.

PRODUCT POSITIONING



Product Positioning:

Instead of ValuePOS determining what order Products are shown in on the Product Grid, ValuePOS takes a more flexible approach by allowing you to specify the order that Products are shown on the Product Grid.

ValuePOS stations can show a total of 84 Products for each category defined in your Product Menu. Products are grouped into 3 pages of 28 products each. Only products that have been assigned a Position will be displayed on the stations and thus made available for sale to customers. (4 columns of 7 buttons per column)

While ValuePOS allows up to 84 products per category, you should make an effort to restrict the number of products for each category to 28 or less so that you do not have to flip from page to page.
This problem may be avoided by properly organizing your Products using the right Categories and Sub Categories.

Ways To Add Products for Display:

These are the ways that you can add Products for display that is the same as adding a product to a Page.

- You can Choose a category from the category drop down box (upper left hand corner of the screen) and click the Add All button which will add as many Products to the currently selected Page as possible (that will actually fit) This will add Products alphabetically from the list on the left. Use this method if you don't care which order Products show up on a Page, especially if you have 28 or less Products for a particular Category because they will all show up on page 1 easily.

- You can selectively add Products to a Page by first highlighting a product in the list and clicking the Add button. This will Add the currently selected Product to a slot of your choice on the currently selected Page. Repeat these actions until you have filled the current page.
- To Change a Page and Continue filling Products: Change the Current Page by using the Up/Down Arrow at the top of the Current Page of buttons.

HELPFUL HINT:
You can Delete Products form the Current Page by right clicking the button that represents the Product you want to remove from the Current Page.

MAKE PRODUCT BUTTONS

ValuePOS allows you to create your own Product Buttons to display on your stations. Logos are usually used for this but you can use any type of picture. EZManager will take the picture that you supply and meld it with the picture that we use to represent a Product Button thus creating a new Product Button.

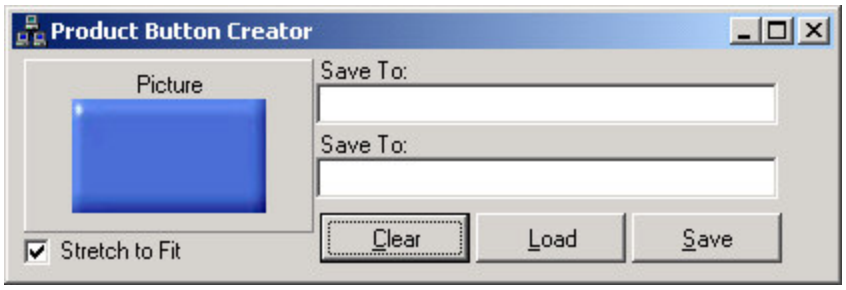
CREATING PRODUCT BUTTONS:

Click the Load button to find a .bmp file that you would like to use to create a new Product button.
Click the Save button to save the newly created .bmp file to your hard drive.

Remember Product Buttons must be copied to the directory where you installed ValuePOS on every POS station.

GETTING THE BEST PICTURE QUALITY:

By default, EZManager will stretch the picture down to fit in the appropriate area of the Product Button. However this can result in distorted pictures because of rendering that takes place. It is better to use an external image editor such as Paint Shop Pro or the free utility IrfanView to reduce the picture down to a size of 70 pixels wide and 39 pixels high before creating the button and choosing the .bmp that you would like to use. This way, you can uncheck the Stretch to Fit Button and avoid dithering that occurs otherwise.



CHANGE REMOTE PRINTING:

Change Remote Printing by Category:

Many times you will find it much more convenient to change remote printing based on a Category. More than likely whole Categories usually print to the same location. This is much faster and more accurate than navigating through each record in the Product Management screen and changing Remote Printer destinations individually. This dialog box allows you to change them.

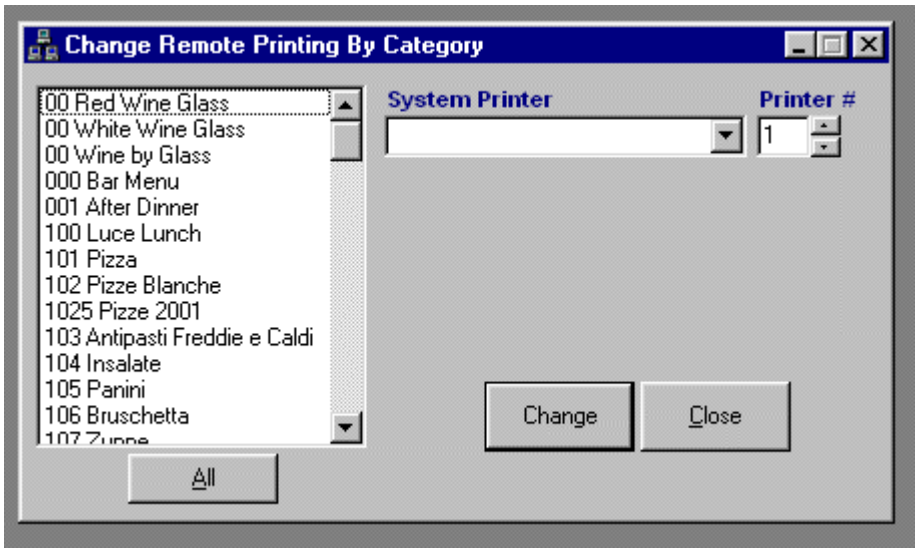
To Change Remote Printing by Category:

In the Categories list (left side of dialog box) select the Category that you want to change Remote Printing for.

1) In the System Printer drop down, select the System Printer you would like to update(IE. Kitchen1Printer)
2) Select the Printer# (IE First Destination, Second Destination or Third Destination);Printer 1,2 or 3
3) Click the **Change** button.

HELPFUL HINT:

You can select multiple categories by either holding down Shift or CTRL and selecting the Categories that you would like to change printing for. After selecting multiple Categories, follow the same steps above (2-4)



UPDATE PRODUCTS BY CATEGORY

What does this Box do?

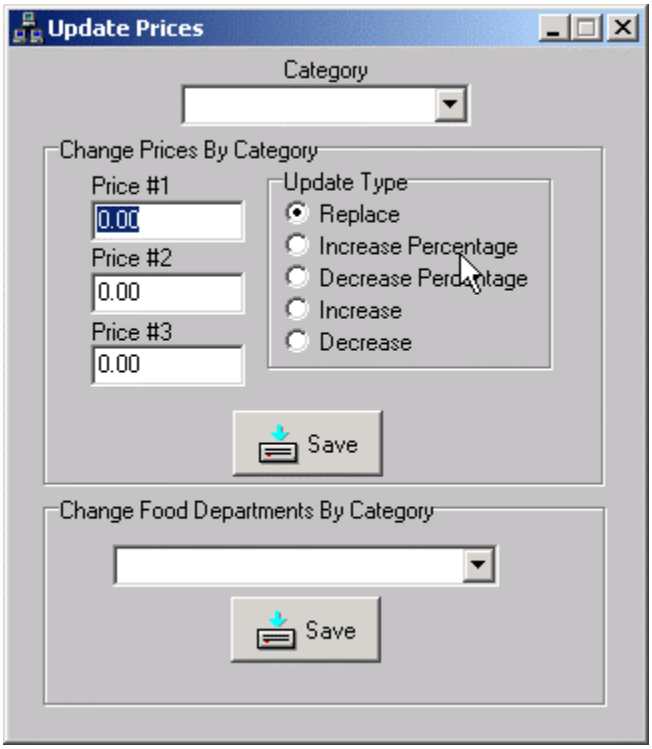
The Update Products by Category or Update Products Display allows you to perform two different types of updates on Products based on the Category the Product belongs to.

Update prices:

You can update prices for Products (Prices 1 through 3). Simply select a category from the Category drop down box (upper portion of the dialog). Enter the changed prices (to make no change to a price leave as zero) and click the SAVE button in the Change Prices by Category section. There are three ways to change the price: replace the current price for each product; increase/decrease percentage the price by a certain percentage; or increase/decrease which simply increases or decreases the price of each product in the category you select by an amount you specify.

Change Food Departments:

You can also change the Food Department associated with Products based on the Category that they belong to. Simply select the Category that you want to change from the Category drop down box upper portion of the dialog). Select the Food Department that you want to change the selected Category to and click the SAVE button in the Change Food Department by Category section.



PIZZA TOPPING REDUCERS:

The ValuePOS Pizza Builder allows you to specify Halves and Quarters when applying toppings to a Pizza. Many times you will not want to charge a customer the full price for a topping if the topping is being applied to a half or a quarter of a pizza. For this reason, ValuePOS allows you to specify Pizza Topping Reducers to offset the amount charged for a topping based on whether it is for a half or a quarter portion of a pizza.

For both half and quarter toppings you have the option of deciding how much to deduct from the original price and you can do this as:

A Dollar Amount

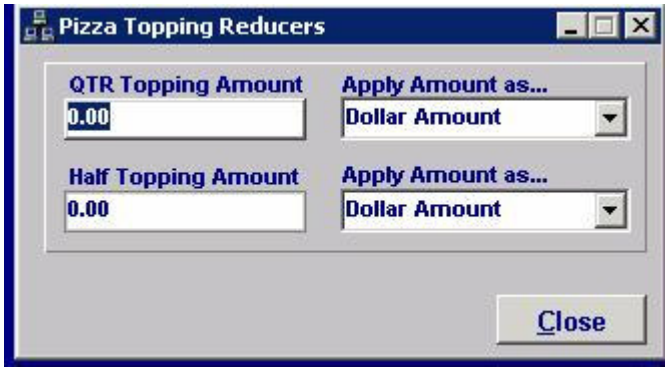
Or

A Percentage Amount

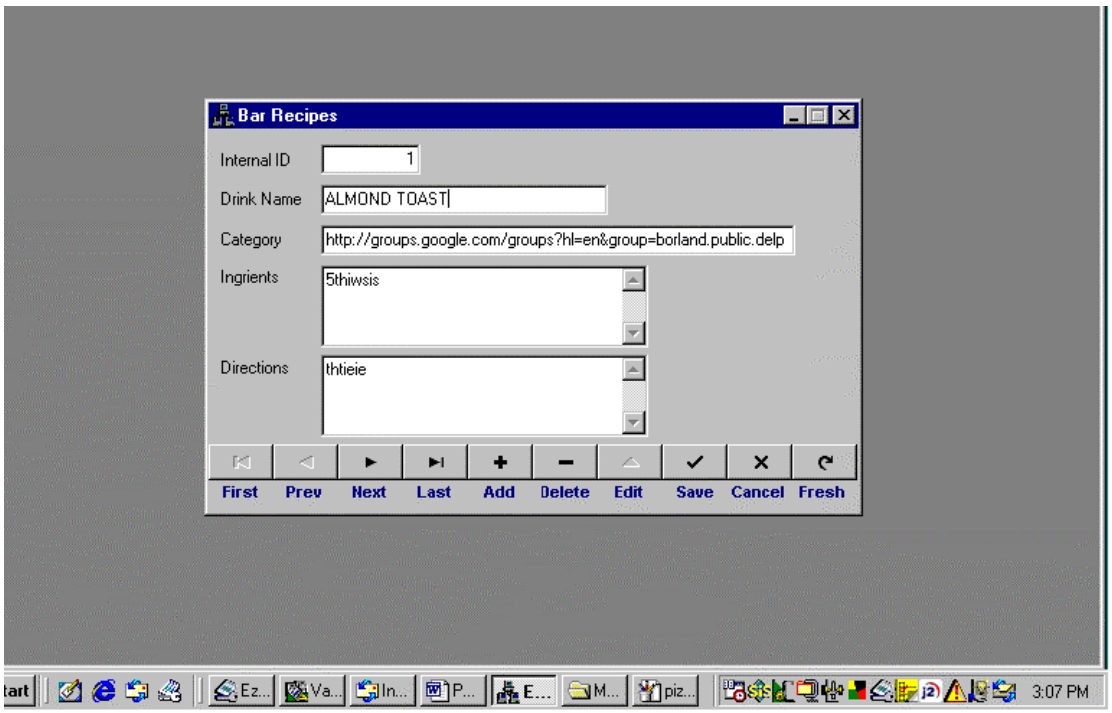
For Example, if you have a topping that was priced at say $1.99, you could specify that if is applied to a half topping, you only want to charge 50% for it, or maybe $.75 cents instead of $1.99.

Entering Reducers:
If the reducer you are using is a percentage, then you must enter the amount as a decimal. For example, if you want to charge 50% of the original amount then you would enter .50 and set the Apply Amount As…drop down to Percentage. If you wanted to charge the .75 cents instead, you would enter .75 in the Amount field and select Dollar Amount from the Apply Amount As… drop down.

When you are closing the Pizza Reducers Dialog, you will be asked if you want to save those changes that you made. Be sure to click YES if you want to save the changes.



BAR RECIPES



In this section, you can enter the names of drinks you use in your bar, the ingredients and the recipes.

VALUE POS INVENTORY SYSTEM

ValuePOS comes integrated with a built in inventory control system. The inventory control system allows the establishment to track inventory down the recipe level. The system, each evening, batches the sales of items from the POS system and then relieves the inventory of the items as defined by the user in this section of the program.

Obviously, this is a very useful feature and one that the developers would hope each and every user would utilize to its maximum benefit. However, this feature requires a significant investment of time on the part of the user, or, the user's staff. In fact, to maintain good inventory control, users must enter each day the number of units arriving on delivery from vendors and must do periodic physical inventories to maintain the system properly.
If you do not have the ability to dedicate time to this endeavor, we would recommend that you do not utilize this part of the system.

Definition of modules within the Inventory Control system:

1) Vendors:

It is important that you define all the vendors who supply you with products for your business. This is a good starting point as many parts of the inventory areas will ask or have drop down boxes which ask you to tell the system the vendor from whom you purchase certain items. If you do not define them in advance, the drop down box will not contain that vendor. Thus, there is no way to track where the merchandise came from.

Vendor ID: Unique ID number assigned to the Vendor by the system. Cannot be changed.
Vendor Name: Enter the name of the vendor here.
Contact: Enter your contact (usually a Sales Rep or Account Exec) here.
Phone: Enter the Vendor's phone number here.
Fax Number: Enter the Vendor's Fax number here.
Address, City, State, Zip: Enter the appropriate information about Vendor in these fields.
Account Number: Enter the Account Number you have with the Vendor here.

2) Units of Measure:

This is the second area that will require your attention. The program allows you to define your own units of measure to be used in conjunction with Inventory and Product Mixing. ValuePOS needs to know the unit of measure for certain items. There can be unlimited units of measure defined. A case of 20 items might be one unit of measure. Or an ounce, or a pound, etc. The system allows you to define these different units of measure. They are important because later on, as you define your inventory, you will need to tell the software, for a particular bulk item, how that item comes delivered to you. (Beer might be 20 to a case) However, when you sell one beer, you are only deleting from inventory 1 of the 20 that come in the case. You will re-order beers in this scenario in cases, not individually. Hence, the reason for units of measure.

Unit of Measure Name:
This will be the name by which you refer to the Unit of Measure (UOM) when using Product Mixing and Inventory setup.

Prep Unit Name: This is the name of the parts of the UOM that are used to prepare Menu Items in your Restaurant. If you have a product that is measure in pounds, Pound is the Unit of Measure Name and Prep Unit Name is Ounce.
Prep Units Included: The last part of the UOM is the Prep Units included. If you have a pound of flour measured by the ounce, your prep units include would be 16 (ounces).

3) Purchase Orders:

To make life easy, the software allows you to create purchase orders from vendors in order to then receive the inventory into the system. In this way, the inventory is replenished from the receiving section of the program. This makes adding bulk inventory to the system much easier than having to find an item in inventory and manually entering the number of items received.

INVENTORY:

In order to accurately track your inventory, you should enter every Inventory Item into your ValuePOS system. During End of day procedures, EZManager performs a number of maintenance chores including what we call Inventory Explosion. Inventory Explosion is the process that EZManager uses to take the sales of each and every menu item sold for the day, match it up with every Inventory item used to make those Products (using Product Mix) to effectively reduce your inventory and keep track of your on-hand levels.

Inventory ID: This is the unique ID number assigned by the system to identify inventory items. You cannot change these values.

Vendor: Every inventory item must be associated with a Vendor. Select a Vendor from the drop down list. This is a list of Vendors previously entered into the system.

Description: Enter a unique description that you will use to identify this inventory item in reports, historic data, etc. Remember to use unique names throughout so that you will not be confused when looking at sales and inventory reports.

Unit of Measure: Enter the Unit of Measure that will be used to calculate use of this inventory item.

Purchase Unit: A Purchase unit can be just about anything including but not limited to a case, barrel, box, crate, gross, etc.

There are: Use this field to indicate how many Units of your UOM are in each Purchase Unit. For instance, in a crate of eggs, you might receive 12 dozen eggs. If your UOM was setup as a "Dozen" with the Prep Units being 12, you could enter 12 here indicating that there are 12 dozen eggs in a purchase unit. When ValuePOS calculates your inventory, ValuePOS will let you know how many "Dozen" of eggs you have on hand.

Shipping Cost: If you incur any shipping for freight charges for this particular Inventory Item, indicate the amount in this field.

Vendor ID: This is the vendor's alpha numeric value for that item

Price Purchase Unit: Indicate here your price for the Purchase Unit as indicated above under Purchase Unit.

On Hand: This is the number of this inventory item that you have on and, express in terms of the UOM you chose for this inventory item.

On Order: You indicate here any number of Units, expressed in terms of the UOM you chose for this inventory item, that are currently on order from your Vendor.

Re-Order Point: Enter the number of Units that your On Hand level must fall to in order to generate an alert to order more of this Inventory item.

Store Number: If your location is part of a multi-store company, enter the number of the store here. Otherwise, enter number 1.

INVENTORY EXPLOSION:

This is the term used to explain the process that EZManager uses to track Inventory Levels. During End of day procedures, EZManager performs the following steps.(Other Maintenance chores are also performed at this time).

A) For each Product sold during the day, EZManager will do a count of the number of that product sold. For this example, let's say that EZManager has counted the sale of a "2 Egg Breakfast" to be 24.

B) Let's say that we have setup a UOM called "Dozen" with the Prep Unit included set to 12. So now, EZManager will look to see if there is an entry in Product Mix for the product. "2 Egg Breakfast". Finding an entry for that product, let's say 2 eggs are used to make the "2 Egg Breakfast" . EZManager calculates at this point that a total of 48 eggs have been used to sell those 24 "2 Egg Breakfast".

C) Let's say that our Eggs inventory item indicates there are 6 dozens in a purchase unit and that before the start of the day, we had a total of 36 dozen eggs on hand. EZManager simply figures out that we have used 4 dozen eggs and now have 34 dozen on hand.

4) Receiving Inventory:

Once the purchase order is created, you await the arrival of the order from the vendor. When the order arrives, you can easily enter the receiving area and highlight the purchase order from the database, select the items you are receiving. Once the completed, you can update the inventory accordingly.

Open Inventory Items:

This portion of the Receive Inventory Screen represents Line items from Purchase orders that you have created that have created that have not yet been marked as received. As you select a row, it becomes highlighted indicating that it is the currently selected item in the list.

Current Vendor:

Choosing a Vendor from this drop down box will populate the Open Inventory Items list with PO Line items that have not been marked as received for the selected Vendor.

Receiving Inventory:

Select the PO Line Item that represents the Items that you have received from your vendor by clicking on it.
Click the **Receive button** and indicate **YES** that you would like to receive that inventory.
Inventory levels will be increased as you Receive Inventory.

5) Inventory Form:

In this section, you can view the inventory, find items quickly, review on hand quantities, and edit items directly on the form. We recommend using the purchasing and receiving modules to physically receive inventory as described above.

6) Inventory Reports:

The system has the ability to display in the reports the on-hand inventory, items which have fallen below the re-order quantity, print physical inventory sheets for counting, product mix reports to show detail on what items in your menu are composed of the bulk items per your definition.

7) Product Mixing:

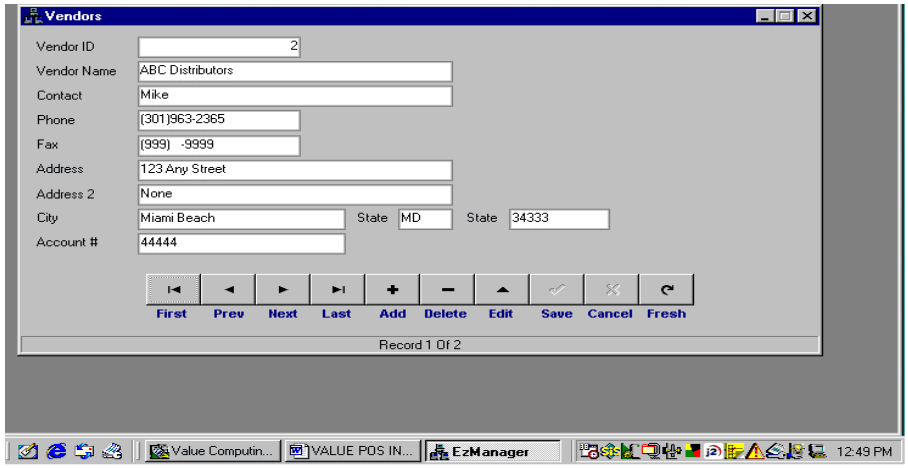
This is the meat and potatoes! Product mixing is the process taking the products that you sell to your customers, the Inventory that you purchase from your Vendors and combining the two so that you can efficiently and easily track and control your inventory and Product Costs. In order to get the inventory depleting correctly, the system needs to know what bulk items, or individual items (bottles of beer, bottles of wine, etc) make up a particular item on your front of the house menu. (those buttons that the waiters are pressing to sell items) This is what this section does. In a nutshell, you can select an item from the menu (you can filter by category if you like) then choose an item, then tell the system how many inventory items that item consists of. You use the units of measure which you created earlier to define exactly how many inventory units go into the item. Once linked in the mix, when someone sells one of those items in the front of the house, the system will deduct that quantity from the inventory items during system closeout. That is the way you get inventory counts and depletions recorded.

There are 4 main areas on the Product Mix screen:

Available Products
Available Inventory
Current Mix Information
Assigned Inventory

Now that you have reviewed the seven parts of the inventory control system. Let's take a look at the screens to get a visual idea on how this works.

1) Vendor Screen:



Much like all the other areas of the ValuePOS system, you have the same navigation bars at the bottom to add, delete, and edit records. Simply fill out the form for each vendor.

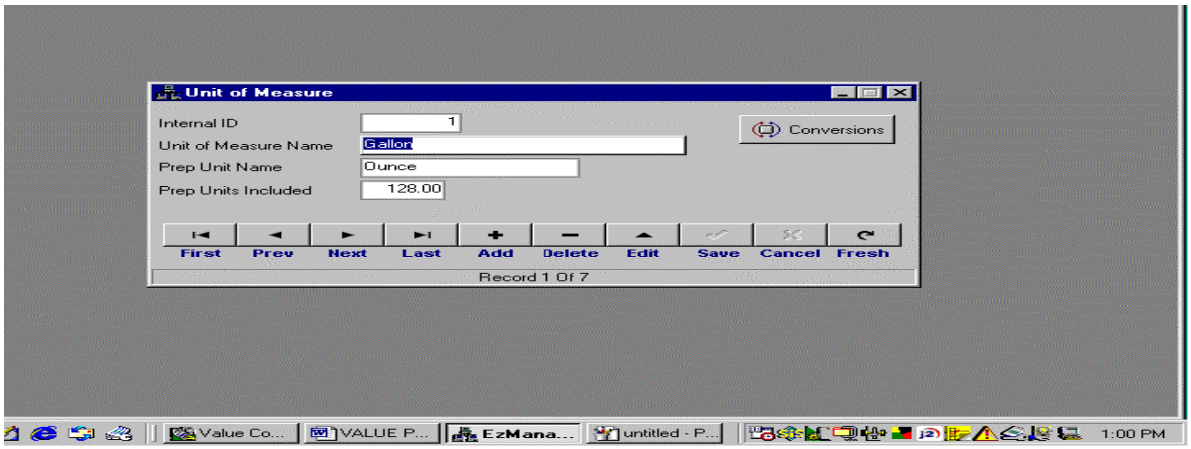
2) Unit of Measure Screen:

The internal ID will be automatically set by the system. You create the name for the unit of measure, such as ounces, pounds, cases, crates, etc.

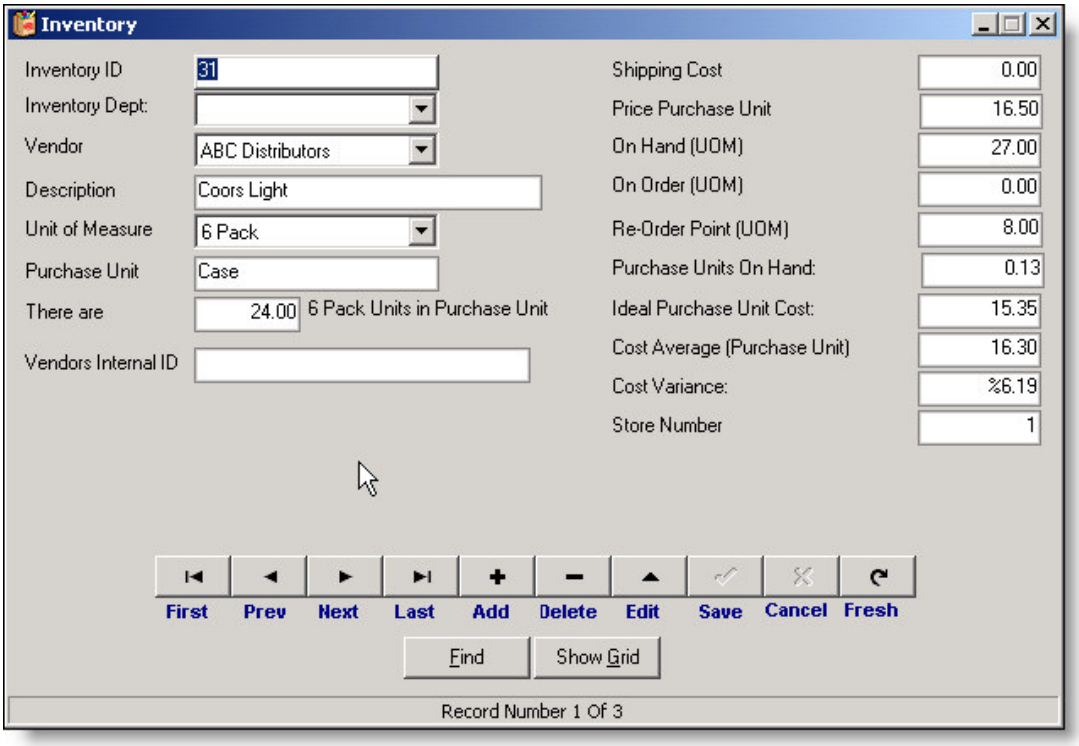
The important detail is the number of prep units included. Let's say, you define a unit of measure called Case of 20. You would want the prep unit field name to also be called Case of 20 and the number of prep units would be 20 to denote that 20 units make up 1 case of 20.

Another example of defining an actual unit of measure would be a pound that consists of 16 ounces. You would define a unit of measure called Pounds. Then you would indicate that the prep unit name would be ounces. And you would indicate the Prep units included would be 16 to denote that there are 16 ounces to a pound and so on.

For example:
Using the example of a Unit of Measure called "Pound", we can setup our Product Mix. We are going to want a way to express how much of an Inventory item is used in the preparation of a Product in our Menu. For our example, we'll use everyone's favorite, the Hamburger. We have a Product in our Menu called Hamburger.
This Hamburger is made with ¼ pound of Ground Beef.
We have an inventory item called "ground Beef" which uses the UOM "Pound" shown above.
When we create our Product Mix, we are going to indicate that the inventory item, "ground Beef" is used in the preparation of our Product called "Hamburger".
We would indicate that 4 Prep Units (ounces) are used to prepare our Hamburger. using the Inventory Item Ground Beef.
Now when we sell this Product called "Hamburger " ValuePOS will know to take out 4 Prep Units from the Inventory Item known as "Ground Beef" . Since ValuePOS knows that there are 16 Prep Units(ounces) for every Pound of Ground Beef, it can do the math very easily.
Let's say that the start of business on Monday, we have a total of 10 pounds of the Inventory Item "Ground Beef".
Today we sell 15 "Hamburger" ValuePOS knows that there are 16 ounces for every Pound in the UOM named Pound. 15 X 4 (Prep Units used per Hamburger) = 60 ounces used. The program calculates that 60 ounces equals 3.75 pounds(60 divided by 16) and will show that we now have exactly 6.25 pounds of the inventory item Ground Beef on hand because 3.75 lbs were used.
.



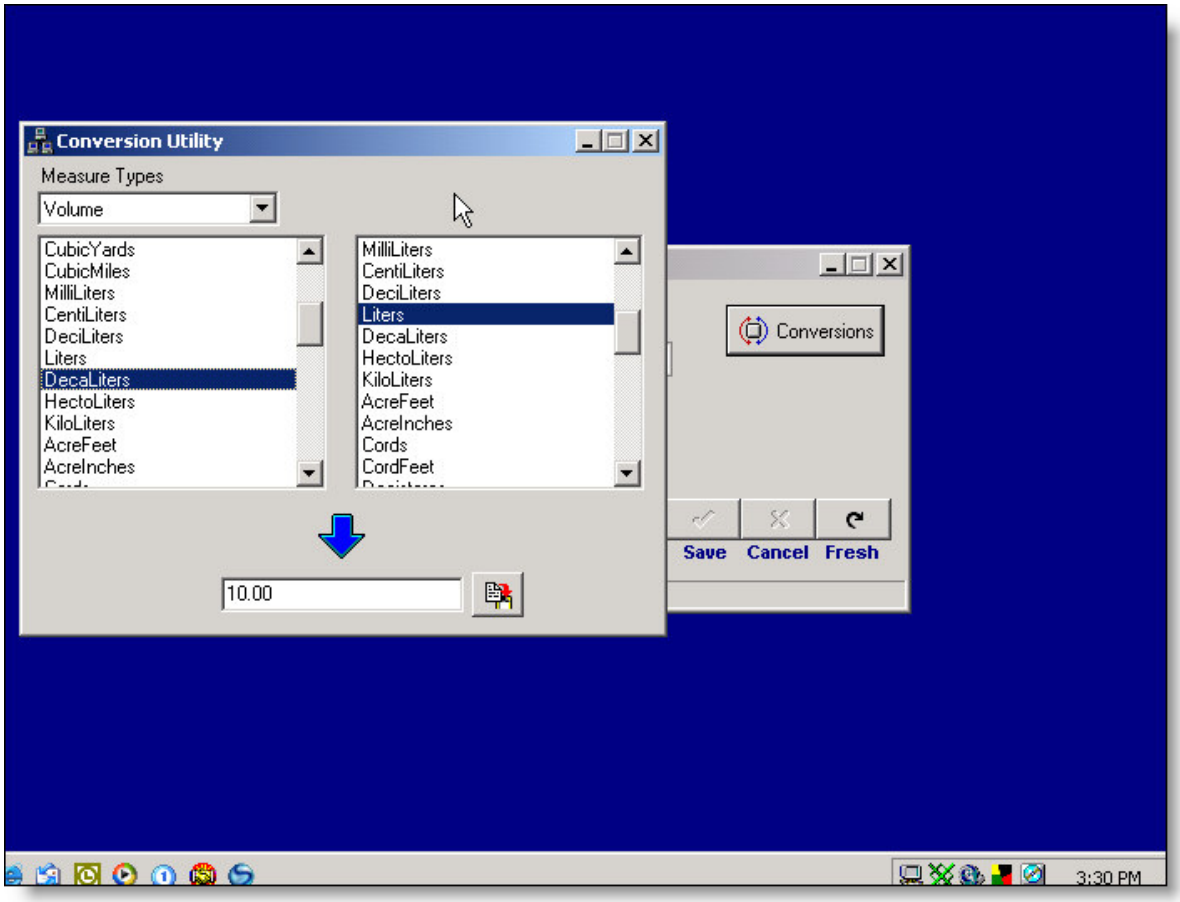
3) INVENTORY SCREEN

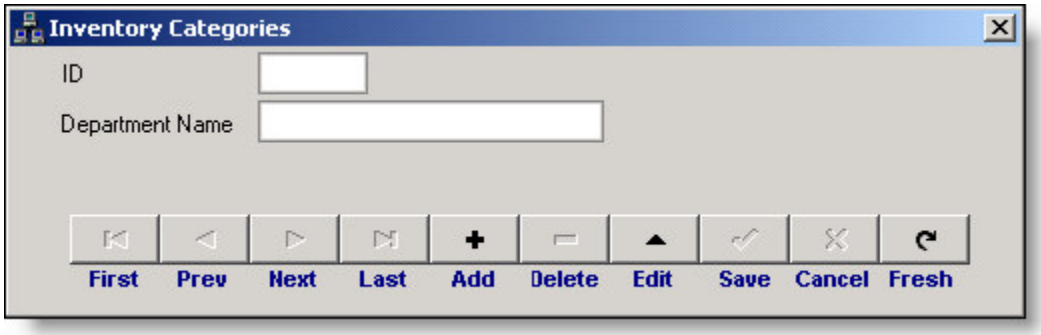


The inventory ID field will be automatically defined by the system. The drop down box that indicates the vendor would have required that you had already defined the vendor in order to select it. The description is whatever the description of the bulk item would be. For instance, you might buy Strip steaks in a box of 20. You would then want to call the item description Bulk Strip Steaks. The unit of measure would be case of 20(drop down box would show this as you would have previously defined this in the units of measure section.)

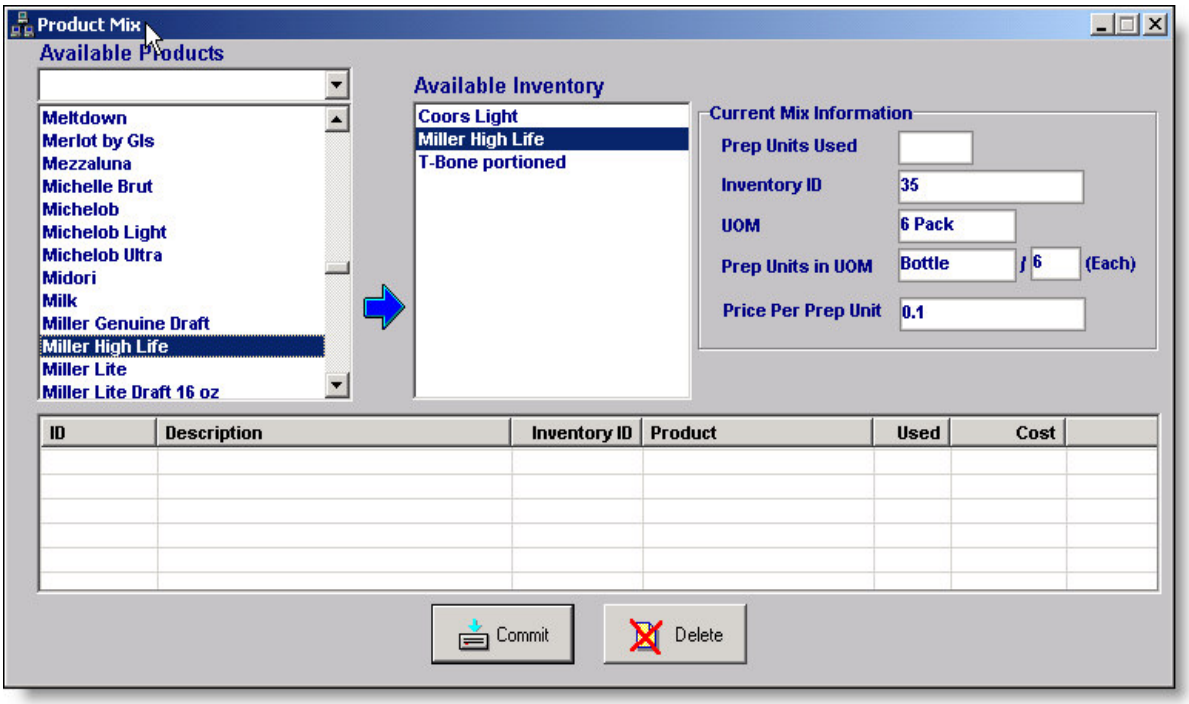
The purchase unit would be whatever the normal number of bulk items you purchase. In the above example, a case of 20 comes with 20 steaks in it, but, you order in quantities of 1 case of 20, 2 cases of 20, etc. Therefore, the Purchase unit would be 1 (1 unit which contains 20 steaks). If there is a shipping cost, enter it in the field, as well as the purchase price you pay for each unit(case) etc.

This information can also be done in an automated fashion using the purchasing and receiving areas of the program from which the inventory database grabs accordingly.


Conversion Utility
Measure Types
Volume
CubicYards
CubicMiles
MilliLiters
CentiLiters
DeciLiters
Liters
DecaLiters
HectoLiters
KiloLiters
AcreFeet
AcreInches
MilliLiters
CentiLiters
DeciLiters
Liters
DecaLiters
HectoLiters
KiloLiters
AcreFeet
AcreInches
Cords
CordFeet
10.00
Conversions
Save
Cancel
Fresh
3:30 PM


Inventory Categories
ID
Department Name
First
Prev
Next
Last
Add
Delete
Edit
Save
Cancel
Fresh

4) Product Mix Screen:



Ok, so you have defined the bulks in the inventory, you have your units of measure and now, you need to do the product mix.
You can go ahead and find any item on your menu quickly by filtering with the by category designation. To do this, use the available products drop down at the top of the form to select a category. Now, only those items in that particular category are displayed in the window on the left.

In the window on the right are all the inventory products that you previously defined (what we call the bulk inventory products). So you select the menu item by making it blue on the left panel, and then, you select from the available inventory, then, you select how many prep units are used. The system will automatically pull the other fields from the database including the UOM field, prep units in UOM and then determine the price per prep unit, etc.
You will see the quantity and item selected appear in the window form below the two panes. Now proceed to enter whatever other bulk items belong to this item. For instance a hamburger may have 8 ounces of beef, 1 bun, 1 slice of cheese, 2 strips of bacon, etc. You will be filling up the screen with those different lines. When completed, press the commit button.
You can review the product mix by printing the product mix report located in the reporting section under inventory reports.

Continue to do each item in your menu accordingly to teach the system what ingredients go to what product

Creating a Product Mix Example:

Step 1: The first step is to determine which Product that we want to assign inventory usage to. Remember, that's all Product Mixing s really about; assigning quantities of inventory items to the preparation of Menu Products so that when those Products are sold, we know how much to deduct from inventory levels. Select a Product to assign Inventory to from the available Products list on the left side of the Product Mix screen.
(You can restrict the Products that are shown in the Available Products list by selecting a Category from the drop down box above it. This will restrict the Available Products list to those of the selected Category.

Step 2: The second step is to select an inventory item that will be used in the preparation of the previously selected Product. The Available Inventory list shows all Inventory items defined in the database system. When you select an Inventory item from the list, its information will be shown in the Current Mix Information area. This information is explained next.

Prep Units Used: allows you to enter the number of Prep Units for the current Product's preparation.
UO M: shows the Units of Measure of the selected inventory item.
Prep Units in UOM: shows the Prep Units used in the UOM of the selected Inventory item.
Price Per Prep Unit: shows the relative price of each unit in preparation for the select Inventory item.

Step 3: After you have selected the inventory item that you w to include in the Product Mix for the current Product in the Prep Units field.

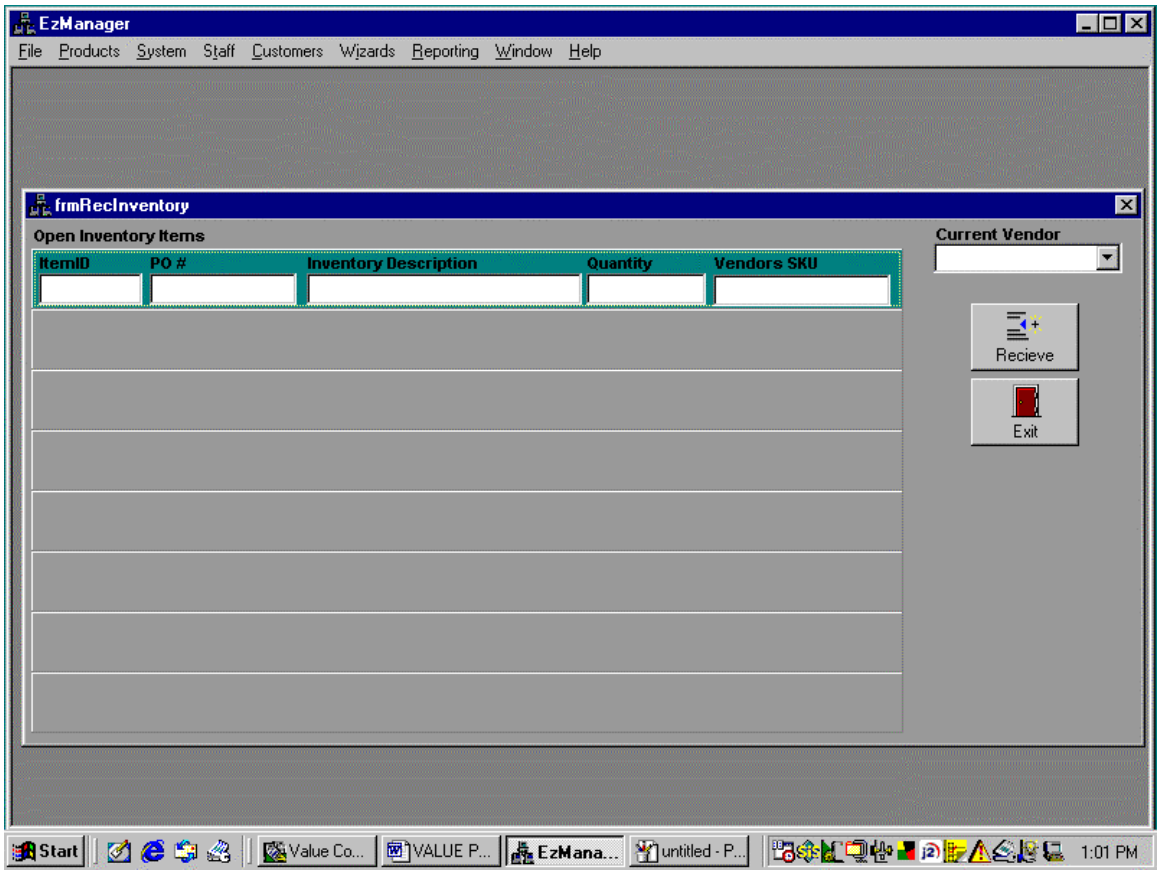
Step 4: Click the commit button. The assigned Inventory list will now display the Product Mix for the currently selected Product.

Deleting a Product Mix Item:

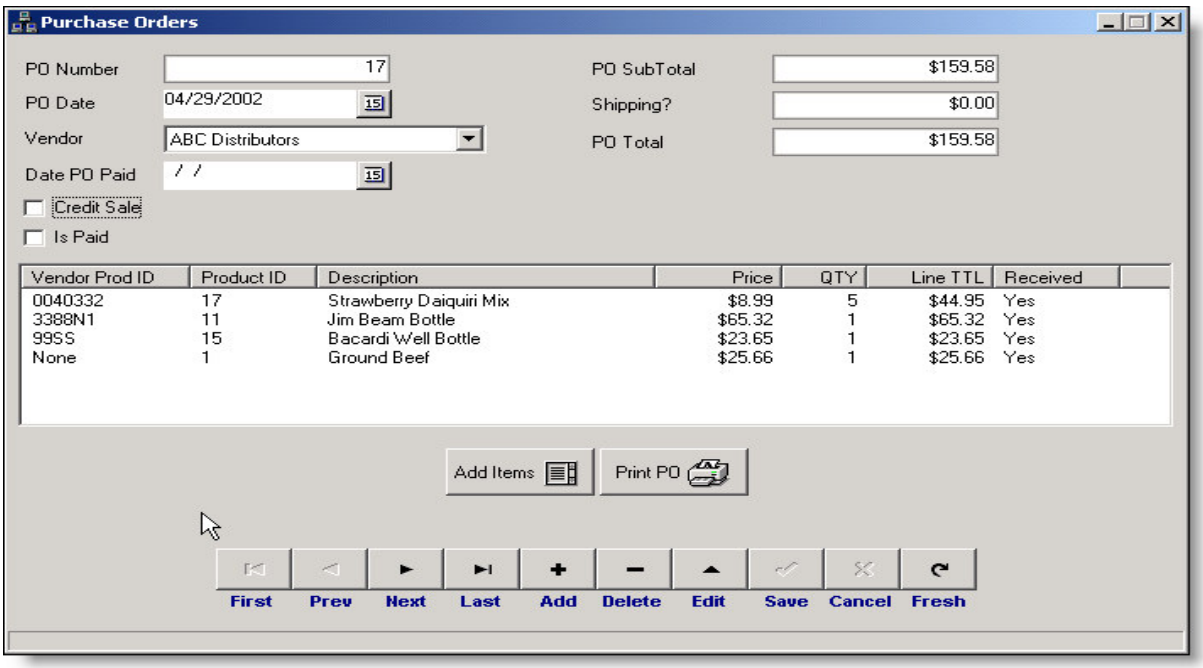
If you would like to delete an item from the Product Mix, simply select the item in Assigned Inventory List and click the Delete button and the item will be removed from the current Product's Product Mix.

Additional Screens in the Inventory Module:

Receiving Inventory:



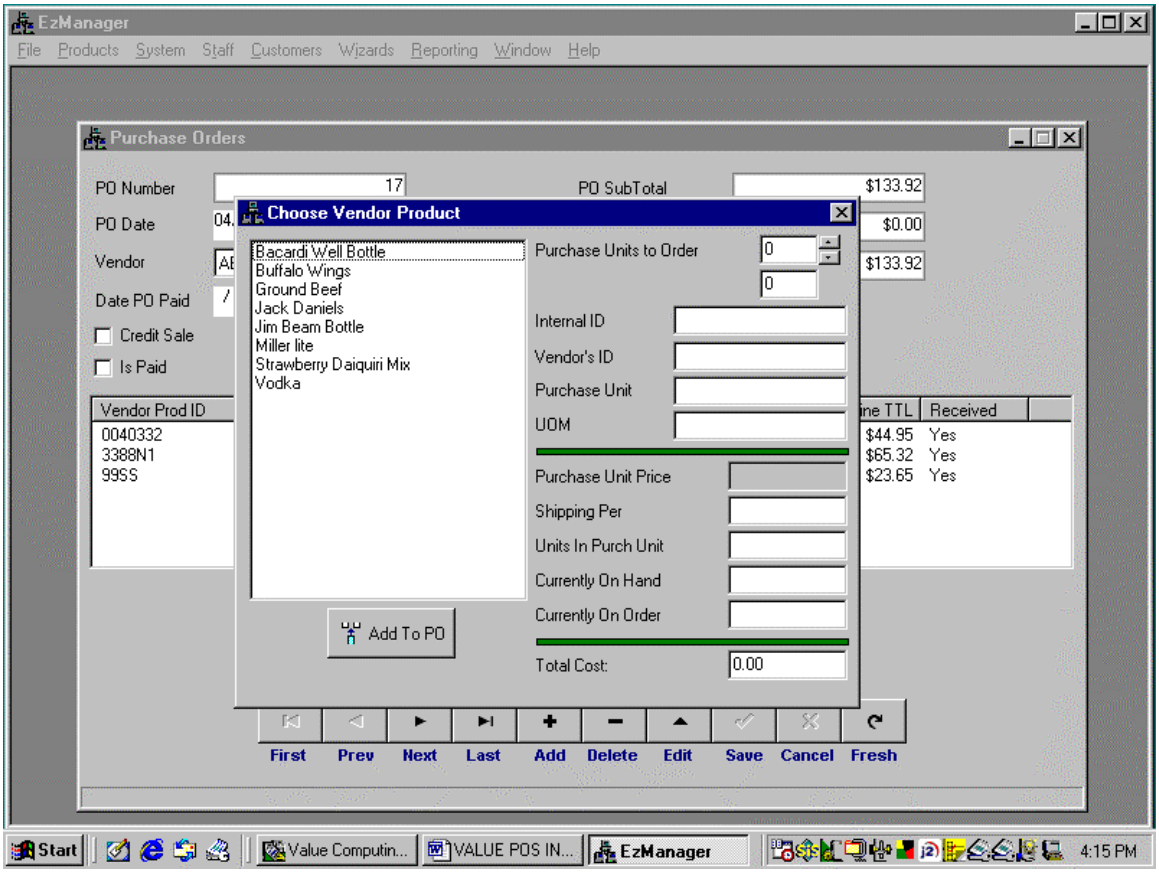
PURCHASE ORDER SCREEN



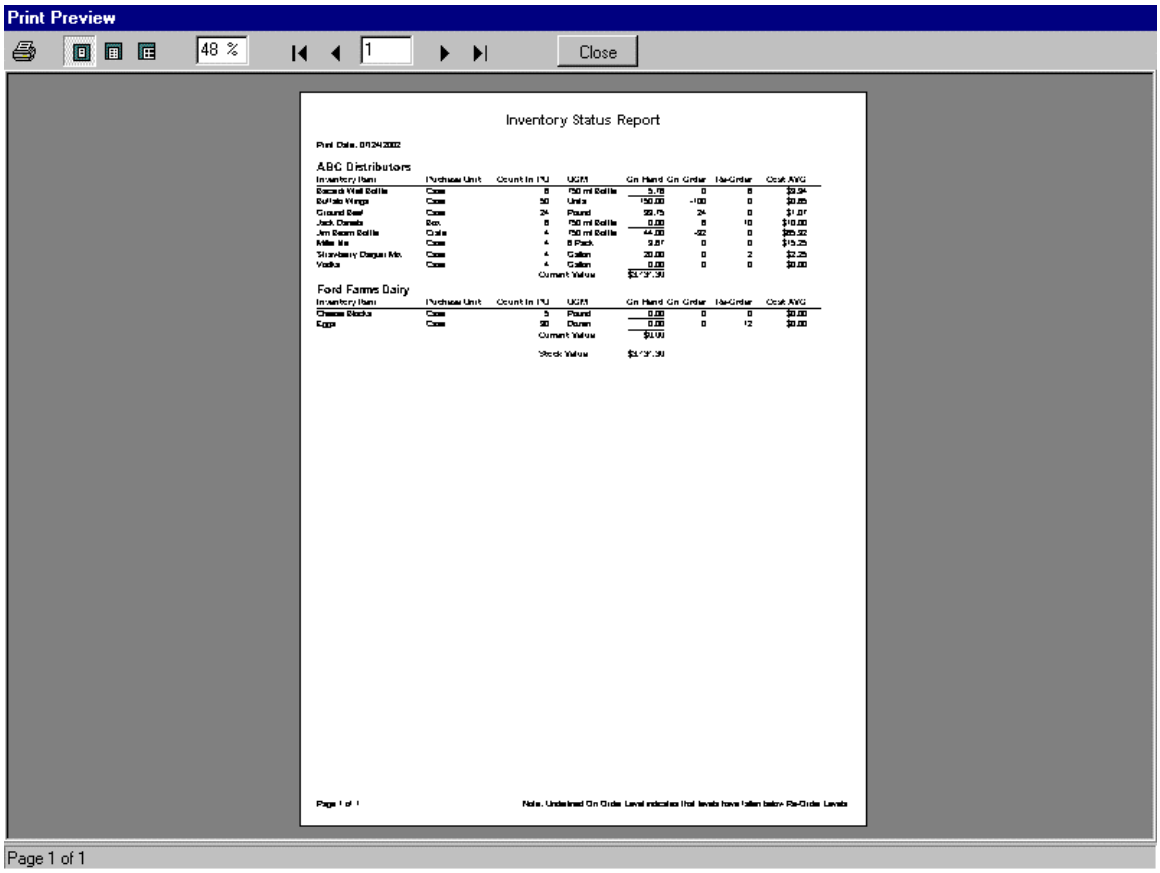
The Purchase Order Screen allows you to create Purchase Orders to keep track of where your inventory is purchased from and how much in quantity is purchased. This is tracked by price and amount of items.

PO#: This is the number of the Purchase Order.
PO Date: This is the date the PO was written.
Vendor: This is the name of the Vendor where you buy the product from.
Date PO Paid: Date the Purchase Order was paid.
PO Subtotal: Amount of Purchase Order without Shipping Costs.
Shipping: This is the field to add shipping or freight costs.
PO Total: This is total of PO with shipping.
Credit Sale: This is field if this is a credit
Is Paid: Field to check when PO is paid
Vendor Product ID: Product ID assigned by the Vendor
Product ID: Product ID you have assigned to the product.
Description: Simple explanation of product
Price: Price of item
Qty: How many of item you are ordering
Line TTL: Total of Price times Quantity
Received: Line to check if merchandise was received

Add to Purchase Order Screen:



INVENTORY STATUS REPORT



PRODUCT LISTING REPORT

Print Preview

62 % 1 Close

Product Listing By Category

Printed 07/24/2002

Food Department: Beer

Catagogory: Beer Ales

Product	Price 1	Price 2	Price 3	HH Price	Open Price	OP Limit	Sides	Side Catagory
Chimay Ale	$10.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Corsendonk Pale Ale	$9.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Duvel Belgian	$9.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Flying Dog Pale Ale	$5.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Paulaner Weizen	$7.00	$0.00	$0.00	$0.00	No	$0.00	0	None

Catagogory: Beer Draught

Product	Price 1	Price 2	Price 3	HH Price	Open Price	OP Limit	Sides	Side Catagory
Magic Hat	$5.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Sierra Nevada Pale Ale	$5.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Stella Artois	$5.00	$0.00	$0.00	$0.00	No	$0.00	0	None

Catagogory: Beer Lager

Product	Price 1	Price 2	Price 3	HH Price	Open Price	OP Limit	Sides	Side Catagory
Amstel Light	$4.50	$4.50	$4.50	$3.00	No	$0.00	0	None
Anchor Steam	$5.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Becks	$4.50	$0.00	$0.00	$0.00	No	$0.00	0	None
Blackened Voodoo	$5.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Brooklyn Pilsner	$4.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Brooklyn Pilsner	$4.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Budweiser	$3.50	$3.50	$3.50	$2.50	No	$0.00	0	None
Coors Light	$2.75	$2.75	$2.75	$2.50	No	$0.00	0	None
Corona	$2.75	$2.75	$2.75	$2.50	No	$0.00	0	None
Heineken	$2.75	$2.75	$2.75	$3.00	No	$0.00	0	None
Killians Red	$2.75	$2.75	$2.75	$3.00	No	$0.00	0	None
Molson Golden	$3.50	$0.00	$0.00	$0.00	No	$0.00	0	None
Peroni	$4.50	$0.00	$0.00	$0.00	No	$0.00	0	None
Rolling Rock	$2.75	$2.75	$2.75	$2.50	No	$0.00	0	None
Sam Adams	$4.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Staten	$4.50	$0.00	$0.00	$0.00	No	$0.00	0	None

Catagogory: Beer Non Alcohol

Product	Price 1	Price 2	Price 3	HH Price	Open Price	OP Limit	Sides	Side Catagory
Haake Beck	$4.50	$0.00	$0.00	$0.00	No	$0.00	0	None

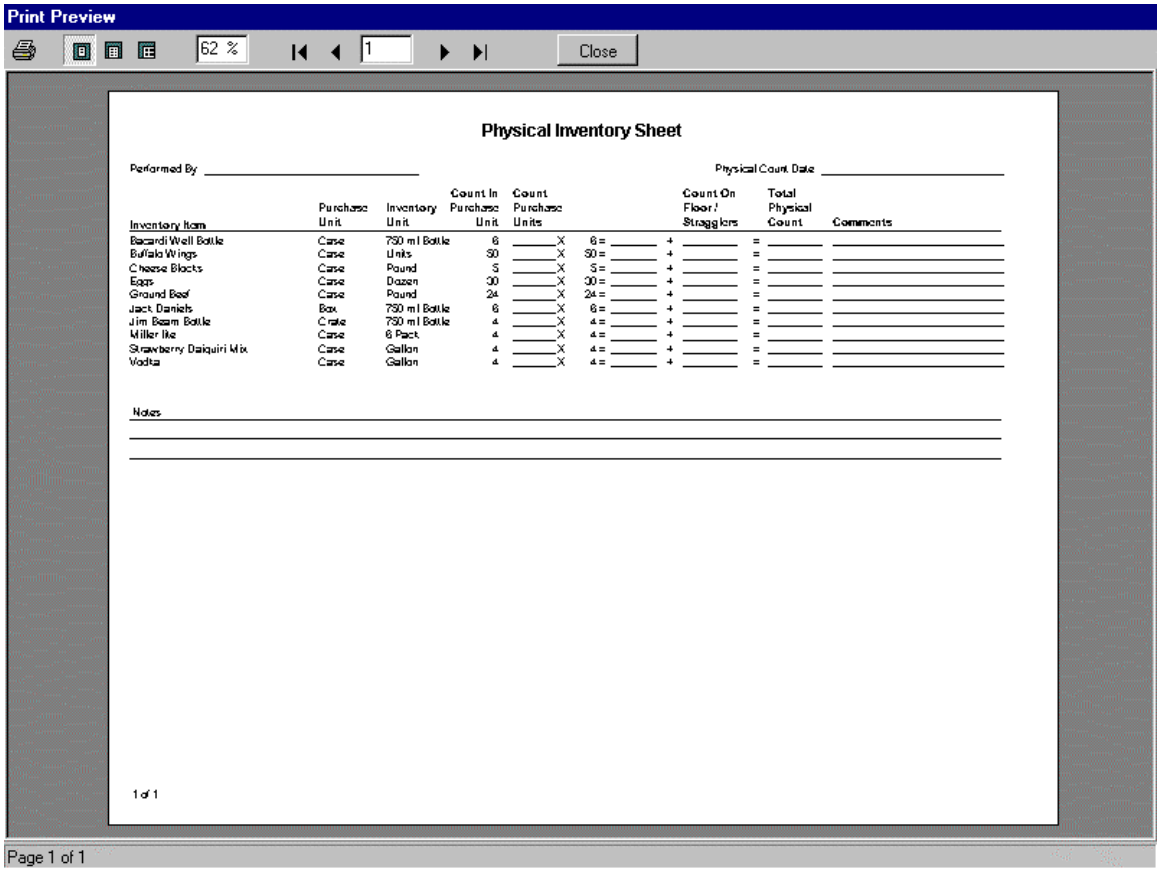
Catagogory: Beer Seasonal

Product	Price 1	Price 2	Price 3	HH Price	Open Price	OP Limit	Sides	Side Catagory
Sam Adams Spring Ale	$5.00	$0.00	$0.00	$0.00	No	$0.00	0	None
Saranac Single Malt	$4.50	$0.00	$0.00	$0.00	No	$0.00	0	None

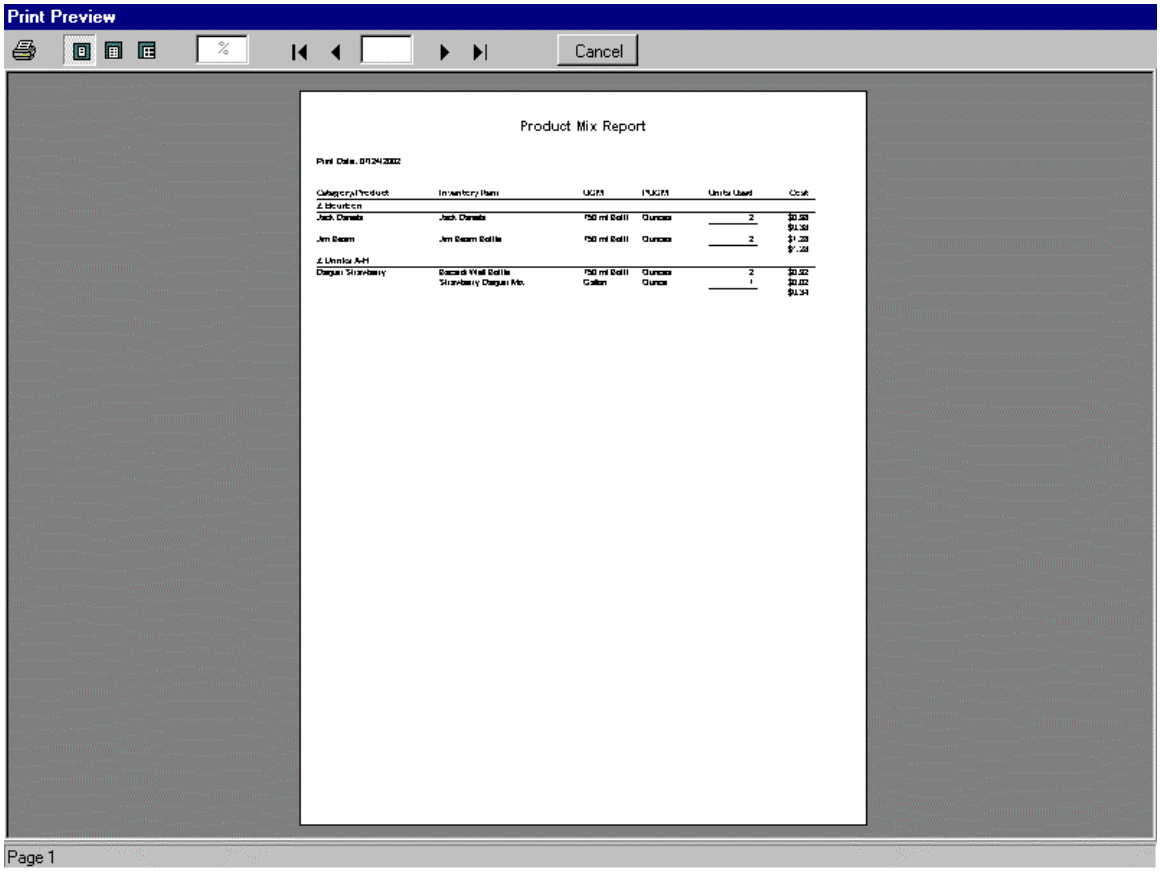
1 of 10

Page 1 of 10

PHYSICAL COUNT REPORT



PRODUCT MIX REPORT

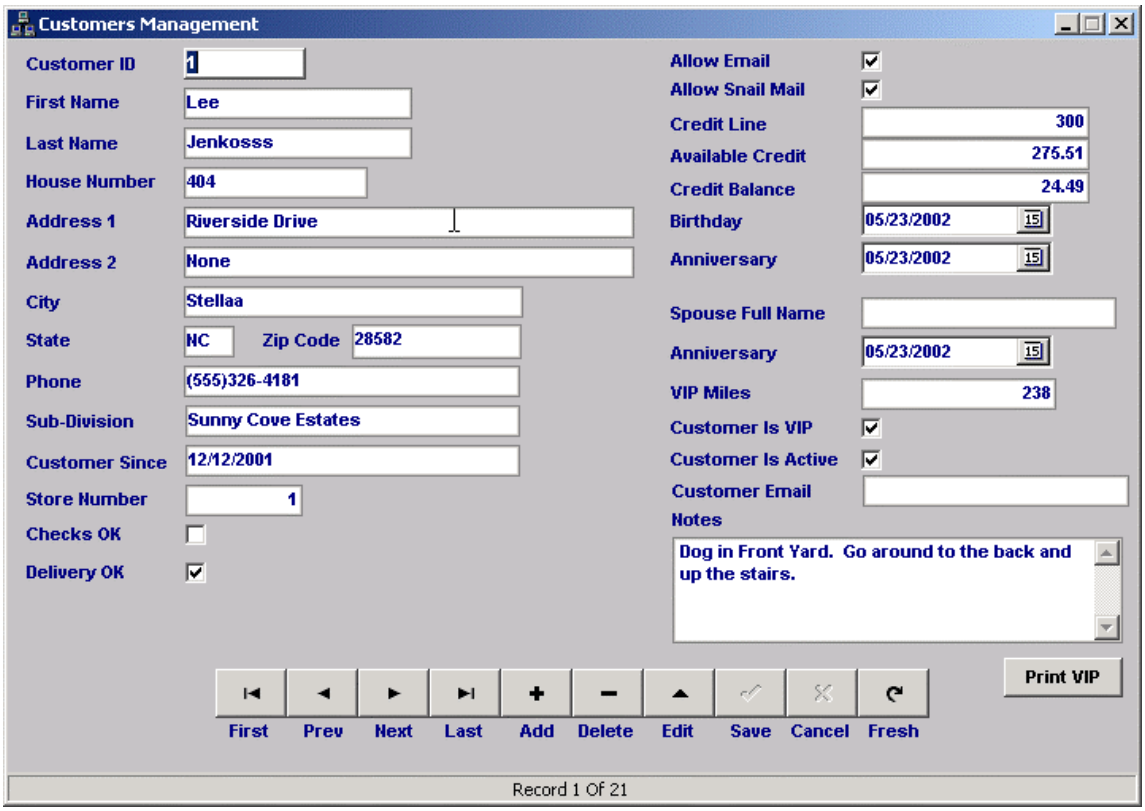


CHAPTER 7

CUSTOMERS

It cannot be stressed too much that the customer is what makes our establishment or our company grow. What better way to treat your customer than to acknowledge them on their special days.

In this section, you can keep track of your customers for delivery or for in store VIP function. Gift Server functions is an additional module.



Customer Number: This field is generated by the program and cannot be changed.

In this form, you fill in the following bolded items:

First Name: Enter customer's first name here
Last Name: Enter customer's last name here.

House Number: Enter customer's House number here
Address 1: Enter customer's address here
Address 2: Enter 2nd line of address here if needed
City: Enter City here.
State: Enter State here
Zip: Enter Zip Here
Phone: Enter customer's phone number with area code

Sub-Division: Enter name of subdivision here if applicable

Customer Since: Enter the date customer began doing business
Store 1: Enter your store number, this is usually 1, unless you a part of a multi-store chain

Checks OK : check this box if checks are acceptable from this customer
Delivery OK: check this box if it is alright to deliver to this customer
Allow E-mail: check this box if it is acceptable to send e-mail to customer
Allow Snail Mail: check this box if it is acceptable to send regular mail
Birthday: Fill in the birthday of the customer
Anniversary: Fill in the customer's anniversary date
Spouse's Name: Fill in the name of the customer's spouse

Fill in the amount of award credit here

Is VIP: Check here if this customer is a VIP

Cust: is Active: Check here if this is an active customer
Cust: E-Mail: Enter the customer's e-mail address here
Notes: Enter any special notes about this customer here

Customer Subdivisions:

These are the community divisions within a county or city. For example, the City of Coral Gables has several private communities such as Gables by the Sea, or Deering Bay. Another example would be a gated community in a county such as Flamingo Gardens in Miami Dade County .

Sub Division ID: Generated by the program
Sub Division: Enter the name of the Sub Division here.

CHAPTER 8

VPOS REPORTS GUIDE

BACK OF THE HOUSE REPORTS:

First set is under **Products and Inventory:**

Product Listing	listing of all products in your menu
Product Mix	shows relationship between products and cost
Physical Count	listing of all products for periodic physical counts
Inventory Status	shows current status of inventory

Second set is under **Employees:**

Time Clock by Date Detail	time clock activity by employee by date
Time Clock by Employee	time clock activity by employee
Declared Tips	employee declared tips
Suspicious Tip Report	shows tips greater than threshold you set
Employee Contact Report	employee contact information
Void and Comp Report by	Issuer audit trail for voids and comps
Discounts Issued	audit trail for discounts issued
Scoops Report	shows scoop (cash) taken from cash drawer
Employee Summary Report	summary of employee sales and labor
Line Item Sales By Employee	shows sales for employee by dates

Third Set is under **Sales:**

Master Sales	general info about all sales
Sales by Dept and Category	shows sales sorted by dept and category
Sales Detail	sales details sorted by employee
Sales by Month	total sales this year versus same sales last year
Covers Report	specify what amt constitutes sale or cover info
Payment Summary	shows payments received for a time range
Sales Vs Payments	shows sales made versus money received
Operations Summary	sales by dept, taxes, payments, labor
COGS Report	shows cost of goods sold

Fourth set is under **Charts:**

Sales Charts:

Line:	Sales by Day of Week
Bar:	Sales by Month(Guest Comparison)
Pie:	Sales by Category
Pie:	Sales by Department
Pie:	Sales by Sale Type

Employee Charts:

Bar:	Sales by Employee
Pie:	Hours by Position

FRONT OF THE HOUSE REPORTS:

MANAGER REPORTS:

Open VPOS Module
Go to Manager Menu
Go to On Screen Reports
Go to Reports (at bottom of page)

The reports that are included in this section are:

Front Of House
Labor
Product Sales
Current Status Report
Transaction Detail Report
(This report details sales sorted by status and order# shows voids and comps issued, and payments received summary)
Snapshot Report
(this report details sales and guest counts;labor costs and Sales by Department)

SERVER REPORTS:

Open VPOS Module:
On Initial Screen is Closeout Report

CHAPTER 9

WINDOWS GLOSSARY

Activate: To make a window active by bringing it to the front.

Active window: The current window that is being used.

Associate: To link a file with a certain program. This way, when you associate the file with he program it needs, it will open the correct program.

Application: Software designed for a certain use, such as word processing. Or in this case for Hospitality management. Also called a program.

Attribute: A characteristic or property.

Background Operation: This is an action performed by an application when another application is already active.

Backspace: A key on the computer keyboard that is marked with the word Backspace or an arrow. Pressing this key erases characters one at a time to the left of the cursor on the screen. Backspace also deletes anything that has been highlighted.

Bit: The smallest piece of information that is recognized by a computer. It represents a 1 or 0 in the binary numbering system.

Bookmark: To mark a document or a specific place in a document for future reference.

Boot: To start or restart a computer. A cold boot means to start the computer by turning on the power switch. A warm boot or reboot is resetting a computer that is already on usually by using the windows Start, shut down, and Restart command.

Browse: To examine and search through files, directories, the Internet

Byte: Eight bits of information is a byte, which can represent one letter of the alphabet.

CD-ROM: Compact Disc-Read Only Memory-A hard plastic disc that holds 650 megabytes of computer data.

Check box: A dialog box, usually square that records an on or off value.

Clear: Normally refers to removing the check from a checkbox.

Client: Any workstation that connects to another computer's resources.

Clicking: Pressing the mouse button and releasing it quickly. This usually refers to the left mouse button. Double click means to press the left mouse button twice in quick succession. It usually initiates some action right away. For example if you double click a program icon, it will launch the program. Right click means to press the right mouse button. Most of the time you click to initiate some action, such as pulling down a choice of menus. Right clicking usually displays a shortcut menu of choices relevant to the object you clicked.

Close button: The X in the upper right hand corner of a window. When clicked, it closes the current window.

COM: COM refers to the serial port on which a peripheral is connected. It is a communications port and peripherals such as mice, datapoles, modems, etc can be attached to them.

Command Button: A command button when clicked will cause an action to occur.

Computer Case: The plastic structure that houses the main electrical components, which include the CPU (central processing unit)

Computer Chip: A thin silicon wafer that contains integrated electronic circuits. Chips perform many computer functions including serving as the computer memory.

Connection: An established communication session between two computers, or a server and a terminal.

Control Panel: A system utility that comes with Windows that allows the user to change a variety of Windows and system settings.

CPU: Central Processing Unit- the main component of a computer system. Processes all instructions and information.

Current Window: The window that you are using at the moment.

Cursor: A symbol, usually a solid line or blinking underline character or arrow that signifies where on the screen the next entry will occur.

Database: A group of files or a single file that is designed to hold records just as if the files are lists.

Default Button: A command button that will activate once the user presses it. This button is recognizable by the dark outline around it.

Delete: A key on the computer keyboard that is marked with this word Pressing this key erases characters one at a time starting to the right of the cursor on the screen. It also deletes anything that has been highlighted.

Desktop: A metaphor for the on screen computing environment. A computer desktop includes the screen background, icons, and windows visible on the computer screen.

Dialog Box: A message box that pops up in a screen and asks you to input information.

Document: A file created by an application.

Download: To move or copy a document, program, or other data from the Internet or another computer to your computer. The opposite of upload.

Dragging: Drag means move the mouse while holding down the button.. It is used to move or resize items on the screen, as well as to select text or other items.

Dropping: After dragging an item, releasing the mouse button will leave(drop) the object at the new place on the screen.

Drop-down List: A dialog box such as a File Menu that contains one command and when clicked contains a number of commands that drop-down.

E-Mail: Messages sent through a computer network, such as the Internet.

FAQ: Frequently asked questions. Compilation of the most common questions about a certain program or subject.

File name: The name that an operating system gives to a file when it is created, or the name that you give a file or document.

File extension: A three-letter extension after a file name tells you what type of file it is. For example Microsoft Word files are document files. Hence, WORD.DOC where DOC is the three letter file extension for document

Floppy Disk: A thin case enclosing a magnetic disk that stores computer data.

Folder: A folder represents a directory on a storage device. They can hold folders and programs.

Gigabyte: A unit of computer storage. Most hard drives now come with 20 gigabytes or more of storage.

Hard Disk: The storage disk inside the computer that holds the operating system and programs. Often described as Hard Drive. It is stored in a small metal mechanism.

Hardware: The physical components of a computer system. Refers to objects such as disk drives, monitors, keyboards, mice, and printers

Help: A program giving information on how to use parts of another program.

Home Page: The main page of a web site.

HTML: Hypertext Markup Language- The language that is used to create graphic documents for publication on the web. Documents may have graphics, sound, and video in addition to text.

HTTP: Hypertext Transfer Protocol- the protocol used by the World Wide Web that defines how your messages are formatted and transmitted.

Hub: A wiring multiport concentrator that allows information to travel between the server and the terminals and the remote printers.

Hypertext Link: A word that you lick on when on the Web to take you to another Web page or site. These links are usually underlined or in a different color.

Icon: A small picture that represents a program, file or command in your computer system. Moving the cursor onto the icon and double clicking or clicking once and hitting the Enter key activate the program or file or command.

Inactive Window: A window that is open but not active.

Insertion Point: A vertical flashing line that shows the user where text will be inserted.

Interface: The visible layer which allows a user to communicate with a program.

Internet: A global web of computers that allows individuals to communicate with each other.

ISP: Internet Service Provider- a company that lets you dial into their computers in order to connect to the Internet for a fee.

Keyboard: An input device used to type programs, instructions, and data into the computer. Similar to the keys on a typewriter.

Keyboard Shortcut: A combination of keystrokes that when pressed will perform a **certain** action.

List Box: A dialog box that shows all available options.

Local Printer: The printer which is directly connected to the computer.

Log On: Before using the Internet or other on-line service, you are required to log on. This usually entails entering your user name and password.

Logging In: The process of entering your associate number or manager number or password to begin operation of an application or program.

LPT: parallel port in which the printer is normally connected.

Luminosity: Refers to the brightness of color.

Map Network Drive: Associates a network drive with the hard drive on your computer so that your computer can find files on the network.

Maximize button: To make a window appear at its largest possible size. In a windows application , it is the square button in the top right hand corner of the window.

Megabyte: A unit of computer storage roughly equally one million bytes.

Megahertz (Mhz) Unit of measure used to determine the speed of microprocessors (computer chips). One MHZ represents one million cycles per second. This determines how many instructions per second the microprocessor can execute.

Menu: list of command options that are available

Menu Bar: displays the names of all menus available.

Menu Command: A command from a menu that will perform an action when pressed

Minimize Button: To make a window disappear from the screen and move down. It is located in the top right hand corner of the window.

Modem: A device that allows computers to communicate over the telephone lines. Modems change the computer's digital signal to an analog signal that can be sent over the telephone lines

Monitor: A television like screen that shows you what your computer is doing.

Motherboard: The main circuit board of the computer.

Mouse: An input device that lets you control the computer by controlling the location and action of the cursor on the computer screen. Moving the mouse will reposition the placement of the cursor. If, for example, you reach the end of your desk, you can move the mouse by simply picking it up and repositioning it.

Mouse Pointer: A symbol that represents mouse movement. When you move the mouse, the mouse pointer will move accordingly.

Multitasking: The possibility of an operating system to efficiently manage more than one task at a time.

Network Interface Card: A card that is connected to the bus of the computer that connects it to the Local Area Network(LAN)

Network Neighborhood: This is a utility that Windows' users only have access to if they are part of a network. It allows the user to see what computers are available on the network.

Offline: It is a device that is connected to the system but is not in ready mode. It can either be turned off, out of ribbon, out of paper, etc.

Online: device is online when it is ready to accept instructions.

Operating System: A computer program which acts as the link between the computer and the user.

Option Button: An item in a dialog box that allows users to select only a group of options.

Parallel Port: A port that has a parallel transmission. It is usually used for printers.

Port: A socket or connection that connects devices to a computer.

Printer: A printer transfers graphics and text from your computer to paper.

Printer Driver: A program in Windows that tells different programs how to format data for a certain type of printer.

Print Server: A device which attaches to a remote printer to connect it to the network.

Printer Settings Window: A window that displays all printers which contain drivers that are identified by Windows. From here, you can configure any print job with a large group of options available for each printer.

Printer Window: A window that displays the status of the current print job for the printer. From here you can cancel, pause, or restart a print job.

Program: Software designed for a certain use (also called an application).

RAM: Random Access Memory The temporary memory of the computer where programs and information are kept. The contents of this memory are lost when the computer is turned off.

Recycle Bin: An icon on your desktop that contains items that you want to delete. To delete an item drag the item to this box. It will be hidden from view before you delete the entire bin. MAKE SURE THERE ARE NO ITEMS IN THIS FOLDER THAT WERE ACCIDENTALLY MOVED HERE. It has happened before and can easily happen when you are using your touchscreen application.

Screen Saver: A software program that runs some sort of animation on the computer screen when it is turned on but not in use.

Software: The program or instructions that tell the computer what to do.

Taskbar: A bar that runs at the bottom of Windows that shows what items are currently being run. The Start button is usually on the lower left of the task bar. A clock is usually on the lower right. Your

Licensing Manager and Unicomp Red U for the credit card processing will appear on the lower right of the task bar.

Task List: A list of applications that are currently running.

Text box: A section of a dialog box where characters can be entered without a command.

Text file: A file containing nothing other than text.

Time-out: A quick period of time in which a driver or device must stop the current action and contact the operating system.

Toolbar: A strip of icons in a software program that usually is located at the top and/ or bottom of the screen. These buttons allow access to certain functions quicker and easier.

Uninstall: To uninstall a program is to completely remove all files of the program and all associated files in other directories. Simply deleting the files in the main directory often will not remove all the files.

Upload: To move or copy a document. Program, or other data from your computer to another computer.

Virus: A computer program, made to spread from one computer to another that can cause harm to the computer or can just be an annoyance. Worms are another intruder that can cause havoc. Make sure that you use an Antivirus program on your computer.

Web Page: A unit of the World Wide Web, comparable to a page in a book.

Web Site: Usually consists of several Web pages that share a common focus and has a home page.

Wizard: A step-by-step group of instructions that will help the user perform a task.

World Wide Web: WWW- A portion of the Internet that contains text, audio, graphics, and video that are linked together and easily searched with a web browser.

CHAPTER 10

POINT OF SALE TERMINOLOGY

ADAPTER CARDS--Cards that can be installed in expansion slots located on the Central Processing Unit of a computer.. These cards enhance the flexibility of the computer to accept devices such as monitors, memory adapters and parallel and serial peripherals.

ASCII (American Standard Code for Information Interchange)--A seven-bit-plus parity code established by this standards committee to submit information from computer to computer.

ANSI (American National Standards Institute)—standard used to achieve compatibility between data devices.

BAR CODE--A printed code consisting of a series of vertical bars that vary in width. Bar codes are capable of being "read" and decoded by bar code scanners. Bar codes are used to identify retail sales items, identification cards, library books and other products. They are also utilized to manage work in progress, to track documents and for many other automated identification applications.

BAR CODE PRINTER--A printer used to produce bar-codes on labels, tags and other paper materials. A bar code printer can be a simple dot-matrix report printer or a sophisticated, dedicated device that uses thermal printing technology.

BAR CODE SCANNER--A bar code scanner reads bar codes. Bar code scanners are generally classified as wands, hand-held, projection/vertical or in-counter scanners.

BAR CODE VERIFIER--Bar code verifier's are designed to measure and ensure traditional print quality. Bar codes are normally analyzed foe wide to narrow ratio, print contrast, bar growth or loss and quiet zone dimensions and formats.

BAUD--Unit of signaling speed. The speed in baud is the number of discrete conditions or events per second.

BI-DIRECTIONAL--Characteristic of a printer, in which print element moves first to the right on one line, then to the left on the following line.

BIT (Binary Digit)--The smallest unit of information in a binary system: a 1 or 0 condition.

BIOMETRIC SCANNER—Fingerprint scanner.

BUFFER--A temporary-storage device used to compensate for a difference in data

rate and data flow between two devices (typically a computer and a printer): also called a spooler.

BUMP SCREEN:--This term refers to a monitor that is usually hung in the kitchen. It is used to show the kitchen staff what orders are waiting to be made. When an order is finished, it is bumped off the screen.

BYTE--A binary clement string functioning as a unit. Eight-bit bytes are most common. Also called a "character".

CALIBRATE:-- This term applies to a touchscreen monitor to make sure that all points are aligned properly to your touch. If they are, when you touch the screen , the pointer will pick up your touch and press the right icon. If all points are not aligned properly, the pointer will not point to the icon you want to press.

CARD PRINTER:--A printer that prints loyalty cards, photo ID's, club membership cards and employee password cards.

CASH DRAWER--A cash drawer holds paper money and currency and can either be an integrated component of a complete register or a separate peripheral device. As a separate component, a cash drawer is operated and electronically opened by a printer or directly from a computer.

CCD--Charged Coupled Device. A memory device used in hand held bar code reader. CCD scanners use a light technology to read bar codes.

CENTRAL PROCESSING UNIT (CPU)--The portion of a computer that directs the sequences of operations and initiates the proper commands to the computer for execution.

CHECK READER--A peripheral device used to read encoded information on a check to be transmitted and processed by a computer or register for authorization and approval.

COMMUNICATION PROTOCOL--The rules governing the exchange of information between devices on a data link.

CREDIT CARD AUTHORIZATION--The process in which a credit card is accepted, read and approved for a sales transaction. Credit card authorization is normally accomplished by reading a credit cared through a credit card reader that is integrated into a register or stand-alone reading device. Generally, pertinent credit information is transmitted via a modem and telephone line to a credit card "clearinghouse". The clearing house (authorization source) communicates with the credit card's bank for approval and the appropriate debit amount of the sale.

CREDIT CARD READER (Magnetic Stripe Reader)--A device that reads the magnetic stripe on a credit card for account information to automatically be processed for a transaction. A credit card reader is either integrated into a register, attached onto a register as a separate component or is part of a stand-alone terminal dedicated for the sole function of processing credit card transactions. These readers can read many types of cards with magnetic stripes including some ID cards and driver's licenses.

CRT:-- Desktop computer monitor

CURSOR--A blinking symbol on the screen that shows where data may be entered next.

CUSTOMER POLE DISPLAY--A peripheral device designed to show customers information about their transaction. This information normally consists of a description and price of the product they are purchasing. Customer pole displays are also used to display marketing information and other messages. (Datapole) These displays can either be multilane or fluorescent LCD.

DECODE--A term used to describe the process of interpreting scanned or "read" information and presenting it in a usable fashion to the computer.

DIRECT THERMAL--Direct thermal is a printing technology method in which the printer utilizes a paper that reacts chemically to heat. The label rolls are coated with a thermo-sensitive layer that darkens when exposed to intense heat. Direct thermal printers require no ink or ribbon and are typically used when a bar code label needs to endure for a year or less.

DOWNLOADING--The process of sending configuration parameters, operating software or related data from a central source to remote stations.

DUAL TRACK--A type of credit cared reader that is capable of reading both Track 1 and 2 on a credit card.

EXPANSION BOARD / EXPANSION SLOT--The optional device board that is usually added inside the system cabinet at an available expansion slot.

HARD DISK DRIVE--Enclosed disk drive that contains one or more metallic disks for data storage. A hard disk has many times the capacity of a diskette.

HOST COMPUTER--A central computer, such as a mainframe computer at a company's headquarters or central office. The central computer in a star network.

IN-COUNTER SCANNER--A bar code scanner that normally has multiple laser beams emitting from it to read bar codes in high-speed environments (i.e. grocery stores). An in-counter scanner is usually mounted into a countertop so that products can quickly and easily be passed over the scanner for bar code reading.

LASER SCANNER--A bar code scanner that utilizes laser technology. These scanners emit laser beams that read bar codes. Laser scanners have "depth of field" which enables them to read bar codes from short distances away (6" to a few feet).

LCD: -- Liquid Crystal Display, used in Flat Panel monitors and other applications.

LED (Light Emitting Diode)--A semiconductor light source that emits visible light or invisible infrared radiation.

LICENSING MANAGER:--The module of the ValuePOS program that informs the computer that your license is verified.

MAGNETIC STRIPE READER--See Credit Card Reader

MASTER REGISTER--A cash register that acts as the central register or "file server" in a multiple register environment. The master register normally controls "slave" registers that are networked and cable to it.

MEGABYTE--A unit of measure that consists of 1,014 bytes.

MICROCOMPUTER (Personal Computer)--A small. low cost computer originally designed for individual users. Recently, microcomputers have become powerful tools for many businesses that, when networked together, have replace minicomputers and in some cases mainframes and information tools.

MICR READER--MICR is an acronym for Magnetic Ink Character Recognition. MICR Readers are normally used to read the encoded information within the ink on a check.

MODEM (Modulator - Demodulator)--A device used to convert serial digital data for transmission over a telephone channel, or to reconvert the transmitted signal to serial digital data for acceptance by a receiving terminal.

MONOCHROME MONITOR--A monitor that displays characters in only one color, such as amber or green.

MTBF (Mean Time Between Failures)--The average time between failures of a particular device based on statistical or anticipated experience.

NETWORK--A communications system connecting two or more computers and their peripheral devices.

NETWORK CARD--An expansion card that is installed in an available slot in a computer so that it may connect and communicate to another computer.

OPERATING SYSTEM--System that consists of several programs that help the computer manage its own resources, such as manipulating files, running programs and controlling the keyboard and screen.

PARALLEL TRANSMISSION--Transmission mode that sends a number of bits simultaneously over separate lines. Usually unidirectional.

PERIPHERAL DEVICE--Hardware that is outside of the system unit, such as a disk drive, printer, cash drawer or scanner.

POS (Point-of-Sale)--Term normally used to describe cash register systems that record transactions or the area of "checkout" in a retail store.

PINPAD--A "pin pad" is a small keyboard that normally contains numeric keys. PIN is an acronym for personal identification number which is normally entered into the keyboard "pad" to verify account information for a transaction (i.e. similar to an automated teller machine).

PORTABLE DATA COLLECTOR--A hand-held computer that can be used as a stand-alone portable unit for point-of-sale, inventory, receiving and other applications. A portable data collector is normally a temporary storage device that gathers information and downloads data into a main or central computer.

PRINT SERVER:--A device attached to a remote printer that allows it to be connected to the Local Area Network.

PROGRAMMABLE KEYBOARD--A keyboard that is capable of being configured and programmed in a variety of ways. Programmable keyboards allow keys to represent special departments, functions, product, etc.

PROJECTION SCANNER--A type of bar code reader that is normally placed vertically, and that projects laser beams horizontally to scan bar codes. Often used when high performance and speed to reading bar codes is critical.

PROTOCOLS--A set of rules for the exchange of information, such as those used for successful data transmission.

RECEIPT PRINTER:--A small printer, that holds three inch paper, and prints customer receipts for the restaurant, retail, or hospitality environments. It can use 1 ply or two ply paper and operate with a single color ribbon or a two-color ribbon.

REMOTE PRINTER: This is a small printer, generally the same size as a receipt printer that is not located near a terminal. It is usually in a remote location in the environment and produces receipts for orders to be filled such as drinks at a bar, food to be prepared in the kitchen, or orders to be filled in a warehouse. These printers

may have an auto-cut option which makes it easier to extract the paper.

SCALE--A scale is a peripheral device used to record the weight of an item and transmit the amount to a computer for processing.

SERIAL TRANSMISSION--Transmission mode that sends data one bit at a time. In most cases, in personal computers, serial data is passed through as RS232 serial interface port.

SERVER: -- A computer that serves as the intelligent coordinator in the network. All operations are coordinated here.

SIGNATURE CAPTURE: --A peripheral device that electronically captures an individual's signature for customer identification and transaction applications.

SLAVE REGISTER--A cash register that is driven by a "master" register in a multiple register environment.

SMART CARD--A smart card contains a "chip" with memory and is typically used to hold customer account information and a "balance" of money similar to a checking account. The card is inserted into a device that can read and write to it updating information appropriately.

SOLENOID--Solenoids are commonly used in "dumb" cash drawers and incorporate a cable-connected trigger which releases the drawer. Cash drawers with solenoids are interfaced to receipt printers that "drive" them. Solenoids have different voltages and are integrated into the cash drawer dependent on the printer they are interfaced to.

SQL DATABASE:--A SQL database is a combination of a software program and database file or files. The Software program handles requests for information and requests to write information to the database from clients through Structured Query Language (SQL). It is used in commercial applications that require speed and reliability in a mission critical environment.

SWIPE CARDS:--The cards that are used to swipe in the card swipe reader also known as the magnetic stripe reader. These cards are programmed with data that is read by the tracks on the reader. For most retail and restaurant applications, they have passwords encoded that are used to enter an individual's information in the application.

TERMINAL:--The nodes that are on a local area network.

THERMAL TRANSFER--Thermal transfer is a printing technology method in which printers use regular paper and a heat sensitive ribbon. The ribbon deposits a coating of dark material on the paper when exposed to intense heat. Thermal transfer printers produce a more durable label that won't fade as quickly as direct thermal

labels and are often used when a label needs to endure longer than a year.

TILL--The paper money and currency tray that holds money in a cash drawer. Tills are usually available in 4 or 5 till versions, available with lock and cover and are removable.

TOUCHSCREEN:--A monitor that uses a “touch” interface so the user can use their finger or a stylus to move information on the screen. These monitors come in a variety of sizes and colors. They can be CRT(the large bulky monitors) or LCD Flat Panels and range in size from 14”- 17” inches.

UPS--An acronym for uninterruptible power source. A UPS is primarily used as a back up power source for computers and computer networks to insure on-going operation in the event of a power failure. Sophisticated units also have power conditioning and power monitoring features.

VERTICAL SCANNER--See Projection Scanner.

WAND--A pen-shaped bar code scanner that emits a beam from the end or tip of the wand. Wands are older, bar code reading technology but inexpensive and still widely used where speed and performance are not crucial.

WEB CHECK:-- The operation that is performed to update your system with the newest revisions to the program.

WEDGE--A wedge decodes "read" data (i.e. bar codes, credit cards) and communicates that information through a keyboard port on a computer. The keyboard plugs into the wedge and the wedge device plugs into the computer where the keyboard was. Sophisticated wedges can accept a few different peripheral devices. Also See Decode.

Y-CABLE--A cable that normally allows two peripheral devices to communicate off of one port on a computer.

in

CHAPTER 11

INDEX

A

Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2
Index 3, 3
Index 1, 1
Index 1, 1

B

Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2

C

Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2
Index 1, 1
Index 1, 1
Index 1, 1

D

Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1

E

Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2
Index 1, 1
Index 1, 1
Index 1, 1

G

Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1

H

Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2
Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1

K

Index 1, 1

L

Index 1, 1
Index 2, 2
Index 1, 1
Index 1, 1
Index 2, 2
Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1

M

Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2

N

Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2
Index 1, 1
Index 1, 1
Index 1, 1

R

Index 1, 1
Index 1, 1

S

Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2
Index 1, 1
Index 1, 1
Index 1, 1

T

Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2

W

Index 1, 1
Index 1, 1
Index 1, 1
Index 2, 2
Index 1, 1
Index 1, 1
Index 1, 1
Index 1, 1