

Volume

1

VALUEPOS OPERATIONS GUIDE

Server Functions

FRONT OFFICE

VALUEPOS:

Server Functions

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Welcome

Welcome to the ValuePOS Operations Guide. This document will guide you through each facet of operation for the ValuePOS software system. This manual is designed to take you step by step through each phase of operation within the ValuePOS system.

Minimum Working Knowledge

This manual assumes that you have minimum working knowledge of computers and restaurant operations. If you do not possess these basic skills, please see your computers manual as well as any accompanying Windows Manual included.

Minimum System Requirements

- Pentium 233 MHz or AMD K62 300 MHz PC (Pentium II or better recommended)
- 32 MB of RAM (64 recommended)
- Touch Screen (or mouse)
- ValuePOS software and purchased license

Network Architecture Visited

Although some ValuePOS systems consist of only one PC (workstation) and are “stand alone”, the vast majority of ValuePOS installations involve more than one workstation. When you group two or more PC’s together, you are building a “network” of PC’s. Through software built into the Windows operating system, you or anyone else can fairly easily, build a network of PC’s. The special software that is used to build networks is called a “Protocol”. A protocol is basically a standard (agreed on) way for PC’s to be able to “talk” to one another. The two most common protocols are NETBEUI (pronounced NET-BOOIE) and TCP/ IP. While NETBEUI is used with smaller Windows based Networks of computers, TCP/ IP is the standard protocol that is becoming more and more the de facto standard, which is evidenced by the fact that the Internet and World Wide Web are based on the TCP/ IP protocol. For now, just remember that these two protocols are the way that computers can communicate with each other.

While the network that is setup for your ValuePOS resembled in many ways, a typical network that you might see in an office building, it designed overall for faster operations where a tremendous amount of network activity is very common.

SQL and Client/Server

In the early days of computers, there were huge mainframe computers housed in huge sterile rooms that housed huge amounts of data and hosted very basic applications that were run from “dumb” terminals. Basically, the huge mainframes did all the work and these “dumb” terminals displayed the work that was performed and allowed uses to interact with applications there were being hosted on those huge mainframes.

Then came the PC. Now, more and more of the application (or “Logic”) side could be stored and run on the local PC rather than on a mainframe hidden away somewhere. Today, most of the “labor” involved with computing is shared between a “client” PC and a “Server” computer. For instance, with ValuePOS, the ValuePOS software is installed and run on the local PC workstation. However, most of the data crunching is performed on the Server computer (usually located in a back office) and the results are sent to the client workstation after having been processed on the server. This is known as Client/ Server computer. The best example of Client/ Server computing is the Internet. A browser is the client, which makes requests to a server computer (for instance to display a web page) some where on the Internet. When the “Web Server” receives a request from a client browser, it processes the request and sends back the requested data (web page) to the browser.

ValuePOS works much in the same way. For instance, when you create a new customer order ticket on an ValuePOS workstation, the ValuePOS software is actually making a request to the Database Server to create that data object. The server then processes the request (create the new customer order ticket data entry) and sends back the number of the new order ticket to the ValuePOS software, which then displays the results on the screen. In essence, ValuePOS is a graphical layer between you and the database.

SQL and Client/Server Benefits

Your ValuePOS uses a SQL (Structured Query Language) database. This is important to note because many POS systems on the market today use a flat file database such as MS Access, FoxPro, Clipper and Paradox to name a few. With a flat file database, workstations manipulate the database file directly, over the network. That means that workstations are forced to pull huge amounts of data over the network to be processed locally. A SQL database is client/ server in nature. With a SQL database the POS workstation requests a small subset of data and the SQL Database processes the request locally and **only sends back over the network what was requested.** This results in tremendous improvements in performance and reduced network traffic.

ValuePOS Operations

The ValuePOS system has been designed to be very easy to use. However, because ValuePOS offers substantial functionality and flexibility, the complexity of the program has risen accordingly. This is not to say that ValuePOS is difficult to learn, quite the contrary. ValuePOS is one of the easiest to use POS system on the market. The point is, that you should follow this manual closely to take full benefit of the ValuePOS system.

The ID Screen (Logging In)



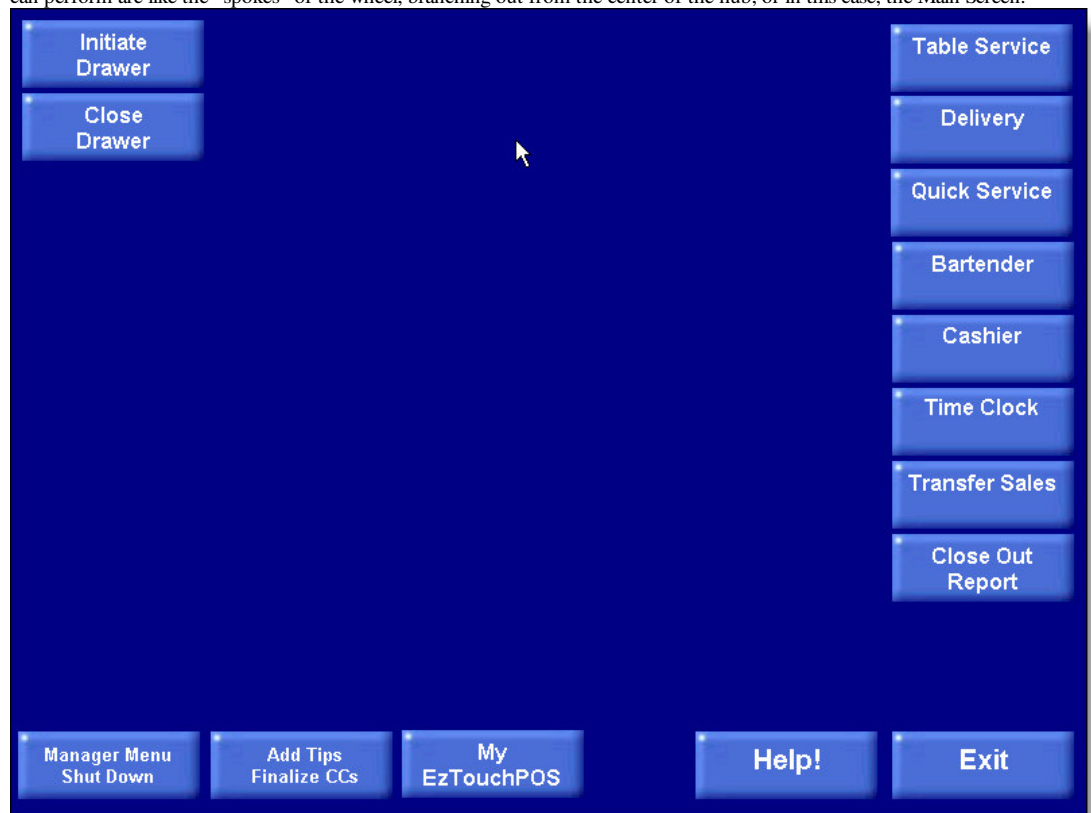
Before you can perform any functions in the ValuePOS system, you must first log into the system. ValuePOS defaults to the screen shown above when you start the ValuePOS software on a workstation. There are 2 methods that you can use to log into the ValuePOS system.

- Using the buttons provided on the keypad, enter your PIN number followed by the **OK** button.
- Using an Employee Swipe Card (ESC), swipe the card using an attached magnetic swipe reader.

After performing either action explained above, ValuePOS will check the number against information stored in the database to validate the number provided using either the keypad or an ESC. ValuePOS checks to see if the employee number is valid and upon validating the number, ValuePOS will check to see what **Positions** have been made available for you to assume for the duration of your work. The Position that you assume determines what permissions (what you are allowed to do) you have been granted in the ValuePOS system.

Main Screen

After a successful login, you will be taken to the Main Screen. In some cases, after clocking in, you will be taken back out to the ID Screen. This is usually the case with Positions that do not require permission to Create Sales such as Cooks, Janitors, etc. Imagine a bicycle wheel. The Main Screen would be the portion in the middle of the wheel, the “hub” because it’s the starting point for all actions and activities in the ValuePOS system once you have logged in. Each actions that you can perform are like the “spokes” of the wheel, branching out from the center of the hub, or in this case, the Main Screen.



Buttons of the Main Screen

Each of the buttons explained next will include a brief description in this section only. They are fully explained in upcoming sections of this manual.

Manager Menu Button

This button is only visible and available if the Position that you assumed has Full Manager Permissions. Otherwise, it will not even be visible. This button provides access to the Manager Menu where you can perform various tasks related to Management Functions.

Table Service Button

This button allows access to the Table Sections where you can create, edit and manage Table Service Sales.

Delivery Service Button

This button allows access to the Delivery Service Screen where you can create, edit and manage Delivery Sales and customers.

Quick Service Button

This button allows access to the Quick Service Screen where you can create, edit and manage Quick Service Sales.

Bartender Button

This button allows access to the Bartender Screen where you can create, edit and manage Bartender Sales.

Cashier Station Button

This button allows access to the Cashier Screen. The Cashier Screen is usually used in those restaurants where customers pay on their way out at a Cashier Station.

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Finalize Credit Card Button/Add Tips:

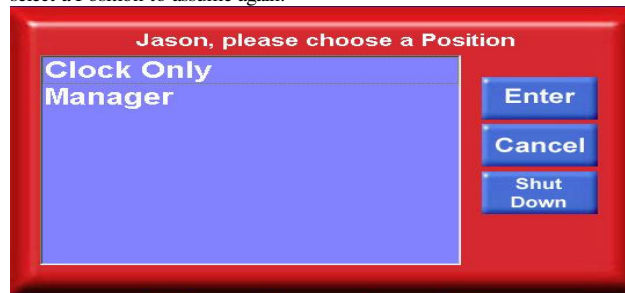
This button allows access to credit card payments to finalize transactions. This area is also where you can change or add tips and reprint credit card receipts.

Initiate Drawer Button: allows you to initiate the cash drawer for opening

Close Drawer Button: closes the cash drawer

Time Clock Button

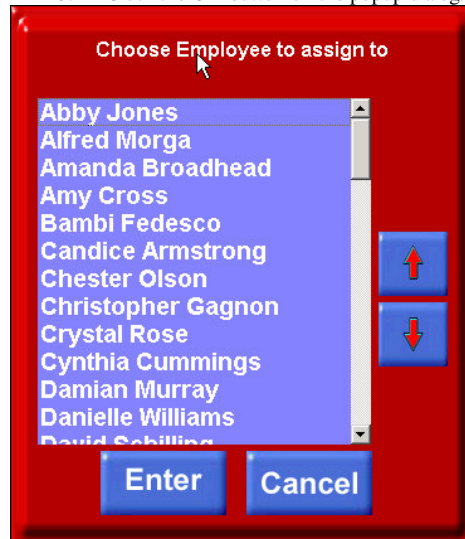
If you were required to Clock In, this button will allow you to clock back out. If you clock out, you will no longer be able to use the system until clocking in again. If you were not required to clock in when you logged into the system for the first time (assumed a Position) ValuePOS will "Reset" your current Position so that next time you login, you will be required to select a Position to assume again.



Transfer Sales Button

This button will allow you to transfer your sales (and any tables that you have assigned to yourself) to another person. The Position that you have assumed must have permission to do this.

1. Click the Transfer Sales button.
2. From the Dialog that pops up, choose someone to transfer your sales and tables to.
3. Click the OK button on the popup dialog.



Close Out Report Button

This button will print to the local receipt printer, a report detailing your sales, payments received and how much cash that you owe the house.

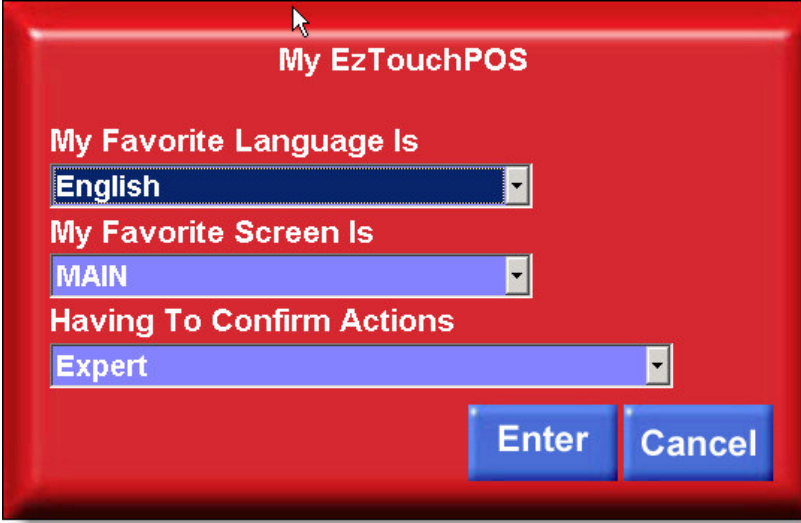
Exit Button

This button will effectively log you out of the system. Most screens in ValuePOS offer a log out button that will log you directly out of the system. Since the Main Screen is only "one screen away" from the ID Screen, clicking this close button does the same thing.

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My POS Button:

This button brings up a dialog that reflects your favorite language, your favorite screen, and your favorite confirming actions. You pick your choice and press enter or cancel.



My EzTouchPOS

My Favorite Language Is
English

My Favorite Screen Is
MAIN

Having To Confirm Actions
Expert

Enter Cancel

Help Button:

This button brings up the help files for the front office

Table Service Sales

Table Service involves those restaurants that have indoor/ outdoor seating and have wait staff that serves customers. If you are a Quick Service establishment with tables, but do not use wait staff, then you should probably not use this feature even though you may have tables in your restaurant.

To get to Table Service, click the Table Service button from the Main Screen. A screen similar to the following will be displayed.

Table Section Screen

The Table Section Screen shows up to 10 sections that may be defined for the restaurant along with the name of the section or the number (if a name was not defined). In order to create and manage Table Service sales, you must choose a Table Section to work in.

1. Click the button that represents the Table Section that you would like to work in.



TABLE SCREEN

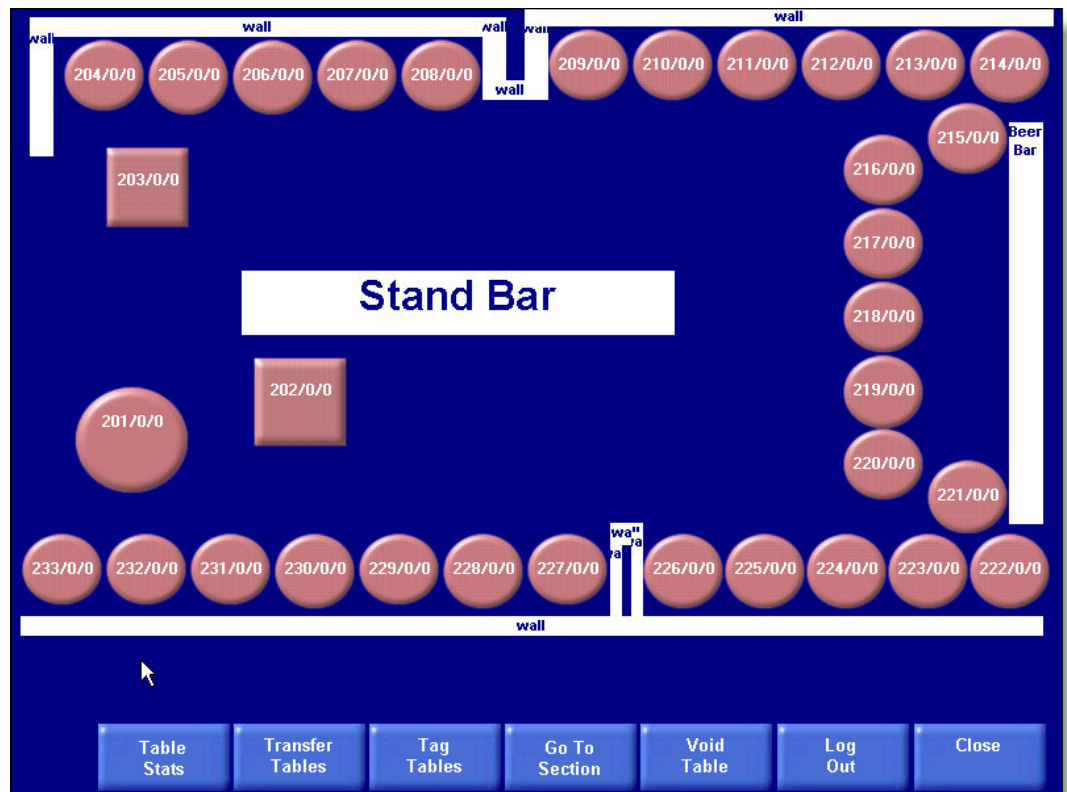
FOLLOWING IS AN EXAMPLE OF A TABLE SCREEN. THE SCREENS ON YOUR SYSTEM WILL LOOK DIFFERENT, SETUP TO RESEMBLE THE POSITIONS OF TABLES IN A PARTICULAR SECTION OF YOUR RESTAURANT.

TABLE COLOR CODE

- Yellow – Tables that are assigned to you but have no customers or open sales attached.
- Red – Tables that are assigned to you that have at least one open sale attached.
- Pink – Tables that are not assigned to anyone.
- Light Blue – Tables that are assigned to someone else.

Unless the Position that you assumed has Full Manager Permissions or has permission to Access All Tables, you will only be able to use tables that you have assigned to yourself.

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Go To Section Button

Instead of closing the Table Screen to return to the Table Sections screen to select a different section, you can use the Section button, which will allow you to select a Table Section and display it directly instead of back-tracking.

Clear Table Button

This button requires Full Manager Permissions or for someone who has that permission to swipe their card in order to use it. This will clear an assigned table **and void any sales attached to the table.**

Table Stats:

The screenshot shows a window titled 'Table Stats' with a red background. It is divided into two main sections: 'Current Statistics' and 'All Day Statistics'. The 'Current Statistics' section shows: Currently Assigned To: No Info, Current # of Guests: 0, # of Products Sold: 0, Total Sales: \$0.00, # of Sales: 0, and Time Open: 0. The 'All Day Statistics' section shows: Total Sales: 0.00, % Sales of this Section: 0, % Sales Dine In Sales: 0, Average Table Turn: 0.00 Mins, Occupancy %: 0 (with sub-values for 2 Hrs, 4 Hrs, 8 Hrs, and 16 Hrs), Avg. # Products Sold/Sale: 0, and % of Sales that are Bar: 0. At the bottom, there are four buttons: 'Assigned to w/ No Sales' (yellow), 'Assigned To You w/Sales' (red), 'Not Assigned to Anyone' (pink), and 'Assigned To Other' (cyan). A blue 'Close' button is also present.

This button gives you the statistics of the tables that are being served.

Logout Button:

These buttons are available through the system to allow you to quickly logout of the system without having to backtrack through several screens to do it.

Update and Tag Tables Buttons: Tagging Tables

If you do not have Full Manager Permission to permission to Access all Tables (tagging tables before using them is generally a better practice than just using tables without tagging them first), you will have to "tag" tables before being able to use them.

1. Click the **Tag Tables** button. This will put the screen into "Tagging Mode".
2. Click tables that are not assigned to anyone (they are pink) and they will be highlighted blue.
3. Click the **Update** button to assign those tables that you have "tagged" to yourself. They will turn yellow to indicate that you have successfully assigned them to yourself.

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Close Button

This button will take you back out to the Table Sections Screen.

TABLE SALES SCREEN

When you either click on a Table that has been assigned to you or you have permission to access other tables and you have clicked on someone else's table, the Open Sales Selector will be displayed. Here is where you choose a sale to use.

Open Sales on a Table

The vast majority of the screen is reserved for showing Open Sales attached to the current Table you are in. In the example above, there is one Open Sale (#22) with no comments. (Comments can be attached to a Sale to show important information).



Detaching and Attaching Sales

In ValuePOS, you can easily transfer sales from one table to another (provided you have permission). For instance, you might have a Table Section setup to resemble a bar. If a party of customers come in and there is no table available for them, you can seat them at the bar and when their table is ready, the sale can be detached from the bar and re-attached to the appropriate table without forcing the customer to settle their tab at the bar first or having to pay out multiple checks before leaving.

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TO DETACH A SALE FROM A TABLE

1. Click **Select Order To Detach** button. This will put the screen into Detach Mode.
2. Click the Sale (light blue button) that you would like to Detach. The sale will be detached and the screen will be returned to normal mode.

TO ATTACH A DETACHED SALE

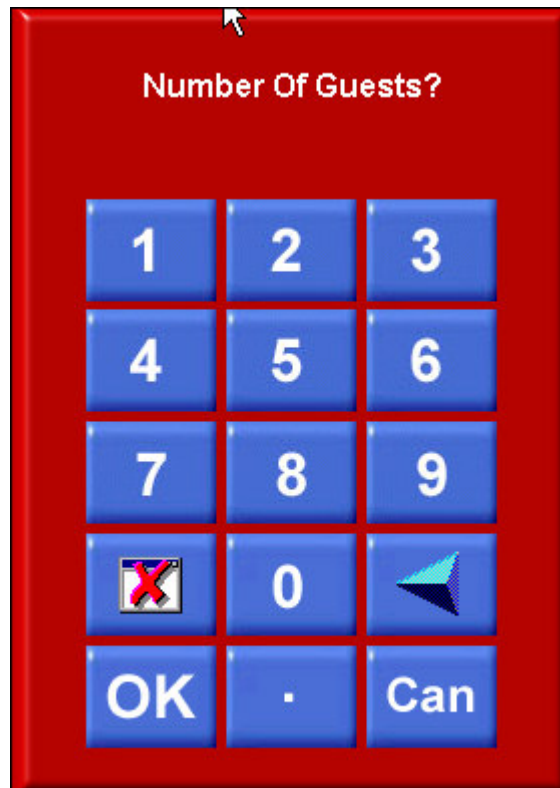
1. Click the **Show Detached** button and the following dialog will appear.
2. Select the Sale that you want to Attach to the current table by highlighting the Order # from the list as shown above.
3. Click the **Attach** button and the Sale will be displayed in the Table Sales Screen to indicate that it has been successfully attached.

Log Out Button

These buttons are available through the system to allow you to quickly logout of the system without having to backtrack through several screens to do it.

New Order Button

To create a new Table Service Sale, you need to click this button. If the setting "Require Number of Guests" has been turned on, the following dialog will be displayed.

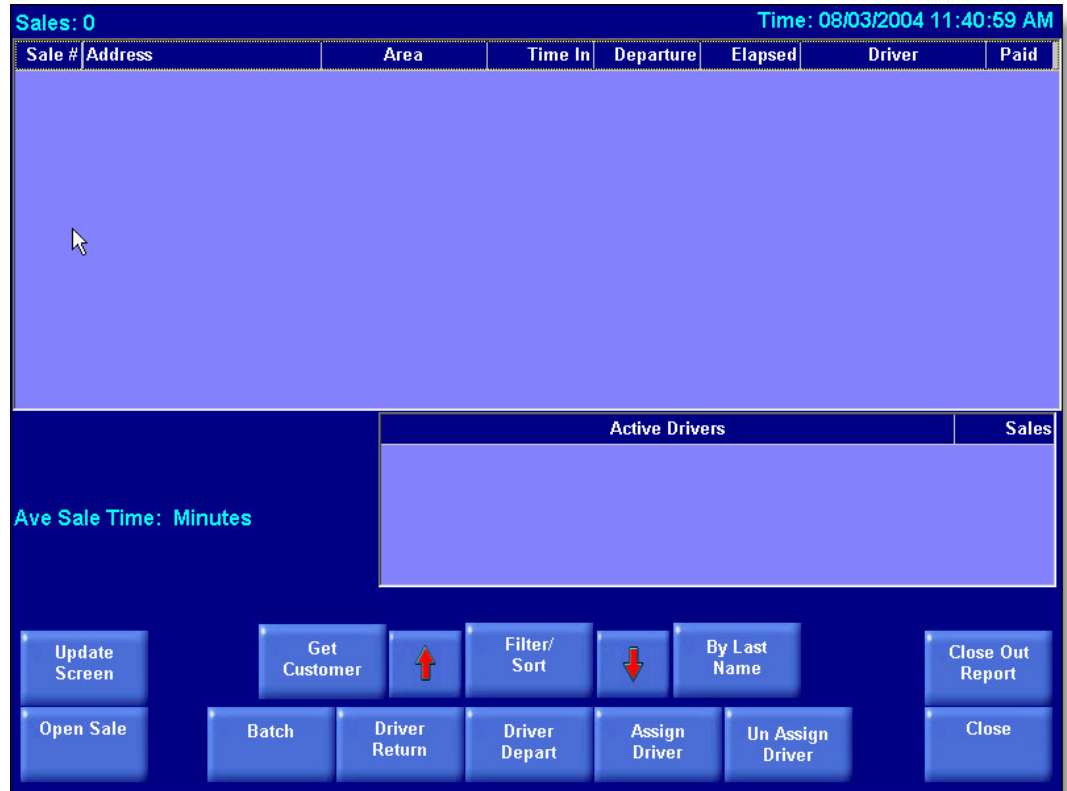


1. Enter the number of Guests that will be seated at the table.
2. Click the **OK** button and a new Table Service Sale will be displayed.

*Note: See the section **Order Screen** for more information on entering products to the sale.*

DELIVERY SERVICE SALES:

Delivery Service involves managing delivery sales to customers through the Delivery Service portion of the ValuePOS system. To get to the Delivery Service Screen from the Main Screen, select the Delivery Service button and this screen will be displayed.



The Delivery Screen shows existing delivery sales (that have not been cashed out) in the blue area. The bottom portion of the screen shows the current “filter” being used to show sales on the screen as well as the current time.

This screen will show all open delivery sales. You can sort the list by clicking the column header of the column you want to sort by. Click Customer Name and it sorts by name; Click Customer Address and it will resort by address.

Up/ Down Arrow:

Lets you scroll through the list

Open Sale-

opens an existing sale, highlight the existing sale in sales grid and click this button

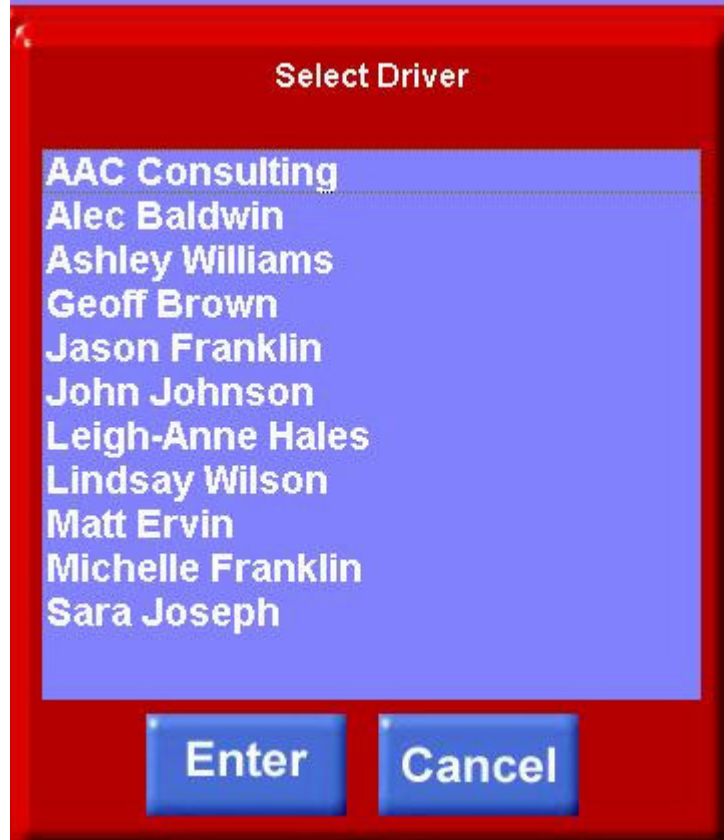
Set Refresh Interval Button:

The Delivery Screen refreshes periodically to update the screen with sales that may have been entered at a different ValuePOS station. This button will bring up a dialog prompting you to enter the number of minutes ValuePOS should wait before it refreshes.

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Select Drivers:

Before a sale can be closed out in the Delivery Screen, ValuePOS needs to know whom the driver is. Click Select Drivers button. This will put the screen into Select Driver mode. A dialog box will appear as shown below. Select a driver to assign the sale to and click the Enter button.





The screen will now be in Assign mode; the Assign Drivers button will say Select Orders to assign. Select each sale that you would like to assign to one driver. As you select a sale, the sale button will turn yellow. Click Select Orders to Assign. And these sales selected will indicate driver's name and turn green.

New Customer Button:

Enter 10 Digit Phone #

555

1	2	3
4	5	6
7	8	9
	0	
OK	.	Can

Phone Number was not found in the database.
Would you like to create a new Customer?

27

Yes	No
-----	----

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This button will display a blank customer screen where information for the customer needs to be entered.

Customer ID		Credit Line	0.00
First Name		Credit Balance	0.00
Last Name		Avail Credit	0.00
House Number		Active Date	
Street Name		Email	
Address #2		Store Number	
City		<input type="checkbox"/> Checks OK	
State	Zip	<input type="checkbox"/> Delivery OK	
Phone #	3052385539	<input type="checkbox"/> Receive Snail Mail	
Sub Division		<input type="checkbox"/> Receive Email	
Notes		<input type="checkbox"/> Multi-Unit Location (Hotel, College Dorm, etc)	
Driving Directions			

Update New Sale Pick Up Close

Update Button:

Updates customer information

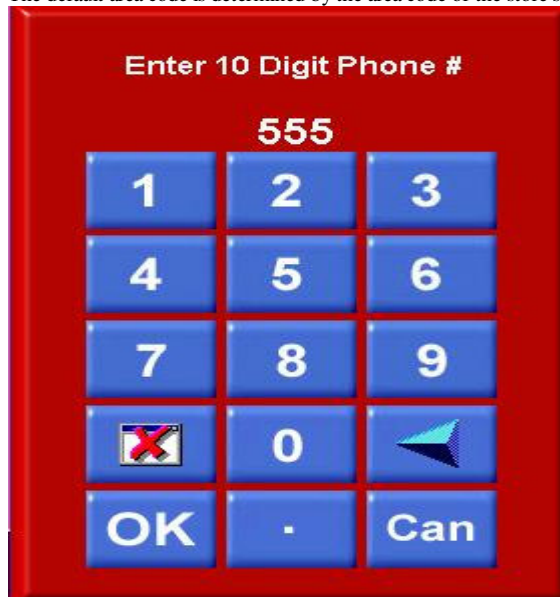
New Sale: allows you to enter a new sale for this customer

Pick-Up-defines this order as a pick up order.

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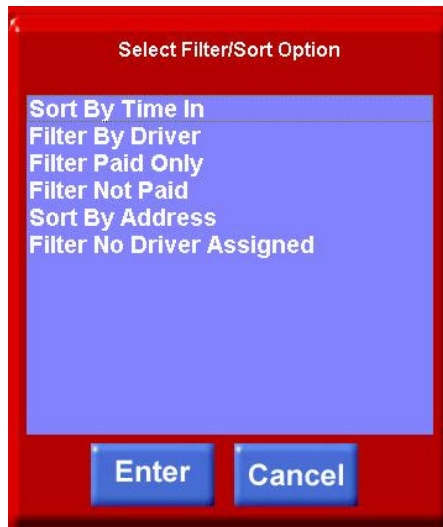
Get Customer Button:

Click the Get customer Button. A dialog will prompt you for the customer's phone number. The default area code is determined by the area code of the store's phone number.



Enter the remaining 7 digits of the customer's phone number and click OK. The Customer screen will be displayed with the customer's information filled in.

Filter Sort Button:



The Filter button allows you to specify the information that is shown on the Delivery Screen (the sales that are displayed).

Sort by Time In: sorts by time driver clocked in

Sort by filter by driver: filters the screen to only show the sales assigned to a particular driver

Sort by paid only: sorts by those sales that are paid

Sort by not paid: sorts by sales that are not paid

Sort by no driver assigned: sorts by sales not assigned a driver

Sort by Address: sorts by the address of the customer

Driver Dispatching:

The process of driver dispatching involves managing delivery sales by assigning delivery sales to drivers and dispatching drivers out to deliver those sales.

Assigning Drivers to Sales:

The first step is assigning a driver to one or more delivery sales in preparation for dispatch. 1. Click the Multi-Select button

- 2 Click one or more delivery sales on the sales grid on the Delivery Screen. Each of these sales will turn red to indicate that it has been selected.
3. Now click the Assign Driver button. From the dialog that is displayed, select driver you wish to assign the sale to and click OK button.

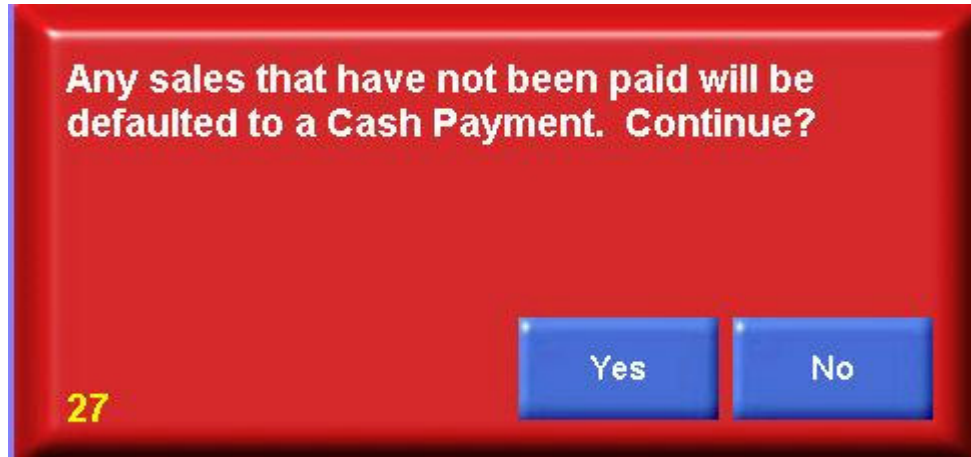
After choosing the driver to assign the sale to, the DRIVER column for each sale that you choose will display the driver's name that you assigned the sale to.

Dispatching Drivers:

Next we need to Dispatch the driver using the Driver Depart button. When you dispatch a driver, ALL sales that you have assigned to that driver that have not been dispatched will be marked as dispatched. You can tell which sales have been dispatched because they are shown in green in the sales grid.

- 1) Click the Driver Depart button. A dialog will be displayed asking you to specify which driver to depart.
- 2) Choose the driver from the displayed list and click OK button. All sales that have not been dispatched are marked in green for the driver that you chose.

Driver Return Screen:



When you indicate that a driver has returned from a dispatch, all sales that were dispatched are automatically closed out to cash (unless they have been previously paid out with a single payout) and removed from the Delivery Dispatch Screen. THIS OPERATION IS PERMANENT. MAKE SURE BEFORE YOU PERFORM THIS ACTION.

- 1) Click the **Driver Return** button. A list dialog will be displayed asking you to choose the driver to return from dispatch.
- 2) Choose the driver you would like to return from dispatch and click the OK button. All sales that were assigned to the driver that you choose that had been dispatched are automatically paid out to cash and removed from the screen

Closing Out Delivery Sales:

There are 2 different methods of closing out Delivery Sales:

Single Payouts: Single Payouts apply to individual delivery sales. You perform these payouts just like any other sale.....from within the sale itself. For instance, a customer is paying over the phone with a credit card, you would perform the payout while you have the sale open.

Batch Payouts: Batch Payouts cause all sales for a particular driver to be closed out automatically to cash unless a sale has been previously closed out using another method.

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Understanding Delivery Customers:

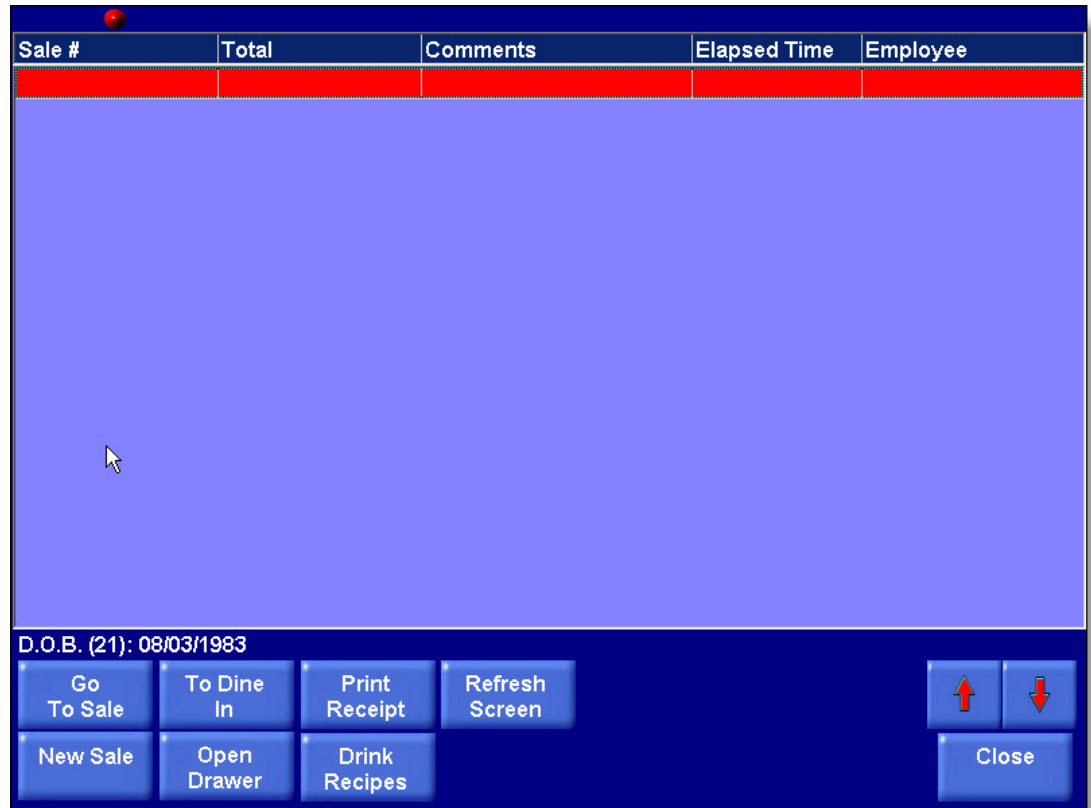
There are actually two different types of sales associated with delivery customers. There is the standard delivery sales where the order is brought to the customer and is handled through the Delivery Dispatch system and there is the Pick Up sale where the customer comes to the store to receive their order and pay for it.

Use **UPDATE** button whenever you change information on the Custom Screen or after you have entered the information for a new customer. ValuePOS saves any unsaved data when you create a sale by clicking either New Sale or Pick Up Buttons.

Use **New Sale** button to create a new Delivery Sale for the current customer.

As mentioned above, when you create a sale using the **Pick Up** button, ValuePOS will still tag internally the sale with the current customers ID that you can track sales for your customers, but instead of managing the sale through the Delivery Dispatch system, it will be transferred to Quick Service and you can access the sale from the Sales Locator while in the Quick Service Sales Screen.

Bartender Sales



Bartender Screen

The Bartender Screen is designed to promote fast, easy management of sales that are ordered at a bar or similar setting. Sales are shown in a grid just like in Delivery Screen. Unlike other Sales Modules, the Bartender screen displays sales in a simple list to ensure that easy access to bar sales.

Sale#: shows sale number

Total: shows the total of that sale

Comments: shows comments that you may have entered for the sale

Elapsed Time: shows time since sale started. Used to enforce limits to customers to avoid legal liabilities.

Employee: shows the employee who owns the sale and their date of birth.

New Bar Sale Button:

This button creates a New Bar Sale **without prompting** you to verify that you actually want to create a new Bar Sale.

Go to Sale:

This button opens an existing bar sale that is selected from the list. Choose the sale that you would like by clicking on it in the sales grid. It will be highlighted. Click the Go to Sale button

Open Cash Drawer

Opens cash drawer if you have permission to do so...

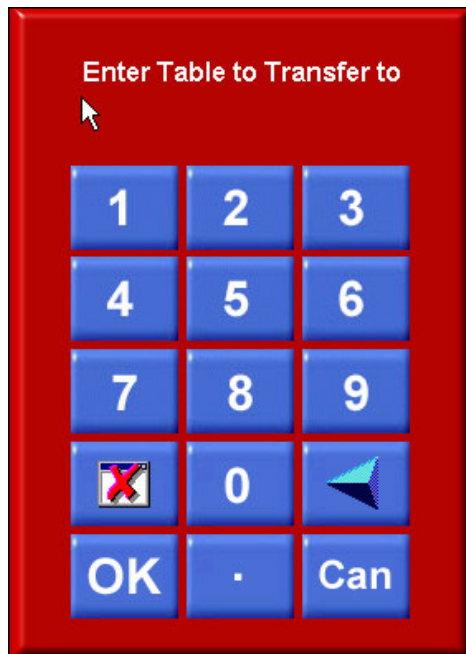
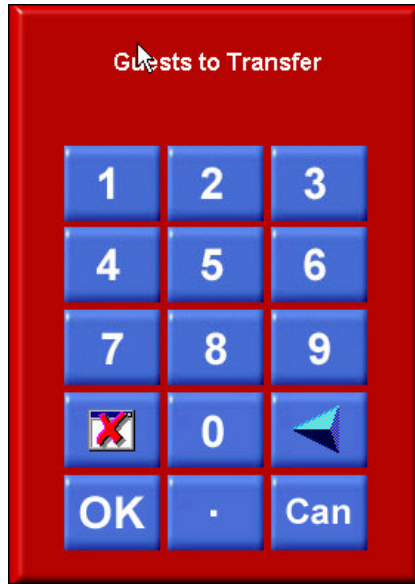
Close/Exit

These buttons are available through the system to allow you to quick logout of the system without having to backtrack through several screens to do it.

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To Dine In

This button lets you set up a screen where the customer at the bar will be dining in. Choose the sale to be transferred by clicking on it in the sales grid. Click To Dine In and enter number of guests, enter table number to transfer sale to and press OK.



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Up/Down Arrow Buttons

These buttons allow you to scroll through the list of Bar Sales when the number of sales exceeds the default view of the list.

Drink Recipes:

Drink Category:

A-H I-M N-Z

Drink/Product:

Directions

I

Ingredients:

Close

Cashier Service

Cashier Screen



The Cashier Screen is designed for those restaurants where customers pay their checks on the way out at a Cashier Station. Sales do not show up by default on the Cashier Screen until a check is printed for the sale.

Go to Sale

This button displays the Existing Quick screen which is where Quick Service sales are stored if they have not been paid for yet.

Set Refresh

The Cashier Screen refreshes itself at regular intervals. Using this button you can specify the number of minutes that elapse between refreshes.

New Sale

This button will load a New sale so that Cashier can sell items “on the fly”.

Open Drawer

This button will “kick” open the cash drawer (assuming one is installed).

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QUICK SERVICE SCREEN:

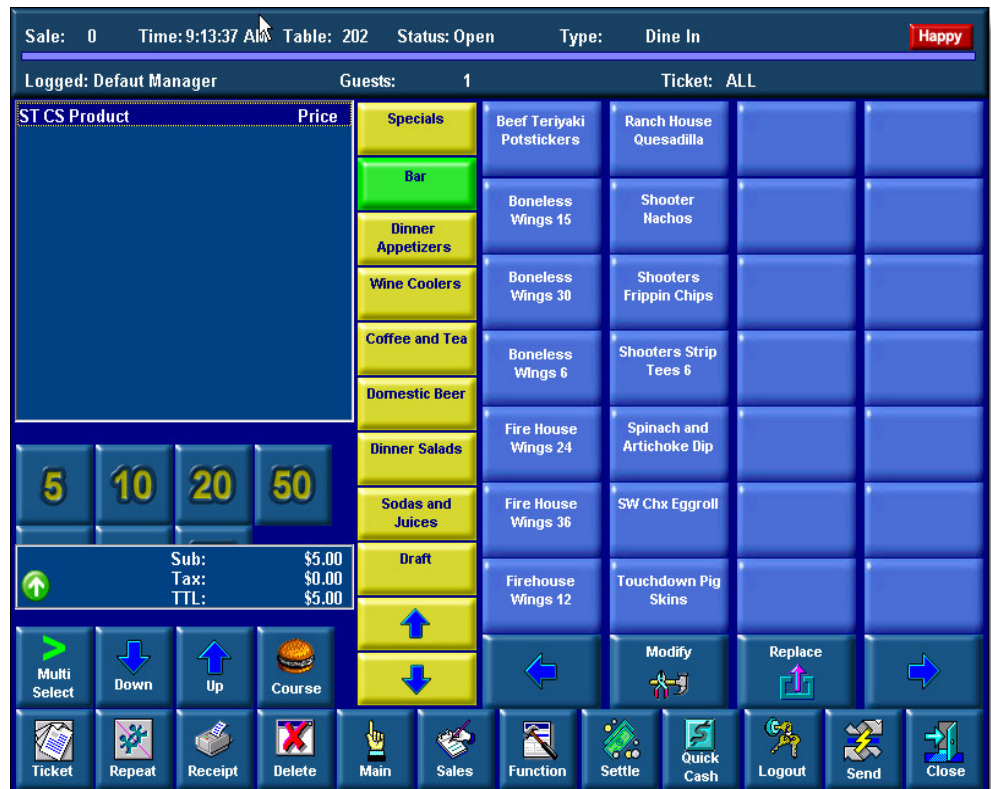


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The screenshot displays the VALUEPOS Front Office interface. At the top, there are fields for Sale#, Time, Table#, Status, and Sale Type (set to Happy). Below these are Sub and Tax fields. The main area shows a list of sales for a specific table, with columns for Sale #, Table #, Guests, Total, and Comments. A red dialog box titled "Open Sales for Table:" is overlaid on the interface. This dialog box contains a table with the same columns as the main interface. Below the table are buttons for "Go to Sale" (with an up arrow), "New Sale" (with a down arrow), and "Close / Cancel". The background interface includes a keyboard-like grid of buttons for various functions such as Multi Select, Down, Tickets, Repeat, Receipt, Delete, Main, Functions, Settle, Quick Cash, Logout, Send, and Close.

A red dialog box with a white border is shown. The text inside reads "Close out the sale to the exact amount of 0.11?". At the bottom right, there are two blue buttons labeled "Yes" and "No". In the bottom left corner, the number "25" is displayed in yellow.

SALES SCREEN



The Order Screen is the most widely used portion of the ValuePOS system because it is here that you create, edit and settle customer sales. It is the main area of activity within the ValuePOS system. The Sales Screen consists of 6 basic areas
Order Header, Order Ticket, Category Selector, Product Grid, Product Navigator, Sales Screen Buttons explained next.

Order Header:

The Order Header consists of the upper portion of the screen and show the following information:

- Sales # - Show the sale current sales number. Note: when you first open the sale, it is not saved to the database until you either "Send" the sale or close the sale screen and answer YES when you asked to save the sale. Until that time, the sale number will show zero.
- Time: Time the sale was created or opened.
- Table #: Table Sale is attached to (for Table Service)
- Status: Status of the Sale. Usually open.
- Sales Type: Type of Sale (Dine In, Counter, Delivery, etc)
- Sub Total: Shows sum of all items without taxes being calculated
- Tax: shows sum of all taxes levied against the sale
- TTL: shows total of the sale including sales taxes, auto gratuities, total amount customer must pay.
- Logged: - The person (you) currently logged on.
- Guests: - Number of Guests (for Table Service)
- Seat: - Current Seat Number if this option is being used
- Shows: if Happy Hour is on or off
- Ticket: ValuePOS allows you to manage multiple sub tickets within the Master Sale for separation at a later date

Order Ticket

The Order Ticket is the rectangular area on the left portion of the Order Screen. The Order Ticket is designed to resemble a hand written Order Ticket, yet better because it organizes the items that you added to it in hierarchy that is easy to read and decipher for others that might need to see that Order. It has two different views: **Detail View and Summary View.**

Detail View: Detail View allows you to see each and every product that was entered onto the Order Ticket including any side dishes and modifiers. You must be in Detail Mode to manipulate items on the Order Ticket and Detail View is shown by default.

ST= Seat Number. This number is automatically set to zero if not using this feature.

CS= Course. This feature is used with Table Service sales and allows you to stagger preparation of items on the order ticket in the kitchen to coincide with natural coursing of the customer experience.

Product= The Product column shows any products ordered for the current sale.

Price= Shows the Price of the each item on the order ticket.

Detail View Provides a hierarchy view of the items entered onto a Sale. White colored items are considered to be Parent Items while yellow colored items are considered Child Items such as side dishes and any applicable modifiers attached to products.

Summary View: shows items entered onto the Sale grouped and summarized by Product and shows the count of each group as well as the total price of each product group.

Selecting Items on Order Ticket: To select an item on the Order Ticket, it must be in detail view. Click on the item and it will be highlighted. Now you perform whatever action needs to be taken.

Sales Locator:

The sales locator allows you to jump to other sales that belong to you regardless of what type of sale that may be. If you have a Table Service sale open, you can jump to a Quick Service sale that you own through the Sales Locator. You access it by clicking the **Sales Button** on the Sales Screen. When the Sales Locator is displayed, you can highlight the sales that you would like to jump to and click **GO TO SALE** button.

Other buttons on the Sales Locator are **New Sale** (allows you to quickly create a new sale, creates sale of the type you are currently in); **UP/ DOWN** arrow button allows you to scroll the respective direction of the button you click. **SHOW ALL** button shows all types of sales; **RESTRICT VIEW** shows sales of the type that were displayed before using the Show All button.; **Print Receipt** button: prints receipt of selected sale. **Close button:** closes sale.

Sales Locator

Sale #	Table #	Guests	Total	Comments
2	0	0	\$44.17	None
4	0	0	\$45.53	None
10	0	0	\$17.02	None
37	0	0	\$0.03	None
40	0	0	\$0.00	None
41	714	2	\$12.74	poop
43	708	2	\$45.82	lee
46	0	0	\$25.52	None
48	109	2	\$13.38	None

Choose↑Show AllPrint Receipt

↓Restrict ViewClose

Category Selector

The Category Selector is the vertical group of yellow buttons located in the center of the Order Screen. In ValuePOS products are organized under groups called Categories. When you click a Category, the products that are organized under that Category as displayed on the **Product Grid** (see next topic). Use Up/Down arrows to scroll the Category list. Sub Categories: If a category button is green it means that there are additional Categories to be displayed when clicking it.



Product Grid

The Product Grid is a group of buttons. The Product Grid can show up to 3 pages of 24 products (4 across and 7 down for a total of 72 products per Category. Products are displayed either in **Text** (shows name of Product and is in white) or by **Logos** (pictures that you can force ValuePos to display. They can be no more than 80 pixels wide and 39 pixels high. To choose a product, simply click the button that represents the product you would like to enter onto the sale. {PRODUCT GRID CHANGES- If you choose a product that has side dishes assigned to it, the Product Grid is repainted to that Category which is Yellow to denote Secondary Product Mode. Once final side selections are made, the color will return to white

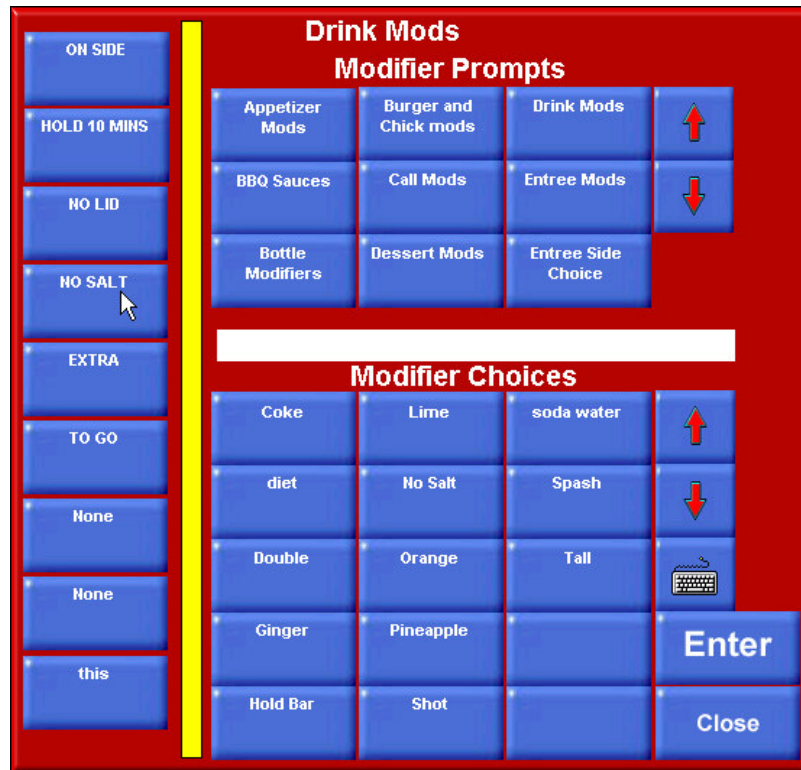
Product Navigator

The Product Grid shows only 28 buttons at a time. Depending on how you have your products set up and positioned, that means that you can have a maximum of 28 products showing at a time.

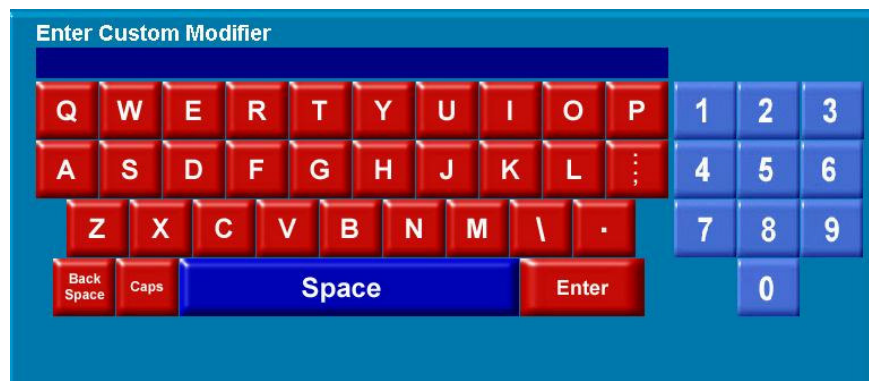
Using the **Left and Right Arrows** or **UP/DOWN Arrows** on the Product Navigator, you can scroll from page to page (when there is more than one page to show)

Sales Screen Buttons:

Modify: modifies a product entered on the order Ticket (if it has not been sent to the kitchen) Highlight Product on Order Ticket. Click the Modify Button and a Modifier Screen will be displayed. If not listed, you can make one on the fly. Follow instructions on using Modifier Screen to add a modifier on the fly.



Pressing the keyboard button on the modifier screen , you will get this pop up keyboard. You can enter , on the fly, any modifier items not found in the existing modifier lists .



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Replace: If you have made a mistake and entered the wrong product onto the order Ticket, you can delete it or its parent item and start again. You can also Replace it without deleting it since it has not been sent to the kitchen. Highlight Product you want to Replace. Click Replace button. You will see products repainted in the product grid from the Original Category that the original product was chosen from. Choose correct product to replace the existing one with.

On The Fly:

This button allows you to enter custom items to the Order Ticket “on the fly”. If, for instance, you want to add something that is not already defined in the system to the Order Ticket, this button will open the On the Fly screen to allow you to do just that. This feature to be implemented soon.

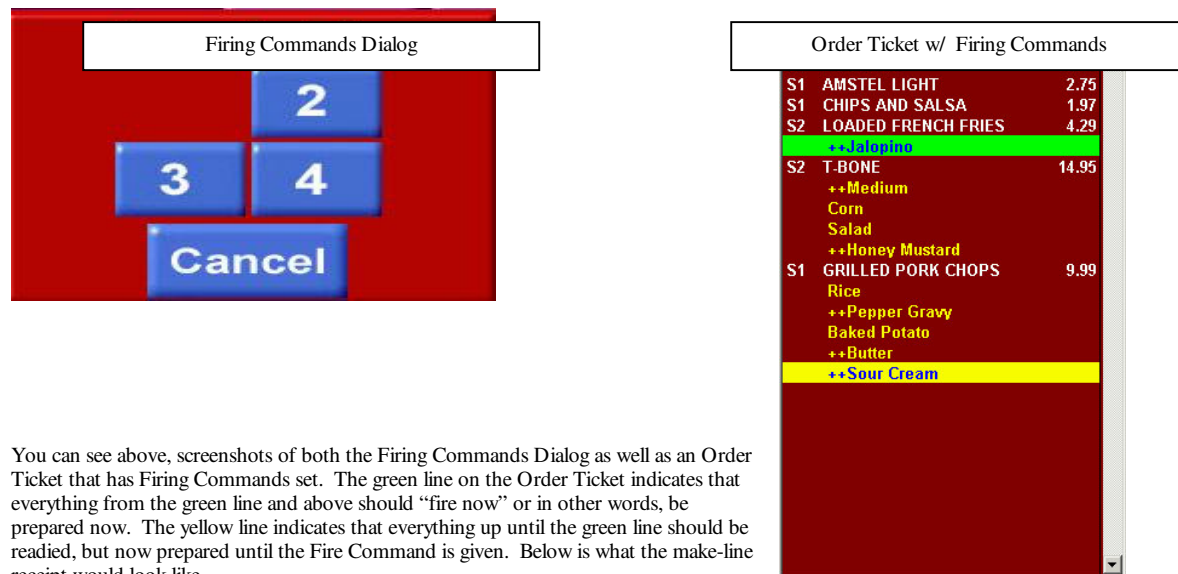
Send:

Sends order to the kitchen for processing

Course Sep/Firing Commands

In ValuePOS, you can perform what is known as COURSING. It allows you to send instructions with prep notifications that let the kitchen know that certain items that you are sending should not be prepared yet. At a later time, you will send notification when those items that were held should be prepared.

This button allows you to enter Firing Commands for use with make-line (remote) kitchen printing.



You can see above, screenshots of both the Firing Commands Dialog as well as an Order Ticket that has Firing Commands set. The green line on the Order Ticket indicates that everything from the green line and above should “fire now” or in other words, be prepared now. The yellow line indicates that everything up until the green line should be readied, but now prepared until the Fire Command is given. Below is what the make-line receipt would look like.

```

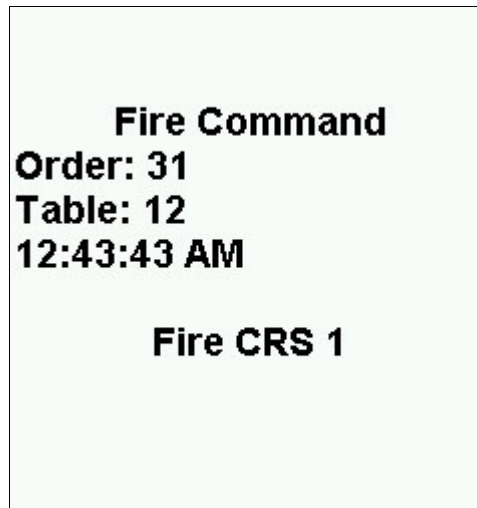
S1 CHIPS AND SALSA
S2 LOADED FRENCH FRIES
S2 ++Jalopino
  ↑=== Fire Now ===↑
=====

S2 T-BONE
S2 ++Medium
S2 Corn
S2 Salad
S2 ++Honey Mustard

S1 GRILLED PORK CHOPS
S1 Rice
S1 ++Pepper Gray
S1 Baked Potato
S1 ++Butter
S1 ++Sour Cream
  ↑=== Hold CRS 1 ===↑
=====
    
```

As you can see from the picture to the left, the appetizers will be fired right away while the main course items will be readied, but not actually prepared (cooked) until the firing command is given. The separator line marked “Hold CRS 1” indicates this.

When the main course (CRS 1) is needs to be prepared, the waitperson issues the fire Command and the receipt shown below is printed to the make-line printer.



In order to use Firing Commands, you must first, "setup" Order Ticket with the commands. Everything that should be fired right away should be entered first so that those items are the topmost items on the Order Ticket.

1. On the Order Ticket, highlight the last item that will be part of the *firing group*. In the example above, both the "Chips and Salsa" and "Loaded French Fries" need to be fired right away so the last item of the group (Loaded French Fries) would be the items that you highlight.
2. Click the **Course Sep** button and select **Fire Now**. A yellow line will be painted underneath the last item for that group.
3. Repeat the same steps as above for each course. For instance, in the example again, everything else was part of the Course 1 so the last item of that group (Grilled Pork Chops) was highlighted and the **Hold CRS 1** button was clicked to include everything above it up until the first Firing Group.
4. When you are ready to fire a course, simply click the **Course Sep** button without highlighting anything on the Order Ticket and the commands to fire will be available. Click the one that applies to your course number.

Repeat Button

This button does what its name implies, it repeats items on the Order Ticket. For instance, instead of enter 10 Draft Beers, one after the other, you would enter 1 Draft Beer then highlight it, select the **Repeat** button, select 9 from the dialog that prompts you for the number to repeat and click **OK** from the prompt and the Draft Beer would be repeated 9 more times.



Receipt Print Button

This button allows you to print the customer receipt at any time for presentation to the customer.

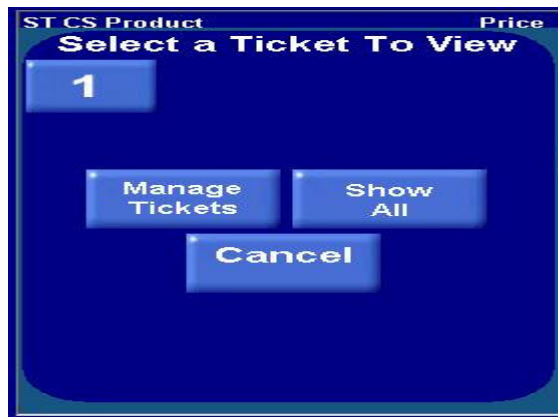
Delete Button

This button is self-explanatory. It deletes items from the Order Ticket. Please note that if the item has already been sent (saved) then you must either have Full Manager Permissions to delete it or someone with those permissions must swipe his or her Employee Swipe Card (ESC) when prompted in order to do so.

Main Button:

Categories on the Category Selector can be “nested” underneath another one. For instance, you might have a Category called “Beer” that when pressed, will show additional Categories called “Draft”, “Import”, etc. Pressing the Main button will take you back to the “Main” (default) level of Categories.

Tickets Button:



You can either select manage tickets or show all. Manage tickets lets you sort tickets and separate them so that parties can by for the whole ticket or for certain items or for separate parties. The show all shows all the tickets.



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Separating Checks:

ValuePOS allows you to manage multiple checks in a number of different ways. With **Sub Tickets** you can manage multiple sales within one master sale. You can also create everything on one check and then at the end, separate items from that check into several different checks.

When you separate a check, you are taking items from one check and marking them to be split to another new check. Let's see how this is done by the following example.

- 1) To access the check splitter screen, open a new or existing table service sale.
- 2) Below the Order Ticket, click the Tickets button and select Manage Tickets button from the dialog that is displayed.
- 3) Using the check splitter, you can split the main sale into 7 checks at a time.
- 4) The Add Ticket button creates a new (temporary) split check on the screen.
- 5) The delete Ticket button deletes a split check on the screen. (You must delete a split check from the end[last one] you cannot delete it in the middle of two other checks)
- 6) When you have all the split checks that you want to separate, click the Separate Tickets button to physically separate the checks into separate checks. You will be prompted to confirm this separation action and if you say YES, then the checks are physically separated, new records are created in the database.
- 7) To move individual items from one ticket to another is by clicking the item that you would like to move on one ticket(it will become highlighted) and then clicking the check that you would like to transfer the item to.
- 8) The Switch Modes button allows you to toggle between Move by Item and Move by Seat modes. Move by seat will move all items associated and belonging to the seat number as the item you are transferring to the destination check.
- 9) **Splitting the Check:** Click Add ticket and a new sub ticket will be added to the screen. Use either Move by Item or Move by Seat mode, transfer items from one check to another by highlighting items from one ticket and clicking the ticket you want to transfer items to. Click Separate Checks button and click YES when asked to confirm the separation process.

Making Things easier with Sub Tickets:

Value POS has a feature that allows you to use Sub Tickets throughout the entire ordering process.

- 1) Following the steps outline above for splitting a check , click add ticket and use Move by Item or Move by Seat, then close the Check Splitter screen.
- 2) From the sales screen click the Send button to save the sale.
- 3) Click the Tickets button and you will see that there are two tickets available on the Ticket Manager dialog. The first one is the Main ticket, the second is the first Sub Ticket.
- 4) When you want to add more products to the Order Ticket, you first select which ticket to view and any items you add will be marked with the current ticket.
- 5) At any time you can go to manage tickets and separate the tickets permanently.

Logout

These buttons are available through the system to allow you to quick logout of the system without having to backtrack through several screens to do it.

Quick Cash

Quick Cash is designed to be a fast method to cash out sales. The Quick Cash method will prompt you to confirm that you want to close the sale out **and that is it**. It will not allow you to specify the amount tendered by the customer, nor will it show change due. It is assumed that you can make change easily. This button is used most often in Bar or other fast paced environments where Tax Inclusive is used so that totals for customer checks always total to a "round" number such as \$2.50, \$54.00, \$13.00, etc.

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Functions:

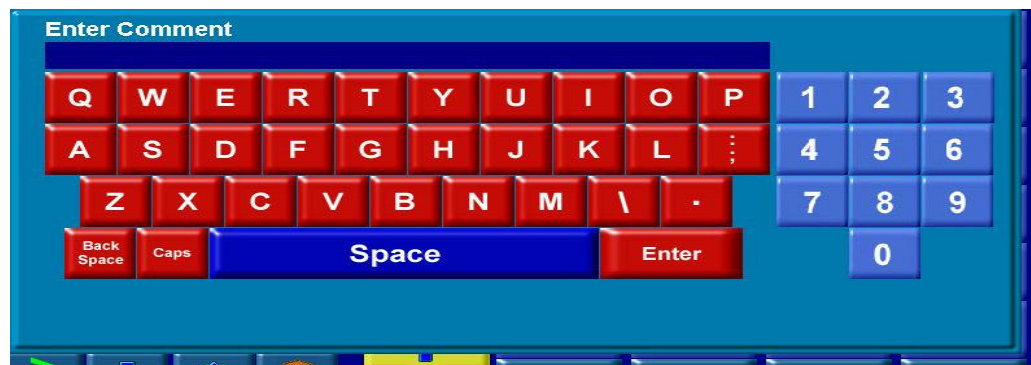
This screen contains buttons we have found that users access most frequently. Those additional functions are contained within the Functions button in order to save real estate on the main sales screen.



Extended Order Functions are available by clicking the Functions button in the Order Screen Function group located along the bottom portion of the Order Screen. When you click the **Functions** button, the above menu will “slide” in from the bottom.

Add Comment Button

Sometimes it may be convenient to add a comment to a sale such as “Husbands Birthday”, “Blue Shirt” or the last 4 digits of a credit card if you’re running a tab for a customer. Click the Add Comment button will display the following screen. (These comments are displayed on prep receipts)



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Change Ticket View Button

The Order Ticket can be viewed in two ways. First there is the default, which is called **Detail View**. With Detail View, you can see a detailed view of the items on the Order Ticket. The other view that you can use is **Summary View**. In Summary View, you don't see the detail of individual items, sides dishes, modifiers, etc. Each "Parent" item on the Order Ticket is summarized and grouped by the item and a total is given for each group. An example of an Order Ticket in Summary View is shown below.

Clicking the **Change Ticket View** button will "toggle" the view from one mode to the other.

Detail View

Summary View

ST	CS	Product	Quantity	Modifier
0	1	Burger Special	1	
		++well		
		++no bacon bits		
		++cheese		
		++ON SIDE		
0	>	Burger Special	1	
		++EXTRA: well		

ST	CS	Product	Quantity	Price
0	1	Boneless Wings 30	1	9.95
0	1	Boneless Wings 15	1	7.95
0	1	Boneless Wings 6	1	5.95
0	1	Shooter Nachos	1	7.25

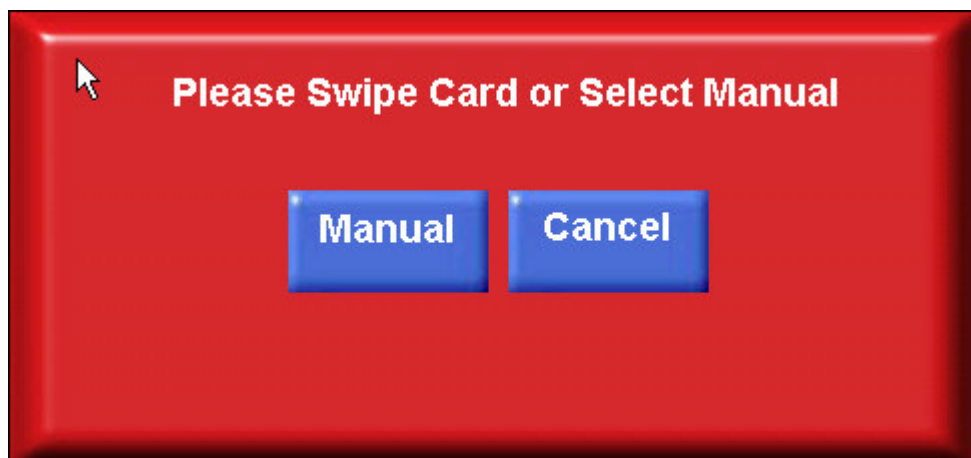
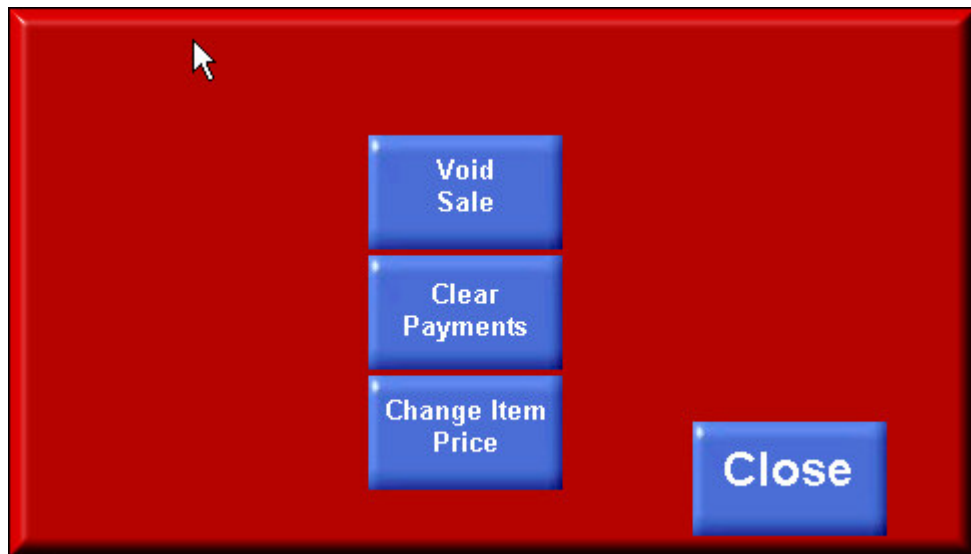
Manager Edit Functions

This menu is accessed from the **Extended Order Functions** menu using the button **Manager Edit** Order Functions. Please note that you must have Full Manager Permissions in order to access the Manager Order Functions menu or be using Manager Swipe Card

Void Sale Button

This button will allow you to void a Sale. When you void a sale, the sale is deleted from the database completely along with any payment records and items that were added to the Order Ticket. All voids are registered in the void/ comp log for audit trail and security purposes.

1. Click the **Void Order** button.
2. ValuePOS will prompt you to confirm that you want to void the sale. Click the **Yes** button.
3. Another popup dialog will be displayed prompting you to select a reason for the void. Select a reason from the list and click the **OK** button on that dialog. The sale will be deleted.



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Clear Payment Button

If you should make a mistake on the payout of a sale, you can clear any payments made to the sale from here. Please note that when using the integrated credit card processing module, some credit card processors do not allow the voiding of a sale in a way that ValuePOS is compatible with. In these cases, you must Void the sale and re-enter it. If the clear payment function is compatible, ValuePOS will contact the appropriate server and perform a void transaction so that the account is credited back the amount of the payment.

All Actions that effect sales such as voiding, comping, discounts, etc are recorded in the Voids/ Comps database table to provide a tight audit trail. A report is provided in the EzManager software that details these entries including the reason, who performed it, who they performed it for, the amount performed for, etc.

Change Item Price

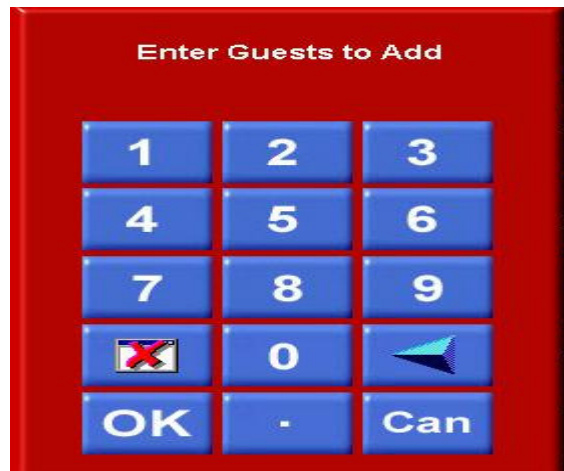
This button allows you to change the price of an individual item quickly.

1. Highlight the item in the Order Ticket that you would like to change the price for. (make sure that you are in Detail Mode, Summary Mode will not allow you to edit item in the Order Ticket).
2. Press the **Change Item Price** button.
3. Enter the new price in the popup dialog that appears.
4. Click the **OK** button.

Add Guests

If you are in a Table Service sale and you have the guest counting option turned on (see EzManager Back Office Manual for more information), you can add to the number of guests at a table. For instance, if you seat two customers at a table and two more join them, you can add them to the guest count and seats will be added for them on screen. (This number adds to the number of guests already present and does not replace the number of guests)

1. Click the **Add Guests** button.
2. From the popup dialog that appears, select the number of guests that you would like to add.
3. Click the **OK** button on the popup dialog.



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Auto Gratuity

Auto Gratuity is a function that allows your wait staff (in Table Service) to add a gratuity to the ticket based on a percentage amount that you setup in the EzManager Back Office Software. Auto Gratuity is based on the total ticket amount, but is not taxed. The amount of the Auto Gratuity is displayed on the Order Screen next to the **Total** in the Header portion of the Order Screen when Auto Gratuity is active. The Auto Gratuity button will “toggle” Auto Gratuity on and off each time it is pressed.

Print Expediter

This button will print an Expediter receipt to the printer designated as the Expediter printer. Expediter Receipts show the entire list of products and items on an Order Ticket to help an expediter (staff member) better manage courses out to a customer table.

Custom Discounts Button:

The Discounts button will display the Discounts menu as shown to the right. The Discounts button allows access to pre-defined discounts that can be applied to the sale. Discounts can be applied either to a line item on the Order Ticket, the entire Ticket or will allow you to choose depending on how management has setup the Discounts.

Some Discounts will “Finalize” the sale, meaning that when you apply the discount, you will no longer be able to add any more items to the sale.

To apply a discount:

1. If the Discount should be applied to a single line item on the Order Ticket, then first highlight that item on the Order Ticket.
2. Press the **Discounts** button on the **Extender Order Functions** menu.
3. Choose the Discount that you would like to apply.
4. If asked to choose, indicate if you want to apply the discount to the line item or the entire ticket.

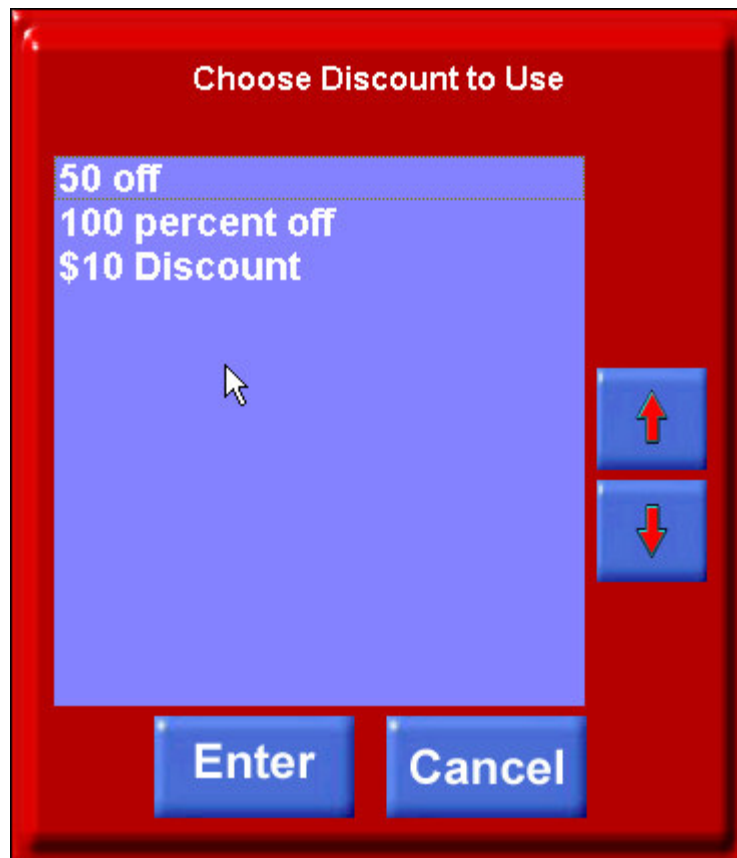
Example #1 – Deducting a Dollar Amount:

1. Ensure that the \$ sign is displayed.
2. Ensure that the – (minus) sign is displayed.
3. Enter the amount that you would like to deduct as a decimal amount (IE 2.99, 1.50, etc).
4. Press the **OK** button.

Example #2 –
Adding a
Percentage
Amount

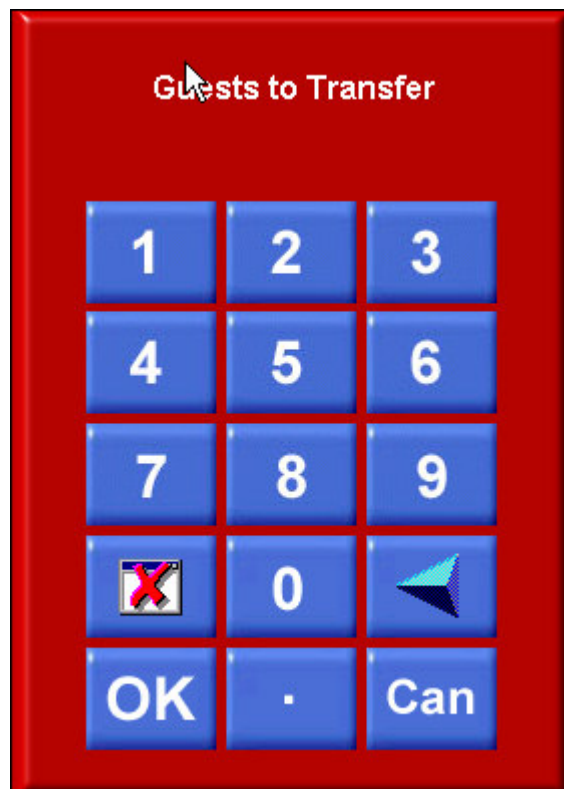
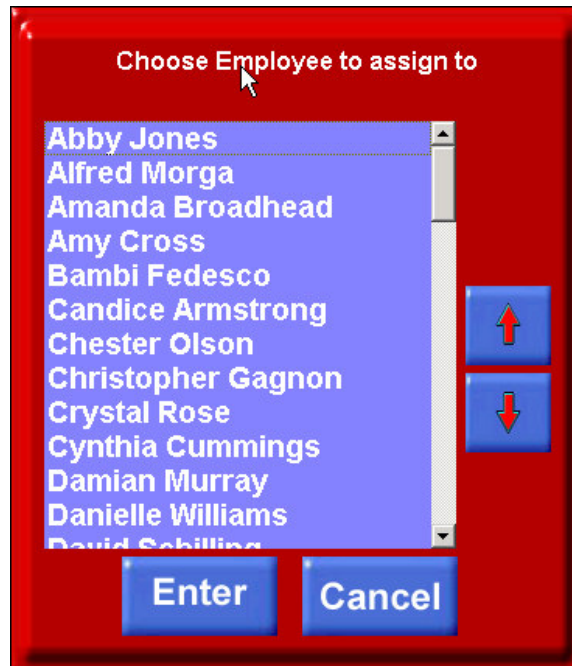
1. Ensure that the % sign is displayed.
2. Ensure that the + (plus) sign is displayed.
3. Enter the percentage that you would like to add (IE .20 for 20%, .15 for 15%)
4. Press the **OK** button.

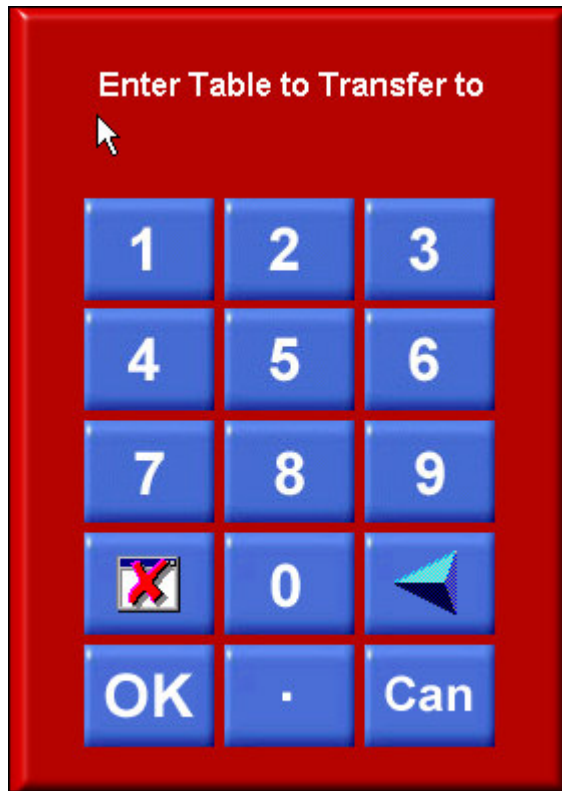




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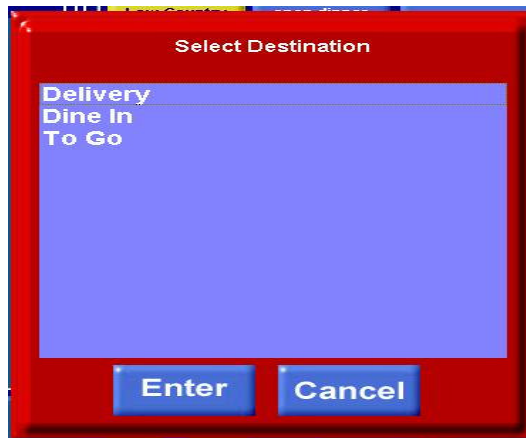
Transfer Sale:





Order Destination:

The Order Destination button doesn't actually change the destination that a sales item will print, it simply adds a note to receipts (kitchen and customer receipts) that indicates whichever choice you indicate. It's used primarily for special handling of sales such as adding a place to put "TO GO".



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Force Credit Button

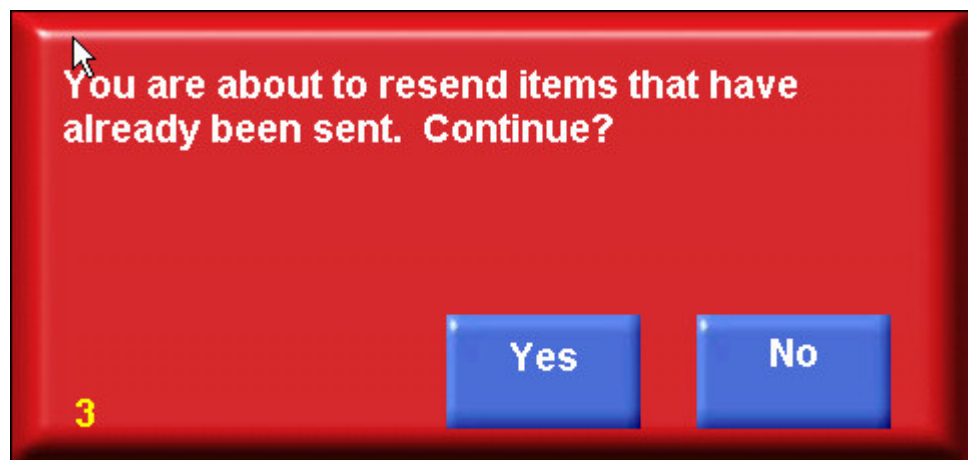
When using the integrated credit card processing module, you may come across situations where the response from the processor comes back something like "Hold / Call". This means, that for whatever reason, the processor has declined a credit card for automated approval. Many times you can call your processor and get a voice authorization and a approval number over the phone. This button allows you to apply a payment using the approval number supplied by the processor.

Swipe VIP Card- gives points or miles for spending money in establishment or gives discount. Perform this action before settling a sale.

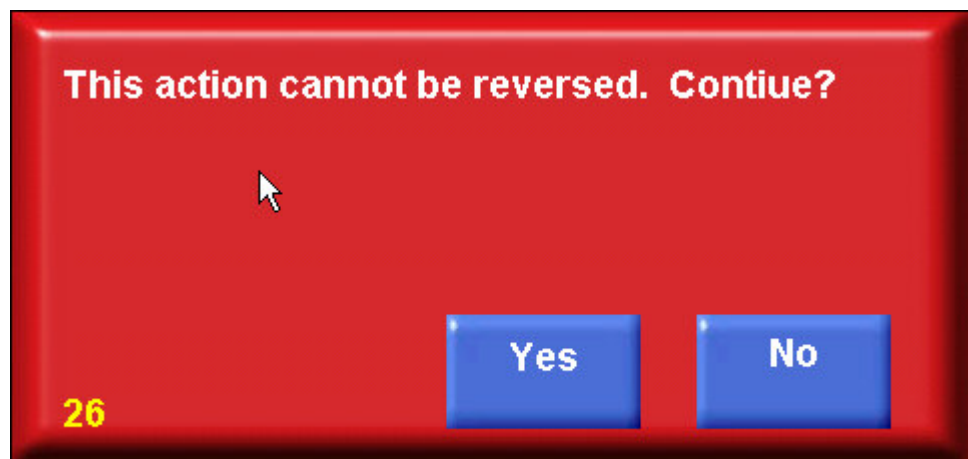
Redeem VIP Card: redeem points or miles (currently not functional)

Refresh Ticket: refreshes tickets in system

Resend Kitchen: resends the ticket to the kitchen with updates or if misplaced and is marked "Kitchen Resend"



Combine Other Sale: combine ticket with another sale-transfers item from chosen sale to current sale and deletes first sale. Entry inserted in void/comps log for auditing.



Sales Locator

Sale #	Table #	Guests	Total	Comments
2	0	0	\$44.17	None
4	0	0	\$45.53	None
10	0	0	\$17.02	None
37	0	0	\$0.03	None
40	0	0	\$0.00	None
41	714	2	\$12.74	poop
43	708	2	\$45.82	lee
46	0	0	\$25.52	None
48	109	2	\$13.38	None

Choose↑Show AllPrint Receipt

↓Restrict ViewClose

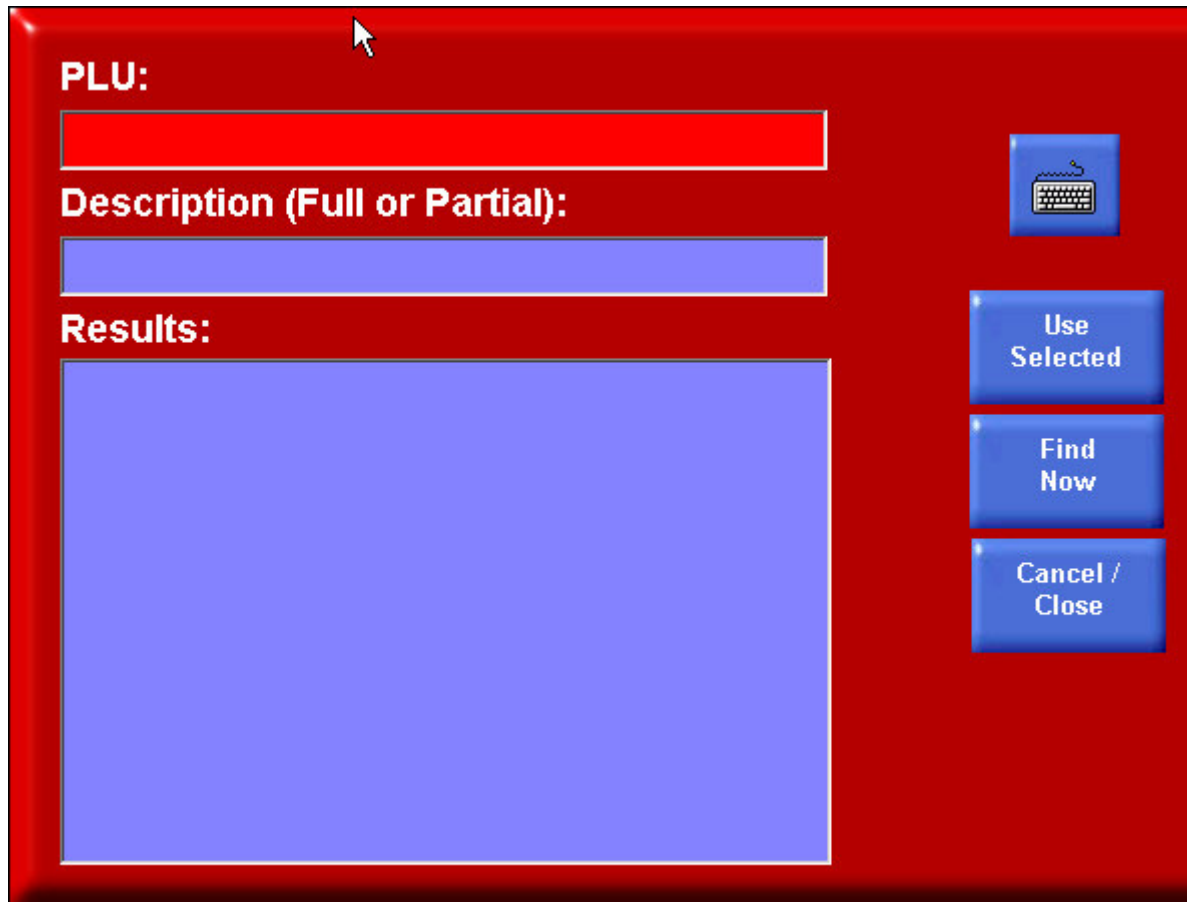
Close - exits this screen

Scan Bar Code: scans the bar code of a any item you have entered in the system.

Please Scan Item

X

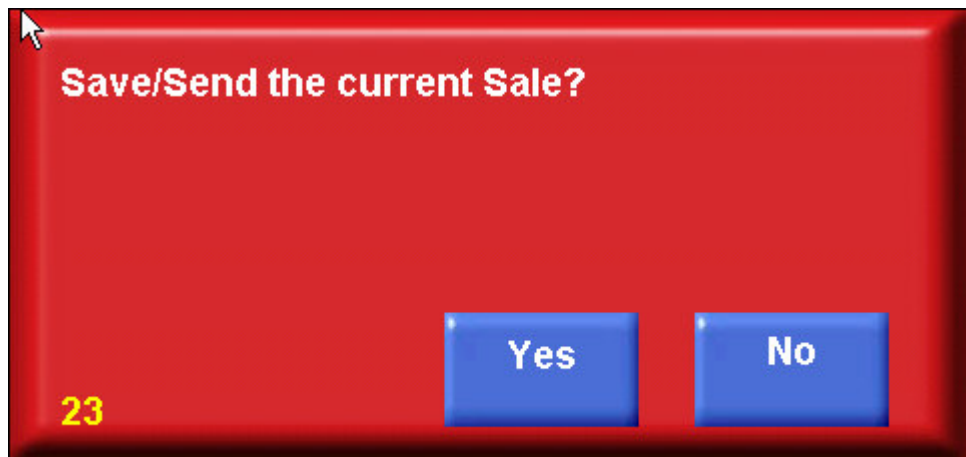
Look Up Product:



The dialog box has a red background and rounded corners. It contains the following elements:

- PLU:** A red text label above a red rectangular input field.
- Description (Full or Partial):** A red text label above a light blue rectangular input field.
- Results:** A red text label above a large light blue rectangular area for displaying search results.
- Navigation Buttons:** A vertical stack of three blue buttons on the right side: "Use Selected" (with a keyboard icon), "Find Now", and "Cancel / Close".

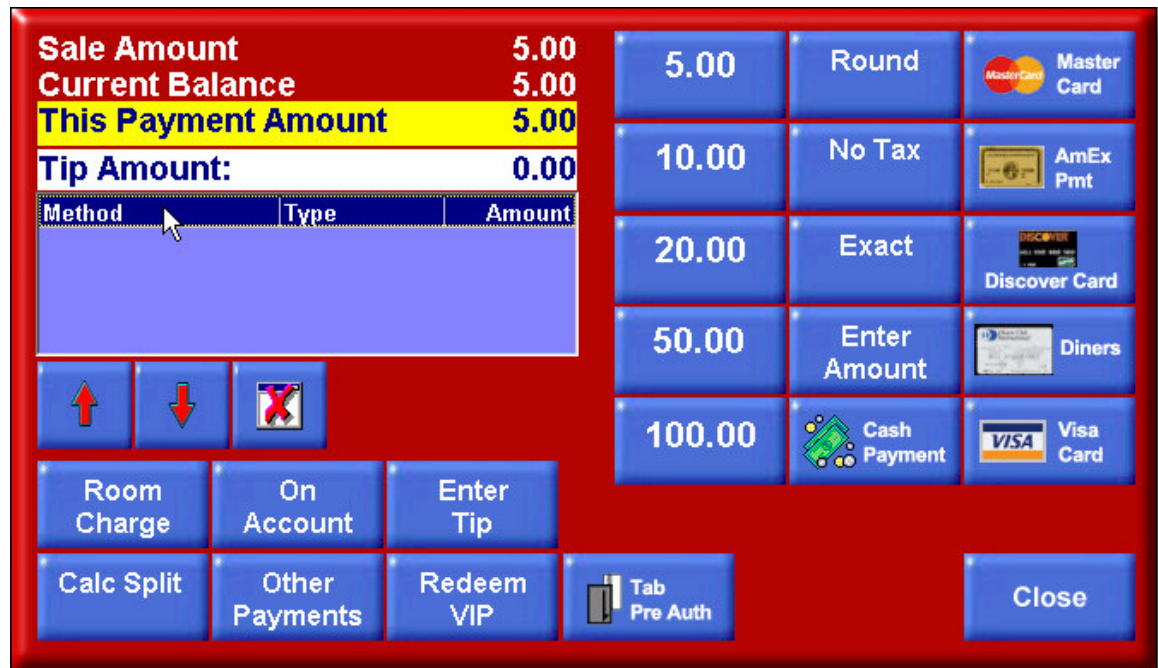
Hold Sale:



The dialog box has a red background and rounded corners. It contains the following elements:

- Save/Send the current Sale?** A red text label at the top.
- Yes** and **No** buttons: Two blue buttons at the bottom right.
- 23**: A yellow number in the bottom left corner.

Regular Settle Screen:



This Settle Screen was recently introduced in ValuePOS to help make payment options for users and their customers more flexible. While the Settle Screen allows multiple payments to be applied to a single sale, there are some restrictions.

- While you can have multiple credit card payments, you can have only one cash payment per sale. If you need to have separate payments like that, you should just separate the sale into the number of sales that you require.

Previous Payments for this Sale

This section shows payments that have been entered for the sale thus far. Anytime you enter a payment that is not equal to or greater than the **Balance**, an entry is made in this portion of the Payment Screen. If you enter a payment that is equal to or greater than the **Balance** than the sale will be closed out after that payment is made.

This Tender

This shows the amount of the current tender. When you open the Payment Screen is amount automatically defaults to the amount of the **Balance**.

Balance

Shows the current balance owed for the sale, less any payments already made (shown in the section "Previous Payment for this Sale").

Pre-Numbered Buttons:

These buttons allow you to quickly enter an amount as the current payment. Denominations of \$5.00, \$10.00, \$20.00, \$50.00 and \$100.00 are supplied.

Enter Amount:

This button will display a numeric number pad which you can use to en a specific amount as the current payment.

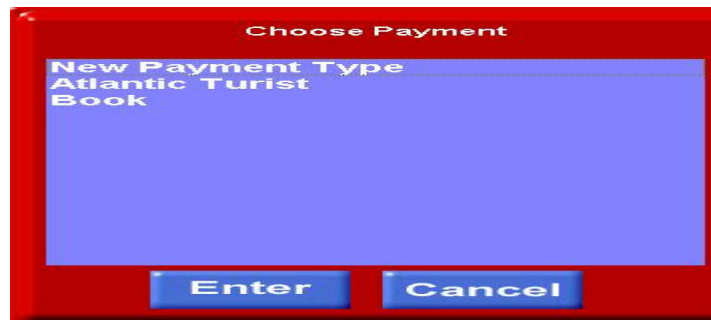
Cash Payment:

After you have entered an amount for a payment, clicking this button will enter a cash payment for the amount that you specified. If the amount is more than the balanced owed, the sale will be closed out and a change due dialog will appear.

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Other Payments:

Valuepos allows you to use custom payment types. This button shows a dialog of those payments you can choose from.



On Account:

ValuePOS offers House Account functionality. This button allows you to make a payment using a House Account. Click the On Account button. A dialog will be displayed prompting you to enter the Account Number (customer's phone number). Enter the phone number and click OK. The software will query the database to see if the customers account has enough credit to cover the sale, and will close it out like a credit card sale.

Redeem VIP:

This button allows you to make a payment using the customers VIP/ Gift Card. Click the VIP Redeem button and swipe customers VIP/ Gift card when prompted.

Calc Split Button

The Split button allows you to quickly determine payment amounts. As you can see from the screenshot below, you can indicate a payment for 1/2, 1/3, 1/4, 1/5, 1/6, 1/7 or 1/8 of either the balance due or the sale total. There is also a button to open the integrated calculator. Click the fraction you would like to use. Click OK. The amount you indicated is entered at the current payment amount.



Arrow Keys :

These keys allow you to scroll through the payment screen.

X Key :

The X Key acts as a Delete button. It allows you to select a payment from the "Previous Payments for this Sale" section and delete it. If you are using integrated credit card processing (and your processor supports it) and the payment you are deleting is a credit card payment, the payment will be voided with the processor.

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Clear \$ Button

If you enter an amount to be tendered and make a mistake, this button will clear that field allowing you to start over again.

Exact Amount

This button will enter into the **This Tender** field the exact amount that is in the **Balance** field. This button may change to a "Round" button in future additions that will "Round" the payment about to the nearest dollar amount for you.

Round: This button will enter a payment rounded to the nearest dollar over the current balance amount.

Exit Button

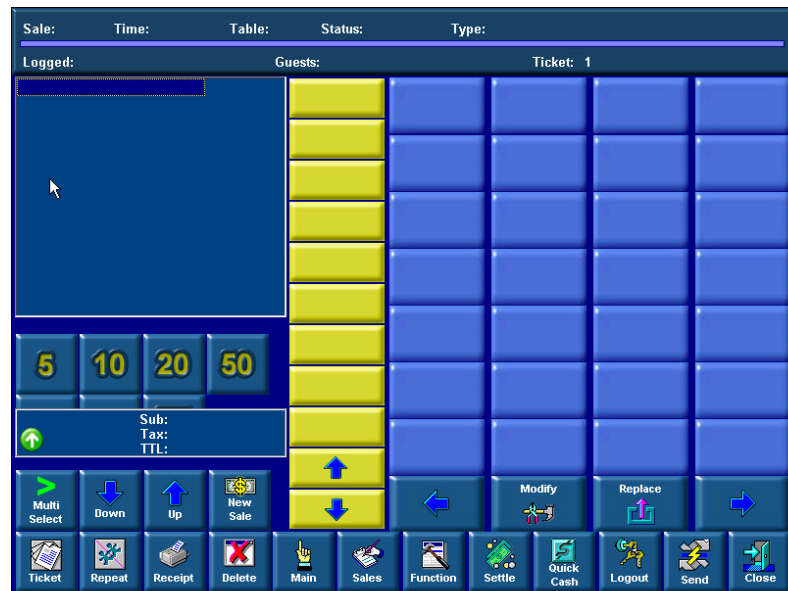
This button will allow you to exit out of the Payment Screen. When the Payment Screen is activated, you cannot use other buttons on the Order Screen, although they may be visible to you. Existing out of the Payment Screen will allow you to work normally as you did before you opened the Payment Screen.

Credit Card Button:

After you have entered an amount for the payment clicking this button will show you the credit card swipe dialog, prompting you to swipe the customer's credit card. After swiping the card or manually entering the number ValuePOS will contact the credit card server for your merchant account and process the transaction for the amount you specified. If the amount you indicated is equal to the amount owing on the balance of the sale, the sale will be closed and a credit card signature receipt will be printed.

How you enter a credit card will depend on if you are using the optional integrated credit card processing module or not. If you are not using the integrated credit card processing module, you will have individual buttons representing each credit card type that can be indicated (Visa, Master Card, American Express, Diner's, Discover etc). If you are using the integrated credit card processing, you will not have the individual credit card buttons because ValuePOS determines the type of card when it is swiped.

QUICK SETTLE SCREEN:



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FINALIZE CREDIT CARD/ADD TIPS SCREEN



ValuePOS treats certain types of payments in the same way. These payments are

Credit Card Payments: House Account Payments: and VIP/ Gift Card Payments.

With these types of payments, a pre-authorization is made for the amount of the payment plus a little bit more.

Add/Change Tip Button:

This button allows you to add a tip onto a payment that has been pre-authorized. Highlight the payment in the payment list. Click the Add/ Change button. When prompted, enter the tip amount and click the OK button.

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Remove All Button:

This button removes all tips added to the list of payments in the Payment list.

Update Data Button:

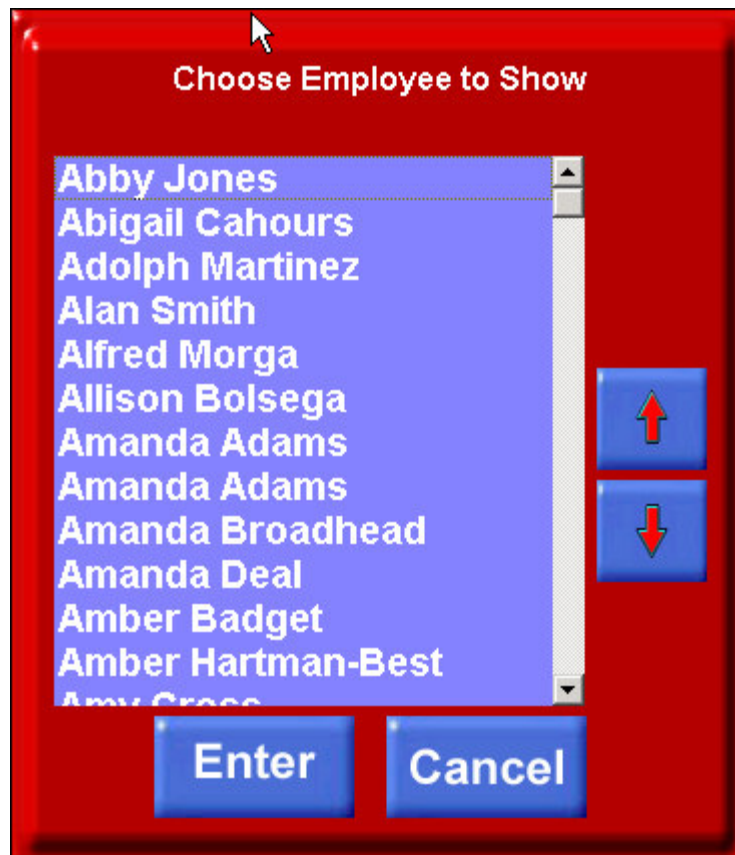
This button manually saves any changes that you have made in the Finalize Credit Card Screen. You are always prompted to save changes if you click the Close button and there are any unsaved changes.

Re-Print CC Receipt:

This button re-prints a receipt for the currently selected or highlighted payment in the Payment list.

Choose Employee Button:

This button allows you to filter the list to show only payments from a specific employee. (Manager Permissions required)



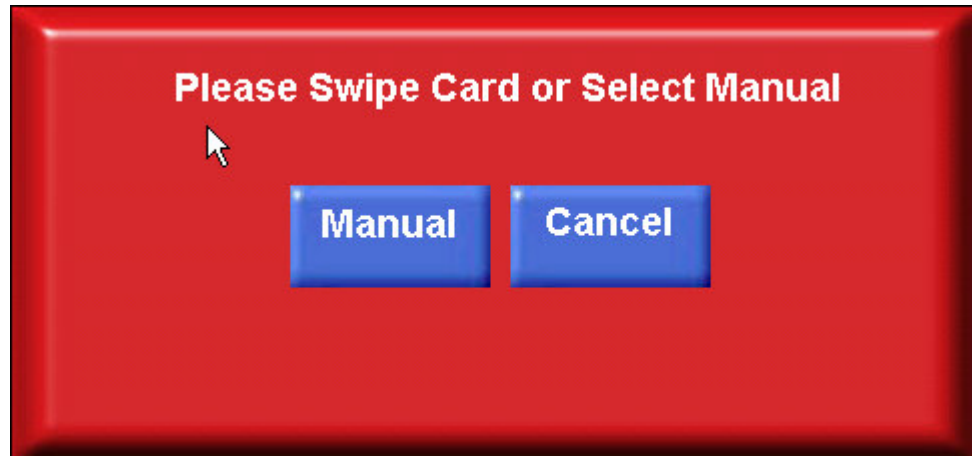
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Finalize Payments Button:

This button will process the payments listed on the Payment list. ValuePOS takes the amount of the payment as well as the tip amount adds them up and submits the finalized amount to the credit card processing software to be presented to the credit card processor for settlement.

With Integrated Credit Card Module

1. Using the numeric keys, or the pre-defined payment amounts, enter the amount of the payment.
2. Select the **Credit Card** button. A dialog like that shown below will be displayed.
- 3) Swipe the customer's credit card using the attached Mag Stripe Reader or select the **Manual** button to enter the customer credit card number manually.



1. Using the numeric keys, or the pre-defined payment amounts, enter the amount of the payment.
2. Select the Credit Card button that corresponds to the type of credit card that the customer presented for payment.

Please note: if you do not have integrated credit card processing, ValuePOS **does not** validate a credit card. If you are not using integrated credit card processing, this must be performed using a separate device such as a Verifone® credit card terminal. When this is the case, you are simply telling ValuePOS how the payment was made.

WITHOUT INTEGRATED CREDIT CARDS

The Credit Card button does not allow for a tip to be added

Pre-Authorize Button

This button is also only available with integrated credit card processing. When you Pre-Authorize a credit card, ValuePOS authorizes the customer's credit card for the amount of the sale **plus** an additional percentage that is determined in the **INI Setup** screen available through the **Manager Screen** (see the Manager Screen section later on in this section) called a **Reserve Amount**.

Example:

If the sale amount is \$10.00 and the Reserve Amount is set to .25 (25%) then ValuePOS will authorize the customer's credit card for the initial \$10.00 plus an additional 25% or \$2.50 for a total authorization of \$12.50.

Later, when you Post-Authorize the credit card, the actual amount that was charged is communicated to the credit card processor and that is the amount that is actually charged to the customer's credit card.

The reason for this functionality is to leave room on the authorization for the waitperson's gratuity, if given by the customer. What if the actual tip amount given by the customer is more than the amount specified in the Reserve Amount? The processor should still accept it. The difference is that some processors will "downgrade" the transaction and charge slightly more for the transaction fee to your merchant account. This functionality is designed to help save your money by providing an extra amount of authorization to cover what most tips should be. You can adjust the Reserve Amount to whatever percentage that you would like to use.

To use this function click the **Pre-Authorize** button and follow the same steps as you would with the **Credit Card** button.

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Post-Auth Button

This button works in conjunction with the Pre-Authorize button (explained above) and is also only available with integrated credit card processing. One you pre-authorize a credit card payment that payment is listed in the “Previous Payments for this Sale” section and shows up as “Pre-Auth” as the payment type.

To Post-Authorize a Pre-Authorized Credit Card Payment

1. Select the Pre-Authorized payment from the “Previous Payment for this Sale” list (highlight it)
2. Optionally enter a tip:
 - a. Press the **Credit Tip** button to put the Payment Screen into Credit Tip mode. (The Credit Tip button’s caption will turn to “Finished Tip”)
 - b. Enter the tip amount.
 - c. Press the “Finished Tip” button.
3. Press the **Post-Auth** button.
4. Choose **Yes** when prompted to print a receipt.

Tab Pre-Auth Button

A Tab Pre-Auth is used for those instances where a customer would like to run a tab on their credit card. You can Pre-Authenticate the customer’s credit card for a particular amount before knowing what the actual price may be.

To Settle a Tab Pre-Auth

1. Press the **Tab Pre-Auth** button.
2. A dialog will be displayed prompting your for the amount to pre-authorize. Enter the amount and click the **OK** button on the displayed dialog.
3. Either swipe the customer’s card to use the **Manual** button to enter the credit card information manually.
 1. Select the Pre-Auth Payment from the “Previous Payment for this Sale” list.
 2. Optionally enter a tip:
 - a. Press the **Credit Tip** button to put the Payment Screen into Credit Tip mode. (The Credit Tip button’s caption will turn to “Finished Tip”)
 - b. Enter the tip amount.
 - c. Press the “Finished Tip” button.
 3. Press the **Tab Post-Auth** button.
 4. Select Yes when prompted to print a receipt. And present that receipt to the customer to sign.

Note:

With a Tab Pre-Auth, you cannot enter other types of payments on the same Sale. This is the only payment that will be allowed for the sale.

Pre-auth , Post-auth and Credit card tips.....

Each server must understand completely what is a pre-auth, a post-auth and what is a credit card tip in EZTOUCH. If they do not understand these concepts, mistakes will be made causing management to work extra hours, and causing waiters, bartenders and others to forfeit their TIPS.... Don't let this happen. Read this carefully and understand this.

DEFINITIONS:

PRE-AUTH: What is a pre-auth? Why is there a button in eztouch called **Start pre-auth WITH TIP?** Well, both are really the same. A pre-auth is when you are doing a transaction where you expect the client to give you a tip. The computer first calls the bank to make sure the credit card holder can pay for the total of the bill PLUS any eventual tip. Since the computer does not know how much the customer is going to give as a tip, it estimates and then asks the bank computer "Does this guy have enough money to pay for this meal plus YOUR TIP?" The bank computer will either come back with YES or NO. If no, you will get a DECLINE message. If yes, you will get an approval message plus the word PRE-AUTH in green, telling you that this person's credit card is GOOD.

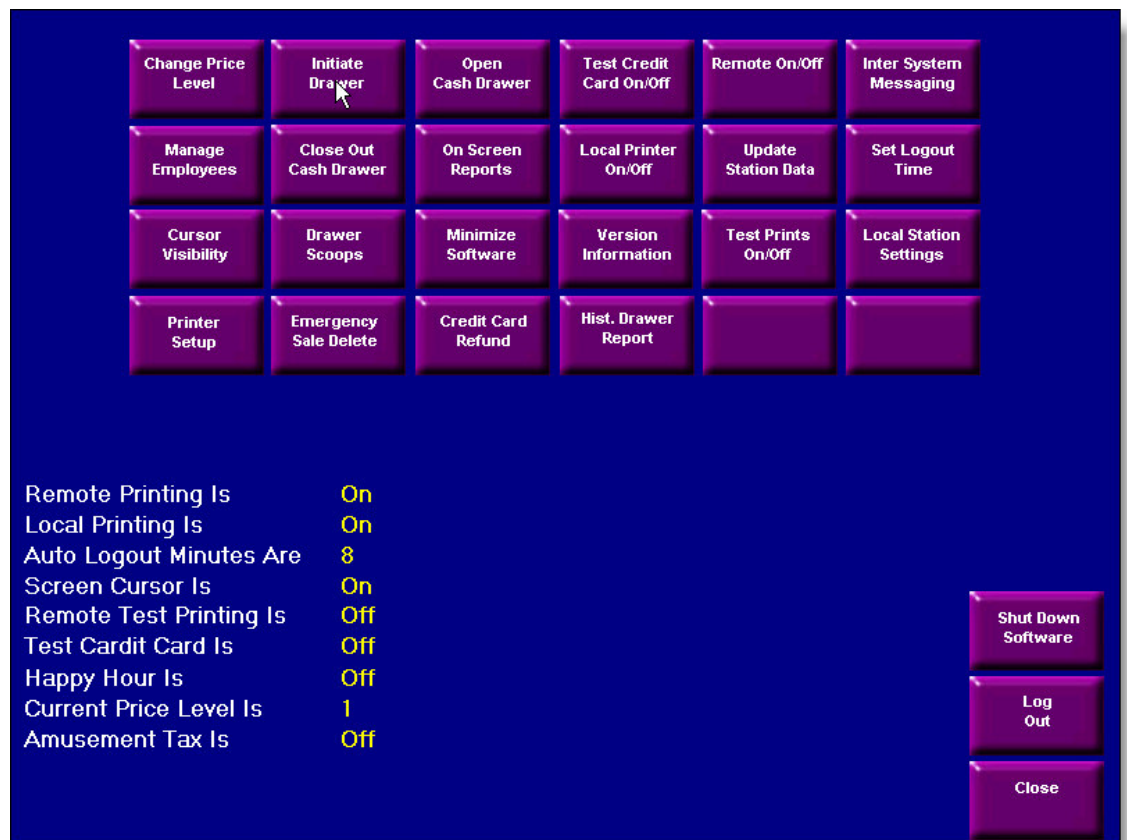
CREDIT TIP: After you get the PRE-AUTH, you will give the client the charge slip to sign. If there is an additional tip, the person will write it on the receipt. It is then YOUR RESPONSIBILITY to enter the correct tip amount from that receipt into the computer. **NOTE:** Management gets a report of all tips entered on what is called a "Suspicious tip report", therefore, do your best to get it right so your name does not appear on that report!! So, go to the computer, and press the CREDIT TIP button. Enter the credit tip. Then make sure you entered it right (look at the RED LINE). Then, press **FINISH TIP** button

POST-AUTH: A post auth (**finalize pre-auth button**) is the end of the transaction, and is the actual amount that will be sent to the bank. It is the amount the customer will actually be charged on his/her credit card. PRE-AUTH transactions that do not have a corresponding POST-AUTH transaction will not go to the bank. Therefore, the POST-AUTH function is critical. Therefore, when you have finished entering your tip, or even if there was no tip, you must select the PRE-AUTH transaction on the top left hand side of the screen, make it blue with your finger, and then press the POST-AUTH button. **NOTE:** Make sure you do not do this if you have a credit tip until after you enter your credit tip and press FINISH TIP button. If you make this mistake, you will not be able to enter your credit tip later. You basically LOOSE the tip.

So to recap, the steps are: PRE-AUTH (Credit card WITH TIP button) Then, swipe card. If approved, take receipt and give to customer to sign (maybe you get a tip...) If tip, then ENTER **CREDIT TIP** button, then enter the actual tip amount perfectly, then FINISH TIP button. Then, highlight PRE-AUTH transaction in top left window, then press POST-AUTH button. Transaction is finished.

Manager Screen

The Manager Screen is accessible only if you are logged in with a Position that has Full Manager Permissions. The Manager Screen allows you to manage the POS station and employees as well as view up to the minute reports.



Change Price Level Button

The Change Price Level button allows you change the current price level being used on a per station basis. This is useful if you have a special event occurring in one part of your restaurant (banquet, live-band, etc) where you would like to charge a different price than the rest of your restaurant temporarily.

You can also turn Amusement Tax on and off (usually used for the same reasons as explained above) and turn happy hour off and on.



Inter System Messaging Button:

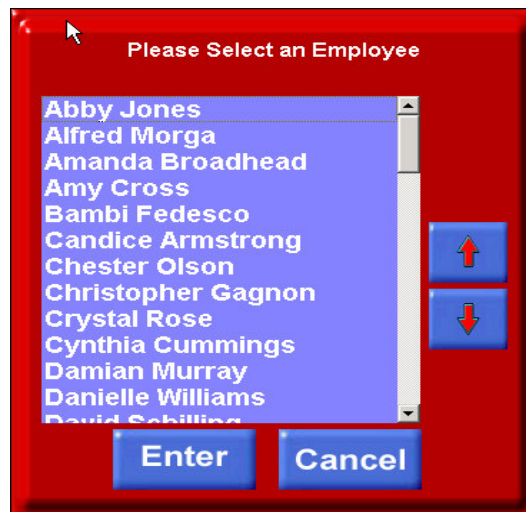
This button gives you access to the Message Screen. It allows you to broadcast messages to a single employee or to everyone that logs into the system. A keyboard will appear when you press this button

Simply type in the message that you would like to broadcast. If you would like to broadcast to only one employee, click the **Choose Employee** button and select the employee. Click the **Enter Button** to send the message.



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Manage Employees:



The **Manage Employee Screen** allows you to view sales that an employee has created and open those sales even if they have been closed out. Use **Load Employee button** to load an employee onto the screen for editing. Use **Employee Close Out button** to run sales and status reports for the loaded employee. Use **GO TO SALE** button to open a sale created by the currently loaded employee. Choose the sale you would like to open from the list on the left side of the Manage Employee screen. Click Go to Sale button

On Screen Reports Button

The On Screen Reports button allows you to view reports that are “live”, meaning that the information presented in these reports is real time as opposed to reports that are run from the EzManager software which are “after the fact”. They are good only for the **current Work Date**. **They are stored in temporary database files till Night Procedures are run and then they are stored in permanent files.**

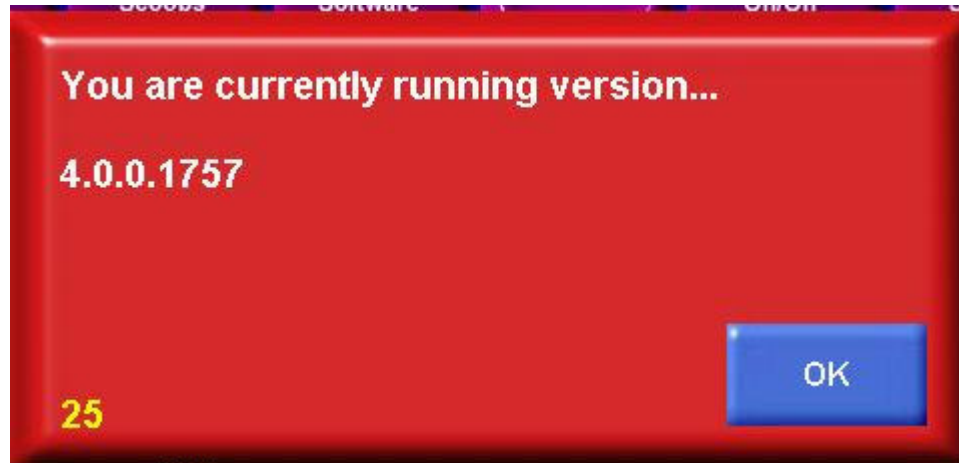


Choose one of the reports presented below.



Version Info

Displays the current version of ValuePOS software you are running. You may be requested by an ValuePOS authorized technical support person to provide this information if you are requesting technical support.



Update Station Data Button:

Allows you to manually refresh the station's cached (local) data after changes have been made to the system through the EZManager software program. This is actually done automatically whenever someone logs in. The ValuePOS checks to see if data has changed and will do it automatically if required.

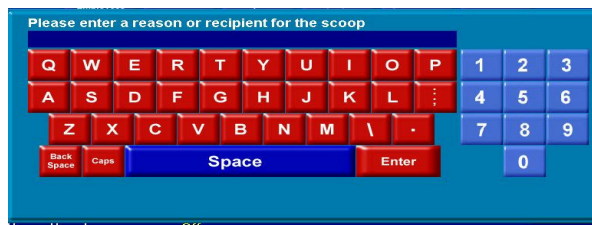
Drawer Scoops:

Drawer scoops are those monies hat you take out of the drawer (those who have Full Manager Permissions) to pay petty cash expenses or vendors in cash. The following steps are used:

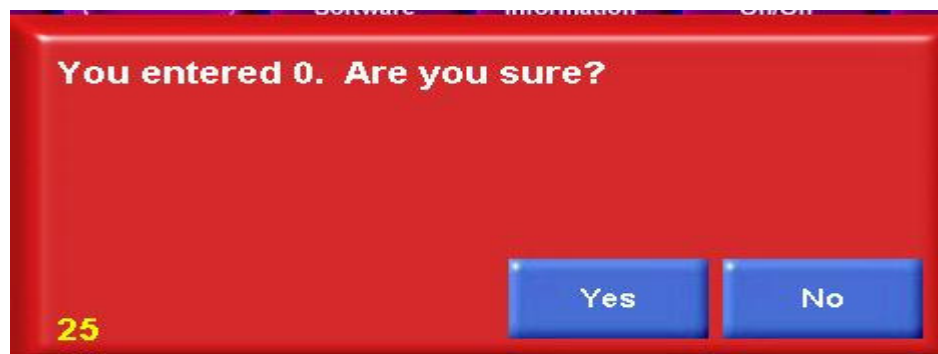


Choose a drawer where the scoop will be taken from.

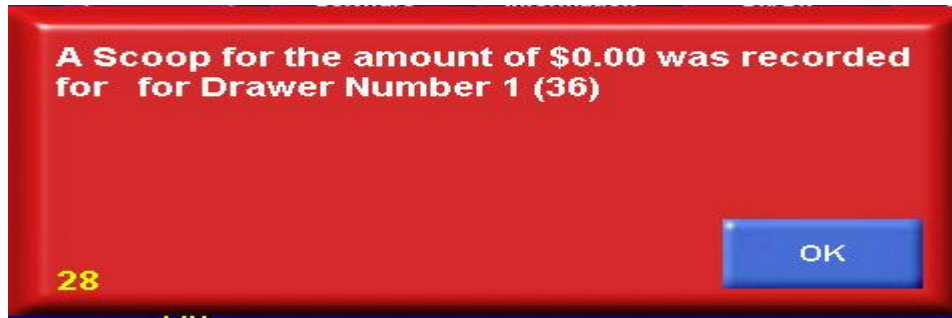
Next put in a reason for the drawer scoop.



Enter Amount:



Press either the Yes or No button depending upon your answer.



A box will appear telling you that a scoop was recorded for X amount for the drawer you selected. The scoop report is located in the backoffice system.

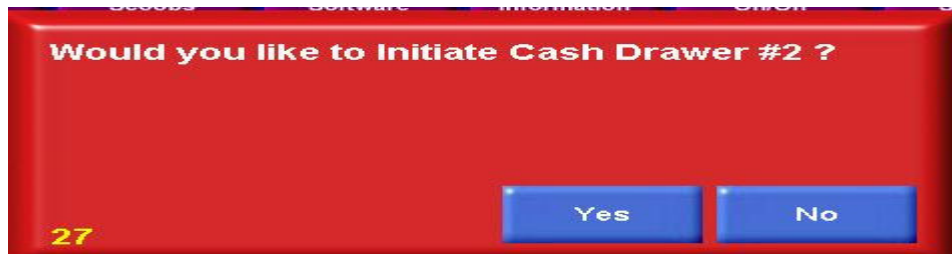
Open Drawer Button

This button will cause the cash drawer to “kick” open (providing that there is a drawer attached and you have sufficient permissions).

Initiate Drawer Button

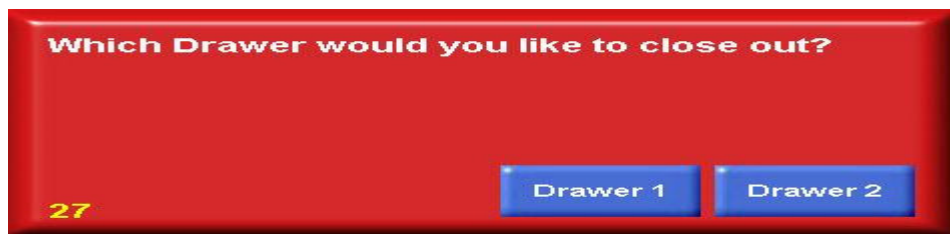
If you are using a cash drawer on the current station, then you will be required to “Initiate” the drawer before enter sales or settling sales on the station. Initiating a cash drawer involves assigning the drawer to an employee and indicating the starting till amount. You can also use up to two different drawers(as in the case of individual bartenders). You must also assign which drawer you will use.

1. Click the **Initiate Drawer** button. A dialog of qualified persons will be displayed. You will be asked whether to initiate Drawer 1 or Drawer 2.
2. Choose the employee you would like to assign the drawer to. An additional dialog will be displayed, prompting you for the starting amount. (If you are transferring an existing drawer to another employee, specify the count of the current drawer)
3. Enter the starting amount for the drawer.



Close Out this Drawer Button

This button will clear the current drawer and print a report to the local receipt printer detailing the drawer's activities. You will have to initiate another drawer for the new person using it before you can enter sales at the station again. In this way, sales and tenders can be tagged with a drawer number (and thus hold the employee accountable for the funds in the drawer) for security reasons.



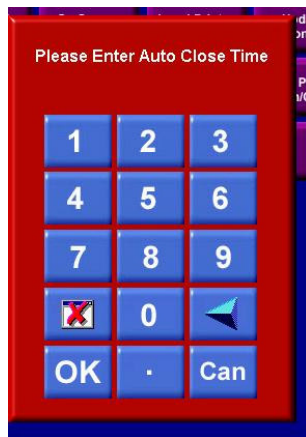
To Close out the Cash Drawer:

- 1) Click the Close Out Cash Drawer Button
- 2) If more than one cash drawer is initialized, ValuePOS will ask which drawer you would like to close out. Choose the drawer you wish to close out.
- 3) After the Cash Drawer report has printed, ValuePOS will ask if you would like to permanently close the drawer, say YES.

NOTE: If you would like to just run a cash drawer report, follow the above steps and on step number 3 , say no to actually closing the cash drawer.

Set Logout Time Button

ValuePOS has several built-in security features. One of them is that after a pre-determined amount of time, if an employee is logged into the system, the station will close back to the ID Screen and log out the currently logged in person. This button allows you to specify the number of minutes ValuePOS should wait before doing this.



Test Credit Card On/Off

This button lets ValuePOS test the credit card functionality of the system if you have purchased the optional credit card processing module. It will allow a "test" credit card number to be used to determine whether all the switches have been set properly and the entire credit card functionality is working.

Credit Card Refund:

The screenshot shows a software interface for processing a credit card refund. The background is a dark red color. On the left side, there are three input fields: a long red field for the credit card number, two blue fields for 'Sale #' and 'Amount \$', and a long blue field for 'Reason/Comment'. On the right side, there are three blue buttons: 'Submit Refund' at the top, a button with a keyboard icon in the middle, and 'Cancel' at the bottom. A mouse cursor is visible in the top-left corner of the red area.

Local Station Settings:

The Local Station Setting dialog allows you to change local settings for ValuePOS stations. Do not use unless directed by an authorized technical support person

Database File Path
C:\EzTouchData\EzTouchPOS.gdb

Database Server IP
localhost

Validation Server IP
127.0.0.1

Station ID
1

Update Path
C:\Program Files\DataTrakPOS\EzTouchData\Updates

CC Overcharge Percent
.35

Time Out (Secs)
90

SMT Apps File Name
C:\Program Files\SMT\UPS

Room Charge Sw
127.0.0.1

Room Charge Sw
1030

Auth Info Interface
x

CC Server IP
x


CC Server Port
x

Gift Server IP
datatrakgift.servebeer.com

Gift Server Port
6363

Gift Merch Number
x

Gift Site #
x

Buttons:  Enter Cancel

Database Path: The database path is the path of the database file relative to the server on which the database server software is running. It is a common mistake of users to enter the path to the database using a UNC path. ValuePOS stations talk to the database server software running on the database server that feed information back to the POS stations or write information to the database file on behalf of the POS stations.

If the database file is located at C:\EzTouchData\EzTouchPOS.gdb, then that is what you would type in this field even if the database file and the database server software is running on a different computer. Basically, you are allowing the local POS station to tell the database server software where to find the database file on the database server's hard drive.

Database Server IP: This is the IP address of the server computer that serves up the database to other computers on the network. You can put the computer name of the server here, but it is best to put the IP address of the server computer such as 192.168.1.100.

Validation Server IP: This is the IP address of the computer (usually the same one running the Database Server) that is running the EZLicense Manager software which manages user licensing on the network. If you do not indicate the correct IP, ValuePOS will start in Demo Mode and prices will be incorrect.

Station Number: This is the number of the current workstation. Each POS workstation should have a unique Station number because activity that is performed on each workstation (such as sales, voids) is tagged with the station that the activity took place on.

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Update Path: The Update Path is a shared folder on the server (or local computer if a stand alone station) where the EZLicense Manager software places updates to the software that it finds when you perform a Web Check. When ValuePOS loads, it checks this folder for an updated version of the software and if found, automatically loads it for you to the local workstation.

CC Overcharge%: All credit card transactions in ValuePOS are run as Pre-Authorizations to account for a credit card tip being added later on. The CC Overcharge percent allows you to specify the amount over the original sale amount that will be charges so that there will be room for a credit card tip later on. For instance, if you set your CC Overcharge % to .25 and your sales amount is \$10.00, then ValuePOS will preauthorize the amount for \$12.50. When you finalize the sale, the actual amount (Sale Total + Tip) will be settled with the processor.

Time Out: This is the amount of time in seconds that will elapse before a Time Out occurs with credit card processing. For instance, if you have set the number of seconds to 60, then if credit card processing cannot be reached within 60 seconds, ValuePOS will give up trying after that amount of time and notify you that it could not reach the processor.

SMTApps Path Name: This is the path to the smtapp.ini file where the credit card processing information is stored to the local POS station. Usually, this information is set automatically so you will not have to change this.

SMTApps Executable File: Enter the path to the shared folder on the computer that is running credit card processing software. ValuePOS needs this information in order to process credit cards.

Auth Info Interface: Leave as the default unless you are using internal TCP/IP to communicate with the credit card processing software

CC Server IP, CC Server Port: Leave as the default unless you are using internal TCP/IP to communicate with the credit card processing software.

Gift Server IP, Serer Port, Merch ID, Site ID: This information is used to validate and run Gift Card and VIP services. Please consult your dealer for information on setting up this field.

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Remotes On/Off: tells software if remotes are being used

Local Printer On/Off: tells software if local printers are being used

Printer Set Up:

	Installed Printer	Printer Type/Model
Receipt Printer:	local	Epson T88
Kitchen1Printer:	Kitchen	Epson 200
Kitchen2Printer:	local	Epson T88
Bar1Printer:	local	Epson T88
Bar2Printer:	local	Epson T88
Other1Printer:	local	Epson T88
Other2Printer:	local	Epson T88
Expediter Printer:	None	Epson T88

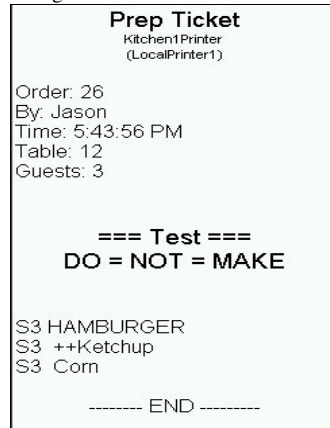
This dialog is used to assign internal printers to actual printers either installed on the local machine or on the Local Area Network. To use the Printer Setup dialog, simply select the installed printer for each internal printer that you would like to use and setup the Printer Type for each one.

For instance, if you would like to setup your local Receipt printer, click the drop down box for Receipt Printer and select the appropriate Printer from the drop down box list. Next, select the printer type from the Printer Type drop down box.

Click the Enter button to save your changes.

Test Prints Off/On Button

Primarily a ValuePOS dealer or technical support person will use this feature, but you can use it as well. Clicking this button will toggle test prints off and on. When test prints are on, any remote make line tickets will have a large caption letting the kitchen staff know not to actually prepare the items printed. An example is shown below.



Minimize Software: minimizes the software

Cursor Visibility Button:

Turns the screen cursor on and off. In Settings

Allows you to change local setting for the ValuePOS station. Do not use unless directed to by an authorized technical support person.

EMERGENCY SALE DELETE:

Although the chance of something happening that would require an Emergency Sale Delete (ESD) is extremely rare, this functionality has been built in to help in those situations where it might become necessary.

Use this function only if you have a problem with a Sale Record that prevents you from closing out your day because ValuePOS requires that you settle all outstanding credit card, VIP, and House Payments before running Night Procedures.

- 1) Click the Emergency Sale Button. The Sales Locator will be displayed.
- 2) Choose the sale that you would like to delete and click choose button on the sale locator.

WARNING: The Emergency Sale Delete function completely removes the sale and any related payments and items associated with the sale. Although an entry is made to the Void/ Comps log for audit and security purposes, the functionality would cause a discrepancy in your reports. Use it only as a last resort and try using the standard void operation first.

Shut Down Software Button:

This button allows you to shut down the POS software and exit it altogether.

LOGOUT: This button allows you to logout

Close/Go back: This button allows you to close the screen you are currently in and go back to where you started from.