

Mercury⁺

POS for Restaurants

User's Guide

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Chapter 1

Introduction

Mercury⁺ POS (Point-of-Sales) for Restaurants is a perfect tool to manage your restaurant. It is easy to use and reliable. Mercury⁺ program includes: Take-out, Delivery, Dine-in, Bar, Reservation, Inventory, Employees' Salary Computations, Customer Records, among others.

1.1 Features

- Provides efficient backup system
- Multiple language support
- User-friendly interface
- Automatic switching of master and slave stations
- Fast restoration time
- Integrated credit card payment system
- Built-in training mode system
- Password security

1.2 Components

Mercury⁺ POS is an integrated system. It consists of the following main components:

- POS Server
- BackOffice
- POS Client
- POS SCM

1.2.1 POS Server

POS Server controls the interaction of POS stations and other devices. It does the following operations:

- Sets the station server style to “master” or “slave”. This function is useful in case the main server breaks down. The station which is set as “master” always acts as the main server, while the “slave” is the backup. They communicate with each other as designed. When the “master” breaks down, the “slave” takes over as the main server.
- Enables and schedules database backup.
- Enables CallerID function.

POS Server can be installed on a dedicated server or a POS station that is setup as a server.

- 🔗 For installation procedures, see “POS Server Installation” on page 11.
- 🔗 For instructions on how to use POS Server, see “POS Server” on page 18.

1.2.2 BackOffice

BackOffice allows you to setup and manage the menu, table or floor plans, finances, employees, and other system configurations. BackOffice is designed to be used by restaurant administrators or high management personnel. Unauthorized employees are denied access to BackOffice.

BackOffice is automatically installed when installing POS Server. See “POS Server Installation” on page 11.

- 🔗 For instructions on how to use BackOffice, see “BackOffice” on page 22.

1.2.3 POS Client

POS Client facilitates the majority of a restaurant’s daily operations. It processes orders, settles payments, and updates customer information. Employees can also use POS Client as an electronic time card to check in to work or check out after work.

POS Client can be installed on all POS stations.

NOTE: To install POS Client on a POS Server station, install POS Server first before installing POS Client.

- 🔗 For installation procedures, see “POS Client Installation” on page 14.
- 🔗 For instructions on how to use POS Client, see “POS Client” on page 69.

1.2.4 POS SCM

POS SCM (Supply Chain Management) is an inventory system where all the raw materials for the restaurant are recorded and can be purchased from their suppliers.

POS SCM is automatically installed when installing POS Server. See “POS Server Installation” on page 11.

- 🔗 For instructions on how to use POS SCM, see “POS SCM” on page 117.

1.3 Installation

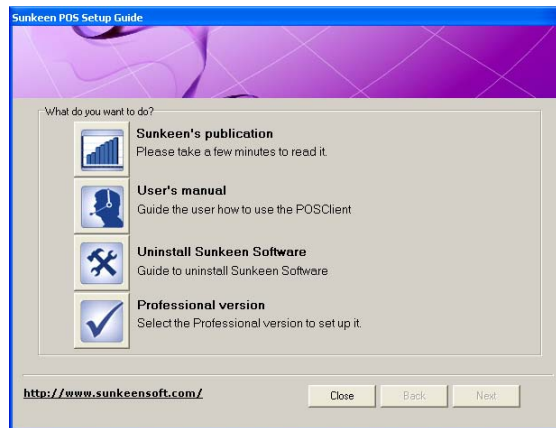
1.3.1 POS Server Installation

When installing POS Server, the following components are installed:

- BackOffice (see “BackOffice” on page 22).
- POS SCM (see “POS SCM” on page 117).
- GiftCard Management

Installing POS Server

1. Insert the CD-ROM into the CD drive.
2. If the setup file does not run automatically, browse and double-click **SetupGuide.exe** in the **Professional** folder.
3. Click the **Professional Version** button.



4. Click the **POS Server** button.

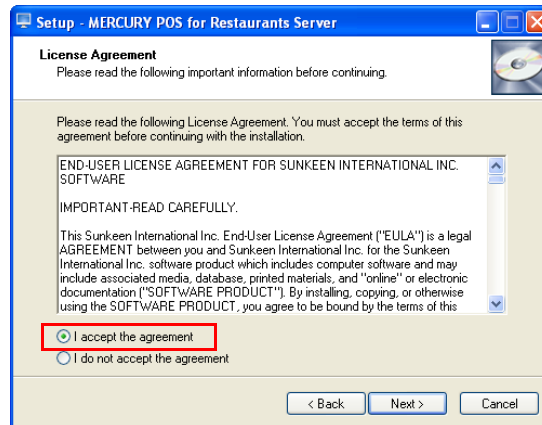
The application searches for other third-party applications required on your computer. If these required applications are not yet installed, setup will install them first before installing POS Server.

NOTE: Installation may take a while to finish depending on the number of third-party applications that need to be installed first.

5. Select the language to use during installation, then click **OK**.
6. Click **Next** to start POS Server installation.



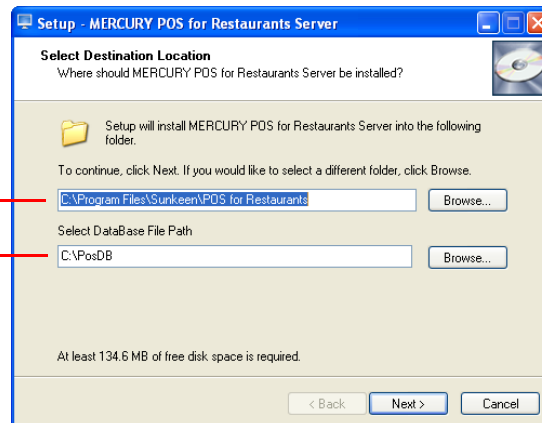
- Read the license agreement. Select “**I accept the agreement**”, then click **Next**.



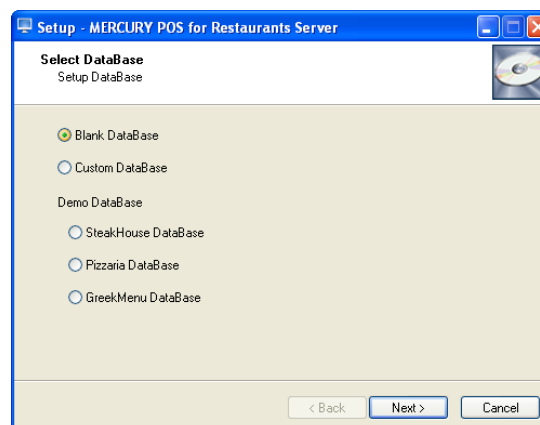
- Click the corresponding **Browse** button and select the system destination folder and the database destination path. Click **Next** to continue.

Saves the system installation files.

Saves the database.

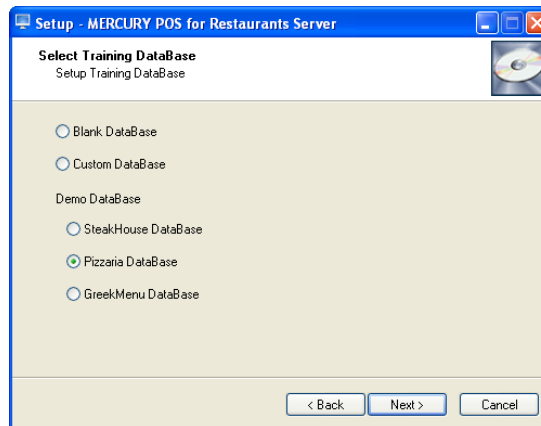


- Select a database, then click **Next**.
POS Server comes with pre-installed demo databases. You may select an applicable database for your restaurant and add or modify the items later.

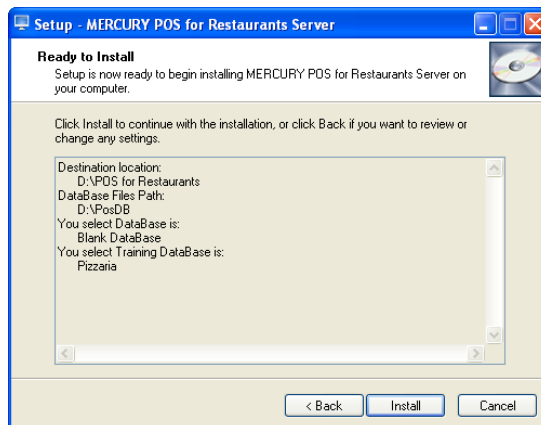


10. Select a training database, then click **Next**.

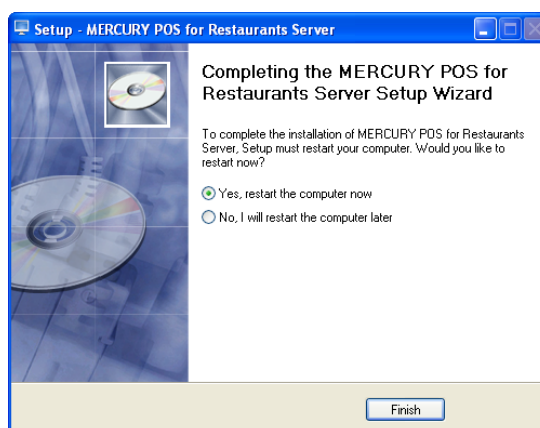
The training database is used to train employees on how to use Mercury+. This database is only used in training mode and does not affect the real restaurant database.



11. Click **Install** to continue.



12. Select “Yes, restart the computer now”, then click **Finish**.



13. After restarting the computer, install the software updates from the CD-ROM.

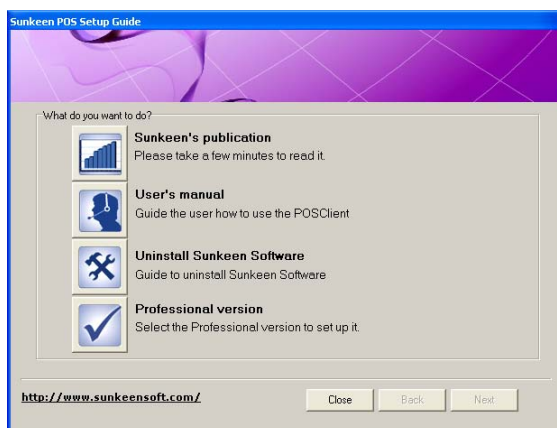
🔗 See “Software Update Installation” on page 16 for instructions.

1.3.2 POS Client Installation

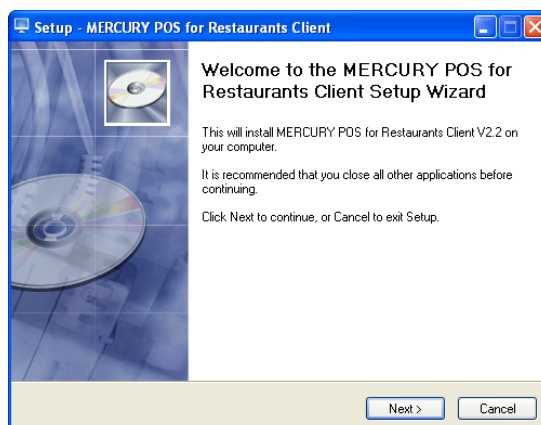
If you are installing POS Client on a POS Server station, you must install POS Server first.

Installing POS Client

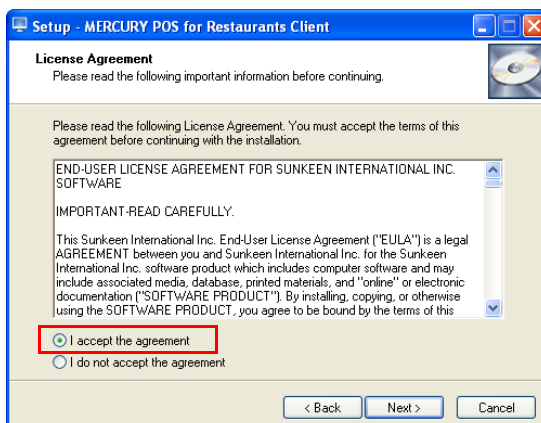
1. Insert the CD-ROM into the CD drive.
2. If the setup file does not run automatically, browse and double-click **SetupGuide.exe** in the **Professional** folder.
3. Click the **Professional Version** button.



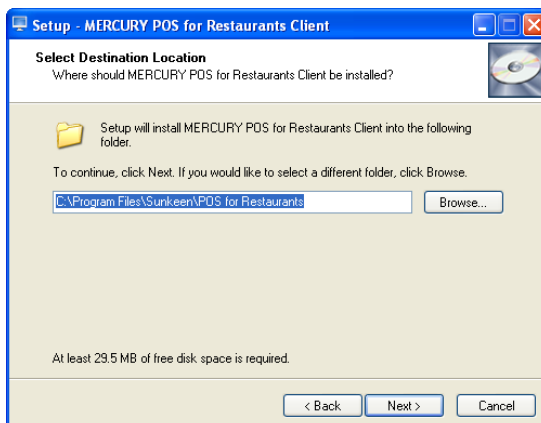
4. Click the **POS Client** button.
5. Select the language to use during the installation, then click **OK**.
6. Click **Next** to start POS Client installation.



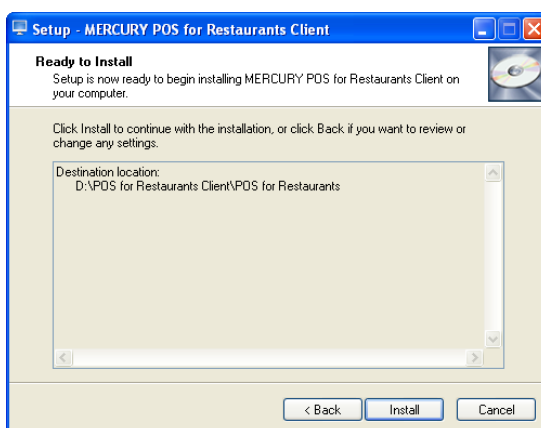
7. Read the license agreement. Select **"I accept the agreement"**, then click **Next**.



8. Click the **Browse** button and select the system destination folder, then click **Next**.



9. Click **Install** to continue.



10. Select "Yes, restart the computer now", then click **Finish**.



11. After restarting the computer, install the software updates from the CD-ROM.

 See "Software Update Installation" on page 16 for instructions.

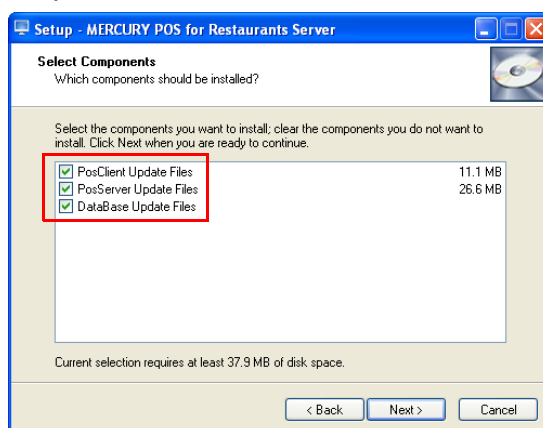
1.3.3 Software Update Installation

After installing POS Server or POS Client, or both, proceed to install the software updates to complete Mercury⁺ installation.

1. From the CD-ROM, browse and double-click **POSUpdateAllSetupPro.exe** in the **UpdatePro0114** folder.
2. Select the language to use during the installation, then click **OK**.
3. Click **Next**.



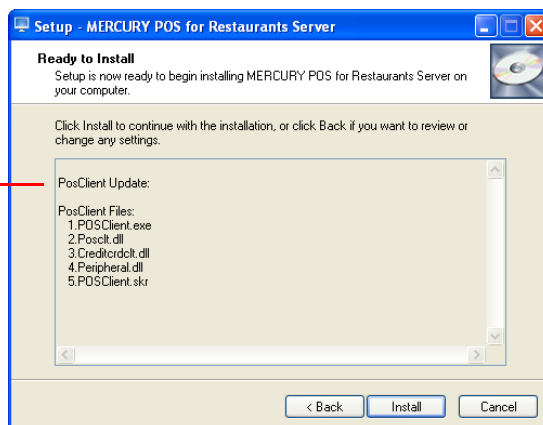
4. Select the updated components to install, then click **Next**.



5. Click **Install** to install the selected components.

The screen below may vary depending on the selected components on step 3.

This screen shows the components to be installed. In this case, only **PosClient Update File** is selected on step 3.







6. Select **“Yes, restart the computer now”**, then click **Finish** to complete installation.



1.4 Mercury⁺ Overview

After POS Server installation, access the following components to setup and use Mercury⁺ POS:

1. POS Server Monitor — Set the “master” server and schedule the backing up of database.
 See “Setting the Master or Slave Station” on page 18.
2. BackOffice — Setup the restaurant.
 - a) Enter basic restaurant information
 - b) Setup table and floor plans of the restaurant
 - c) Setup the menu
 - d) Configure POS stations, cash drawers, and kitchen POS devices
 - e) Record employee data, work schedule and set employee rights
 - f) Setup other miscellaneous tasks like tax, charges, or discount rules, message board, and others
 See “BackOffice” on page 22.
3. POS SCM — Set up the initial inventory.
 See “POS SCM” on page 117.
4. POS Client — Operate the restaurant using POS Client.
 See “POS Client” on page 69.

Chapter 2

POS Server

2.1 Opening POS Server

To open POS Server, do one of the following:

- Click **Start > All Programs > MERCURY POS for Restaurants > POS Server Monitor**.
- Double-click the **POS Server Monitor** icon on the taskbar.



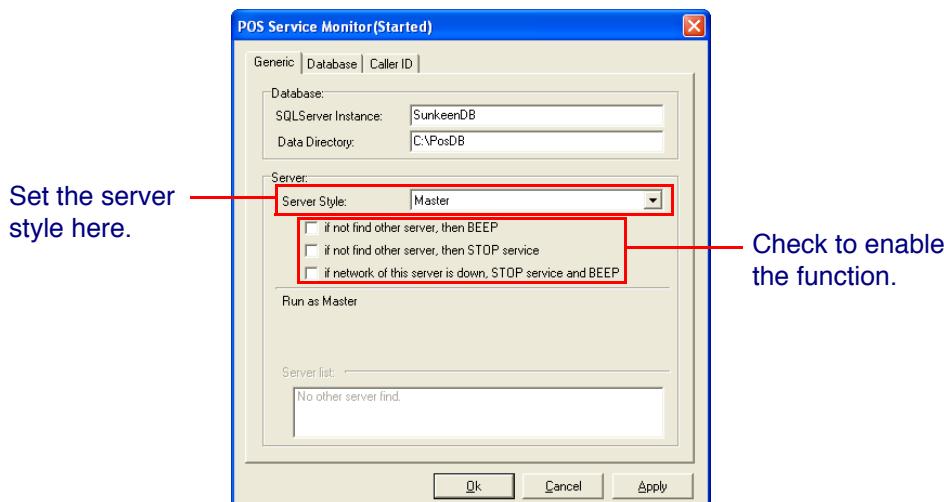
2.2 Setting the Master or Slave Station

Mercury⁺ synchronizes the database between the master and the slave servers. In the event the master POS server fails, the slave POS server automatically takes over the master server job and uses the same database assigned to the master until the master POS server is operational. Any data loss is determined by the backup time interval set in the POS Server.

1. Open **POS Server**.
2. On the **General** tab, select the **Server Style** from the list:
 - **Master** — Sets the POS Server as the main server.
 - **Slave** — Sets the POS Server as the secondary server.

NOTE: To ensure system reliability, set only one master server and one slave server within the entire network. If the network has either more than one master servers or more than one slave servers, communication problem may occur between POS Servers and POS Clients. Therefore, disable the other servers which are not master or slave.

- **Disable** — Disables the ability of the POS Server to be either a master or a slave server in the network.



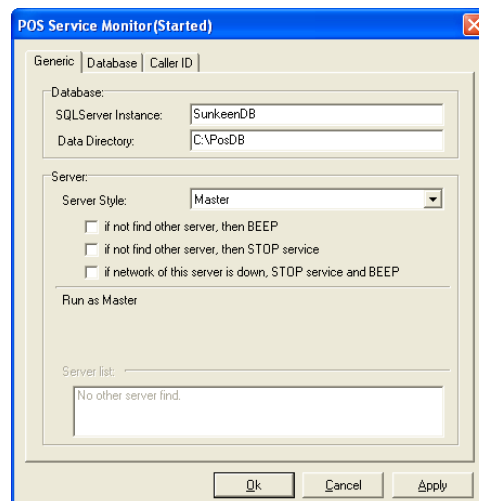
3. Check the boxes to enable the function when the corresponding conditions are met:
 - **If not find other server, then BEEP** — Ensures secured communication between the master server and the slave server. If a server is not detected, the system beeps to alert the administrator.
 - **If not find other server, then STOP service** — Stops the master server from operating and prevents it to function as a POS Client terminal when communication problems occur. This usually happens when the network cable or the interface card malfunctions.
 - **If network of this service is down, STOP service and BEEP** — Ensures that both the master and the slave servers are properly connected within the network.
4. Click **Apply** to apply changes.

NOTE: In the event of a master and slave switch, it is normal for current operations in POS Client stations to fail. Thus, POS Client and BackOffice users are warned and required to logoff and log back into the system to refresh related settings and resume normal operations.


2.2.1 Generic Tab Settings

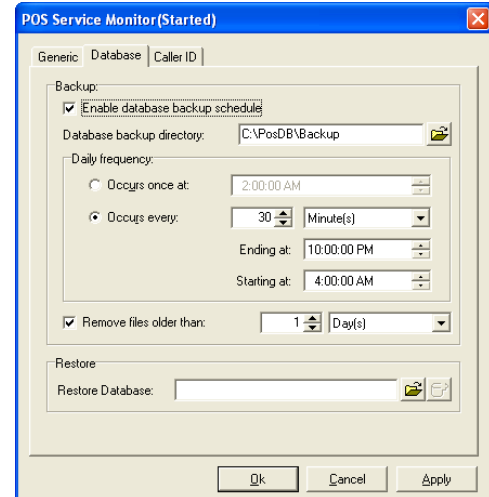
Other settings are as follows:

- **SQL Server Interface** — The default is **SunkeenDB**.
- **Data directory** — The defined directory during setup.
- **Server list** — Displays the IP address of all the other active serves connected in the POS network.




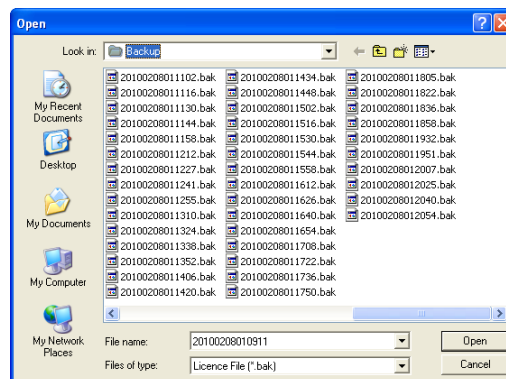
2.3 Scheduling Database Backup

1. Open **POS Server**.
2. On the **Database** tab, check **Enable database backup schedule** to enable database backup function.
3. The **Database backup directory** displays the default backup directory. To change the directory, click , then browse for the desired directory.
4. Set **Daily frequency**:
 - **Occurs once at {time}** — Select this option to backup the database on the specified time daily.
 - **Occurs every {interval time}** (Recommended) — Select this option to backup the database once every specified interval time. Database backup occurs from the starting time to the ending time after every interval time daily.
5. To delete old data from the database, check **Remove files older than**, then specify the timeframe. This function is useful to free up space for new data. If this function is disabled, the system continues to save all backup files.

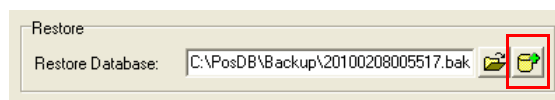


2.4 Restoring a Database

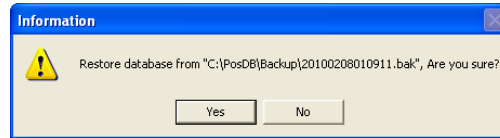
1. Open **POS Server**.
2. On the **Database** tab, **Restore Database** field, click  to browse for the database to restore.
3. Click **Open**.



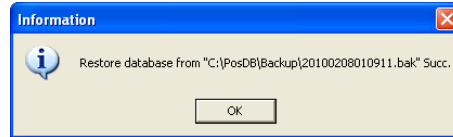
4. Click .



5. A confirmation message appears, click **Yes** to restore the selected database.



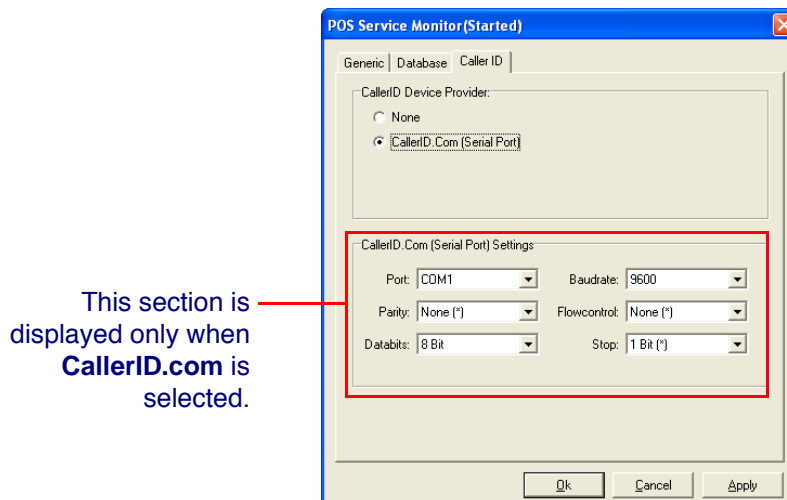
6. A message is displayed when restoration is done, click **OK**.



2.5 Enabling Caller ID

Enabling Caller ID allows the POS system to capture the telephone number of an incoming call. This is designed to efficiently handle reservations or delivery procedures.

1. Open **POS Server**.
2. On the **Caller ID** tab, click **CallerID.COM (Serial Port)**.



3. Set the required settings, then click **Apply**.

Chapter 3

BackOffice

BackOffice is an administration tool used by restaurant administrators or high management personnel to establish a restaurant system. It allows you to do the following:

- Enter restaurant information, services, business schedules, and others.
- Design the restaurant's floor plan and table arrangement.
- Setup the menu and menu choices.
- Setup employee accounts, work schedules, and POS access rights.
- Setup customer accounts.
- Manage POS stations, cash drawers, and kitchen POS peripherals.
- Establish tax, charges, and discount rules.
- Integrate with credit card providers.
- Print reports.
- Backup and restore database.
- Manage the system, menu, or user language.

3.1 Opening BackOffice

1. To open BackOffice, do one of the following:
 - Double-click the **BackOffice** icon on the desktop.
 - Click **Start > All Programs > MERCURY POS for Restaurants > BackOffice**.
2. The Login screen appears. Enter the **ID** and **Login Password**.

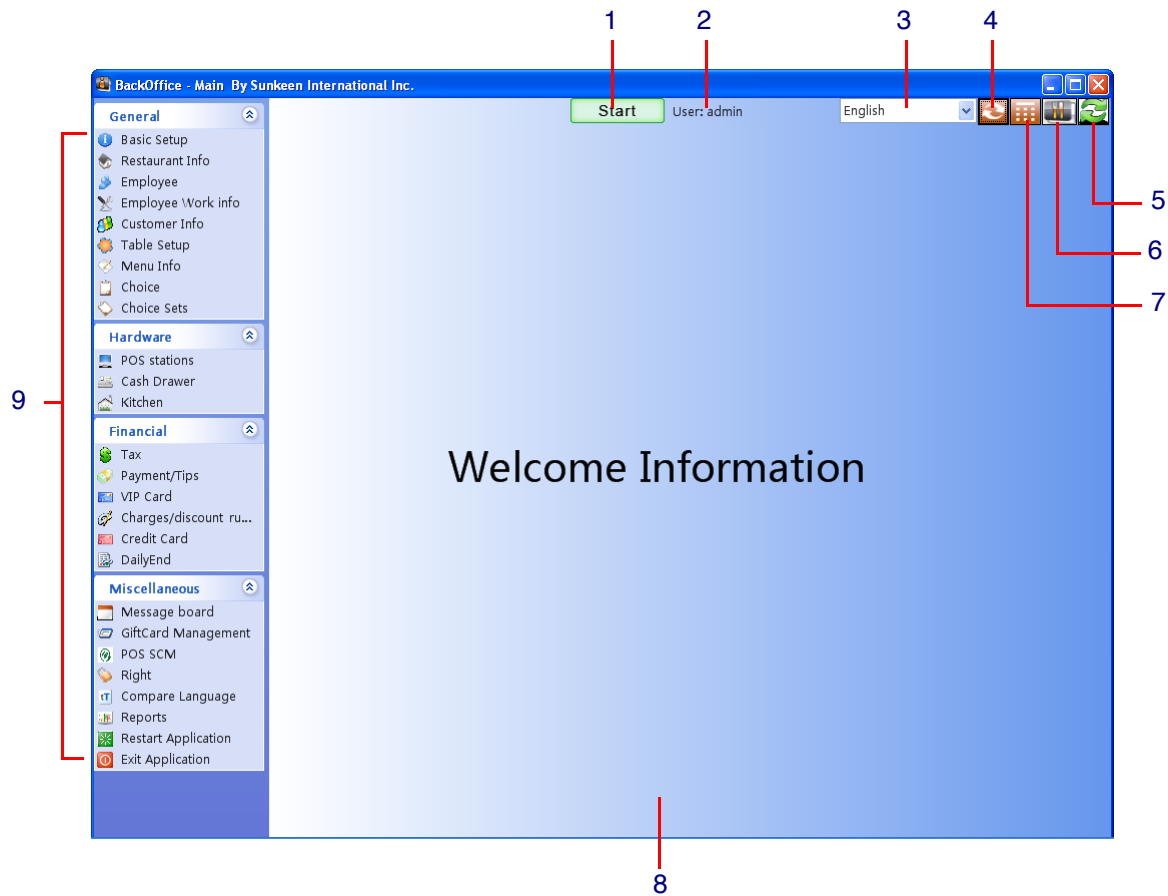
NOTE: The default ID is "1" and the default Login Password is "admin". To change the ID and password, see "Adding a New Employee" on page 36.



















3. Click **Ok**.














3.2 Screen Overview

After logging in, the welcome screen appears as below.



No	Item	Description
1	System status	Displays  if system is active. When system is active, some functions are disabled. Displays  if system is inactive.  See “Initializing the System” on page 27.  See “Stopping the System” on page 29.
2	User	Displays the logged in user.
3	System language	Displays the current system language. Touch the arrow to select other languages.  See “Setting Language Options” on page 30 to set more language options.
4	Refresh	Touch the button to refresh the system.
5	Back	Touch to go back the previous screen.
6	POS Client	Touch to open POS Client.
7	Calculator	Touch to open and use Calculator.

No	Item	Description
8	Main section screen	Displays the main screen of a section. The screen varies depending on the selected section.
9	Section list	Click a section name to perform its function. The main section screen changes according to the selected section.
	Basic Setup	Displays the computer information, MAC address, POS station name, and others. This section also allows you to switch between the main and training database, backup and restore a database, initialize or stop the system, and select other languages.  See “Basic Setup” on page 26.
	Restaurant Info	Allows you to enter the restaurant information, add a logo, set business hours, revenue and coursing.  See “Restaurant Info” on page 30.
	Employee	Allows you to add an employee account and print employee records.  See “Employee Personal Information” on page 36.
	Employee Work Info	Allows you to setup employee work schedule, view attendance, and print employee reports.  See “Employee Work Information” on page 38.
	Customer Info	Allows you to setup customer records.  See “Recording Customer Information” on page 41.
	Table Setup	Allows you to design the table and floor layout of the restaurant.  See “Designing the Table Arrangement” on page 42.
	Menu Info	Allows you to setup the menu items, group menu, and other meal packages.  See “Setting the Menu” on page 44.
	Choice	Allows you to setup other choices such as toppings, for certain menu items.  See “Choice” on page 51.
	Choice Sets	Allows you to group choices into choice sets.  See “Choice Sets” on page 52.
	POS stations	Lists all the POS stations connected to the POS Server and allows you to change the station name, set the login mode, and setup display devices or other functions.  See “POS Stations” on page 54.
	Cash Drawer	Lists and configures the cash drawers connected to a POS station.  See “Cash Drawer” on page 55.

No	Item	Description
	Kitchen	Allows you to setup output devices such printers and displays.  See "Kitchen" on page 57.
	Tax	Allows you to setup tax rules and applications.  See "Tax" on page 58.
	Payment/Tips	Allows you to setup payment methods and tip calculations.  See "Payment and Tips" on page 59.
	VIP Card	Allows you to set VIP card issuance and validity.  See "VIP Card" on page 60.
	Charges/ Discount Rules	Allows you setup other charges or discount rules.  See "VIP Card" on page 60.
	Credit Card	Allows you to export and print credit card reports.  See "Credit Card" on page 63.
	DailyEnd	Allows you to print a report of all orders catered to for the day.  See "Daily End" on page 64.
	Message board	Allows you to enter the text you want to be displayed on the message board of each POS station.  See "Message Board" on page 65.
	GiftCard Management	Allows you to view the records of a gift card.  See "Gift Card Management" on page 65.
	POS SCM	Opens the POS SCM (Supply Chain Management) application.  See "POS SCM" on page 117 for further instructions.
	Rights	Allows you to set access rights for different job titles.  See "Defining Employee Rights" on page 40.
	Compare Language	Lists all terms used in Mercury ⁺ and allows you to compare and edit the terms from any of the supported languages.  See "Compare Language" on page 67.
	Reports	Allows you to generate management reports.  See "Printing Reports" on page 64.
	Restart Application	Restarts BackOffice.
	Exit Application	Closes BackOffice.

3.3 Setting Basic Information

3.3.1 Basic Setup

When using the BackOffice for the first time, the [Basic Setup] screen contains default system values. You can view and edit these information at a latter time or when necessary.

To view the [Basic Setup] screen, click **Basic Setup** from the Section list.

Basic Setup Start User: admin English

Basic Info

Computer Name: test-77edde9c0 MAC address on this POS: 00:C0:D0:AA:37:60

POS station name: test System Language: English

SMS Interface URL:

Update Server Address: www.sunkeensoft.com/update Search radius: -128

☒ iButton authentication

☒ MSR authentication

Swipe card reader begin: % Swipe card reader end: ?

System

Main DataBase Training DataBase

Current Server: (local)\SUNKEENDB

Current Database: PosDB

Select database File: Backup Restore

Initialize System Delete Data 'When server first makes connection, Once the program is running, data cannot be deleted.

Initialize Menu Info, Choice, and Choice Set. CLEAR Menu Info, Choice, and Choice Sets data.

Language Select desired language


BackOffice Professional Edition 2.4.0 Build: 113
Client 2.4.0 Build: 0113
Classes Version 2.3.9 Build: 212

MERCURY POS for Restaurants
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Corporation All rights reserved

Basic Info

This section contains the following information:

- **Computer Name** — Displays the computer name which is automatically generated by the system and cannot be edited.
- **MAC address on this POS** — Displays the MAC address on the computer. The MAC address cannot be manually edited by the user.
- **POS station name** — Enter the desired POS station name here.
NOTE: It is recommended to name as station according to its function or location.
- **System Language** — Select the system language from the list.
- **SMS Interface URL** — Enter the website address for an SMS service to send text messages to confirm reservations.
- **Update Server Address** — Enter the website for Mercury⁺ to receive software updates. The default is www.sunkeensoft.com/update.
 - **iButton authentication** — Check this box to enable iButton authentication.
 - **MSR authentication** — Check this box to enable MSR authentication.
- **Search radius** — Enter the radius. The default is -128.
- **Swipe card reader begin** — Enter the MSR card beginning code.
- **Swipe card reader end** — Enter the MSR card ending code.

When changes are made to any of the values, click .

System



This section allows you to initialize and stop the system, clear menu, backup and restore a database, switch between main and training databases. It also displays the following information:

- **Current server** — Displays the current server.
- **Current database** — Displays the current database. The default path is PosDB.

Switching Databases

1. On the [Basic Setup] screen, click one of the following buttons:
 - **Main Database** — To use the main database.
 - **Training database** — To use the training database and enable training mode.
2. Click **Yes** to confirm. The system automatically closes BackOffice; the switch takes effect after you reopen BackOffice.



Backing Up a Database

1. On the [Basic Setup] screen, click , then select the path where to save the backup file.
2. Enter the desired file name, then click **Open**.
3. Click  to backup database.
4. Click **Yes** to confirm.

Restoring a Database

Before restoring a database, ensure that POS Client is closed.

WARNING: Do not restore a database during business hours as it leads to data loss.

1. On the [Basic Setup] screen, click .
2. Select the backup file to restore, then click **Open**.
3. Click  to restore the database.
4. Click **Yes** to confirm.

NOTE: Ensure that the database you want to restore is from Mercury⁺, importing a non-Mercury⁺ database may not work unless it runs under the same format (contact administrator before attempting).

Initializing the System

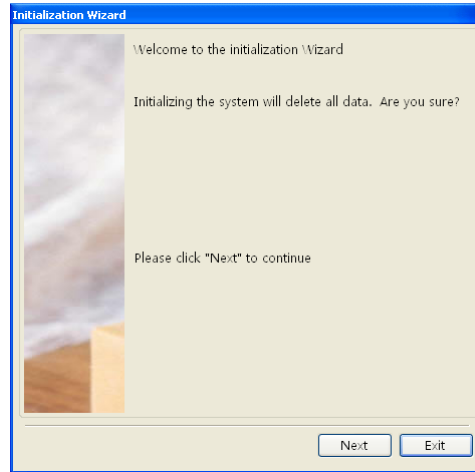
Before connecting the system online for the first time, initialize all databases first. When databases are initialized, all the current databases are deleted which makes the system ready for real-time data.

The following databases can be initialized:

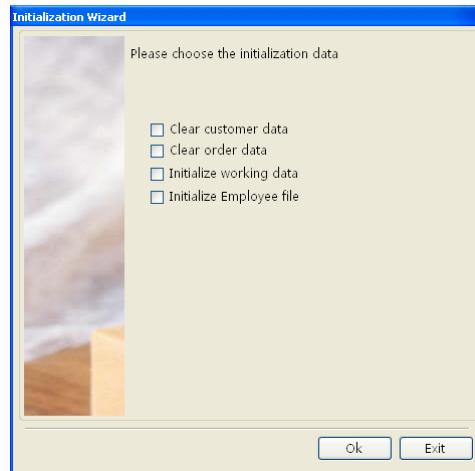
- Customer data
- Order data
- Working data
- Employee file

To initialize the database, do the following:

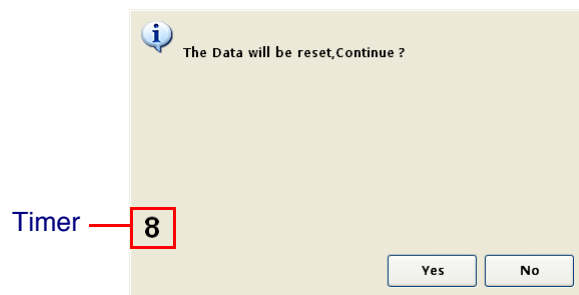
1. On the [Basic Setup] screen, click **Initialize System**.
2. The **Initialization Wizard** appears. Click **Next**.



3. Select all to empty the databases, then click **Ok**.



4. Click **Yes** to confirm.




NOTE: The timer runs as it waits for the user to click a button. When the timer runs out without receiving any user entry, the screen automatically closes and the process is cancelled.

The **Initialize System** button changes to **System Start**.

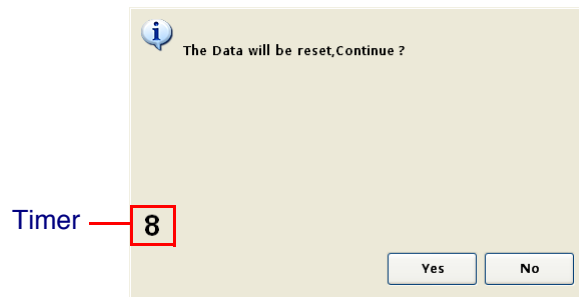
The System Status icon changes to . During this status, you can setup, update, or delete all the data in BackOffice.

5. To restart the system, click **System Start**.

Stopping the System

Once the system is used for daily operations, you may need to modify or delete data. However, deleting any data is prohibited during the  status. To delete any data, stop the system first.

1. On the [Basic Setup] screen, click **Initialize System**.
2. The Initialization wizard appears, click **Next** to continue.
3. DO NOT select any of the databases. Click **Ok**.
4. Click **Yes** to confirm.



NOTE: The timer runs as it waits for the user to click a button. When the timer runs out without receiving any user entry, the screen automatically closes and the process is cancelled.

The **Initialize System** button changes to **System Start**.

The System Status icon changes to . During this status, you can delete data in BackOffice.

Starting the System

After the system has been initialized or stopped, restart the system:

1. On the [Basic Setup] screen, click **System Start**.
2. A message appears. Click **Yes** to confirm.

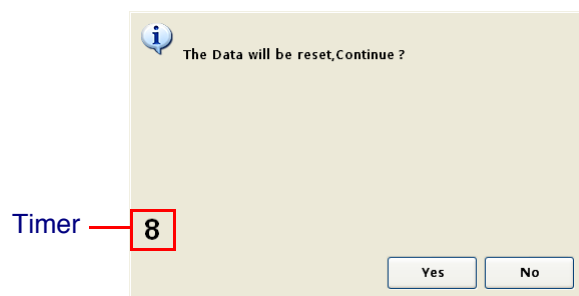
The System Status icon changes to .

Initializing the Menu

To delete all menu, choice, and choice sets data, initialize the menu.

To do this, follow the steps below:

1. On the [Basic Setup] screen, click **Initialize Menu Info, Choice, and Choice Set**.
2. Click **Yes** to confirm.



NOTE: The timer runs as it waits for the user to click a button. When the timer runs out without receiving any user entry, the screen automatically closes and the process is cancelled.

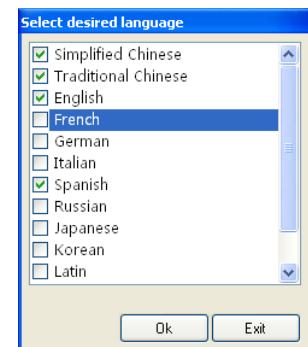
NOTE: Once the restaurant's database is up and running, initializing the menu or the system is not recommended.

Setting Language Options

By default the [System Language] box and other language selection box list four languages: English, Simplified Chinese, Traditional Chinese, and Spanish.

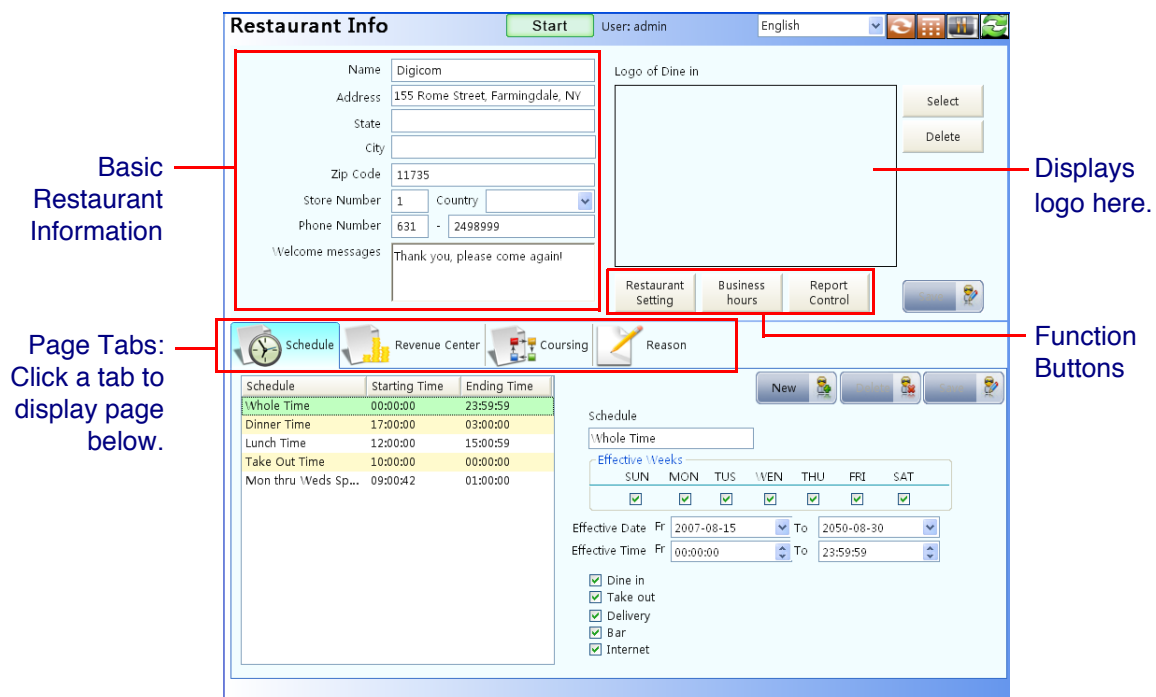
To add more language options, do the following:

1. On the [Basic Setup] screen, touch **Language**. The screen on the right appears.
2. Select desired languages to add to the list.
3. Click **Ok** when done.



3.3.2 Restaurant Info


The [Restaurant Info] screen allows you to enter the restaurant information, set the business hours, serving schedules, revenue center, coursing, and restaurant or system report options.



Basic Restaurant Information

This section allows you to enter the restaurant information which are printed on receipts or other reports.

To add a logo, do the following:

1. On the [Restaurant Info] screen, click **Select**.
2. Select the desired image file, then click **Open**.
3. Click  to save changes.

To remove the logo, do the following:

1. On the [Restaurant Info] screen, click **Delete**.
2. Click **Yes** to confirm.

Function Buttons

Restaurant Setting

1. Click the **Restaurant Setting** button to enable or disable functions for POS Client.

Setting

☐ Enter number of guests
☐ Show pop-up box, when price is "0"
☒ Show POSClient Auto Logout as idle after 60 Seconds
☐ Auto synchronize POSClient station
☐ Max. orders allow driver to deliver before Orders 5
☒ Select Driver for Delivery
☐ Table color for dishes all servered
 Time CallerIn Persistent 5 Minute
☐ Return to inventory, when menu item is deleted
☐ Show warning message when employee's cash overflows
☐ Schedule price remains unchanged for open orders
☐ Turn on the Staff Bank
☐ Display "clearing" status after settlement
☐ Show Message Click to clear table
☐ Force the Staff Bank to transfer when cash overflows
☐ Item Quantity for Bar and Dine In
☐ delay time for order settle 5
☒ PosClient restart time
 Notify time 03:00:00
☐ Reservation reminder
 Days 0 Notify time 10:00:00
 Delivery Commission 0
 Delivery Cost 0

2. Click **Save** to save changes and close the screen.

Business Hours

To set the daily end time, do the following:

1. Stop the system (see "Stopping the System" on page 29).
1. Use the arrows to set the daily end time.
2. Click **Save**.
3. Start the system (see "Starting the System" on page 29).

Report Control

1. Click the **Report Control** button to enable or disable functions for printing receipts, delivery, summary, and other transaction reports.

2. Click **Save** to save changes and close the screen.

Creating Schedules

Some restaurants offer varying menu items or price discounts at a certain period of time. The [Schedule] page allows you to create schedules for a particular time or day(s) of the week.

Adding a New Schedule

1. On the [Restaurant Info] screen, click the **Schedule** tab.

Schedule tab


Schedule list

Enter schedule name here.


Select type of service here.

2. Click **New**.
3. Enter the schedule name on the **Schedule** box.
4. Select the days to apply the schedule on **Effective Weeks**.
5. Set when to start applying the schedule on **Effective Date** and **Effective Time**.
6. Select the type of service to apply the schedule.
7. Click **Save**. The created schedule is displayed on the Schedule list.

Deleting a Schedule

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Restaurant Info] screen, click the **Schedule** tab.
3. Select the schedule to delete from the Schedule list.
4. Click . The message “Are you sure you want to delete?” appears.
5. Click **Yes** to confirm.
6. Start the system (see “Starting the System” on page 29).

Modifying a Schedule

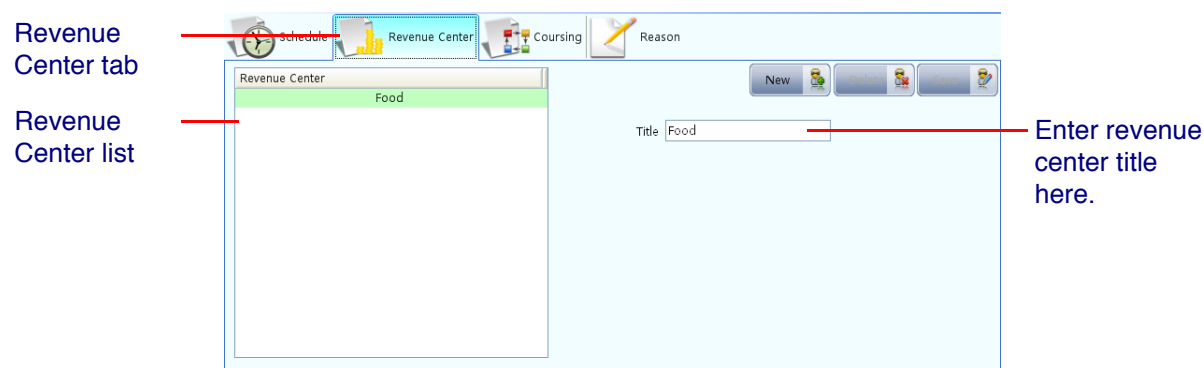
1. On the [Restaurant Info] screen, click the **Schedule** tab.
2. Select the schedule to modify from the Schedule list.
3. Modify the necessary details.
4. Click .



Creating Revenue Centers

The [Revenue Center] page allows you to create revenue centers.

Adding a New Revenue Center

1. On the [Restaurant Info] screen, click the **Revenue Center** tab.




2. Click .
3. Enter the revenue center title on the **Title** box.
4. Click . The created revenue center is displayed on the Revenue Center list.

NOTE: Only one revenue center is required by the system. However, more than one can be created.

To rename a revenue center, enter the new title, and then click .

Deleting a Revenue Center

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Restaurant Info] screen, click the **Revenue Center** tab.
3. Select the revenue center to delete from the Revenue Center list.
4. Click . The message “Are you sure you want to delete?” appears.
5. Click **Yes** to confirm.
6. Start the system (see “Starting the System” on page 29).

Creating Courses

The [Coursing] page allows you to create meal courses and set the priority and serving time. Coursing is required by the system for menu groups. See “Creating Menu Groups” on page 44.

Adding a New Course

1. On the [Restaurant Info] screen, click the **Coursing** tab.

Coursing tab

Coursing list

Title	Priority	Waiting time
Beverages	1	0
Appetizers	1	0
Pre-Entrees	2	10
Entrees	3	20
Desert	4	35

Title: Beverages
 Priority: 1
 \Waiting time: 0 Minute
 \Waiting type: Timing control

Enter course title here.

2. Click .

3. Enter the course title on the **Title** box.

4. Set the priority on the **Priority** box.

NOTE: The smaller the number, the higher the priority. “0” means not prioritized.

5. Set the time when to send the order for processing on the **Waiting Time** box.

6. Select how you want to send the order for processing on the **Waiting type** box.

Options are:

- Timing control — When the waiting time expires, the order is automatically sent for processing.
- Manual control — The order is held until the employee sends the order manually. See “Setting the Course Time” on page 91.

7. Click . The created course is displayed on the Coursing list.

Deleting a Course

1. Stop the system (see “Stopping the System” on page 29).

2. On the [Restaurant Info] screen, click the **Coursing** tab.

3. Select the course to delete from the Coursing list.

4. Click . The message “Are you sure you want to delete?” appears.

5. Click **Yes** to confirm.

6. Start the system (see “Starting the System” on page 29).

Modifying a Course

1. On the [Restaurant Info] screen, click the **Coursing** tab.

2. Select the course to modify from the Coursing list.

3. Modify the necessary details.

4. Click .

Creating Customized Reasons

The [Reason] page allows you to create customized reasons that are used to justify when orders are cancelled. See “Cancelling Orders” on page 97.



Adding a Reason

1. On the [Restaurant Info] screen, click the **Reason** tab.


Reason tab

Reason list


Enter text here.

2. Click .
3. Enter the reason on the **Reason** box.
4. Click . The created reason is displayed on the Reason list.

Deleting a Reason

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Restaurant Info] screen, click the **Reason** tab.
3. Select the reason to delete from the Reason list.
4. Click . The message “Are you sure you want to delete?” appears.
5. Click **Yes** to confirm.
6. Start the system (see “Starting the System” on page 29).

Modifying a Reason

1. On the [Restaurant Info] screen, click the **Reason** tab.
2. Select the reason to modify from the Reason list.
3. Modify the text.
4. Click .

3.4 Recording Employee Information

3.4.1 Employee Personal Information

Click **Employee** from the Section list to view the [Employee] screen.

Check this box to view list with forbidden employees.

TIP: Click a header to change the sorting list order.

The screenshot shows the 'Employee' screen with the following elements:

- Employee Table:**

ID	Name	Right
1	admin	Supervisor
2	BrownMel	Manager
3	MarieLisa	Cashier
4	HueJason	Deliveryman
5	MouseM...	Kitchen Man...
- Form Fields:**
 - ID: 1
 - Nick Name:
 - First Name: admin
 - Last Name:
 - Gender: Female
 - Phone Number:
 - Right: Supervisor
 - Login Password: 1
 - Administrator Password:
 - Magcard:
 - Language: English
 - Address:
 - Zip Code:
 - E-mail:
 - Other Tel:
 - Hourly Rate: 0
 - Job: ☐ Delivery Man
 - Driver Info: ☐
 - Driver's License No.:
 - Insurance company policy:
 - Policy Exp. Date: 2008-09-05
 - Policy #:
 - License exp. date: 2008-09-05

Adding a New Employee

1. Click .
2. Enter the **Nick Name**, **First Name**, **Last Name**, **Gender**, and **Phone Number**.
3. Select the **Right**. Access to some functions in POS Client or the limit of authority given to the employee depends on the selected employee rights.

NOTE: Available options may vary depending on the created rights on the [Right] screen (see "Creating Rights" on page 40).

4. Enter the **Login Password** to assign to the employee. The login password is used to log into POS Client.


NOTE: A login password can only contain numbers.

5. If necessary, enter the **Administrator Password** to assign to the employee. The administrator password is used to log into BackOffice. If the employee is not authorized to use BackOffice, do not assign an administrator password.


NOTE: An administrator password can contain numbers and letters and is case sensitive.

6. Enter the **Magcard**, the ID card number that the employee uses to log into the system.
7. Select a **Language** to assign to the employee. This is the language displayed on screen whenever the particular employee logs into the system.

NOTE: Available options may vary depending on the selected languages on the [Basic Setup] screen (see "Setting Language Options" on page 30).

8. Enter the employee **Address**, **Zip Code**, **E-mail**, **Other Tel** (telephone), and **Hourly Rate**.
9. If necessary, enter optional information:
 - Notes about the employee.
 - If the employee is a driver or a delivery man, check the **Delivery Man** box.
 - If the employee is a driver, check the **Driver Info.** box and enter the **Driver's License No.**, **Insurance company policy**, **Policy Exp. Date**, **Policy #**, **License exp. date**, and **Notes on policy**.
10. Click . The new employee is displayed on the Employee list.


Deleting an Employee

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Employee] screen, select the employee from the Employee list.
3. Click . The message “Are you sure you want to delete?” appears.
4. Click **Yes** to confirm.
5. Start the system (see “Starting the System” on page 29).

For record purposes, it is not recommended to delete an employee. If the employee is no longer employed, it is advised to forbid the employee (see below) instead.

Forbidding an Employee


To access resigned employee records, instead of deleting, forbid the employee.

1. On the [Employee] screen, select the employee from the Employee list.
2. Check the **Forbid Employee** box.
3. Click .

After forbidding an employee, all access rights are cancelled and the employee name is no longer displayed on the employee list.

To view the employee list with former ones, check the **Show inactive items** box.

Modifying Employee Information

1. On the [Employee] screen, select the employee to modify from the Employee list.
2. Modify the necessary information.
3. Click .

Customizing Employee Reports

1. On the [Employee] screen, select the employee from the Employee list.
2. Click the **Print Report** button.
3. Select the type of reports to print when the employee goes off duty.
4. Click **Save**.

3.4.2 Employee Work Information

The [Employee Work Info] screen allows you to set the work schedule, check the attendance, and print work reports of an employee.

Click **Employee Work Info** from the Section list to view the [Employee Work Info] screen.

Check this box to view list with forbidden employees.

TIP: Click a header to change the sorting list order.

View schedule here.

Employee Work info Start User: admin English

☐ Show Hide Employee

ID	Name	Right
1	admin	Supervisor
2	Brown Mel	Manager
3	Marie Lisa	Cashier
4	Hue Jason	Deliveryman
5	Mouse...	Kitchen Man...

Employee Schedule

Title

New

Work Report

Schedule Report

Effective Time

From 02:07:11

To 02:07:11

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Checking attendance

Time	Status
3/18/2008 10:03:15 PM	On D...
3/25/2008 4:02:57 PM	Off D...
3/27/2008 11:12:43 AM	On D...
3/18/2009 1:28:16 PM	Off D...
3/18/2009 1:28:22 PM	On D...
2/4/2010 3:03:52 AM	Off D...
2/4/2010 3:05:44 AM	On D...

Time




2008-03-18

22:03:15

Check the attendance here.

Creating an Employee Schedule

Adding a New Schedule

1. On the [Employee Work Info] screen, select the employee from the employee list.
2. Click .
3. Enter the schedule name on the **Title** box.
4. Click .
5. Set the working time on **Effective Time**.
6. Select a day on the day list, then click  to set the working time for that day.
7. Repeat steps 4 to 5 to set more day/ time schedules.

NOTE: An employee can have more than one work schedule, such as having morning or evening shifts.



Modifying an Employee Schedule

1. On the [Employee Work Info] screen, select the employee from the Employee list.
2. If the employee has more than one schedule, select the schedule title.


3. Select the day to modify, then do any of the following:

Indicates a scheduled working time.

Click “+” to view working time.

- To change the working time for the day, select the working time, then modify the time on **Effective Time**.
- To delete the working time for the day, select the working time, then click .
- To add a working time for the day, set the working time on **Effective Time**, then click .

Deleting an Employee Schedule

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Employee] screen, select the employee from the Employee list.
3. Click . The message “Are you sure you want to delete?” appears.
4. Click **Yes** to confirm.
5. Start the system (see “Starting the System” on page 29).

Printing Employee Work Reports

1. On the [Employee Work Info] screen, click the **Work Report** button.
2. Select the employee to print work report, then click **Ok**.

NOTE: To print the work report of all employees, select **All Employee**.

To print, export, or zoom the report, see “Reports Screen” on page 132.

To close the report screen, click **Employee Work Info** to go back to [Employee Work Info] screen or any item on the Section list.


Printing Schedule Reports

1. On the [Employee Work Info] screen, select the employee from the Employee list.
2. Click the **Schedule Report** button.
3. Select either **General Report** or **Chart Report**, then click **Ok**.
4. Select the coverage date to generate the report, then click **Ok**.

To print, export, or zoom the report, see “Reports Screen” on page 132.

To close the report screen, click **Employee Work Info** to go back to [Employee Work Info] screen or any item on the Section list.

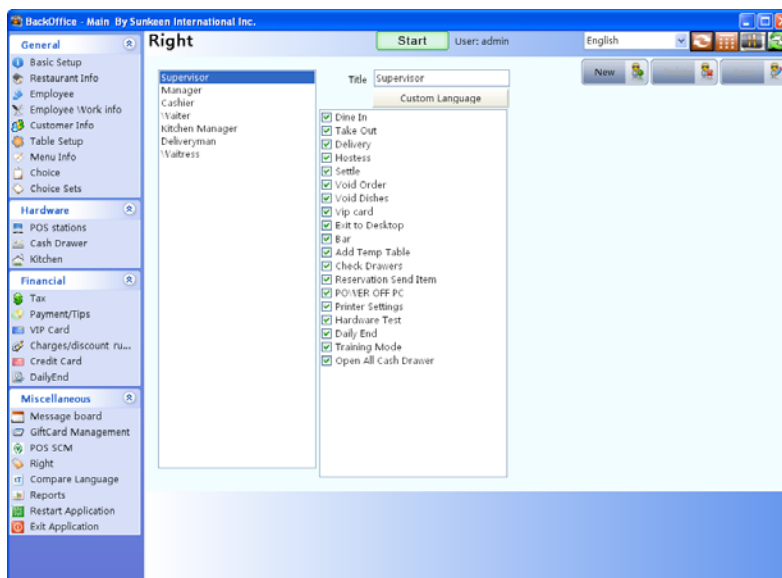
Checking the Attendance

1. On the [Employee Work Info] screen, select the employee from the Employee list.
2. Select the attendance.
3. Modify the date and time on **Time**.
4. Click .

3.4.3 Defining Employee Rights

The [Right] screen allows you to define access rights applicable for different employees.



Click **Right** on the Section list to view the [Right] screen.




Mercury⁺ has predefined rights. However, the user can still add or modify these rights.

Creating Rights


Adding New Rights

1. On the [Right] screen, click .
2. Enter the rights title on the **Title** box.
3. Check the function(s) to give access to.
4. Click .

Modifying Rights

1. On the [Right] screen, select the rights title on the Rights list.
2. Modify the necessary information.
3. Click .

Deleting Rights

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Right] screen, select the rights from the Rights list.
3. Click . The message “Are you sure you want to delete?” appears.
4. Click **Yes** to confirm.
5. Start the system (see “Starting the System” on page 29).

Defining Custom Language

To define the rights title in other languages, click the **Custom Language** button.

3.5 Recording Customer Information

When a customer calls in for delivery or makes a reservation, the customer information is recorded by the system using POS Client. In BackOffice, the information can be viewed and modified or new customer records can be created.

Click **Customer Information** to view the [Customer Information] screen.

TIP: Click a header to change the sorting list order.

Use this section to add more delivery address under the same phone number.



Use this section to add more customer name under the same phone number.

View the VIP card info of the customer here (if any).



The screenshot shows the 'Customer Info' window. At the top, there's a 'Start' button and user info 'User: admin'. Below is a table with columns 'Customer Tel.', 'Name', and 'Zip Code'. The first row shows '12365478' and 'MARY'. To the right of the table are input fields for 'Phone' (12365478), 'First Name' (MARY), 'Last Name', 'Address' (NY), 'Zip Code', 'E-mail', 'State', and 'City'. There's a 'New' button and a 'Net term' checkbox. Below the main form is a 'Delivery Info' section with a 'Delivery Address' table showing 'NY' and input fields for 'State', 'City', 'Zip Code', 'E-mail', and 'Note'. At the bottom is a 'VIP Card' section with fields for 'Card No.', 'Status' (Is not Active), 'Discount rule', 'MSR', 'Valid Date' (2010-02-09), and 'Holder'. Red boxes and arrows highlight these sections with the provided annotations.

Creating a Customer Record

Adding a New Customer


1. Click .
2. Enter **Phone, First Name, Last Name, Address, Zip Code, E-mail, State, and City**.
To grant the customer with limited payment terms, check the **Net term** box.
3. Enter the delivery information (see "Adding a Delivery Address" below).
4. Click .

Adding a Delivery Address

1. Click  on the Delivery info section.
2. Enter the **Delivery Address, State, City, Zip Code, E-mail, and Note**.
3. Click .



NOTE: Some customers may register more than one delivery address with the same phone number. To add more addresses, repeat the above steps.

Deleting a Delivery Address



1. Select the address on the Delivery Info section.
2. Click .
3. Click **Yes** to confirm.

Adding More Recipients


Some registered phone numbers may have more than one recipient, such as a company number with different employees calling in for delivery or reservation. To add more recipients using the same phone number, do the following:

1. Select the customer from the Customer list.
2. Click . A pop up window appears.
3. Enter the alternative **Phone** (if any), **First Name**, **Last Name**, and **Note**.
4. Click .


Phone Number	Name
021 236 5478	MARY
	Vic Ross
	Helen Gates

☐ Net term  

Deleting a Recipient

1. Select the customer name.
2. Click .
3. Click **Yes** to confirm.

Deleting a Customer Record

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Customer Info] screen, select the customer from the Customer list.
3. Click . The message “Are you sure you want to delete?” appears.
4. Click **Yes** to confirm.
5. Start the system (see “Starting the System” on page 29).

3.6 Designing the Table Arrangement

The order management depends on the floor plan and the table arrangement of the restaurant. Orders are recorded using the table number. Without setting the tables, the dine in feature of the POS Client will not function.




Click **Table Setup** from the section list to view the [Table Setup] screen.

3.6.1 Arranging the Tables


Creating Rooms

Tables can be grouped by room or location (i.e. V1 for the first floor, V2 for the second, VIP, Bar inside, or Bar outside).


1. On the [Table Setup] screen, click .

Table Setup		Start	User: admin	English
Type	Dine In	Start Design   		
Room	V1	Title	V1	


2. From the **Type** box, select either of the following:
 - **Dine In** — Dining in customers are directed to these tables.
 - **Bar** — Customers who want to use the bar are directed to these tables.

3. Enter the room (location) name on the **Title** box.
4. Click .
5. Add tables and other elements (see below).

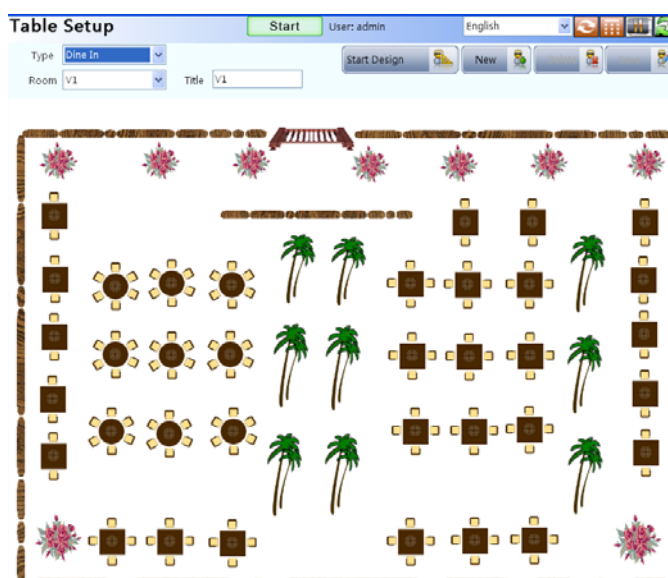
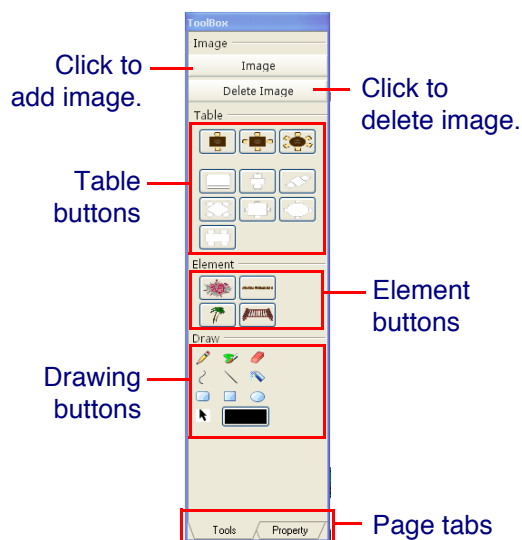
Adding Tables and Other Objects

1. Select the room to design from the **Room** box.
2. Click . The Toolbox appears.
3. Click the table button that you want to add from the Toolbox.
4. Click desired area to place the table on the [Table Setup] screen.
5. Set the table property (see “Assigning Table Properties” on page 43).
6. Repeat steps 4 and 5 to add more tables.
7. To add other objects:

- **To add images** — Click the **Image** button. Browse and select the image file.
- **To add elements** — Click the element button that you want to add. Click desired area to place the element on the [Table Setup] screen.
- **To add freehand drawing** — Click the drawing button. Draw freely on the desired area on the [Table Setup] screen.

8. When done, click .

See sample layout below:





Assigning Table Properties

1. Click the table on the [Table Setup] screen.
2. Click the **Property** tab.


3. Enter the **Table Name**.
4. To set the table attributes, check the boxes.
5. Click **Modify**.

NOTE: By default, the number of people per table is already set based on the selected table.

3.6.2 Modifying the Table Arrangement

1. Select the room to modify from the **Room** box.
2. Click . The Toolbox appears.
3. To modify the table arrangement, do any of the following:
 - To move an object, click the object then drag to desired area.
 - To delete an object, right-click the object then select **Delete**.
 - To delete an image, click the **Delete Image** button on the Toolbox.
 - To add more objects, see “Adding Tables and Other Objects” on page 43.
4. When done, click .

3.6.3 Deleting a Table Arrangement

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Table Setup] screen, select the room from the **Room** box.
3. Click . The message “Are you sure you want to delete?” appears.
4. Click **Yes** to confirm.
5. Start the system (see “Starting the System” on page 29).

3.7 Setting the Menu

3.7.1 Menu Setup Overview

To setup the menu, do the following steps:

1. Create menu groups.
2. Create screen categories.
3. Create menu items.
4. Create menu sets.
5. Create choices.
6. Create choice sets.

3.7.2 Menu Groups

Menu items are basically grouped into categories, such as appetizers, soup, main course, and others. In BackOffice, these categories are called Menu Groups.

Creating Menu Groups

Adding a Menu Group

1. Click **Menu Info** from the Section list to view the [Menu Info] screen.
2. Click the **Menu Group** tab.

Menu Info Start User: admin English

Menu Group tab

Menu Group list

Title	Output \Window
Appetizers	Null
Soups	Null
Hot Heros	Null
Pastas	Null
Salads	Null
Dinner Entrees	Null
Pizza	Null
Beverages	Null
Deserts	Null
Grill Entrees	Null
Calzones	Null
Specials	Null

Title: Appetizers

Other Name: Appetizers

Output \Window: Null

Coursing: No Coursing

☐ Alcohol

☐ Reservation Required

☐ Order according to weights

☐ Need to specific Q'ty or Weight when ordering

Tax

☒ Tax1

☐ Tax2

☐ Tax3

☐ Tax4

Click to enter name in other languages.

Check to apply options.

Check to apply tax.


1. Click .
2. Enter the menu group name on the **Title** box.
To enter the menu group name in other languages, click the **Other Name** button.
3. Select the printer or the display to send the menu group order to on **Output Window**. Output windows are set in the [Kitchen] screen, see "Setting Kitchen Printers or Displays" on page 57.
4. Select the course on **Coursing**. Coursing is set in the [Restaurant Info] screen, see "Creating Courses" on page 34.
5. If necessary, check the box of the following:
 - **Alcohol** — If the menu group contains alcoholic beverages.
 - **Reservation Required** — To order from the menu group, reservation is needed in advance.
 - **Order according to weights** — If the price of the menu group is based according to weight.
 - **Need to specify Q'ty to Weight when ordering** — When ordering from the menu group, quantity of item is needed for the total price.
6. On the Tax section, check a box to apply the corresponding tax rate, if necessary. The tax names displayed may vary depending on the tax set on the [Tax] screen, see "Tax" on page 58.
7. When done, click .

Modifying a Menu Group

1. On the [Menu Info] screen, click the **Menu Group** tab.
2. Select the menu group from the Menu Group list.
3. Modify the necessary details.

4. Click .

Deleting a Menu Group

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Menu Info] screen, click the **Menu Group** tab.
3. Select the menu group from the Menu Group list.
4. Click . The message “Are you sure you want to delete?” appears.
5. Click **Yes** to confirm.
6. Start the system (see “Starting the System” on page 29).

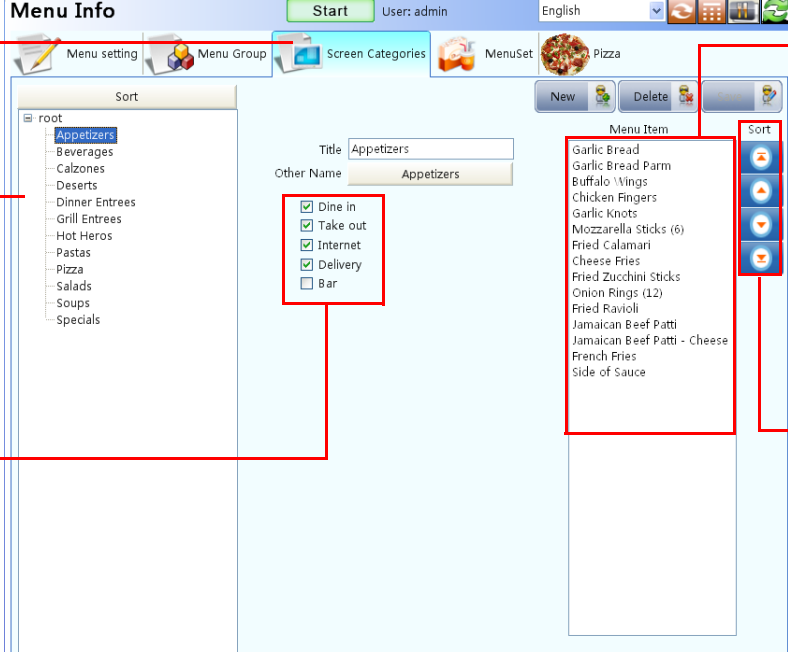
3.7.3 Screen Categories

The Screen Categories are the categorized labels displayed on the POS Client. The screen categories can be the names of the menu groups. Screen categories contain sub groups or menu items within them.

Creating Screen Categories

Adding a Screen Category

1. Click **Menu Info** from the Section list to view the [Menu Info] screen.
2. Click the **Screen Categories** tab.



Screen Categories tab

Screen Categories list: Click the Sort button to change the sorting order.

Check the box to display the screen category in the function in POS Client.

Title: Appetizers

Other Name: Appetizers



☒ Dine in
☒ Take out
☒ Internet
☒ Delivery
☐ Bar

Menu Item


- Garlic Bread
- Garlic Bread Parm
- Buffalo Wings
- Chicken Fingers
- Garlic Knots
- Mozzarella Sticks (6)
- Fried Calamari
- Cheese Fries
- Fried Zucchini Sticks
- Onion Rings (12)
- Fried Ravioli
- Jamaican Beef Patti
- Jamaican Beef Patti - Cheese
- French Fries
- Side of Sauce

Sort buttons: Click to change the order of the list as it is displayed on POS Client.

Displays the menu items under the selected screen category. See page 49 to add menu items.


1. Click .
2. Enter the screen category name on the **Title** box.
To enter the screen category name in other languages, click the **Other Name** button.
3. Check the box to display the screen category in the corresponding function in POS Client.
4. Click .

Modifying a Screen Category

1. On the [Menu Info] screen, click the **Screen Categories** tab.
2. Select the screen category from the Screen Categories list.
3. Modify the necessary details.
 - To change the order of menu items, click the **Sort** buttons.
4. Click .

NOTE: To add menu items under the screen category, see “Assigning the Screen Category” on page 49.

Deleting a Screen Category

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Menu Info] screen, click the **Screen Categories** tab.
3. Select the screen category from the Screen Categories list.
4. Click . The message “Are you sure you want to delete?” appears.
5. Click **Yes** to confirm.
6. Start the system (see “Starting the System” on page 29).

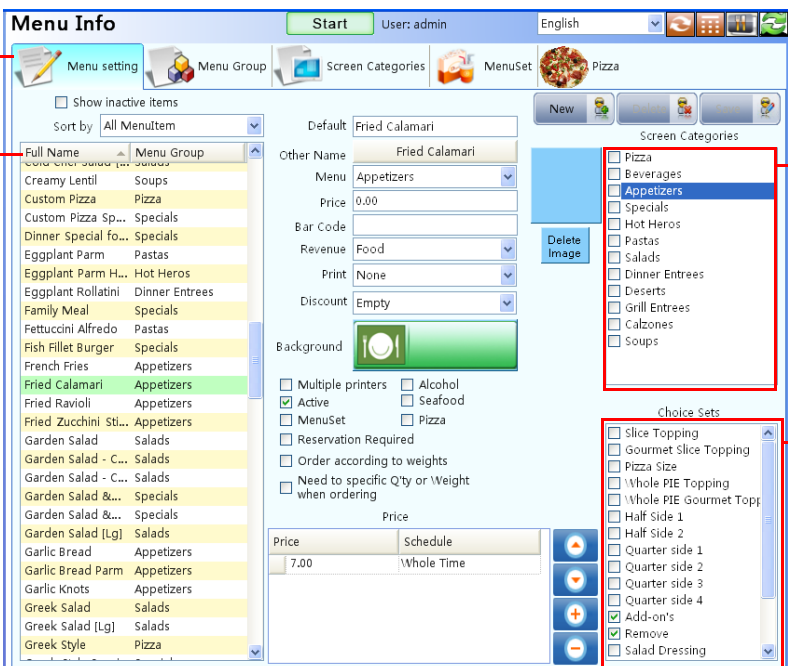
3.7.4 Menu Items

Menu items are the actual items that customers order. Before creating menu items, ensure that screen categories and menu groups are already created.

Creating Menu Items

Adding a Menu Item

1. Click **Menu Info** from the Section list to view the [Menu Info] screen.



The screenshot shows the 'Menu Info' screen with the 'Menu setting' tab selected. The 'Menu Item list' on the left shows a list of menu items with headers for 'Full Name', 'Menu Group', and 'Menu'. The 'Screen Categories' list on the right shows a list of categories with checkboxes. The 'Choice Sets' list at the bottom right shows a list of choice sets with checkboxes. Red boxes and arrows highlight the 'Menu setting' tab, the 'Menu Item list' headers, the 'Screen Categories' list, and the 'Choice Sets' list.

Menu Setting tab


Menu Item list:
Click the headers to change the sorting order.


Screen Categories

Choice Sets

Check to display menu item under that screen category.

Check to make choice sets available for the menu item.


2. On the [Menu Setting] tab, click .
3. Enter the menu item name on the **Default** box.
To enter the menu item name in other languages, click the **Other Name** button.

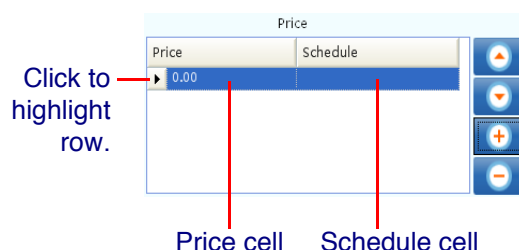
4. Select the menu group to which the menu item belongs to on **Menu**.
The **Price** box displays the price of the selected menu group and cannot be changed here. This is not the price of the menu item.
5. If necessary, enter the barcode of the menu item on the **Bar Code** box.
6. Select the revenue group to which the menu item belongs to on **Revenue**.
7. Select the printer to send the order to on **Print**.
8. If necessary, select the discount rule on **Discount**. Discount rules are set in the [Charges/Discount rules] screen, see “Creating New Discount or Surcharge Rules” on page 61.
9. If necessary, check the box of the following:
 - **Multiple printers** — Send order of this menu item to multiple printers.
 - **Active** — The menu item is available in POS Client. Uncheck this box if the menu item is no longer offered by the restaurant. See “Setting the Menu Item Inactive” on page 50.
 - **MenuSet** — If the menu item belongs to a menu set.
 - **Reservation Required** — Reservation is needed in advance to order this menu item.
 - **Order according to weights** — If the price of the menu item is based according to weight.
 - **Need to specify Q'ty to Weight when ordering** — When ordering this menu item, quantity of item needs to be specified.
 - **Alcohol** — The menu item contains alcoholic beverages.
 - **Seafood** — The menu item contains seafood.
 - **Pizza** — The menu item is pizza.
10. Click .

Setting the Price

A menu item can have varying prices depending on dining time. The price is determined by the schedule set in the [Restaurant Info] screen, see “Creating Schedules” on page 32.

To set the price, do the following:

1. Select the menu item on the Menu Item list.
2. Click . A row appears on the Price table.





3. Click the price cell, and set the price.
4. Click the schedule cell, and select the schedule from the list to apply the price.

NOTE: Available schedules vary depending on the created schedules on the [Restaurant Info] screen, see “Creating Schedules” on page 32.

To add more prices, repeat the above procedures.

To remove a price, highlight the row, then click .

To change the price order by priority, click  or .

Assigning the Screen Category

Check the box of the screen category where you want to display the menu item. More than one screen category can be checked.

NOTE: The listed screen categories vary depending on the created screen categories, see “Creating Screen Categories” on page 46.

Assigning the Choice Sets

Check the box of the choice set that you want to be available for the menu item. More than one choice set can be checked.

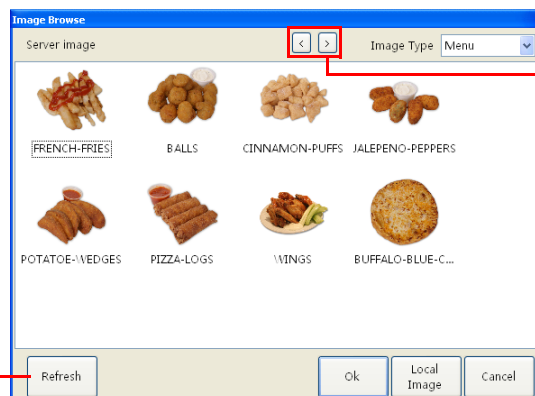
NOTE: The listed choice sets vary depending on the created choice sets on the [Choice Sets] screen, see “Creating Choice Sets” on page 52.

Adding an Image

A menu item image can be displayed on POS Client.

To add an image, do the following:

1. Click the image box . A pop up window appears.

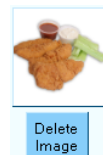


Click to view the next/previous page.

Click to refresh images.



2. Select an image from the pre-installed images on the system.
To select an image from the computer hard disk, click **Local Image**, then browse for the file.
3. Click **Ok**. The image is displayed on the image box.

To delete the image, click **Delete Image**.




Changing the Background

In POS Client, menu items are selected by pressing the menu buttons. These buttons can be color-coded to distinguish the category or to simply suit your preference.


By default, the background color of a button is . To change the background, click , then select your preferred background.

Setting the Menu Item Inactive

Instead of deleting a menu item, it is recommended to set the menu item “inactive” if the menu item is no longer offered by the restaurant.

1. Select the menu item from the Menu Item list.
2. Uncheck the **Active** box.
3. Click . The inactive menu item is not displayed on the Menu Item list.

Deleting a Menu Item

1. Stop the system (see “Stopping the System” on page 29).
2. On the [Menu Info] screen, select the menu item from the Menu Item list.
3. Click . The message “Are you sure you want to delete?” appears.
4. Click **Yes** to confirm.
5. Start the system (see “Starting the System” on page 29).

For record purposes, it is not recommended to delete a menu item. If the menu item is no longer offered, it is advised to change its status to **Inactive** (see “Setting the Menu Item Inactive” on page 50).

Changing the Menu Item List Display

- To change the sorting order of menu items displayed, click a header.
- To filter the list by menu groups, select the menu group on the **Sort by** box.
- To display inactive menu items, check the **Show inactive items** box.




3.8 Choice

Choice is classified as extra requirements when ordering a menu, such as extra cheese, or no salt, and others. The [Choice] screen allows you to define these choices.


Creating Choices

Adding a Choice


1. Click **Choice** from the Section list to view the [Choice] screen.

2. Click .
3. Enter the choice name on the **Title** box.
4. Define other properties, if necessary:
 - To enter the choice name in other languages, click the **Other Name** button.
 - To change the background color of the choice button as displayed on POS Client, click the background button.
 - Check the box of **Crust** or **Topping** to apply its attribute.
5. Set the additional price, priority, or schedule if necessary (see below).
6. For advance features, click .
7. Click .

Setting the Priority, Schedule, and Additional Charge

1. Select the choice from the Choice list.
2. Click . A row appears on the table.
3. Click the Priority cell and set the priority.
4. Click the Schedule cell to select the schedule when the choice is made available.

NOTE: Available schedules vary depending on the created schedules on the [Restaurant Info] screen, see “Creating Schedules” on page 32.

5. Click the **Type** cell to set pricing and select one of the following:
 - **Free** — Set as free of charge.
 - **Money** — Set a fix amount as an additional charge on the **Charge** cell.
 - **Percentage** — Set a percentage from the menu item price as an additional charge on the **Charge** cell.
 6. Click the **Charge** cell and enter the amount of additional charge or percentage.
- To add more schedules with varying additional prices, repeat the above procedures.
- To remove schedules or additional prices, highlight the row, then click .

Changing the Choice List Display



- To change the sorting order of choices displayed, click the header.
- To filter the list by choice sets, select the choice set on the **Sort by** box.
- To display inactive choices, check the **Show inactive items** box.

3.9 Choice Sets

Similar choices are grouped together as Choice Sets.

Creating Choice Sets

Adding a Choice Set


1. Click **Choice Set** from the Section list to view the [Choice Set] screen.
2. Click .
3. Enter the choice set name on the **Choice Set** box.
To enter the choice name in other languages, click the **Other Name** button.
4. Select the type of pricing on the **Type** box, options are:
 - **The use of Choice prices** — Applies the pricing defined in Choices.
 - **Money** — Set a fix amount as an additional charge.
 - **Percentage** — Set a percentage from the menu item price as an additional charge.
5. On the **Charge** box, enter the additional price if **Type** is set to **Money**, or the percentage value if **Type** is set to **Percentage**. “Free” is automatically displayed if **Type** is set to **The use of Choice prices**.
6. Select the validity of the choice set, options are:
 - **Invalid** — Disables the Choice Set. Choice Set is not displayed on the [Menu Info] screen, see “Assigning the Choice Sets” on page 49.
 - **Option** — The selection of Choice Set is an option only.
 - **Required** — The selection of Choice Set is required.
7. To allow several choices to be selected in the Choice Set, check the **Multiple-choice** box. Otherwise, only one choice can be selected.
8. Click .

Grouping Choices in Choice Sets


Adding a Choice in the Choice Set

After creating a choice set, add choices to be grouped together.


The screenshot shows the 'Choice Sets' management interface. On the left is the 'Choice Set list' containing various sets like 'Fresh Green', 'Onions', 'Beef', etc. In the center is the 'Choice list' for the selected set 'Add-on's', showing items like 'Bread', 'Anchovies', 'Black Olives', etc. On the right is the 'Choice Set' details panel for 'Add-on's', showing settings like 'Type: The use of Choice prices', 'Charge: Free', and 'Valid: Option'. Annotations with red lines point to specific elements: 'Choice Set list' points to the left list; 'Choice Set name' points to the 'Add-on's' title in the details panel; 'Choice list. Click the header to change sorting order.' points to the 'Choice list' header; 'Click the "+" icon to display the choices in this choice set.' points to the '+' icon in the 'Choice list'; 'Displays the choices grouped under the Choice Set.' points to the list of items in the 'Choice list'; 'A Choice Set with no choices yet.' points to the 'Spices' set in the 'Choice Set list'.

1. Select the choice set name from the Choice Set list.
2. Select the choice to be added from the Choice list.
3. Click .

Removing a Choice from the Choice Set

1. Select the choice that you want to remove from the Choice Set list.
2. Click .

Removing All Choices from the Choice Set

1. Select the choice set from the Choice Set list.
2. Click  to remove all choices under the selected choice set.

3.10 Customizing Other Hardware Devices

3.10.1 POS Stations

To view connected POS Stations and configure the settings, click **POS stations** from the Section list.

The [POS Stations] screen displays information about connected POS stations, such as **MAC Address**, **Station Name**, **Login Mode**, and **Product Key**.

POS Station list. Click a header to change sorting order.

MAC Address	Station Name	Login Mode	ProductKey
00:C0:0C:AA:37:60	test	Special Mode	

Basic Info

Station Name:

MAC Address:

Login Mode

☒ Special Mode
Re-login is not needed, unless log out

☐ Share Mode
Password input required for full access

Display setup

☒ Using Pole Display

Number of lines:

COM Port:

Line1:

Line2:

Associate Setup

Default setup in Dine in Menu:

☒ Activate Reservation ☒ Activate take-out

☒ Activate dine in ☒ Activate delivery


☒ Activate cash ☒ Activate Bar Menu

Save

Enabled only when **Using Pole Display** box is checked.

Modifying Information and Settings

To modify the information and settings of a POS station, select the POS station to modify from the POS Station list.

After modifications are made, click  to apply changes.

Basic Info

- **Station Name** — Enter preferred station name to identify the POS station.
- **MAC Address** — Displays the network ID and cannot be changed.

Connected Cash Drawer

This section displays the connected cash drawer of the selected POS station.

Login Mode

Select either of the following login modes:

- **Special Mode** — POS stations in this mode require users to log into POS Client. When idle time is reached, users are required to login again.
- **Share Mode** — For limited access; POS stations in this mode do not require users to log into POS Client. However, password input is required in every function that the user will access.

See “Login” on page 70.

Display Setup

If a pole display is connected to the POS station, check the **Using Pole Display** box to set up the display.

- **Number of lines** — Specify the number of display lines; a maximum of 2 lines is allowed.
- **COM port** — Select the COM port where the pole display is connected.
- **Line 1** — Enter the text to display on the first line.
- **Line 2** — Enter the text to display on the second line if the **Number of lines** is set to 2.

Associate Setup

Allows you to define different functions that can be enabled or disabled for the selected POS station.

- Check the boxes of the corresponding functions to enable.
- To limit the function in certain room or table setup, select the room name from the **Default setup in Dine in Menu** box. To apply checked functions to all the rooms, leave the box empty.


3.11 Cash Drawer

To view connected cash drawers and configure the setting, click **Cash Drawer** from the Section list.

Enter the command to open cash drawer here. Enabled only when **Printer control** is selected.

Cash Drawer list. Click a header to change sorting order.

3.11.1 Configuring New Cash Drawers

1. On the [Cash Drawer] screen, click .
2. Enter the preferred cash drawer name on the **Cash Drawer** box.
3. Select which POS station the cash drawer is connected to on the **Connect to POS** box.

4. Select one of the following:

- **POS Station control** — Select when the cash drawer is connected via RJ11 connection.
- **Printer control** — Select when the cash drawer is connected via RJ45 connection.

When **Printer control** is selected, enter the command to open the cash drawer on the box, and select the **Printer**.


5. Click .

NOTE: Connecting cash drawers improperly can damage the unit.

3.11.2 Modifying Information and Settings

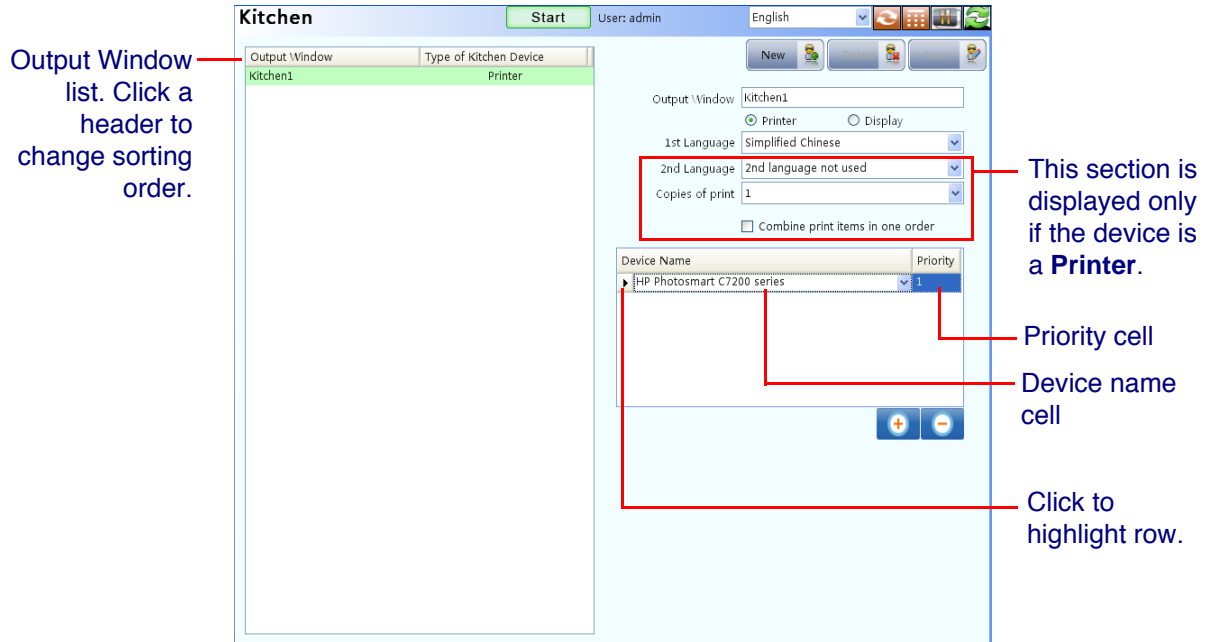
To modify the information and settings of a cash drawer, select the cash drawer to modify from the Cash Drawer list, then follow instructions from step 2 to 5 on “Configuring New Cash Drawers” on page 55.

3.11.3 Deleting Cash Drawers



1. Stop the system (see “Stopping the System” on page 29).
2. On the [Cash Drawer] screen, select the cash drawer from the Cash Drawer list.
3. Click . The message “Are you sure you want to delete?” appears.
4. Click **Yes** to confirm.
5. Start the system (see “Starting the System” on page 29).

3.12 Kitchen

The [Kitchen] screen allows you to view and set up kitchen output devices, such as printers or displays, where orders are sent for preparation. Click **Kitchen** from the Section list to view the [Kitchen] screen.




3.12.1 Setting Kitchen Printers or Displays

- On the [Kitchen] screen, click .
- Enter the kitchen output device name on the **Output Window** box.
- Select one of the following:
 - Printer** — If the output device is a printer.
 - Display** — If the output device is a display monitor.
- Select the language to print orders on the **1st Language** box. By default, the system language is set here.
If **Printer** is selected:
 - Select the alternative language on the **2nd Language** box.
 - Select the number of **Copies to print**.
 - Check the **Combine print items in one order** to print all menu items with the same Order ID on one page. Otherwise, each menu item is printed on a different page.
- Click .
- Add output devices, see "Adding an Output Device" below.

Adding an Output Device

An output device can either be a printer or a display monitor.

1. On the [Kitchen] screen, select the output window name from the Output Window list.
2. Click . A row appears on the table.
3. Click the Device Name cell and select the output device from the list.
4. Click the Priority cell and set the priority.

Priority setting is used to control the sequence of importance between devices when more than one output device is in the kitchen. POS Server sends an order to the output device with the highest priority level first. If the output device is busy, the order is sent to the next device in line.

NOTE: If output devices have the same priority level, the print job is shared.

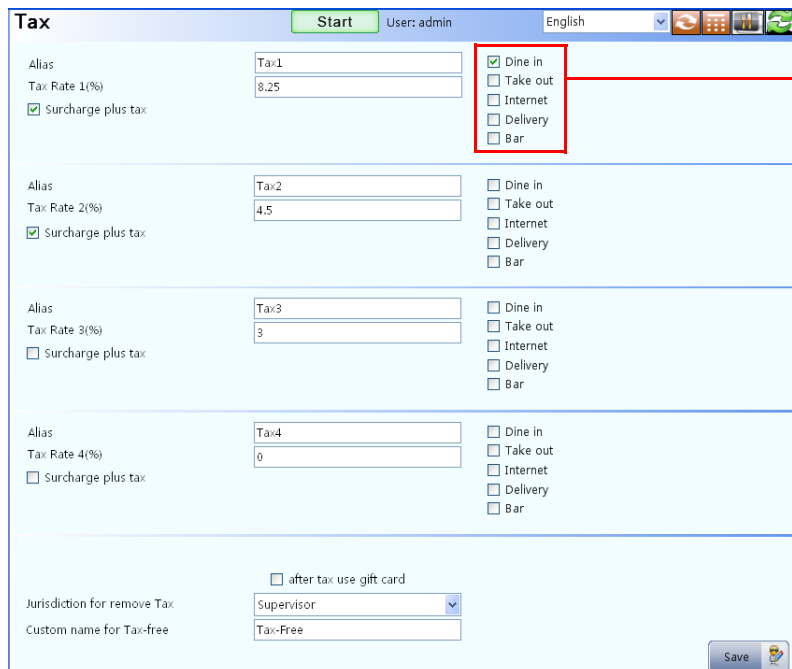
To add more output devices, repeat the above procedures.

To delete an output device, highlight the device from the table, then click .

3.13 Setting Payment Rules

3.13.1 Tax

To set tax rules to pose on orders, click **Tax** from the Section list to view the [Tax] screen.



The screenshot shows the 'Tax' configuration screen. It has a title bar with 'Start', 'User: admin', and 'English'. Below the title bar, there are four sections for configuring tax rules. Each section has an 'Alias' field, a 'Tax Rate' field, a 'Surcharge plus tax' checkbox, and a list of checkboxes for different service types: 'Dine in', 'Take out', 'Internet', 'Delivery', and 'Bar'. A red box highlights the checkboxes for 'Dine in', 'Take out', 'Internet', 'Delivery', and 'Bar' for the first tax rule (Tax1). A red arrow points from the text 'Check to apply tax in the function.' to this box. At the bottom of the screen, there are fields for 'Jurisdiction for remove Tax' (set to 'Supervisor') and 'Custom name for Tax-free' (set to 'Tax-Free'). A 'Save' button is located at the bottom right.

By default, up to four tax rules can be set.

Setting Tax Rules

1. On the [Tax] screen, enter the tax rule name on the **Alias** box. This is the name displayed on the [Menu Info - Menu Group] screen, see “Creating Menu Groups” on page 44.
2. Enter the percentage of tax to impose on the **Tax Rate** box.


3. To add surcharge with tax, check the **Surcharge plus tax** box.
4. Check the function(s) where to apply the tax rule.
5. To use gift card after imposing tax, check the **after tax use gift card** box.

NOTE: This attribute applies to all tax rules.

6. Click .

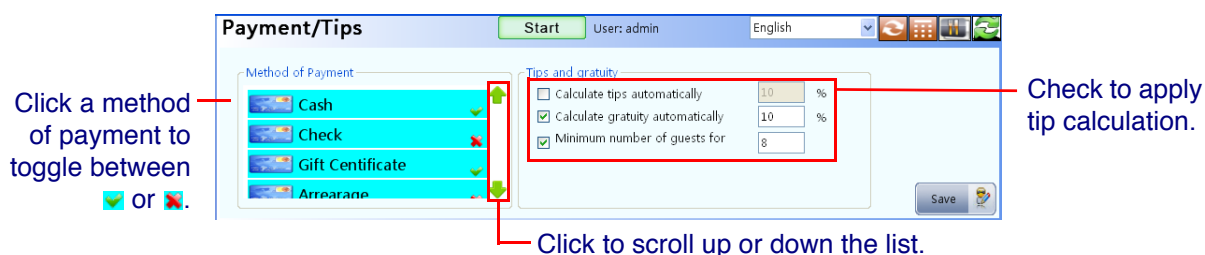
Overriding Tax Rules

Only authorized users, set in the [Tax] screen, who are logged into POS Client can exempt customers from tax.

1. On the [Tax] screen, select the rights of the person who can override tax rules from the **Jurisdiction for remove Tax** box.
2. Enter the **Custom name for Tax-free**.
3. Click .



3.13.2 Payment and Tips

To select different methods of payment and set tip calculations, click **Payment/Tips** from the Section list to view the [Payment/Tips] screen.



Setting Methods of Payment

The Method of Payment section lists the several methods of payment.


-  — Indicates the method of payment is accepted.
-  — Indicates the method of payment is not accepted.

To toggle between accepting the method or not, click the method of payment.

Setting Tips and Gratuity

- **Calculate tips automatically** — Indicates the method of payment is accepted.
- **Calculate gratuity automatically** — Indicates the method of payment is not accepted.
- **Minimum number of guests for** —

To enable automatic calculation of tips/gratuity, check their corresponding boxes.

After modifications are made, click  to apply changes.

3.13.3 VIP Card



To issue VIP cards to customers, click **VIP Card** from the Section list to view the [VIP Card] screen.

VIP Card list.
Click a header
to change
sorting order.


VipCard No.	Status	Issued date	Valid Date
112345678	Issued date	Laura (52364...	2010-3-11
123456789	Issued date	MARY (02123...	2010-3-11

Start User: admin English
 New
 Card No. 112345678
 MSR Information *****
 Discount rule VIP Discount
 Name on VIP card Laura (52364521)
 Valid Date 2010-03-11
 Status Assigned

Issuing VIP Cards


- On the [VIP Card] screen, click .
- Enter the VIP card number on the **Card No.** box.
- Swipe the card on the card reader to get the **MSR Information**.
- Select the discount rule. Discount rules must be set first on the [Charges/Discount Rules] screen, see “Creating New Discount or Surcharge Rules” on page 61.
- Select the customer name from the **Name on VIP card** list.
- Enter the validity date on the **Valid Date** box.
- Select one of the following status:
 - Is not Active** — Card is inactive.
 - Assigned** — Card is assigned and active.
 - Cancelled** — Card is cancelled.
- Click .

Modifying VIP Card Information

- On the [VIP Card] screen, select the VIP Card number from the VIP Card list.
- Modify the necessary details.
- Click .

Cancelling VIP Cards

If a VIP card is no longer honored, it is recommended to cancel a VIP card instead of deleting it from the database.

- On the [VIP Card] screen, select the VIP Card number from the VIP Card list.
- Set the **Status** to **Cancelled**.
- Click .

3.13.4 Charges and Discount Rules

To set charges and discount rules, click **Charges/discount rules** from the Section list to view the [Charges/Discount Rules] screen.

Rule list.
Displays the rule properties.
Click a header to change the sorting order.

Rule name	Apply To	Charge	Rule Type	Active
\$1 Custom Add-on	Menu Item	+1	Surcharge	Yes
10 Off	Order	-10%	Discount	Yes
Birthday Coupon	Menu Item	-10	Discount	Yes
\$2 Custom Add-on	Menu Item	+2	Surcharge	Yes
\$3 Custom Add-on	Menu Item	+3	Surcharge	Yes
Mid-Day Special	Order	-1	Discount	No
Free	Menu Item	-100	Discount	Yes
\$2 Off \$20	Order	-2	Discount	Yes
\$5 Off \$40	Order	-5	Discount	Yes
\$4 Custom Add-on	Menu Item	+4	Surcharge	Yes

Select a discount option. This section appears only when Rule Type is Discount.

Check reasons for rule.

Check when to apply rule.

Rule name: 10 Off Active: ☒ Note:
 Apply To: Order
 Minimum Rights: Supervisor
 Rule Type: Discount
 Type of Discount: Percentage
 Charge: 10.00
 Minimum: 0
 Match Group
 Effective Weeks:
 Effective Date: 2007-08-08 To: 2010-03-16
 Effective Time: 00:00:00 To: 23:59:59
 No maturity date
☐
☐ If the discount is already used, VIP discount
☒ Use the max discount if VIP discount and this rule are used
☐ Overlap this discount and VIP discount
 From cheap to expensive
 Reason for discount
 Without Alcohol
 Without Seafood
 Dine in
 Take out
 Internet
 Delivery
 Bar

Creating New Discount or Surcharge Rules

Adding a New Discount or Surcharge Rule

- On the [Charges/Discount Rules] screen, click **New**.
- Enter the rule name on the **Rule name** box.
- Select when to apply the rule on the **Apply To** box:
 - Order** — The rule is applied per order.
 - Menu Item** — The rule is applied per menu item.
 - VIP Card** — The rule is applied when using the VIP Card.
- Select the minimum rights of the person who can use this rule on the **Minimum Rights** box.
- Select the **Rule Type**:
 - Discount** — To give a discount.
 - Surcharge** — To impose a surcharge.
- Select the type of discount or surcharge on the **Type of Discount** box:
 - Money** — Set a fix amount as an additional charge on the **Charge** box.
 - Percentage** — Set a percentage from the menu item price as an additional charge on the **Charge** box.
 - Appointed Price** — To set an appointed price for discount or surcharge. If this is selected, skip to step 10.
- Enter the amount or the percentage of discount or surcharge on the **Charge** box.
- To set a minimum amount or order to apply the rule, enter a value in the **Minimum** box, then select either of the following on the next box:

- **Money** — The value entered on the Minimum box is the minimum amount of the total order to apply the rule. If the amount is not reached, the discount or surcharge rule cannot be applied.
- **Item Qty.** — The value entered on the Minimum box is the minimum quantity of an item ordered to apply the rule. If the quantity is not reached, the discount or surcharge rule cannot be applied.

9. Select other discount options.

10. Select when to apply the rule.

11. Enter **Notes**, if necessary.

12. Click .

Setting the Effectivity of a Discount or Surcharge Rule

1. Select the rule from the Rule list.

2. Check the days of the week that you want to apply the rule.

3. Set the effectivity date on **Effective Date** (From and To).

To make the rule applicable all year round, check the **No maturity date** box.

4. Set the effectivity time on **Effective Time** (From and To).

5. Click .

Setting Reasons for the Rule

To make the rule understandable for all users, specify the reasons for creating the rule by checking the corresponding boxes on the Reason for Discount section. Available reasons may vary if the rule is a discount or a surcharge.

Modifying Discount or Surcharge Rules

1. On the [Charges/Discount Rules] screen, select the rule name from the Rule list.

2. Modify the necessary details.

3. Click .

Setting the Rule Inactive

If a discount or surcharge rule is no longer in effect but you wish to retain the rule in the database for future use, set the rule to “inactive”.

1. Select the rule name from the Rule list.

2. Uncheck the **Active** box.

3. Click . The inactive rule is still displayed on the Rule list.

Deleting Rules

1. Stop the system (see “Stopping the System” on page 29).

2. On the [Charges/Discount Rules] screen, select the rule name from the Rule list.

3. Click . The message “Are you sure you want to delete?” appears.

4. Click **Yes** to confirm.

5. Start the system (see “Starting the System” on page 29).

3.13.5 Credit Card

To view information about credit card providers and print transaction reports, click **Credit Card** from the Section list to view the [Credit Card] screen.

Select the credit card provider here.

Credit card provider information is displayed here.

Reports section. Reports are displayed here.

Viewing the Local Summary Report

1. On the [Credit Card] screen, select the credit card provider.
2. Click the **Local Summary** button. The summary report is displayed on the Reports section. See sample report below:

Use the toolbar icons to save, print, refresh, or change the zoom of the report.

Summary	Trans.Type	Total	Cou
Total			

Viewing the Local Detail Report

1. On the [Credit Card] screen, select the credit card provider.
2. Click the **Local Detail** button.
3. Select the date to view details.
4. Click the **OK** button.

Select to view today's report.

Select to enter covered dates to view report.

3.13.6 Daily End

To view and print the day's order, click **DailyEnd** from the Section list to view the [Daily End] screen.

- To print the day's report, click the **Print Report** button.
- To select the printer to print the report, click the **Set Printer** button.
- To open POS Client, click the **Switch to PosClient** button.
- To close the screen, click the **Exit** button.

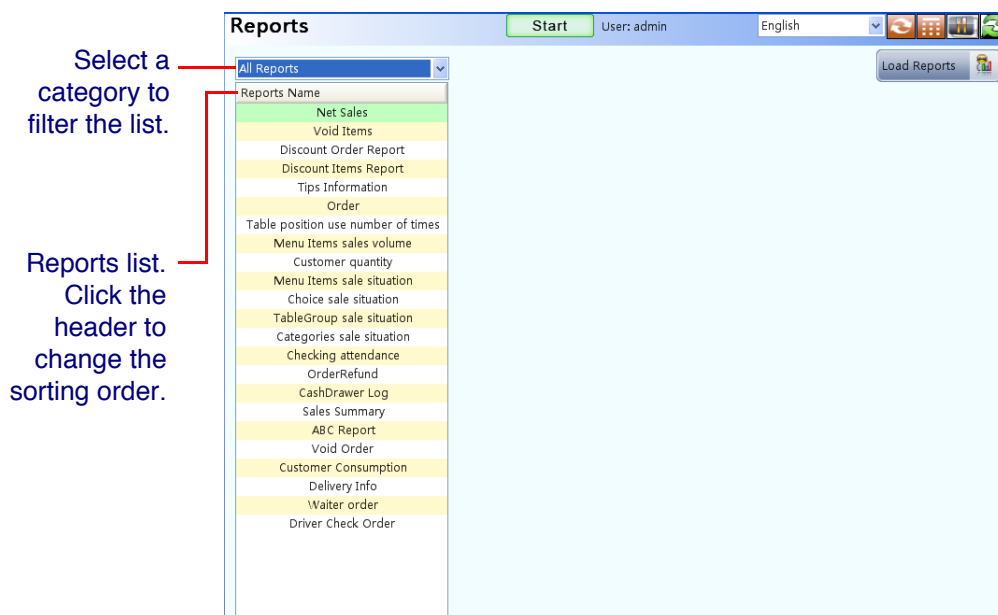


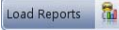
3.14 Printing Reports

Use the [Reports] screen to view and print Sales, Menu Items, Transactions, and Employee reports.

To print reports, do the following:

1. Click **Reports** from the Section list to view the [Reports] screen.



2. Select the type of report from the Report list.
3. Click .
4. Enter the required information, if any.
NOTE: Required information may vary depending on the selected type of report.
5. Set the date.
6. Click the **OK** button.



3.15 Other Features

3.15.1 Message Board

The Message board is used to design and layout promotional messages, images, and other information to be displayed on the POS Client main screen.

1. Click **Message board** from the Section list to view the [Message Board] screen.

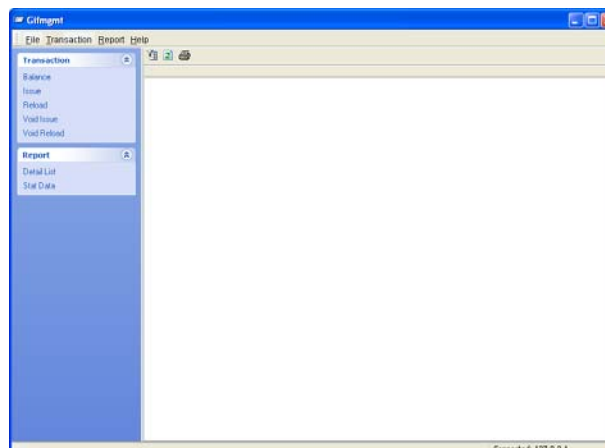


2. Enter the text you want to display.
 - Use the toolbar icons to edit the text properties or add an image.
 - To delete everything on the message board, click .
3. When done, click .

3.15.2 Gift Card Management

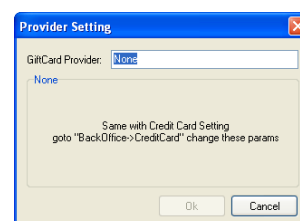
Use the [Gift Card Management] screen to view balance, issue, reload, or void gift cards.

Click **GiftCard Management** from the Section list to view the [Gift Card Management] screen.



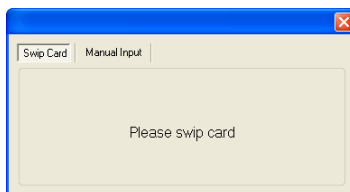
Setting Gift Card Information and Printers

- To set the gift card provider, click **File > Provider Setting**. See “Credit Card” on page 63 for more information.
- To set the receipt or the report printer, click **File > Receipt Printer** or **Report Printer**. Select the printer, then click **OK**.



Checking Balance

- On the [GiftCard Management] screen, click **Transaction > Balance**.



- Swipe the card or click the **Manual Input** tab to enter the card information.
- The gift card balance information is displayed on screen.


Issuing Gift Cards

- On the [GiftCard Management] screen, click **Transaction > Issue**.
- Enter the amount of gift card to issue, then click **OK**.
- Swipe the card or click the **Manual Input** tab to enter the card information, then click **OK**.

Voiding Issued or Reloaded Gift Cards

- On the [GiftCard Management] screen, click **Transaction > Void Issue** or **Void Reload**.
- Enter the **Authentication Code** and the **Reference Number**.
- Click **OK**.

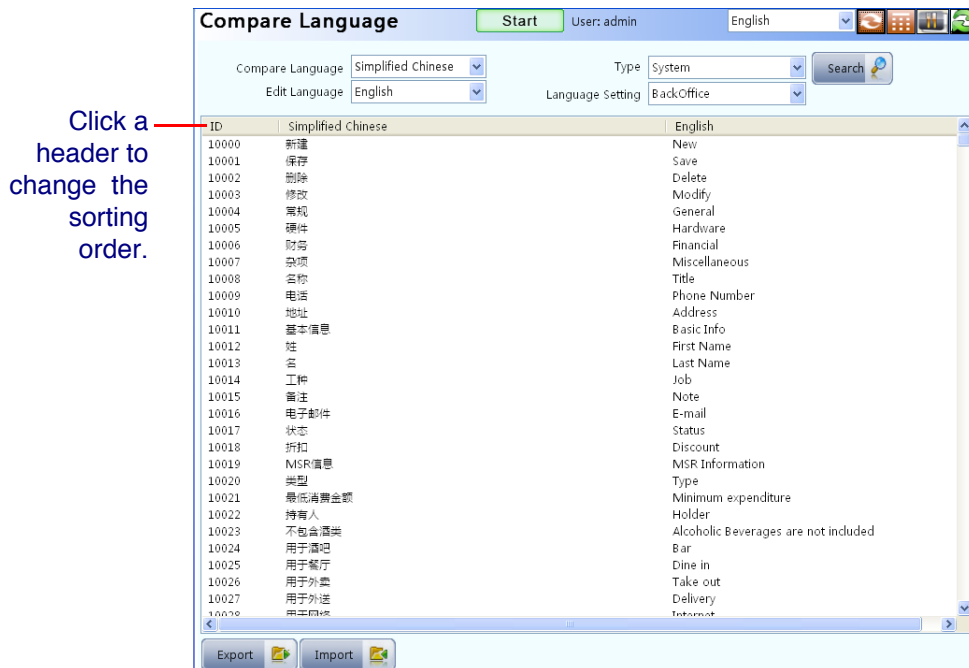
Printing Gift Card Reports

- On the [GiftCard Management] screen, click **Report > Detail List** or **Stat Data**.
- The report is displayed on screen. To print the report, click .

3.15.3 Compare Language

Mercury+ allows you to compare and edit system terms used in different languages.

Click **Compare Language** to view the [Compare Language] screen.

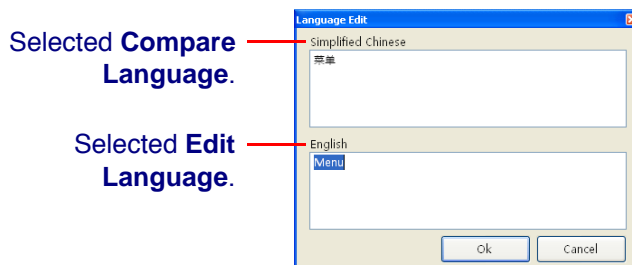


Viewing the Comparison Table

- Select the two languages to compare from the **Compare Language** box and the **Edit Language** box. The available languages in these boxes vary depending on the languages you checked in the [Basic Setup] screen, see “Setting Language Options” on page 30.
- Select the type of language to view on the **Type** box. Options are:
 - **System** — Used for translating terms used in the system.
 - **Custom Language** — Used for translating menu items into other languages.
- Select the where the language is displayed from the **Language Setting** box.


Editing Specific Terms

1. Double-click the term you want to edit from the Comparison Table.




2. Modify the term.
3. When done, click the **OK** button.


Searching for Specific Terms

1. Click  .
2. Enter the term to search.
3. Click the **OK** button. The searched item is displayed on the top of the table.

Exporting Information as XML File

1. Click  .
2. Enter the file name.
3. Click the **OK** button.

Importing Information from an XML File

1. Click  .
2. A confirmation message appears. Click **Yes** to continue.
3. Browse and select the .xml file to import, then click **Open**. The new data replaces the previous file.

Chapter 4

POS Client

POS Client facilitates the daily operations of the restaurant. It allows you to do the following:

- Take dine-in, take-out, or delivery orders.
- Accept reservations.
- Customize table arrangements.
- Settle payments.
- Display employees' salary, tips and gratuity for the day.
- Display cash drawer or cash on hand information.
- Check employees in or out of duty.
- Refresh system data to be synchronized with BackOffice.
- Setup printer settings.
- Test connected hardware, such as cash drawers and pole displays.

4.1 Opening POS Client


To open POS Client, do one of the following:

- Double-click the **POS Client** icon on the desktop.
- Click **Start > All Programs > MERCURY POS for Restaurants > POS Client**.

4.1.1 Running POS Client for the First Time

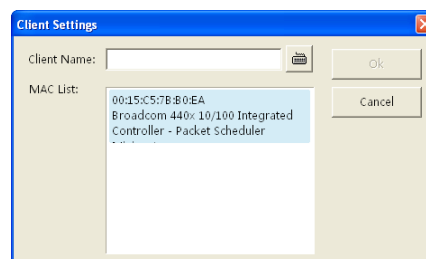
When POS Client is activated for the first time, it registers with the POS Server, and the POS Server acquires the MAC address of the POS Client station. This MAC address is used to identify the POS station in Mercury⁺.

1. Enter desired name for the POS Client station on the **Client name** box.

To enter name, click  to display the on-screen keyboard. See “On-Screen Keyboard” on page 131 for instructions on using the on-screen keyboard.

NOTE: It is recommended to name each client station according to its function (e.g. Main, Bar, Patio, etc.).

2. Click **OK**.



4.1.2 Login

Depending on the mode set in BackOffice, a login password may be required to open POS Client or access any of the functions. See “POS Stations” on page 54.

- If the mode is set to **Special Mode**, once you run POS Client, the on-screen keypad appears. Enter the login password to access POS Client.
- If the mode is set to **Share Mode**, the POS Client main screen is automatically displayed. However, once you click a function, the on-screen keypad appears. Enter the login password to access the function.

Tap the keys on the on-screen keypad to enter password, then tap **Enter**. See “On-Screen Keypad” on page 131 for more instructions on using the on-screen keypad.














4.2 Screen Overview

4.2.1 The Main Screen



No	Item	Description
1	Function Menu	Click an item to access the function.

No	Item	Description
	Settle	Access this function to settle order payments, cancel orders, refund cash, or search orders.  See "Payments" on page 98.
	Delivery	Access this function to take orders for delivery, assign delivery personnel, track deliveries and settle payments.  See "Delivery Orders" on page 83.
	Take Out	Access this function to take orders for take-out or change take-out orders to delivery.  See "Take-Out Orders" on page 79.
	Dine In	Access this function to assign seats to dine-in customers, take orders, track served or unserved dishes, and manage tables.  See "Dine-In Orders" on page 74.
	Hostess	Access this function to manage table reservations and customers waiting to be seated.  See "Reservations and Wait List" on page 108.
	Bar	Access this function to take bar orders and manage bar tables or floating customers.  See "Bar Orders" on page 77.
	Staff Info	Access this function to display employee information, such as hours worked, total salary, tips, or gratuity for the day, amount of cash on hand or in the assigned cash drawer and view and transfer cash between cash drawers.
	System	Access this function to refresh the system data, set hardware settings, switch to Training / Work mode, and exit the application.  See "Setting Up POS Client" on page 72 for setting the hardware.
2	BackOffice	Click to access BackOffice.  See "BackOffice" on page 22.
3	Calculator	Click to use the Calculator.
4	Mode	Displays the current mode.  See "Login Mode" on page 54 and "Login" on page 70.
5	Employee Icon	Click for employee to login or logout in POS Client or check in or out of work.  See "Login" on page 70 or "Check In or Check Out" on page 116.
6	Current User	Displays the current logged in user. If POS Client is set to Share Mode , N/A appears here.
7	Time	Displays the system time.

No	Item	Description
8	Message board	On the main page, displays promotional text or images.  To add or modify text or images, see “Message Board” on page 65.

4.3 Setting Up POS Client

4.3.1 Refreshing System Data


It is recommended to refresh the system data to synchronize the POS Client with changes made in BackOffice.

To do this, click  **System** > **Refresh System Data**.



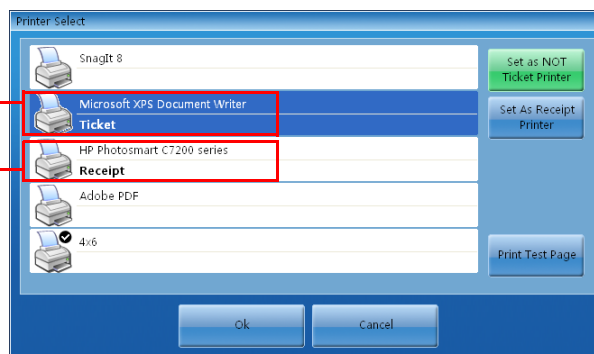
4.3.2 Setting the Printers

POS Client requires two separate printers to print tickets and receipts.

1. Click  **System** > **System Settings** > **Printer Settings**.
2. The screen displays a list of installed printers.

Set as the ticket printer.

Set as the receipt printer.



3. Select a ticket printer, then click **Set as Ticket Printer**.
NOTE: The button changes into Set as NOT Ticket Printer.
4. Select a receipt printer, then click **Set as Receipt Printer**.
NOTE: The button changes into Set as NOT Receipt Printer.
5. If necessary, click the **Print Test Page** button to print a test page.
6. Click **Ok**.

Modifying the Set Printer


To change the printer, do the following:

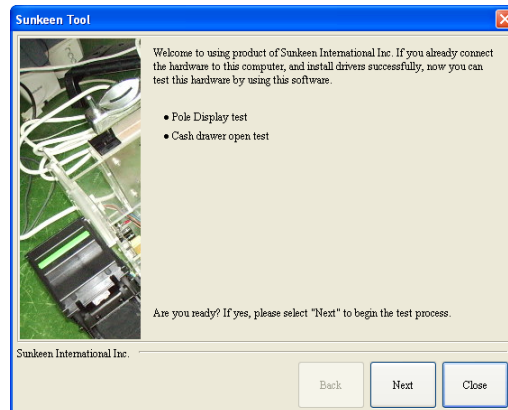
1. Select the current printer.
2. Click **Set as NOT Ticket/Receipt Printer**.
3. Select the new printer.

4. Click **Set as Ticket/Receipt Printer**.
5. Click **Ok**.

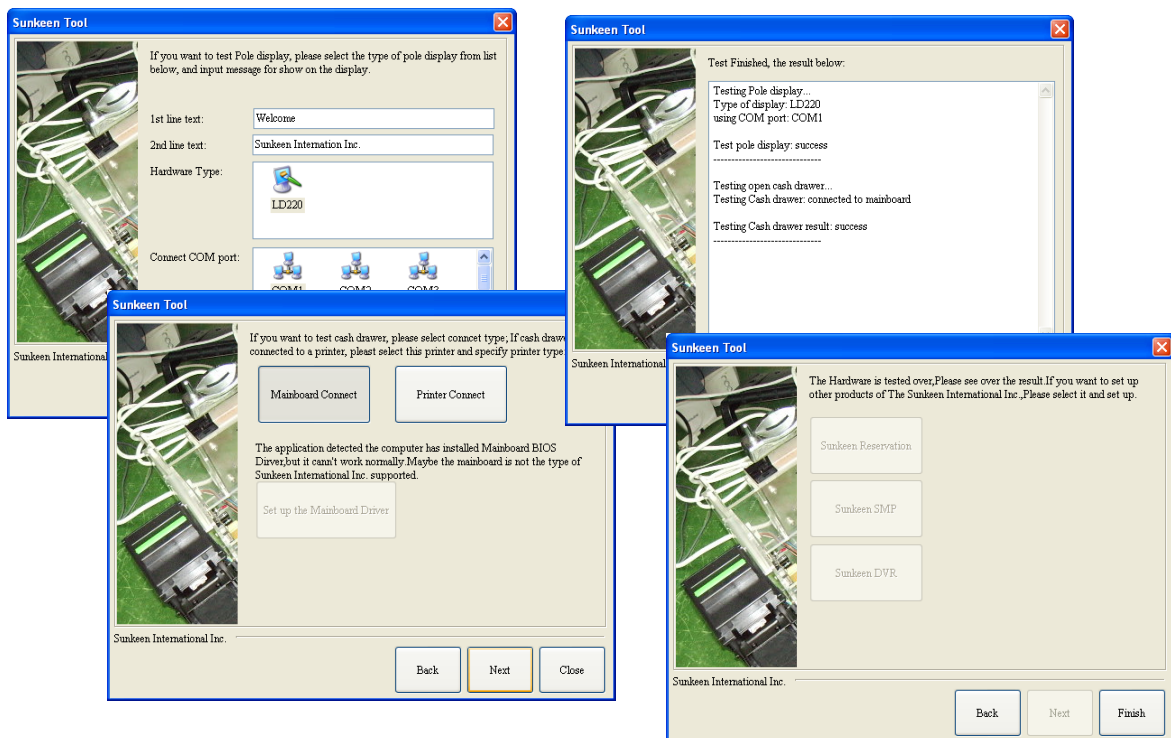
4.3.3 Testing the Hardware

POS Client allows you to test connected hardware, such as cash drawers and pole displays, to ensure proper operation.

1. Click  **System** > **System Settings** > **Hardware Test**.
2. The testing wizard appears. Click **Next** to continue.



3. Follow the on-screen instructions to test your hardware.



4. When done, click **Finish**.

4.4 Dine-In Orders

4.4.1 Viewing Dine-In Orders

Click  to view Dine-in orders.

Dine-in orders can be viewed by either of the following:

- **Table View** — The default view. Tables are displayed on screen and used mainly to take new orders. From this screen, you can do any the following:
 - To take new orders, click **New Order**. See “Taking Dine-In Orders” on page 75.
 - To view an existing order, click an occupied table to view the Order screen.
 - To switch to Order List screen, click **Switch to Order List**.
 - To move customers from one table to another, click **Seat to Seat**. See “Changing Tables” on page 76.
 - To add more tables, click **Add Temp Table**. See “Adding Template Tables” on page 76.
 - To combine tables, click **Combine Table**. See “Combining Tables” on page 76.
 - To close the screen, click **Done**.
- **Order List** — Orders are displayed on screen and used mainly to view details of existing orders. From this screen, you can do any the following:
 - To view order details, click an order to view the Order screen.
 - To switch to Table View screen, click **Switch to Table View**.
 - To uncombine orders, click **Uncombine Order**. See “Uncombining Orders” on page 95.
 - To combine orders, click **Combine Order**. See “Combining Orders” on page 94.
 - To split orders, click **Split Order**. See “Splitting Orders” on page 95.
 - To close the screen, click **Done**.

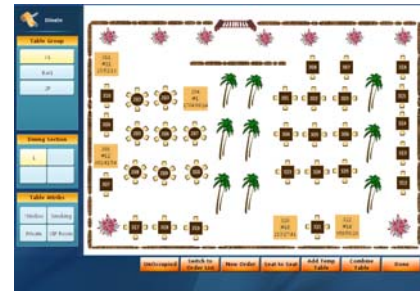


Table View screen




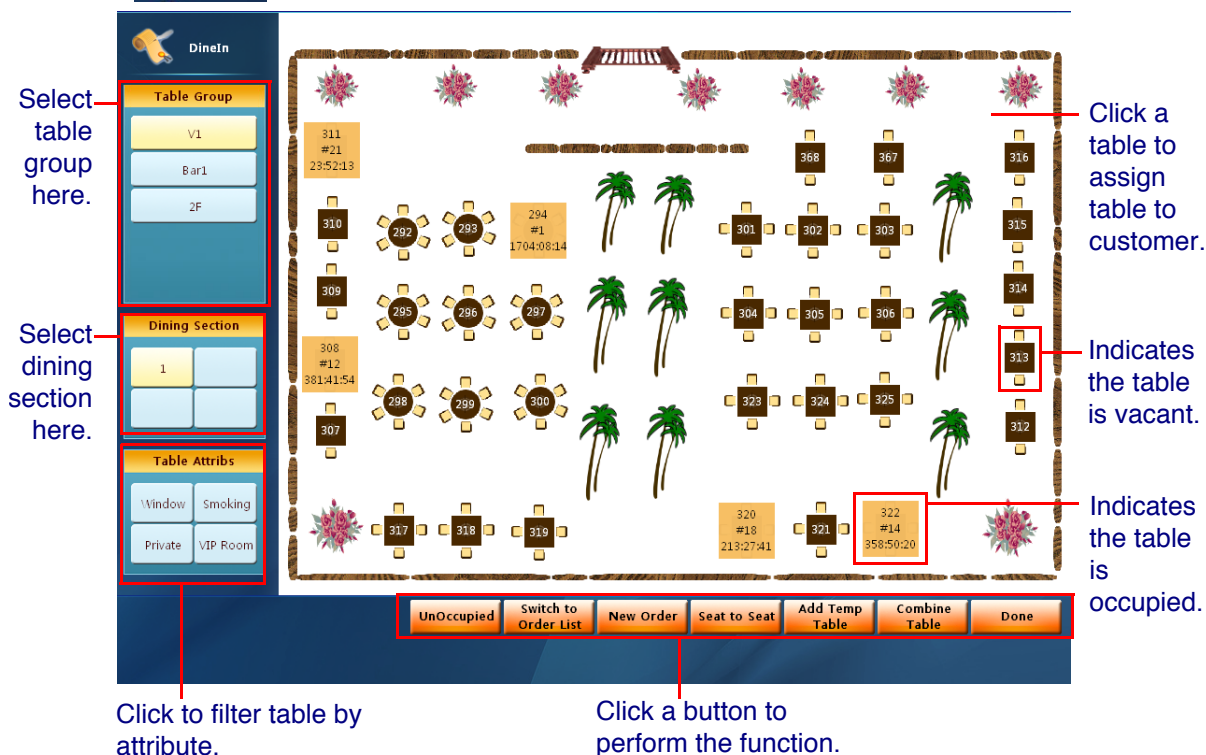
Order List screen



Order screen
(see page 75)

4.4.2 Taking Dine-In Orders

1. Click . By default, the Table View screen appears.



2. Click a vacant table to assign seat to the customer.
NOTE: To select tables from other floors, click a table group button. The table view screen changes to display the floor layout of the selected table group. The table group buttons vary depending on the groups created in BackOffice, see “Designing the Table Arrangement” on page 42.
NOTE: To manage tables, see “Managing Dine-In Tables” on page 76.
3. Enter the number of guests for seating. The Order screen appears.
NOTE: See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
4. Proceed with the ordering process. See “Ordering” on page 88.
 - To specify the guest’s preference for a particular menu item, see “Selecting Choices” on page 90.
 - To set the course time of menu items, see “Setting the Course Time” on page 91.
 - To send ordered items to the kitchen, see “Sending Menu Items to the Kitchen” on page 93.
 - To assign the ordered menu item to another guest on the table, see “Moving Items to Another Guests” on page 92.
 - To mark a menu item as served, see “Serving Menu Items” on page 92.
 - To take-out ordered items, see “Diners Ordering Take Out” on page 93.


4.4.3 Canceling Ordered Items

See “Canceling Menu Items” on page 92.

4.4.4 Managing Dine-In Tables


Changing Tables

After ordering, customers may want to move from one table to another. To do this, use the Seat to Seat function.

1. Click  .
2. Click **Seat to Seat** on the bottom of the screen.
3. Click the table to move. The table is marked with surrounding dots.
4. Click **Done**.
5. Click a vacant table.
6. Click **Done**.

Combining Tables

Use the Combine Tables function when a group of customers exceed the seating at a particular table.


1. Click  .
2. Click **Combine Table** on the bottom of the screen.
3. Click the host table. The table is marked with surrounding dots.
4. Click **Done**.
5. Click a vacant table you want to combine with the host table. Select additional tables if necessary.
6. Click **Done**. The order numbers are displayed on the host table and the guest table(s).

All orders or modifications have to be made from the host table. The guest table(s) are not accessible for orders. Once the bill is settled, the guest table(s) will return to normal tables.

NOTE: Before confirming any table combination, make sure the table combinations are correct, as the system will not release the guest table(s) until the host table's order has been settled.

Adding Template Tables

During high volume periods, the system allows you to add additional tables.

1. Click  .
2. Click **Add Temp Table** on the bottom of the screen.
3. Click on a free space on screen to place the table.
4. Click **Done**.
5. Enter the name of the table. See “On-Screen Keyboard” on page 131 for instructions on using the on-screen keyboard.


6. Enter the number of customers for seating. See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
7. A new order number will be created. Begin the ordering process. See steps 4 to 6 of “Taking Dine-In Orders” on page 75.

Template tables are automatically removed once the bill is settled.

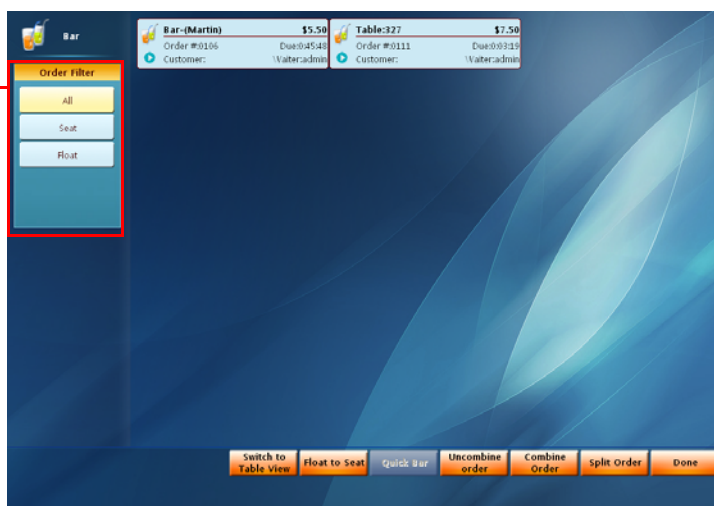
NOTE: In the event that two different employees added two or more template tables on the same location, the tables may become linked with one another and may cause system conflict. Should this happen, click **Switch to Order List** to process the order.

4.5 Bar Orders

4.5.1 Viewing Bar Orders

Click  to view the Bar Order List screen.

Click a button to filter the bar order list.




From this screen, you can do any of the following:

- To view the details of an order, click the order.
- To create a floating bar order, click **Quick Bar**. A floating order has no assigned seat, usually applies when a guest is waiting for a vacant table or the guest simply mingles around. See “Creating a Floating Bar Order” on page 78.
- To create a seated bar order, click **Switch to Table View**.
- To move a floating order to a seated order, click **Float to Seat**. See “Moving From Float to Seat or Seat to Float” on page 78.
- To uncombine orders, click **Uncombine order**. See “Uncombining Orders” on page 95
- To combine orders, click **Combine order**. See “Combining Orders” on page 94.
- To split orders, click **Split Order**. See “Splitting Orders” on page 95.


4.5.2 Taking Bar Orders

Bar orders can be seated or floating. A seated order has an assigned seat at the bar, while a floating order has no assigned seat.

Creating a Floating Bar Order

1. Click .
2. Click **Quick Bar**.
3. Select the menu items to order. See “Ordering” on page 88.
4. Click one of the following:
 - **Settle Now** — To settle the bill right after ordering. See “Settle Payments” on page 99 for payment procedures. After settling the bill, the order is no longer displayed in the Bar Order List screen.
 - **Record this Order** — To tag and track the order. Usually applies when the guest is waiting for a vacant table.
 - a. Enter a name or number to track the order. See “On-Screen Keyboard” on page 131 for instructions on using the on-screen keyboard.
 The order is displayed in the Bar Order List screen.
2. Click **Done**.

Creating a Seated Bar Order

1. Click .
2. Click **Switch to Table View**.
3. Follow the procedures from step 2 of “Taking Dine-In Orders” on page 75 to complete the order.

4.5.3 Moving From Float to Seat or Seat to Float

Float to Seat

To seat a guest that is of floating status, do the following:

1. On the Bar Order List screen, click **Float to Seat**.
2. Select the order.
3. Click **Done**. The table view for the bar appears.
4. Click a vacant table to seat the guest at the bar.

NOTE: To seat the guest on the dine-in table, change the table view to view dine-in tables, and click a vacant table.
5. Click **Done**.

Seat to Float

To move a seated guest to floating, do the following:

1. On the Bar Order List screen, click **Switch to Table View**.
2. Click **Seat to Float**.
3. Select the table of the guest that you want to change to floating.


- 4. Click **Done**.
- 5. Click one of the following:
 - **Settle Now** — To settle the bill right away. See “Settle Payments” on page 99 for payment procedures. After settling the bill, the order is no longer displayed in the Bar Order List screen.
 - **Record this Order** — To tag and track the order and settle the bill at a later time.
 - a. Enter a name or number to track the order. See “On-Screen Keyboard” on page 131 for instructions on using the on-screen keyboard.
The order is displayed in the Bar Order List screen.
- 2. Click **Done** to close the screen.

4.5.4 Transferring a Bar Order to Dine-In

To transfer a bar order to dine-in, follow the steps in “Changing Tables” on page 76.

4.6 Take-Out Orders

4.6.1 Viewing Take-Out Order Status

Click . The Order List screen displays all pending take-out orders.



Displays the order status.

Icon	Status
	Order is sent to the kitchen.
	Order is served. See page 81.
	Order is paid. See page 81.

From this screen, you can do any of the following:


- To view the details of an order, click the order.
- To create a new order, click **New Order**. See “Ordering” on page 88.
- To create a new order using Quick Service, click **Quick Service**. Quick Service allows you to take the order and settle the payment at the same time. See “Using Quick Service” on page 80.
- To search for an order, click **Search Order**. See “Searching Orders” on page 81.
- To cancel an order, click **Void Order**. See “Cancelling Orders” on page 97.
- To check out or settle payment of orders, click **Check Out**. See “Settling Take-Out Orders” on page 81.

- To change a take-out order to delivery, click **Change to Delivery**. See “Changing Take-Out to Delivery” on page 82.
- To combine orders, click **Combine Order**. See “Combining Orders” on page 94.
- To uncombine orders, click **Uncombine Order**. See “Uncombining Orders” on page 95.
- To split orders, click **Split Order**. See “Splitting Orders” on page 95.
- To close the Take-out Order List screen, click **Done**.

4.6.2 Taking Take-Out Orders

Using Quick Service

Quick Service allows you to take orders and settle the payments right away.


1. Click  **TakeOut**.
2. Click **Quick Service**.
3. Select the cash drawer or the cashier receiving the payment.
4. Select the items to order. See “Ordering” on page 88 for instructions on using the Order screen.




5. If necessary, click **Surcharge**, **Discount**, **Gratuity**, **VIP Discount**, or **Tips** to apply other charges or discounts. See “Giving Discounts” on page 103 or “Imposing Other Charges” on page 103 for more information.
6. Select the payment method on the **Payment Type** box.
7. Enter the amount to be paid. See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
The amount to be paid is displayed on the **Paid amount** box.
8. Click **Done** to complete order and payment.
9. The system asks whether to print tickets, click **Yes** to print.

NOTE: On the Take Out Order List screen, clicking **New Order** also takes you to the ordering process. See “Ordering” on page 88 for instructions on using the Order screen.

4.6.3 Searching Orders




1. Click  .
2. Click **Search Order**.
3. Enter the Order number. See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
The order information is displayed on the Order screen.

4.6.4 Serving Take-Out Orders

1. Click  .
2. Click **Dishes served**.
3. Select the order to serve.

If the order is not yet paid, the status changes . If the order is already settled, the order is deleted from the Take-Out Order List screen.

4.6.5 Changing Take-Out to Delivery

1. Click  .
2. Click **Change to Delivery**.
3. Select the take-out order to change to delivery.
4. Enter the delivery information.
 - Click  or  to open the on-screen keypad or keyboard and enter the phone number and other delivery information.
 - Click **OK** when done.


The order is moved to the Delivery Order List screen and no longer shown on the Take-out Order List screen.

4.6.6 Settling Take-Out Orders

You can settle a take-out order by either of the following:

- **Check Out** — Only applicable if the logged in employee has Check Out rights. See “Recording Employee Information” on page 36.
- **Settle** — See “Settle Payments” on page 99.

Checking Out Take-Out Orders

1. Click  .
2. Click **Check Out**.
3. Select the order to check out.
4. Select the cash drawer or the cashier receiving the payment.
5. If necessary, click **Surcharge**, **Discount**, **Gratuity**, **VIP Discount**, or **Tips** to apply other charges or discounts. See “Giving Discounts” on page 103 or “Imposing Other Charges” on page 103 for more information.

6. Select the payment method on the **Payment Type** box.




TIP: When paying in cash, click **Fast Cash** to settle the bill in cash right away and skip all the other steps.

7. Enter the amount to be paid. See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.




The amount to be paid is displayed on the **Paid amount** box.

8. Click **Done** to complete order and payment.
9. The system asks whether to print tickets, click **Yes** to print.

4.6.7 Changing Take-Out Items to Dine-In

1. Click  .
2. Select the order to view details.
3. Select a take-out menu item to change to dine-in.
4. Click **Switch to Dine In**.
 - The take-out icon  changes to guest icon .
5. Click **Done** to close the screen.


4.6.8 Changing Take-Out to Delivery

1. Click .
2. Click **Change to Delivery**.
3. Select the take-out order to change to delivery.
4. Enter the delivery information.
 - Click  or  to open the on-screen keypad or keyboard and enter the phone number and other delivery information.
 - Click **OK** when done.

The order is moved to the Delivery Order List screen and no longer shown on the Take-out Order List screen.

4.7 Delivery Orders

4.7.1 Viewing Delivery Orders

Click  **Delivery** to view the Delivery Order List screen.

Click a button to filter the order list screen.

Icon	Status
	Order is sent to the kitchen.
	Order is on the road for delivery. See page 85.
	Order is paid. See page 86.

NOTE: Available buttons vary depending on the rights of the logged in employee. Red buttons are immediate options for the current function. Orange buttons perform other tasks. Grayed buttons are not available for the current function.

From this screen, you can do any of the following:


- To view the order details, click an order. However, if the order is already settled or on the road for delivery, click **Search Order**, then enter the order number to view the order details.
- To cancel an order, click **Void Order**. See “Canceling Delivery Orders” on page 87.
- To settle payments, click **Check Out**. See “Checking Out Delivery Orders” on page 86.
- To change delivery to take-out, click **Change To TakeOut**. See “Changing Delivery to Take-Out” on page 87.
- To send orders for delivery, click **Departure**. See “Sending the Deliveryman for Delivery” on page 85.
- To report a delivery, click **Arrive**. See “Coming Back From a Delivery” on page 85.
- To take new delivery orders, click **New Order**. See “Taking Delivery Orders” on page 84.
- To print order information for each deliveryman, click **Print Order**. See “Printing Order for the Deliveryman” on page 87.
- To print unsettled order information for each deliveryman, click **Print Unsettled Order**. See “Printing Unsettled Order” on page 87.
- To uncombine orders, see “Uncombining Orders” on page 95.
- To combine orders, see “Combining Orders” on page 94.
- To split orders, see “Splitting Orders” on page 95.
- To check the delivery route using Google Maps, click **Map**.

- To settle payments through the deliveryman, click **Check Out Driver**. See “Receiving Payments Via Deliveryman” on page 86.
- To close the screen, click **Done**.



4.7.2 Taking Delivery Orders

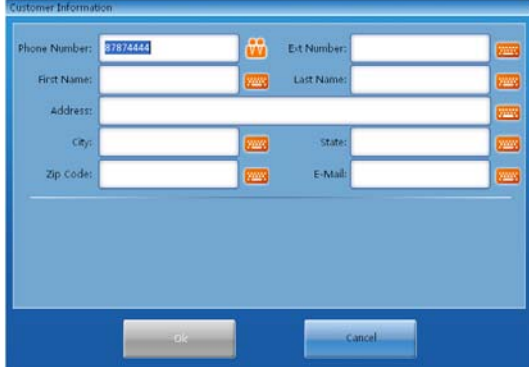
Orders From New Customers

When taking orders for delivery, the customer’s phone number and order history are recorded in the database.



1. Click  **Delivery**.
2. Click **New Order**.
3. Enter the customer’s phone number. See “On-Screen Keypad” on page 131 for using the on-screen keypad.
4. Enter the customer’s delivery information.



NOTE: Do not leave the **First Name** and the **Address** blank.


- Click  or  to open the on-screen keypad or keyboard to enter the necessary details.
 - Click **OK** when done.
5. Select the menu items to order. See “Ordering” on page 88 for the ordering process.
 6. Click **Done**.
 7. The system asks whether to print tickets or receipts, click **Yes** to print.







Customer Information

Phone Number:  Ext Number: 


First Name:  Last Name: 


Address: 

City:  State: 

Zip Code:  E-Mail: 

Orders From Regular Customers

1. Click  **Delivery**.
2. Click **New Order**.
3. Enter the customer’s phone number. See “On-Screen Keypad” on page 131 for using the on-screen keypad.
4. The list of customer names for the entered phone number appears. Select the name of the customer.
5. The Customer Information screen appears. Check the customer’s delivery information.

List of existing customer names.
Click to select a name.
Click  to add more names.



Customer Information


Phone Number:  Ext Number: 



First Name:  Last Name: 

Address: 

City:  State: 



Zip Code:  E-Mail: 

List of delivery charges.
Click  to add other delivery charges.

- Click  or  to open the on-screen keypad or keyboard and modify the necessary details.
 - Click **OK** when done.
6. Select the menu items to order. See “Ordering” on page 88 for the ordering process.
 7. Click **Done**.
 8. The system asks whether to print tickets or receipts, click **Yes** to print.

4.7.3 Sending the Deliveryman for Delivery

NOTE: The deliveryman should be logged in to access this function.

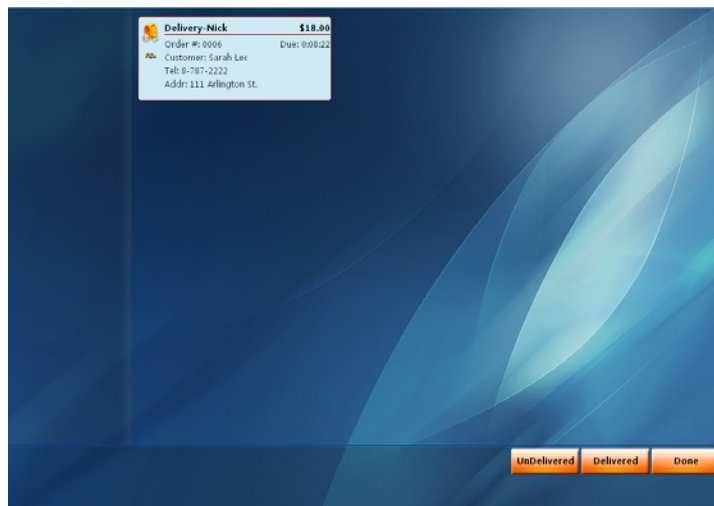
1. Click  Delivery .
2. Click **Departure**.
3. Select the order to deliver. The selected order is highlighted in blue.
NOTE: More than one order can be selected for delivery.
4. Click **Done**. The order status of the selected order becomes .

4.7.4 Coming Back From a Delivery

When the deliveryman comes in after a delivery, he should report the status of the orders.

NOTE: The deliveryman should be logged in to access this function.

1. Click  Delivery .
2. Click **Arrive**.



3. Click one of the following:
 - **Delivered** — If the order is delivered.
 - **Undelivered** — If the order is undelivered.
4. Select the order.
5. If the order is delivered, click **Done**, then skip to step 4.
If undelivered, do the following:
 - a. Specify the reason for failing to deliver the order.

- Select a predefined reason from the left, then click **Copy to Right**.
 - To enter other reasons, click **Input**. See “On-Screen Keyboard” on page 131 for using the on-screen keyboard.
 - To delete the reason, click **Clear**.
- b. Click **Ok**.
 - c. A confirmation message appears. Click **Yes** to confirm.
4. Click **Done** to close the screen.

4.7.5 Settling Delivery Orders

You can settle a delivery order by either of the following:


- **Check Out** — Applicable when customers come into the restaurant to settle the bill personally or when a deliveryman has Check Out rights.
- **Check Out Driver** — In most cases, a delivery is paid through the deliveryman, then the deliveryman turns over the payment to the cashier. See “Receiving Payments Via Deliveryman” on page 86.

Checking Out Delivery Orders

The check out delivery function may be used in the following cases:

- When customers come into the restaurant, order for delivery and pay for the bill in advance.
- If a deliveryman is given Check Out rights and act as a physical cash drawer to track the cash on hand during a delivery.

NOTE: Only applicable if the logged in employee has Check Out rights. See “Recording Employee Information” on page 36.


1. Click  **Delivery**.
2. Click **Check Out**.
3. Select the order to check out.
4. Select the cash drawer or the cashier receiving the payment.
5. If necessary, click **Surcharge**, **Discount**, **Gratuity**, **VIP Discount**, or **Tips** to apply other charges or discounts. See “Giving Discounts” on page 103 or “Imposing Other Charges” on page 103 for more information.
6. Select the payment method on the **Payment Type** box.

TIP: When paying in cash, click **Fast Cash** to settle the bill in cash right away and skip all the other steps.
7. Enter the amount to be paid. See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
The amount to be paid is displayed on the **Paid amount** box.
8. Click **Done** to complete the payment.

Receiving Payments Via Deliveryman


When the deliveryman comes in after a delivery, he should hand in all payments to the cashier to settle and close the orders he delivered.

NOTE: The employee receiving the payment must have Check Out rights to access this function. See “Recording Employee Information” on page 36


1. Click  **Delivery**.
2. Click **Check Out Driver**.
3. Select the deliveryman.
4. Select the cash drawer or cashier receiving the payment.
5. Select the order.
6. Select the payment method on the **Payment Type** box.
TIP: When paying in cash, click **Fast Cash** to settle the bill in cash right away and skip all the other steps.
7. Enter the amount to be paid. See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
The amount to be paid is displayed on the **Paid amount** box.
8. Click **Done**.
9. Repeat steps 5 to 8 to settle the payment of other orders.
10. Click **Done**.

4.7.6 Printing Delivery Orders

Printing Order for the Deliveryman

1. Click  **Delivery**.
2. Click **Print Order**.
3. Select the deliveryman. The order details assigned to the deliveryman is printed.


Printing Unsettled Order

1. Click  **Delivery**.
2. Click **Print Unsettled Order**.
3. Select the deliveryman. All unsettled order assigned to the deliveryman is printed.

4.7.7 Canceling Delivery Orders

See “Cancelling Orders” on page 97.

4.7.8 Changing Delivery to Take-Out

1. Click  **Delivery**.
2. Click **Change to TakeOut**.
3. Select the order to change to take-out.
4. A confirmation message appears, click **Ok** to confirm.

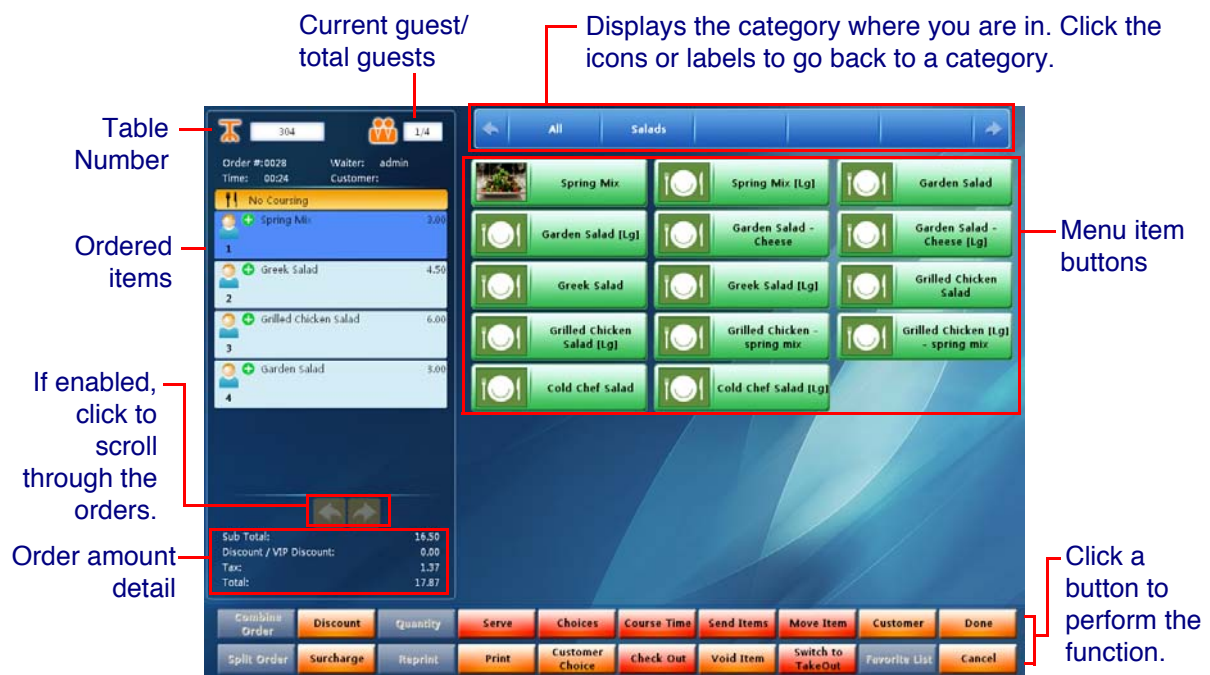
4.8 Ordering

When **New Order** is clicked from the Dine-In, Take-Out, Bar, or Delivery function, the Order screen appears.

Order Screen



1. Click a menu group button.
2. Click a menu item button to order.



NOTE: Available buttons may vary depending on the current function and the rights of the logged in employee. Red buttons are immediate options for the current function. Orange buttons perform other tasks. Grayed buttons are not available for the current function.

The selected item is shown on the left panel. See picture on the right.

NOTE: Some menu items require choices to be specified, in this case, the Choice screen automatically appears. See “Selecting Choices” on page 90.

- Repeat step 5 to order for other guests seated on the table.

From this point, you can select an ordered item and do any of the following:

- Click **Choice** to specify the guest’s preference for a particular menu item. See “Selecting Choices” on page 90.
- Click **Course Time** to set the course time. See “Setting the Course Time” on page 91.
- Click **Move Item** to move the item to other guests on the table. See “Moving Items to Another Guests” on page 92.
- Click **Void Item** to cancel a menu item. See “Canceling Menu Items” on page 92.
- Click **Switch to Take Out** to take out the ordered item. See “Diners Ordering Take Out” on page 93.

- Click **Done** to complete ordering.

NOTE: All menu groups and menu items are created in BackOffice, see “Setting the Menu” on page 44.

Guest icon	Menu Item	Amount of item
1	Spring Mix	3.00
	Remove	
	NO Onions	0.00
	Salad Dressing	
	Thousand Island	0.00
2	Greek Salad	4.50
	Salad Dressing	
	French	0.00
3	Garden Salad - Cheese	4.00
	Salad Dressing	
	NO Dressing	0.00
4	Grilled Chicken Salad	6.00
	Salad Dressing	
	Thousand Island	0.00
1	Chocolate Chip Cookie	1.25

Status Icon

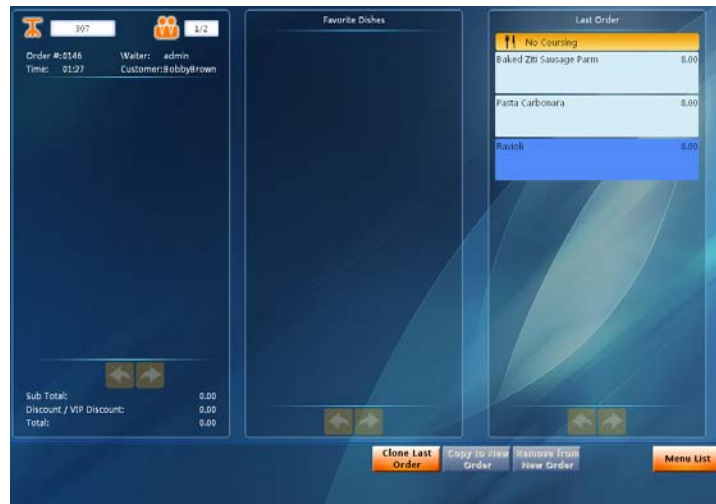
Icon	Description
	Menu item has no coursing and will be sent to the kitchen right away.
	Menu item is served. See page 92.
	Course time is set to Manual. See page 91.
	Course time is set to a particular time. Therefore, the menu item is on Auto Hold and will be sent to the kitchen at the designated time. See page 91.
	Menu item is cancelled. See page 92.

4.8.1 Ordering Customer Favorites

You can order menu items based on a customer’s order history or from his/her last order.

- For Dine-In, Take-Out, or Bar order, click **Customer** on the Order screen. For Delivery, skip to step 3.
- Enter the customer’s phone number. See “On-Screen Keypad” on page 131 for using the on-screen keypad.
- The list of customer name for the entered phone number appears. Select the name of the customer.
- The Customer Information screen appears. Check the customer’s information.
 - To modify any information, click or to open the on-screen keypad or keyboard.
- Click **Ok** to close the Customer Information screen.

6. Click **Favorite List** to view the customer's order history.



7. Do any of the following:

- To order the same menu items as the last order, click **Clone Last Order**.
- To order a menu item from the last order, select the menu item from the Last Order panel, then click **Copy to New Order**.
- To remove an ordered item, select the menu item from the left panel, then click **Remove from New Order**.

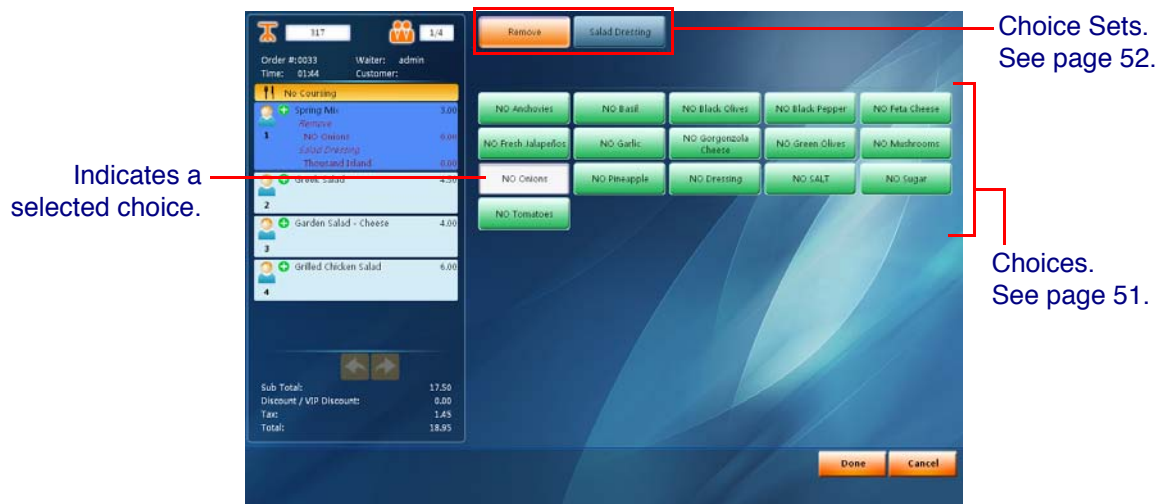
8. When done, click **Menu List** to go back to the Order screen.

4.8.2 Selecting Choices

Some menu items may need customers to specify other requirements or preferences. Once a menu item that requires choices is selected, such as when ordering pizza, the size of pizza must be specified. In some cases, specifying a particular choice is an option.

To select a choice, do the following:

1. On the Order screen, select the menu item that you want to add the choice for on the left panel.
2. Click **Choice** on the bottom of the screen.



NOTE:




- The Choices and the Choice Sets vary depending on the selected menu item.
 - For menu items without offered choices, the message “No choice to select” appears on screen, click **OK** to continue.
3. Click a Choice Set button to view choices under that set.
 4. Click a Choice button to select it. Repeat to select more choices.
 5. Click **Done**.

NOTE: Choices and Choice Sets are created and maintained in BackOffice, see “Choice” on page 51 and “Choice Sets” on page 52.

4.8.3 Setting the Course Time




Coursing is a system timer, which signals when to cook the menu item and serve the guest. Coursing is controlled from BackOffice (see “Creating Courses” on page 34), where you can make your own menu groups with coursing options accordingly.

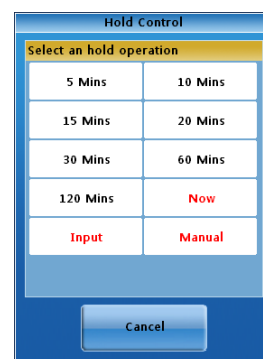
When a menu item is selected, the system indicates its coursing status as follows:

Icon	Description
	Menu item has no coursing, and will be sent to the kitchen when once Done is clicked.
	Menu item has Manual control coursing. The waiter/waitress has to signal the system to send the order to the kitchen by clicking Send Item .
	Menu item has Auto Coursing.

Modifying the Course Time

The course time of menu items can be modified individually using POS Client. To do this, follow the steps below:


1. On the Order screen, select the menu item that you want to set the course time for on the left panel.
2. Click **Course Time** on the bottom of the screen. A pop up window appears.
3. Click a time option, or:
 - To specify other time, click **Input**, then enter the time. The icon changes to .
 - To send the menu item to the kitchen immediately, click **Now**. The icon changes to .
 - To set to manual coursing, click **Manual**. The icon changes to .
4. Click **Done**.

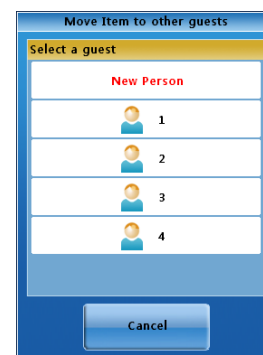


4.8.4 Moving Items to Another Guests

Mercury+ assigns numbers to guests on a table and sets the ordered menu items under each guest. This feature is useful to identify who orders what when serving the menu items.


When a selected menu item is assigned to the wrong guest, do the following to move the item:

1. On the Order screen, select the menu item, then click **Move Item** on the bottom of the screen. Or, double-click the guest icon .
2. Click the correct guest. To set the menu item to a different person, click **New Person**.
3. Click **Done**.



4.8.5 Serving Menu Items


To mark menu items as served, do the following:

1. On the Order screen, select the menu item on the left panel.
2. Click **Serve** on the bottom of the screen. The icon changes to .
3. Click **Done**.


4.8.6 Canceling Menu Items

Before cancelling a menu item, check its current order status.

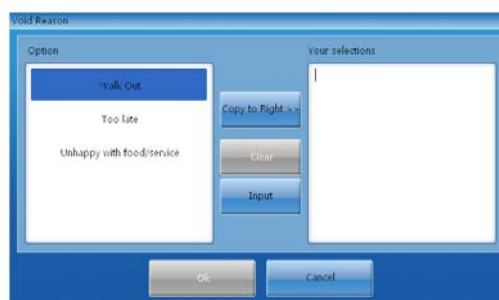
- For newly ordered items, where the order has not been confirmed by clicking **Done**:

On the Order screen, select the menu item on the left panel, then click **Void Item** on the bottom of the screen. The status icon changes to . Once you re-enter the order screen, the cancelled item is removed.

- For menu items that are already confirmed by clicking **Done**, have been sent to the kitchen, or are being held by the system within the hold time:
 - a. On the Order screen, select the menu item on the left panel, then click **Void Item** on the bottom of the screen.
 - b. Specify the reason for cancelling the order, do any of the following:
 - Select a predefined reason from the left, then click **Copy to Right**.
 - To enter other reasons, click **Input**. See “On-Screen Keyboard” on page 131 for using the on-screen keyboard.
 - To delete the reason, click **Clear**.
 - c. Click **Ok**.




The status icon changes to  and a cancellation report is printed out in the kitchen.

Once you re-enter the order screen, the cancelled item still appears on the order, but the item price is already deducted from the total price.



4.8.7 Diners Ordering Take Out



A dine-in guest may want to order take-out items.

1. On the Order screen, select the menu item on the left panel.
2. Click **Switch to Take Out** on the bottom of the screen.
 - The guest icon  changes to take-out icon .
 - The status icon changes to  manual coursing and the waiter/waitress has to manually send the menu item to the kitchen for preparation.
3. Click **Done**.

4.8.8 Sending Menu Items to the Kitchen

When a menu item is set to manual coursing, the waiter/waitress needs to manually send it to the kitchen.

1. On the Order screen, select the menu item on the left panel.
2. Click **Send Item** on the bottom of the screen.

The status icon changes from  to .
3. Click
4. **Done**.

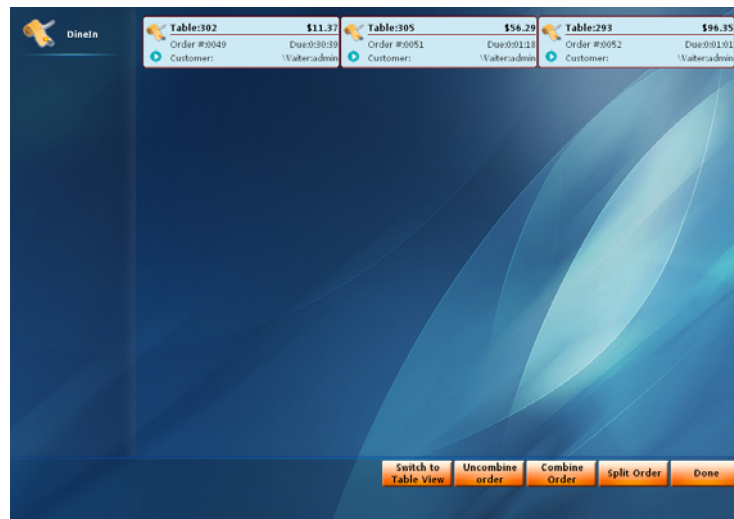
4.9 Managing Orders


The following functions cover Dine-In, Take-Out, Bar, and Delivery Orders.

4.9.1 Combining Orders

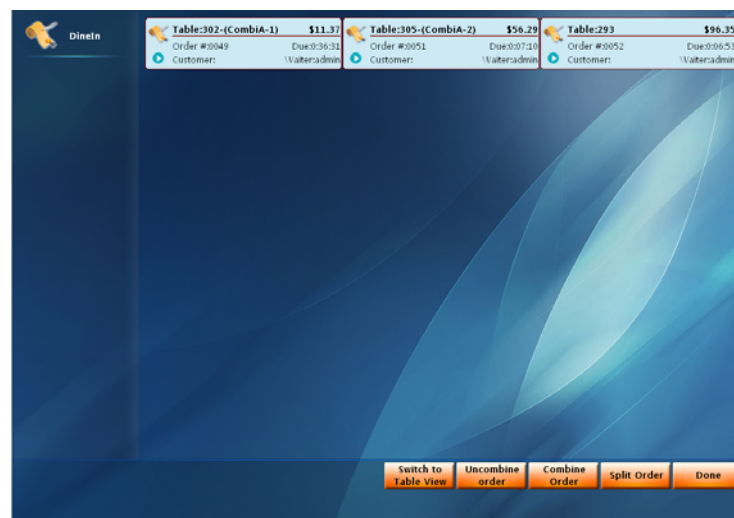
Use the Combine Order function to combine the bills of two or more separate orders.

1. On the Dine-In / Take-Out / Bar / Delivery Order List screen, click **Combine Order**.



2. Click the orders to combine, the selected orders are highlighted in blue.
NOTE: You can combine as many orders as you want. If an order is selected accidentally, click it again to remove the highlight.
3. Click **Done**.
4. Enter a new order number or name for the combined order.
 See "On-Screen Keyboard" on page 131 for instructions on using the on-screen keyboard.

The combined order is shown as below.

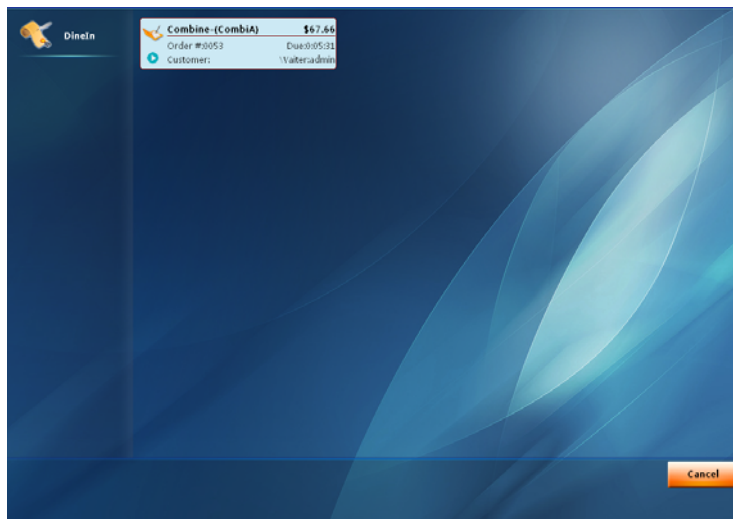


5. Click **Done** to close the screen.

4.9.2 Uncombining Orders

Do the following steps to uncombine the bills of combined orders.

1. On the Dine-In / Take-Out / Bar / Delivery Order List screen, click **Uncombine Order**. Combined orders are displayed on screen.

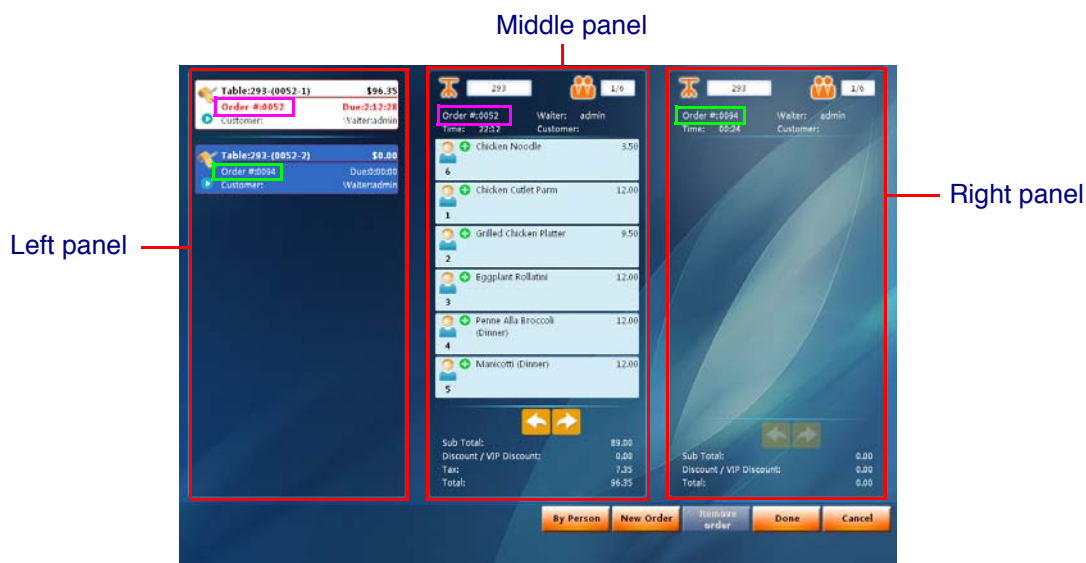


2. Click the order to uncombine.
3. A confirmation message appears, click **Ok** to confirm.
4. Click **Done** to close the screen.

4.9.3 Splitting Orders

Guests may request separate checks, use the Split Order function to do this.

1. From the Dine-In / Take-Out / Bar / Delivery Order List screen, click **Split Order**.
2. Click the order to split. The Split Order screen appears.



When orders are split, Mercury⁺ creates new order numbers for each new sub-order. However, the table number changes to [Table number-(original order number-N)].

For example, the table number of the original order is 293, and the original order number is 0052. After splitting the order, The table number of the original order becomes 293-(0052-1). The next sub-order becomes 293-(0052-2) and so on.

The Split Order screen is divided into three panels:

- **Left panel** — Displays the sub-order numbers and details.
- **Middle panel** — Displays all the menu items ordered. After orders are split, the remaining items in this panel is charged to the Table ID-(original order-1).
- **Right panel** — Displays the menu items of a sub-order. Menu items displayed here changes depending on the selected order number from the left panel.

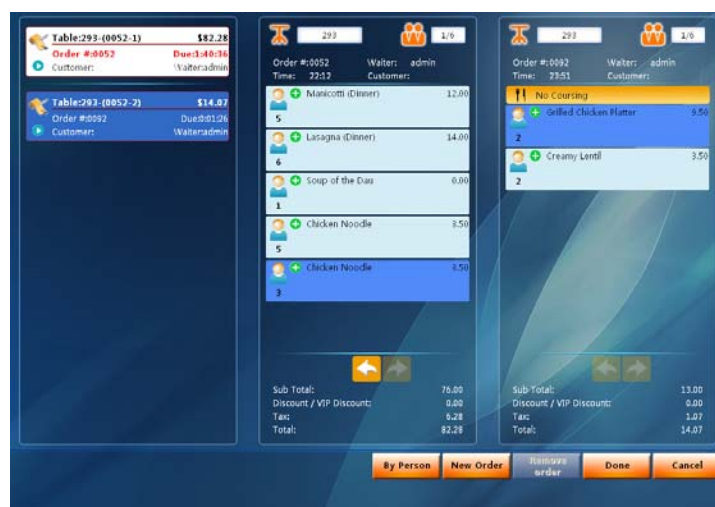
Splitting Orders Automatically

Orders can be split automatically for each guest on the table, having each guest pay for their own ordered items. To split orders by person, click **By Person**.



Splitting Orders Manually

1. Select the order number from the left panel.



2. Select the menu item that you want to separate from the middle panel, then click an empty space on the right panel to move that menu item. Repeat to add more menu items to the same order number.

NOTE: If a menu item is moved accidentally, select that item from the right panel, then click on an empty space on the middle panel to move it back to the original order.

By default, Mercury⁺ splits the original order into two.

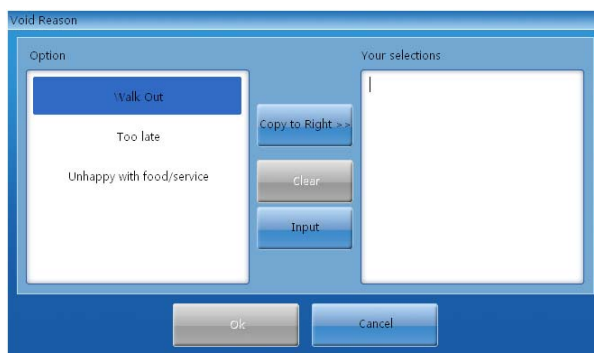
- To create another sub-order, click **New Order**. Do the above procedures in splitting orders manually to allocate menu items to the new order.
- To delete a sub-order, select the order number from the left panel, then click **Remove order**.

3. When finished, click **Done**.

4.9.4 Cancelling Orders

Do the following steps to cancel orders.


1. From the Settle / Delivery / Take-Out Order List screen, click **Void Order**.
2. Select the order to cancel.
3. Specify the reason for cancelling the order, do any of the following:
 - Select a predefined reason from the left, then click **Copy to Right**.
 - To enter other reasons, click **Input**. See “On-Screen Keyboard” on page 131 for using the on-screen keyboard.
 - To delete the reason, click **Clear**.

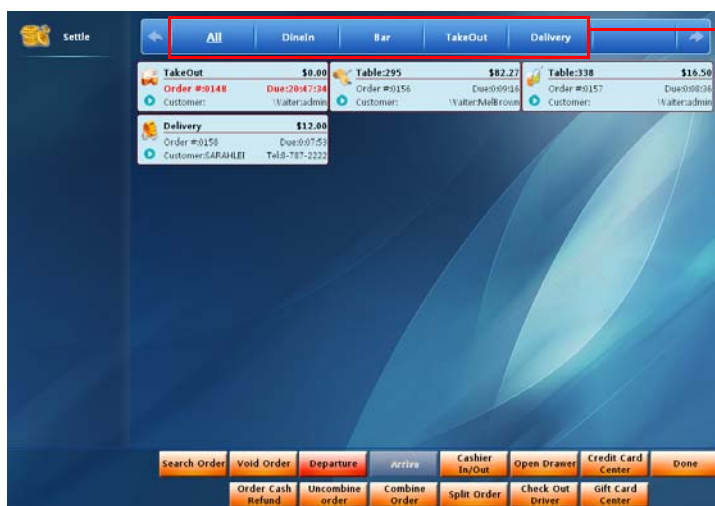


4. Click **Ok**. A cancellation report is printed out in the kitchen and the order is deleted from the Order List screen.

4.10 Payments

NOTE: The Settle function is available only on POS stations where a cash drawer is connected and a cashier is logged in.

Click  **Settle** to view all unclosed orders and handle settlement process.



Click a category to filter the order list.

NOTE: Available buttons vary depending on the rights of the logged in employee. Red buttons are immediate options for the current function. Orange buttons perform other tasks. Grayed buttons are not available for the current function.

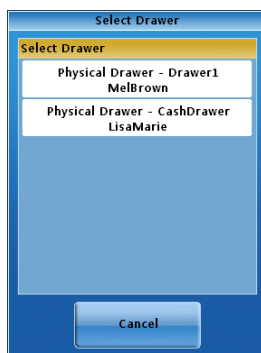
From this screen, you can do any of the following:

- To settle payments, click an order. See “Settle Payments” on page 99.
- To view the order details, click **Search Order**.
- To cancel an order, click **Void Order**. See “Cancelling Orders” on page 97.
- To send orders for delivery, click **Departure**. See “Sending the Deliveryman for Delivery” on page 85.
- To report a delivery, click **Arrive**. See “Coming Back From a Delivery” on page 85.
- To log a cashier in or out, click **Cashier In/Out**. See “Cashier In” on page 101 or “Cashier Out” on page 102.
- To open a cash drawer, click **Open Drawer**. See “Opening the Cash Drawer” on page 104.
- To process credit card operations, click **Credit Card Center**. See “Refunding Credit Card Payments” on page 106.
- To refund payment of orders, click **Order Cash Refund**. See “Refunding Cash Payments” on page 105.
- To uncombine orders, see “Uncombining Orders” on page 95.
- To combine orders, see “Combining Orders” on page 94.
- To split orders, see “Splitting Orders” on page 95.
- To settle payments through the deliveryman, click **Check Out Driver**. See “Receiving Payments Via Deliveryman” on page 86.
- To process gift card operations, click **Gift Card Center**. See “Checking Gift Card Balance” on page 107.

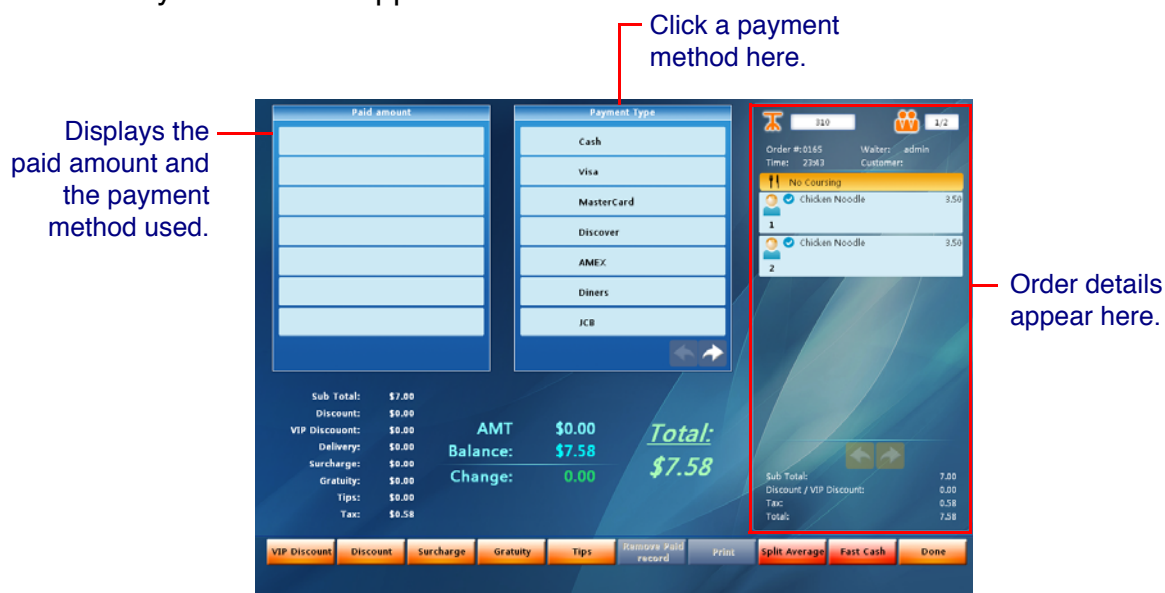
4.10.1 Settle Payments

NOTE: Before settling any payments, the cashier must log as Cashier In. See “Cashier In” on page 101.

1. Select the cash drawer or the cashier receiving the payment.



2. The Payment screen appears.



- If necessary, click **VIP Discount**, **Discount**, **Surcharge**, **Gratuity**, or **Tips** to apply discounts or other charges, see “Giving Discounts” on page 103 or “Imposing Other Charges” on page 103.
 - To split the bill equally among the number of guests, click **Split Average**, see “Splitting the Bill Equally” on page 100.
3. Select the payment method on the **Payment Type** box.
TIP: When paying in cash, click **Fast Cash** to settle the bill in cash right away and skip all the other steps.
 4. Enter the amount to be paid. See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
 - If paying in check, enter the check number.
 - If paying in gift card, swipe the card or manually input the card number.
 The amount to be paid is displayed on the **Paid amount** box.
 5. Click **Done** to print the receipt and complete the payment.

Modifying a Paid Amount

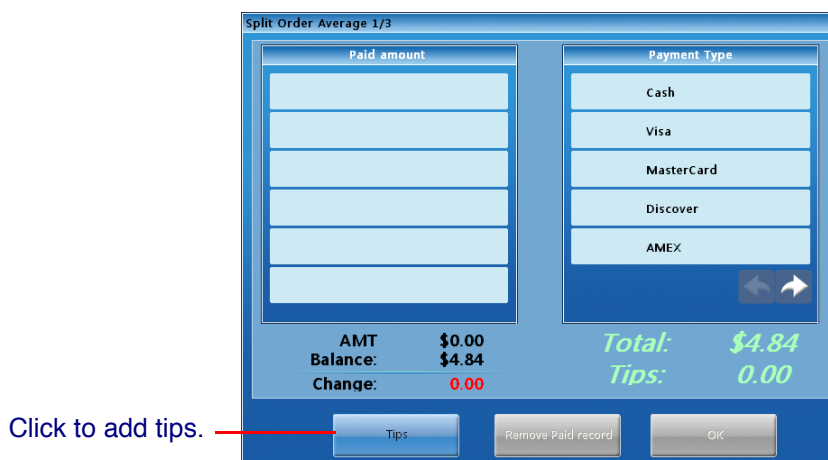
When an amount is accidentally entered, do the following to delete the amount:

1. Select the amount from the **Paid amount** box.
2. Click **Remove Paid record**.
3. A confirmation message appears, click **Yes** to confirm.

Splitting the Bill Equally

To split the bill equally among the number of guest, do the following:


1. Click **Split Average**.
2. A confirmation message appears, click **Yes** to confirm.
3. Enter the number to split.
4. Select the payment method.

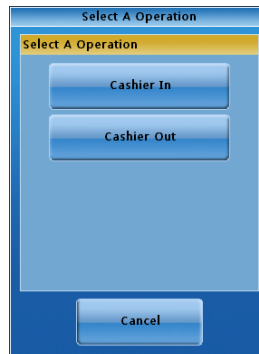


5. Click **Enter** on the on-screen keypad to accept displayed split amount.
 - If paying in check, enter the check number.
 - If paying in gift card, swipe the card or manually input the card number.
6. Click **OK**. The receipt is printed and the screen displays the screen of the next payable splitted amount.
7. Repeat steps 4 to 6 until all the splitted amount is paid.

4.10.2 Cashier In

Before settling any payments, the cashier must log as Cashier In.

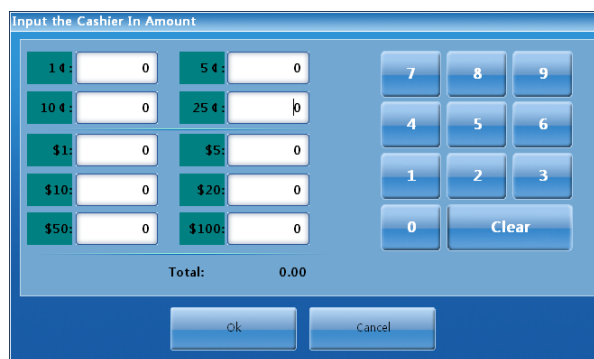
1. Click .
2. Click **Cashier In/Out**.
3. Click **Cashier In**.



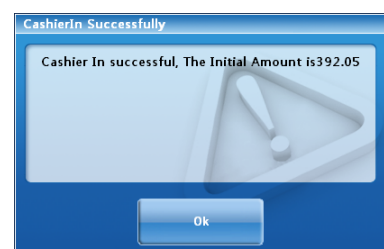
4. Select a cash drawer.



5. Enter the denomination of cash in the drawer at the beginning of the shift.




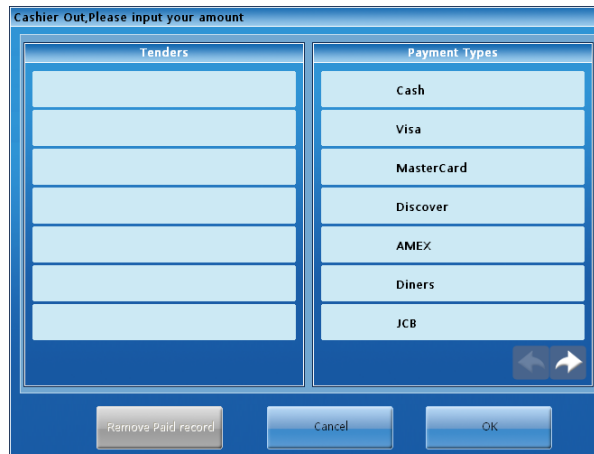
- Click the numbers on the keypad to enter the denomination.
 - To delete a wrong entry, click **Clear**.
6. Click **Ok** when done.
 7. The total cash on hand is displayed, click **Ok** to close the screen.



4.10.3 Cashier Out

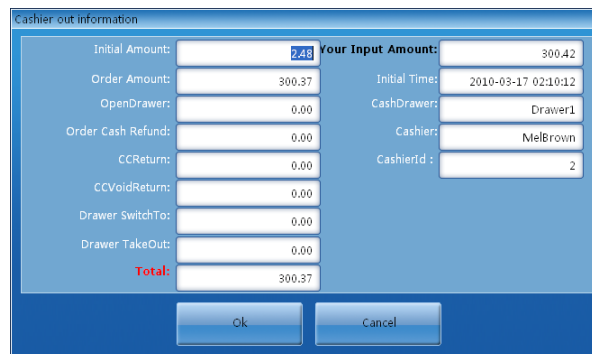
At the end of a cashier's shift, he/she must log as Cashier Out and audit the total amount in the cash drawer.

1. Click .
2. Click **Cashier In/Out**.
3. Select the cashier who is logging out.
4. Enter the amount of cash and other received payments in the drawer.



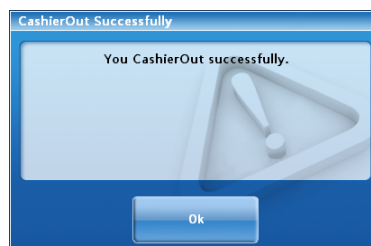
The 'Cashier Out, Please input your amount' dialog box has two main panels. The left panel, titled 'Tenders', contains seven empty input fields. The right panel, titled 'Payment Types', contains a list of payment methods: Cash, Visa, MasterCard, Discover, AMEX, Diners, and JCB. At the bottom of the dialog are three buttons: 'Remove Paid record', 'Cancel', and 'OK'.

- a. Select the payment type from the right panel.
- b. For cash, enter the denomination. For other payment methods, enter the amount.
- c. Click **OK** when done.
4. The Cashier Out Information is displayed on screen. Check the information, then click **Ok**.



The 'Cashier out information' dialog box displays transaction details. On the left, it lists various amounts: Initial Amount (2.48), Order Amount (300.37), OpenDrawer (0.00), Order Cash Refund (0.00), CCReturn (0.00), CCVoidReturn (0.00), Drawer SwitchTo (0.00), Drawer TakeOut (0.00), and a Total of 300.37. On the right, it shows 'Your Input Amount' (300.42), Initial Time (2010-03-17 02:10:12), CashDrawer (Drawer1), Cashier (MelBrown), and CashierId (2). At the bottom are 'Ok' and 'Cancel' buttons.



5. A message is displayed, click **Ok** to close.



The 'CashierOut Successfully' message box displays the text 'You CashierOut successfully.' above a graphic of a hand dropping a coin into a slot. An 'Ok' button is at the bottom.

4.10.4 Giving Discounts

VIP Discounts


1. On the Payment screen, click **VIP Discount**.
2. Enter the VIP card number.
 -  See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
3. Finalize settlement procedures.
 -  See “Settle Payments” on page 99.

Changing or Removing the VIP Discount

Once a VIP discount is given, do the following to change or remove the VIP discount:

1. On the Payment screen, click **VIP Discount**.
2. Do one of the following:
 - To change the VIP card number, click **Change VIP Discount**, then enter the new card number.
 - To remove the VIP discount, click **Remove: VIP Discount**.

Other Discounts

1. On the Payment screen, click **Discount**.
2. Select a discount option.
 - NOTE:** Discount options are set in BackOffice, see “Creating New Discount or Surcharge Rules” on page 61.
3. Finalize settlement procedures.
 -  See “Settle Payments” on page 99.

Changing or Removing the Discount

Once a discount is given, do the following to change or remove the discount:

1. On the Payment screen, click **Discount**.
2. Do one of the following:
 - To change the discount, click **Change Discount**, then select another discount option.
 - To remove the discount, click **Remove: {discount name}**.



4.10.5 Imposing Other Charges

Surcharge

1. On the Payment screen, click **Surcharge**.
2. Select a surcharge rule.
 - NOTE:** Surcharge rules are set in BackOffice, see “Creating New Discount or Surcharge Rules” on page 61.
3. Finalize settlement procedures.

 See “Settle Payments” on page 99.

Gratuity and Tips






1. On the Payment screen, click **Gratuity** or **Tips**.
2. Enter the amount of gratuity or tips.
 See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
3. Finalize settlement procedures.
 See “Settle Payments” on page 99.

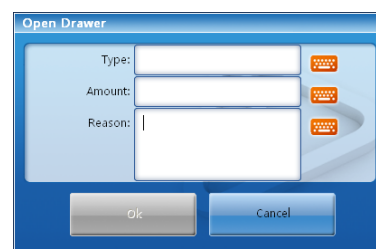
To change the amount of gratuity or tips, follow the same procedures above and enter the correct amount. To remove gratuity or tips, enter ‘0.00’ as the amount.

4.10.6 Managing the Cash Drawer

Opening the Cash Drawer

To open the cash drawer at anytime, do the following:



1. Click  **Settle**.
2. Click **Open Drawer**.
3. Select the cash drawer to open. The Open Drawer screen appears.
4. Click the corresponding  to select a cash drawer function. Options are:
 - **Deposit** — To deposit money to the cash drawer.
 - **Take Out** — To take money out of the cash drawer.
 - **Only Open** — To open the cash drawer, normally used to change coins or check the money, etc. Skip to step 6.
5. Click corresponding  to enter amount to deposit or take out.
 See “On-Screen Keypad” on page 131 for instructions on using the on-screen keypad.
6. Click the corresponding  and enter the reason for opening the drawer.
7. Click **Ok** when done.

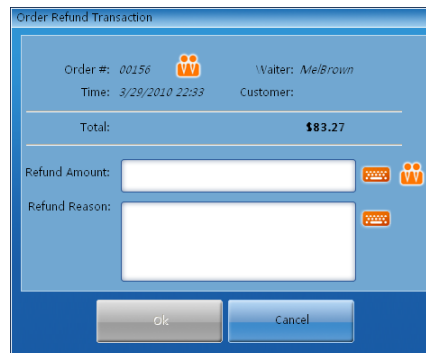


4.10.7 Refunding Payments

Refunding Cash Payments

To refund a payment, do the following:

1. Click  **Settle**.
2. Click **Order Cash Refund**.
3. Select the cash drawer or the cashier.
4. Click  and enter the Order number. The order information is displayed.



Order Refund Transaction



Order #: 00156 Waiter: MelBrown
Time: 3/29/2010 22:33 Customer:

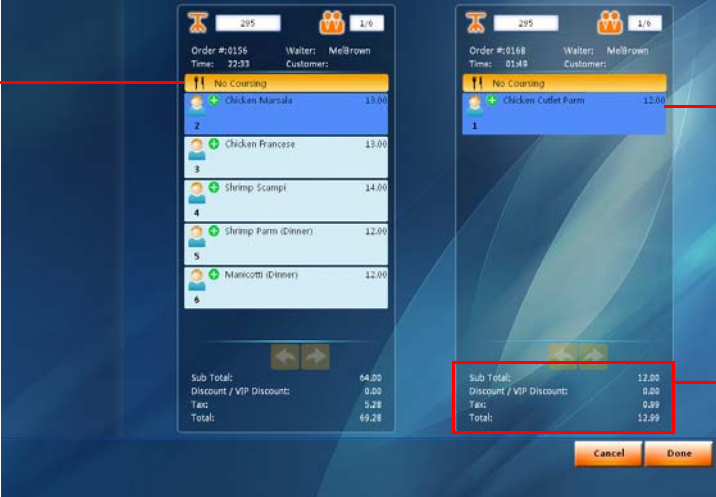
Total: **\$83.27**

Refund Amount:

Refund Reason:

Ok Cancel

5. Click either of the following **Refund amount** icons:
 -  to enter an amount to refund. See “On-Screen Keypad” on page 131 for using the on-screen keypad.
 -  to select menu items and refund its amount.



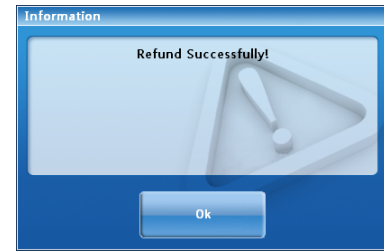
Original order. Select an item to refund here.

Menu items for refund.

Amount to refund.

- a. Click the menu item on the left panel.
- b. Click an empty space on the right panel to move the item for refund.
- c. Click **Done** when finished.

- Click **Ok**.
- A message appears. Click **OK** to close the screen.



Refunding Credit Card Payments

- Click **Settle**.
- Click **Credit Card Center**.
- Select the cash drawer or the cashier.
- Click **Return**.
- Click and enter the Order number. The order information is displayed.

Order Refund Transaction

Order #: 00156 Waiter: MelBrown
Time: 3/29/2010 22:33 Customer:

Total: **\$83.27**

Refund Amount:

Refund Reason:

- Click either of the following **Refund amount** icons:
 - to enter an amount to refund. See “On-Screen Keypad” on page 131 for using the on-screen keypad.
 - to select menu items and refund its amount.

Original order. Select an item to refund here.

Menu items for refund.

Amount to refund.

Item	Amount
No Cousing	13.00
Chicken Marsala	13.00
Chicken Francese	13.00
Shrimp Scampi	14.00
Shrimp Parm (Dinner)	12.00
Mancotti (Dinner)	12.00

Item	Amount
No Cousing	12.00
Chicken Cutlet Parm	12.00

Category	Amount
Sub Total:	64.00
Discount / VIP Discount:	0.00
Tax:	5.28
Total:	69.28

Category	Amount
Sub Total:	12.00
Discount / VIP Discount:	0.00
Tax:	0.89
Total:	12.89

- Click the menu item on the left panel.
- Click an empty space on the right panel to move the item for refund.
- Click **Done** when finished.

4. Select the credit card provider used.
The refund is processed and the screen closes automatically.

Return

Select Card Type:

- Visa
- MasterCard
- Discover
- AMEX
- Diners
- JCB

Cancel

4.10.8 Checking Gift Card Balance

1. Click **Settle**.
2. Click **Gift Card Center**.
3. Click **Balance**.

Input Information

Swiped Manual Input

Swiped (\$32.00):

Please Swiped

Ok Cancel

4. Check the gift card balance.
 - If the POS station is connected to an MSR, swipe the card, the balance is displayed on screen.
 - If no MSR is connected, click **Manual Input**.

Input Information

Swiped Manual Input

Manual Input (\$32.00):

Card Num:

Exp Date: CVV2 Num:

Ok Cancel

- a. Click the corresponding and enter the **Card Number**, **Expiration Date**, and **CVV2 Number** to display the gift card balance.

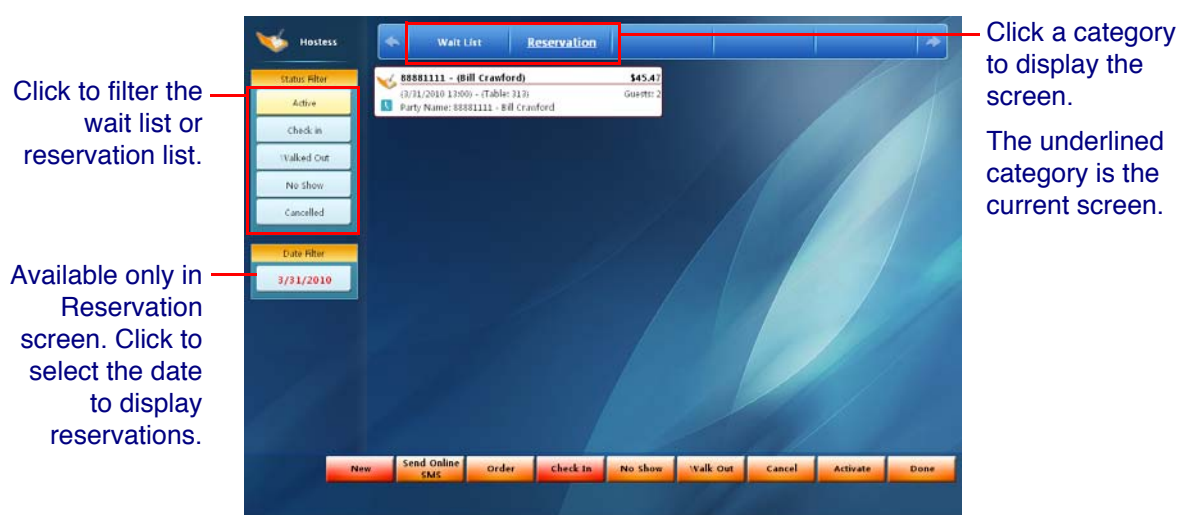
4.11 Reservations and Wait List

4.11.1 Viewing Reservations and Wait List

Click  **Hostess** to manage reservations or wait list customers.

A reservation is when a customer calls in to reserve a table on a specified date and time. To view the Reservation screen, click **Reservation**.

A wait list is when a customer walks in and waits in line for a vacant table, especially during peak hours. To view the Wait List screen, click **Wait List**.



NOTE: Available buttons vary depending on the rights of the logged in employee. Red buttons are immediate options for the current function. Orange buttons perform other tasks. Grayed buttons are not available for the current function.

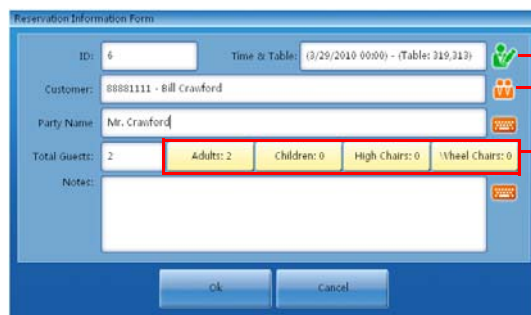
From either the Wait List or Reservation screen, you can do any of the following:

- To make a new wait list or reservation, click **New**. See “Recording New Reservations” on page 109 or “Recording New Wait List” on page 112.
- To send an SMS message to the customer to notify the reservation or wait list status, click **Send Online SMS**. See “Sending a Notification Message for Wait List or Reservation” on page 114.
- To take the order in advance, click **Order**. See “Taking Advance Orders” on page 113.
- To assign a table to a wait list customer or seat a reserved customer, click **Check In**. See “Assigning a Table to a Wait List Customer” on page 114 or “Seating a Reserved Customer” on page 114.
- To report a reservation status as “No Show”, click **No Show**. See “Setting a Reservation as “No Show”” on page 115.
- To report a wait list status as “Walk Out”, click **Walk Out**. See “Setting a Wait List as “Walked Out”” on page 115.
- To cancel a reservation or wait list, click **Cancel**. See “Cancelling a Reservation or Wait List” on page 115.
- To reactivate a “No Show”, “Walk Out” or cancelled reservation or wait list, click **Activate**. See “Reactivating a Reservation or Wait List” on page 115.

4.11.2 Recording New Reservations

Reservations From New Customers

1. Click  **Hostess**.
2. Click **Reservation**.
3. Click **New**, the Reservation Information screen appears.



The screenshot shows the 'Reservation Information Form' with the following fields and values:



- ID: 6
- Time & Table: (3/29/2010 00:00) - (Table: 319,313)
- Customer: 88881111 - Bill Crawford
- Party Name: Mr. Crawford
- Total Guests: 2
- Adults: 2
- Children: 0
- High Chairs: 0
- Wheel Chairs: 0
- Notes: (empty text area)

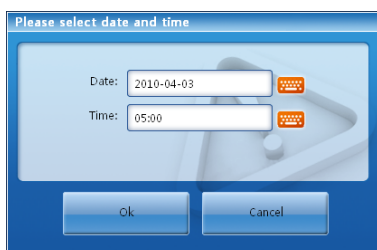
Buttons at the bottom: OK, Cancel.

Click to enter reservation function, date, and time.

Click to enter customer's phone number.

Click to enter the number of guests.

4. Click .
5. Select a function:
 - **Dine In** — Click to reserve a table for dine in, then select a table.
 - **Bar** — Click to reserve a bar table for dine in, then select a table.
 - **Take Out** — Click to order a take out in advance, then enter the date and time for take out.
 - **Delivery** — Click to order a delivery in advance, then enter the date and time for delivery.
6. Click  to select the date and time, then click **OK**.



The dialog shows input fields for Date (2010-04-03) and Time (05:00). Buttons: OK, Cancel.






The calendar shows the date 3/31/2010. The day 31 is selected. Buttons: OK, Cancel.

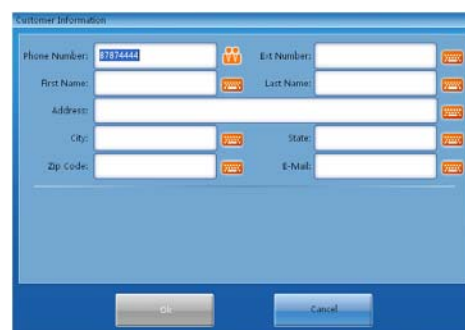
Click to select the date.



The time selector shows 00:00. The time 00:00 is selected. Buttons: OK, Cancel.

Click to select the time.

7. Click , then enter the customer's phone number.
8. Enter the customer's information.
NOTE: Do not leave the First Name and the Address blank.
 - Click  or  to open the on-screen keypad or keyboard to enter the necessary details.
 - Click **OK** when done.




The form contains the following fields:

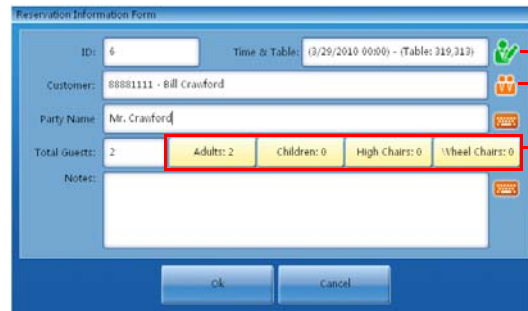
- Phone Number: 9734444
- Ext Number: (empty)
- First Name: (empty)
- Last Name: (empty)
- Address: (empty)
- City: (empty)
- State: (empty)
- Zip Code: (empty)
- E-Mail: (empty)

Buttons at the bottom: OK, Cancel.

9. For Dine-In or Bar, click the following buttons to enter the total number of guests:
 - **Adults** — Enter the number of adult guests, excluding those on wheel chairs.
 - **Children** — Enter the number of children guests, excluding those on high chairs.
 - **High Chairs** — Enter the number of children guests that will be seated on high chairs.
 - **Wheel Chairs** — Enter the number of adult guests that will be seated on wheel chairs.
10. If necessary, enter additional information on the **Notes** area.
11. Click **Ok** when done.

Reservations From Regular Customers

1. Click  **Hostess**.
2. Click **Reservation**.
3. Click **New**, the Reservation Information screen appears.





The screenshot shows the 'Reservation Information Form' with the following fields and buttons:

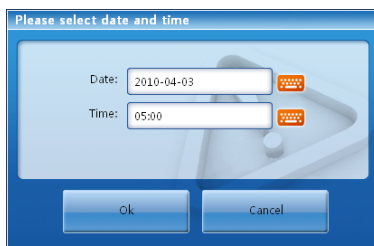
- ID:** 6
- Time & Table:** (3/29/2010 00:00) - (Table: 319,313)
- Customer:** 88881111 - Bill Crawford
- Party Name:** Mr. Crawford
- Total Guests:** 2
- Adults:** 2
- Children:** 0
- High Chairs:** 0
- Wheel Chairs:** 0
- Notes:** (empty text area)
- Buttons:** ok, cancel

Click to enter reservation function, date, and time.

Click to enter customer's phone number.

Click to enter the number of guests.

4. Click .
5. Select a function:
 - **Dine In** — Click to reserve a table for dine in, then select a table.
 - **Bar** — Click to reserve a bar table for dine in, then select a table.
 - **Take Out** — Click to order a take out in advance, then enter the date and time for take out.
 - **Delivery** — Click to order a delivery in advance, then enter the date and time for delivery.
6. Click  to select the date and time, then click **OK**.



The dialog box has two input fields:

- Date:** 2010-04-03
- Time:** 05:00
- Buttons:** ok, cancel




The calendar shows the date 3/31/2010. The days of the week are S, M, T, W, T, F, S. The numbers 1 through 31 are displayed in a grid. The number 31 is highlighted.

Click to select the date.



The time selection grid shows times from 00:00 to 23:00 in 1-hour increments. The time 00:00 is highlighted.

Click to select the time.

7. Click , then enter the customer's phone number.

8. Select an existing customer name or select **New** to add a new name, see step 8 on “Reservations From New Customers” on page 109.
9. The Customer Information screen appears.

Customer Information

Phone Number: 87871111 Ext Number:

First Name: Bobby Last Name: Brown

Address: Tinkerdale St.

City: New Jersey State:

Zip Code: E-Mail:

List of existing customer names. Click to select a name. Click to add more names.


List of delivery charges. Click to add other delivery charges.


OK Cancel

- Click or to open the on-screen keypad or keyboard and modify the necessary details.
 - Click **OK** when done.
10. For Dine-In or Bar, click the following buttons to enter the total number of guests:
 - **Adults** — Enter the number of adult guests, excluding those on wheel chairs.
 - **Children** — Enter the number of children guests, excluding those on high chairs.
 - **High Chairs** — Enter the number of children guests that will be seated on high chairs.
 - **Wheel Chairs** — Enter the number of adult guests that will be seated on wheel chairs.
 11. If necessary, enter additional information on the **Notes** area.
 12. Click **Ok** when done.
 13. Select the menu items to order. See “Ordering” on page 88 for the ordering process.
 14. Click **Done** to close the Ordering screen.
 15. Click **Done** to complete reservation.

4.11.3 Recording New Wait List

Wait List of New Customers


1. Click  Hostess.
2. Click **Wait List**.
3. Click **New**, the Wait List Information screen appears.





The screenshot shows the 'Wait List Information Form' with the following fields: ID (5), Customer (empty), Party Name (Billy Jeans), Total Guests (5), Adults (5), Children (0), High Chairs (0), Wheel Chairs (0), and Notes (empty). There are 'OK' and 'Cancel' buttons at the bottom. Red boxes highlight the 'Total Guests' field and the 'Adults', 'Children', 'High Chairs', and 'Wheel Chairs' fields. Red arrows point to the phone number icon and the 'Total Guests' field.

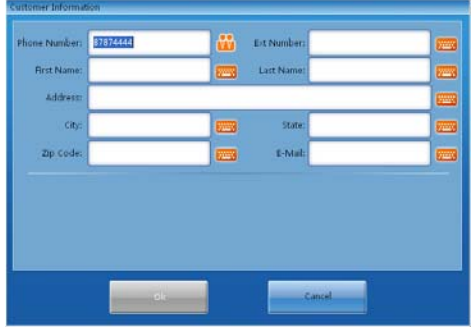
Click to enter customer's phone number.

Click to enter the number of guests.

4. Click , then enter the customer's phone number.
5. Enter the customer's information.

NOTE: Do not leave the **First Name** and the **Address** blank.

- Click  or  to open the on-screen keypad or keyboard to enter the necessary details.
 - Click **OK** when done.
6. Click the following buttons to enter the total number of guests:
 - **Adults** — Enter the number of adult guests, excluding those on wheel chairs.
 - **Children** — Enter the number of children guests, excluding those on high chairs.
 - **High Chairs** — Enter the number of children guests that will be seated on high chairs.
 - **Wheel Chairs** — Enter the number of adult guests that will be seated on wheel chairs.
 7. If necessary, enter additional information on the **Notes** area.
 8. Click **OK** when done.



The screenshot shows the 'Customer Information' form with the following fields: Phone Number (073444), Ext Number (empty), First Name (empty), Last Name (empty), Address (empty), City (empty), State (empty), Zip Code (empty), and E-Mail (empty). There are 'OK' and 'Cancel' buttons at the bottom. Red arrows point to the phone number icon and the 'Phone Number' field.

Wait List of Regular Customers

1. Click  Hostess.
2. Click **Wait List**.

- Click **New**, the Wait List Information screen appears.

The 'Wait List Information Form' contains the following fields: ID (5), Customer (empty), Party Name (Billy Jeans), Total Guests (5), Adults (5), Children (0), High Chairs (0), Wheel Chairs (0), and Notes (empty). There are 'OK' and 'Cancel' buttons at the bottom.

Click to enter customer's phone number.

Click to enter the number of guests.

- Click , then enter the customer's phone number.
- Select an existing customer name then skip to step 6, or select **New** to add a new name, see step 5 on "Wait List of New Customers" on page 112.
- The Customer Information screen appears.

The 'Customer Information' form includes fields for Phone Number (787-1111), Ext Number, First Name (Bobby), Last Name (Brown), Address (Tinkerdale St), City (New Jersey), State, Zip Code, and E-Mail. It also features a list of existing customer names at the bottom, with 'Bobby Brown 8 787-1111' selected. There are 'OK' and 'Cancel' buttons at the bottom.

List of existing customer names.

Click to select a name.

Click to add more names.

List of delivery charges.

Click to add other delivery charges.

- Click or to open the on-screen keypad or keyboard and modify the necessary details.
 - Click **OK** when done.
- Click the following buttons to enter the total number of guests:
 - Adults** — Enter the number of adult guests, excluding those on wheel chairs.
 - Children** — Enter the number of children guests, excluding those on high chairs.
 - High Chairs** — Enter the number of children guests that will be seated on high chairs.
 - Wheel Chairs** — Enter the number of adult guests that will be seated on wheel chairs.
 - If necessary, enter additional information on the **Notes** area.
 - Click **OK** when done.

4.11.4 Taking Advance Orders


When a customer makes a reservation or while wait list customers are waiting to be seated, their orders can be taken in advance. Do the following:

- Click Hostess.
- Click **Wait List** or **Reservation**.
- Click **Order**.

4. Select a wait list or reserved customer to display the Order screen.
5. Select the menu items to order. See “Ordering” on page 88 for the ordering process.
6. Click **Done**.

4.11.5 Assigning a Table to a Wait List Customer


When tables are already available to seat a wait list customer, do the following:

1. Click  **Hostess**.
2. Click **Wait List**.
3. Click **Check In**.
4. Select the wait list to check in.
5. Select the table to assign to the customer, then click **Done**.
6. Select the menu items to order. See “Ordering” on page 88 for the ordering process.
7. Click **Done**.

NOTE: To view the checked in wait list, click the **Check In** button under **Status Filter**.

4.11.6 Seating a Reserved Customer


When a customer appears for a reservation, do the following:

1. Click  **Hostess**.
2. Click **Reservation**.
3. Click **Check In**.
4. Select the reservation to check in.
5. Select the menu items to order. See “Ordering” on page 88 for the ordering process.
6. Click **Done**.

NOTE: To view the checked in reservation, click the **Check In** button under **Status Filter**.


4.11.7 Managing Wait List or Reservation

Sending a Notification Message for Wait List or Reservation


1. Click  **Hostess**.
2. Click **Wait List** or **Reservation**.
3. Click **Send SMS Online**.
4. Select the wait list or reservation to send message.

NOTE: To use this function, SMS Interface URL must be set up in BackOffice. See “Basic Setup” on page 26.

Editing a Wait List or Reservation

1. Click .
2. Click **Wait List** or **Reservation**.
3. On the Wait List or Reservation screen, select the wait list or reservation.
4. Modify the necessary information.
5. Click **Ok**.


Cancelling a Reservation or Wait List

1. Click .
2. Click **Wait List** or **Reservation**.
3. Click **Cancel**.
4. Select the wait list or reservation to cancel.

NOTE: To view the cancelled wait list or reservation, click the **Cancelled** button under the Status Filter.

Setting a Reservation as “No Show”

When a customer does not appear for a reservation, mark the reservation status as “No Show”. Do the following:

1. Click .
2. Click **Reservation**.
3. Click **No Show**.
4. Select the reservation to mark as “No Show”.

NOTE: To view the marked reservation, click the **No Show** button under **Status Filter**.


Setting a Wait List as “Walked Out”

When a wait listed customer walks out, mark the wait list status as “Walked Out”. Do the following:

1. Click .
2. Click **Wait List**.
3. Click **Walk Out**.
4. Select the wait list to mark as “Walked Out”.

NOTE: To view the marked wait list, click the **Walked Out** button under **Status Filter**.

Reactivating a Reservation or Wait List

1. Click .
2. Click **Wait List** or **Reservation**.
3. Under Status Filter, click any of the following:
 - **Cancelled** — To reactivate a cancelled wait list or reservation.
 - **Walked Out** — To reactivate a wait list marked as “Walked Out”.

- **No Show** — To reactivate a reservation marked as “No Show”.
4. Select the wait list or reservation to reactivate.
NOTE: To view the reactivated wait list or reservation, click the **Active** button under the Status Filter.

4.12 Employee

4.12.1 Check In or Check Out

From the POS Client, an employee can check in and check out of work, or report his/her status as on break.

1. Click the employee icon.
2. Click **Employee Check In**.
3. Click any of the following:
 - **On Duty** — To check in for work.
 - **Off Duty** — To check out of work.
 - **Rest Begin** — To report his/her status as on break.
 - **Rest End** — To go back to work after a break.

NOTE: Not all the options mentioned above may be available. Displayed options may vary depending on the current status of the employee.

Chapter 5

POS SCM

POS SCM (Supply Chain Management) is an inventory system that records and tracks the supply of raw materials and facilitates purchasing of goods from the suppliers.

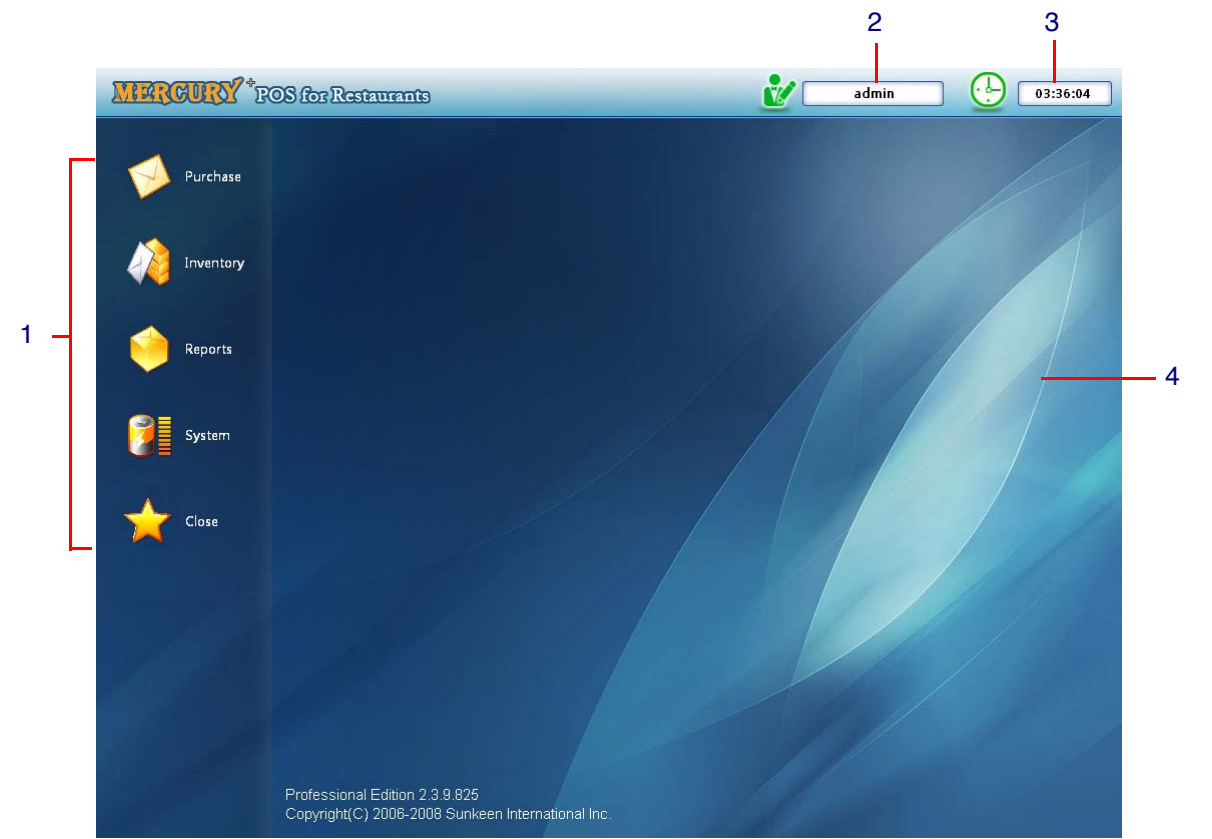
5.1 Opening POS SCM

To open POS SCM, do one of the following:





- Click **Start > All Programs > MERCURY POS for Restaurants > POS SCM**.
- From **BackOffice**, click **POS SCM** on the left panel.

5.2 POS SCM Overview

5.2.1 The Main Screen



No	Item	Description
1	Function Menu	Click an item to access the function.

No	Item	Description
	Purchase	Access this function to purchase supplies and receive ordered materials.  See “Purchasing Supplies” on page 126.
	Inventory	Access this function to view, edit, and search items in the current inventory.  See “Managing the Inventory” on page 129.
	Reports	Access this function to view and print inventory reports.  See “Printing Inventory Reports” on page 130.
	System	Access this function to create product lines and warehouse location, add vendors, and set the consumable amount of supplies versus ordered items.  See “Setting the Inventory” on page 119.
	Close	Click to close POS SCM.
2	Current User	Displays the current logged in user.
3	Time	Displays the system time.
4	Display page	Displays the current function.

5.2.2 Setup Overview

Set up the initial inventory to have an accurate record of the supplies on hand. Do the following steps:

1. Create product lines. See “Product Line” on page 119.
2. Create locations to store supplies. See “Location” on page 120.
3. Create vendor records. See “Vendor” on page 121.
4. Create specific product items. See “Product Item” on page 122.
5. Set the product item and the amount that is used for a menu item. See “B.O.M.” on page 124.
6. Refresh system data. See “Refresh Data” on page 125.

5.2.3 Maintenance Overview

After setting the initial inventory, you can do the following:

1. Order product items from suppliers. See “Purchasing Supplies” on page 126.
2. Receive ordered product items. See “Receiving a Purchase Order” on page 127.
3. View and manage the inventory. See “Managing the Inventory” on page 129.
4. Print order and inventory status reports. See “Printing Inventory Reports” on page 130.



5.3 Setting the Inventory

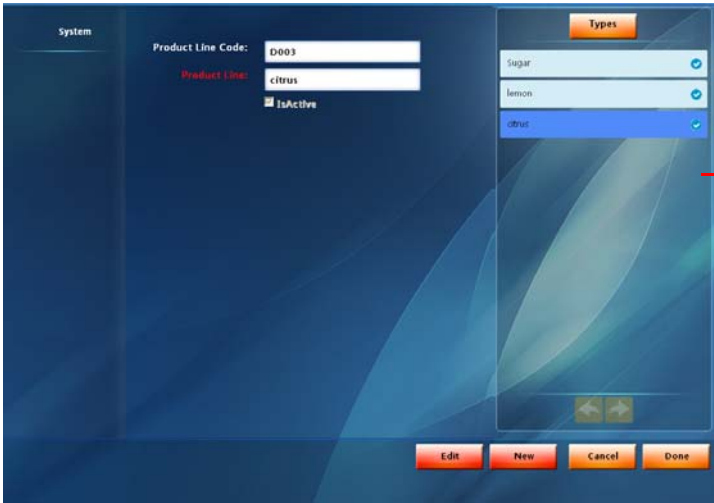
5.3.1 Product Line

Product lines are the main product categories. For example, you have product line called “Sugar”. Under the category “Sugar”, product items such as brown sugar and white sugar can be created as its product items.



Creating Product Lines

To create a product line, do the following:

- 1. Click  System.
- 2. Click  Product Line to open the Product Line screen.



Displays the available product lines.



Icon	Status
	The product line is active.
	The product line is inactive.

NOTE: When creating a new product line, the item in red is required. Make sure the required field is entered.

- 3. Click **New**.
- 4. Enter the **Product Line code** and the **Product Line**.
- NOTE:** Make sure the **IsActive** box is enabled.
- 5. Click **Done**. The created product line is listed on the right panel.

Modifying Product Lines

To modify a product line, do the following:

- 1. Click  System.
- 2. Click  Product Line to open the Product Line screen.
- 3. Click the product line to modify on the right panel.
- 4. Click **Edit**.
- 5. Modify the necessary details.
- 6. Click **Done**.

Deactivating Product Lines

Once a product line is created, it can no longer be deleted. Instead, deactivate the product line.

1. Follow steps 1 to 4 in “Modifying Product Lines” on page 119.
2. Click the **IsActive** box to disable it.
3. Click **Done**.



NOTE: An inactive product line can be reactivated anytime. Check the **IsActive** box to enable it.

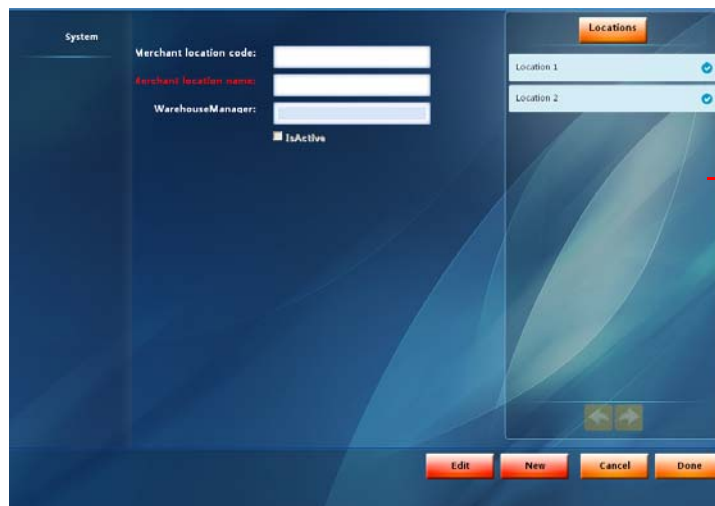
5.3.2 Location

The Location function allows you to create warehouse locations and assign warehouse managers.



Creating Locations

To create a location, do the following:


1. Click  **System**.
2. Click  **Location** to open the Location screen.



Displays the available locations.

Icon	Status
	The location is active.
	The location item is inactive.

NOTE: When creating a new location, the item in red is required. Make sure the required field is entered.



3. Click **New**.
4. Enter the **Merchant location code** and **Merchant location name**.
5. Click the  icon next to **Warehouse Manager** to open a pop-up menu.
6. Select the employee to assign as the **Warehouse Manager**.

NOTE: Make sure the **IsActive** box is enabled.

7. Click **Done**. The created location is listed on the right panel.

Modifying Locations

To modify a location, do the following:

- 1. Click  System .
- 2. Click  to open the Location screen.
- 3. Click the location to modify on the right panel.
- 4. Click **Edit**.
- 5. Modify the necessary details.
- 6. Click **Done**.

Deactivating Locations

Once a location is created, it can no longer be deleted. Instead, deactivate the location.

- 1. Follow steps 1 to 4 in “Modifying Locations” on page 121.
- 2. Click the **IsActive** box to disable it.
- 3. Click **Done**.



NOTE: An inactive location can be reactivated anytime. Check the **IsActive** box to enable it.

5.3.3 Vendor



The Vendor function allows you to add suppliers and record their information.

Creating Vendors

To create a vendor, do the following:

- 1. Click  System .
- 2. Click  to open the Vendor screen.

Displays the available vendors.

Icon	Status
	The vendor is active.
	The vendor is inactive.

NOTE: When creating a new vendor, the item in red is required. Make sure the required field is entered.

- 3. Click **New**.



4. Enter the **Vendor Name** and other information.

NOTE: Make sure the **IsActive** box is enabled.

5. Click **Done**. The created vendor is listed on the right panel.

Modifying Vendors

To modify a vendor, do the following:

1. Click  **System**.
2. Click  to open the Vendor screen.
3. Click the vendor to modify on the right panel.
4. Click **Edit**.
5. Modify the necessary details.
6. Click **Done**.

Deactivating Vendors

Once a vendor is created, it can no longer be deleted. Instead, deactivate the vendor.

1. Follow steps 1 to 4 in “Modifying Vendors” above.
2. Click the **IsActive** box to disable it.
3. Click **Done**.

NOTE: An inactive vendor can be reactivated anytime. Check the **IsActive** box to enable it.


5.3.4 Product Item

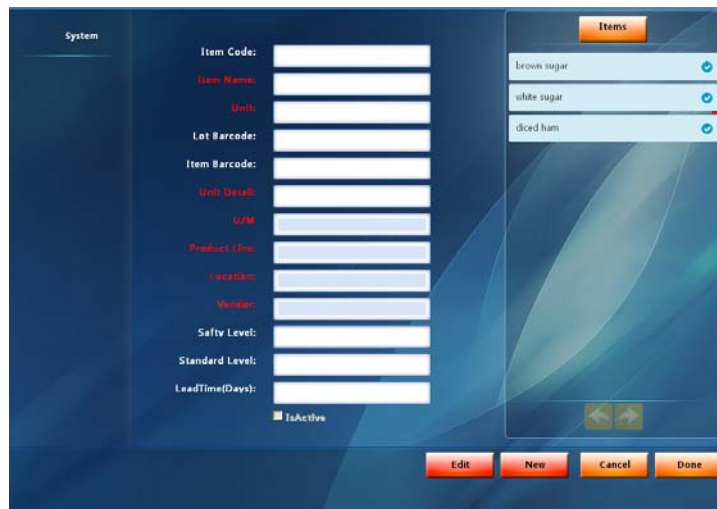
Product items are the ingredients of a menu item. For example, a pizza has cheese, ham, green pepper, etc. Cheese, ham, green pepper are classified as product items. These product items are the items that you order from your suppliers. Product items are grouped according to product lines.

Creating Product Items



To create a product item, do the following:





1. Click  **System**.

- Click  to open the Product Item screen.



Displays the available product items.

Icon	Status
	The product item is active.
	The product item is inactive.



- Click **New**.
- Enter the following required information:
 - Item Name** — Enter the name of the item.
 - Unit** — Enter the unit that is used when ordering the product item.
 - Unit Detail** — Enter the unit detail.
 - U/M** — Click the  icon to enter the unit of measurement that is used for menu items.
 - Product Line** — Click the  icon to select the product line where the product item belongs to.
 - Location** — Click the  icon to select the location where to store the product item.
 - Vendor** — Click the  icon to select a supplier.

NOTE: Make sure the **IsActive** box is enabled.

- Enter other information.
- Click **Done**. The created product item is listed on the right panel.

Modifying Product Items

To modify a product item, do the following:

- Click .
- Click  to open the Product Item screen.
- Click the product item to modify on the right panel.
- Click **Edit**.
- Modify the necessary details.
- Click **Done**.

Deactivating Product Items

Once a product item is created, it can no longer be deleted. Instead, deactivate the product item.

1. Follow steps 1 to 4 in “Modifying Product Items” above.
2. Click the **IsActive** box to disable it.
3. Click **Done**.

NOTE: An inactive product item can be reactivated anytime. Check the **IsActive** box to enable it.

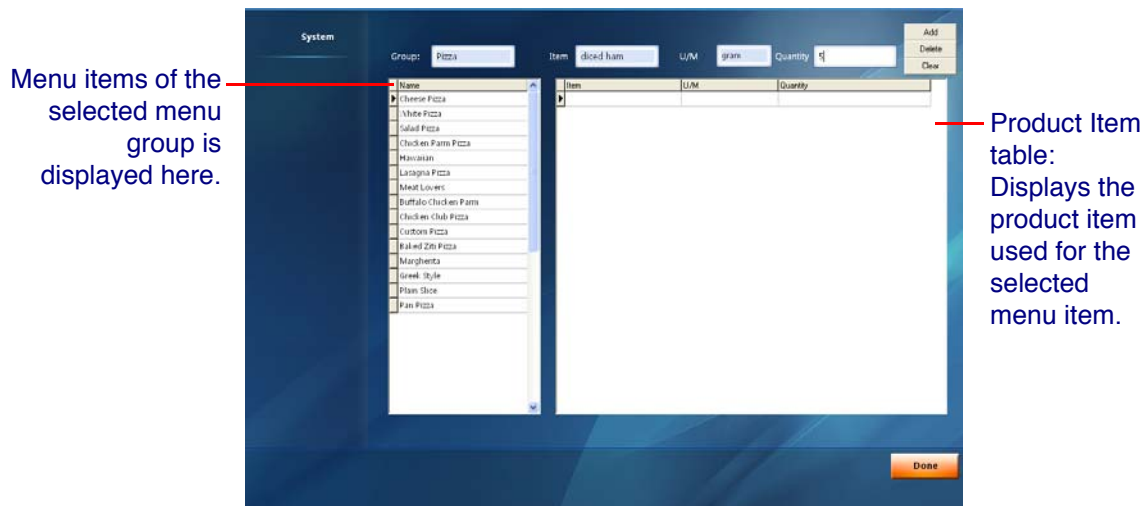
5.3.5 B.O.M.

The B.O.M. (Bill of Material) function allows you to set the product items and the amount of product items that is used in a particular menu item.

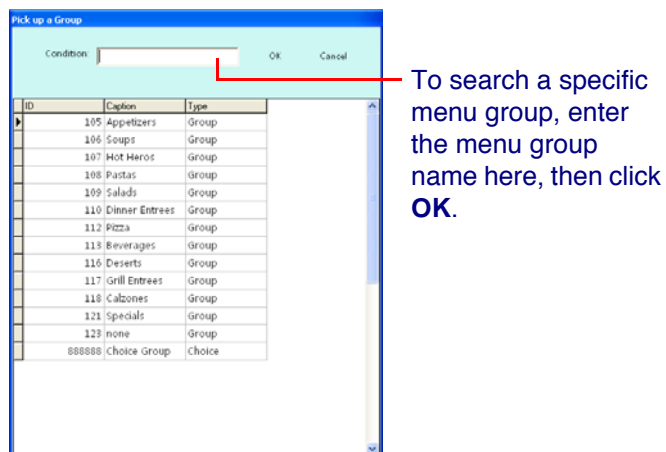
Creating B.O.M.

To create a B.O.M., do the following:

1. Click  System.
2. Click  to open the B.O.M. screen.



3. Double-click the **Group** box.





4. Double-click to select the menu group from the list. The menu items belonging in the selected menu group is displayed on the left column.
5. Click to select a menu item.
6. Double-click the **Item** box.
7. Double-click a product item that is an ingredient of the selected menu item, then click **OK**.
8. Double-click the **U/M** box.
9. Double-click a unit to measure the amount of the product item used for the menu item.
10. Enter the quantity of the product item used for the menu item.
11. Click **Add**. The product item is displayed on the Product Item table.

NOTE: Added B.O.M. cannot be modified. To change any detail, delete the B.O.M. first then create another one.

12. Click **Done** to close the B.O.M. screen.


Deleting B.O.M.

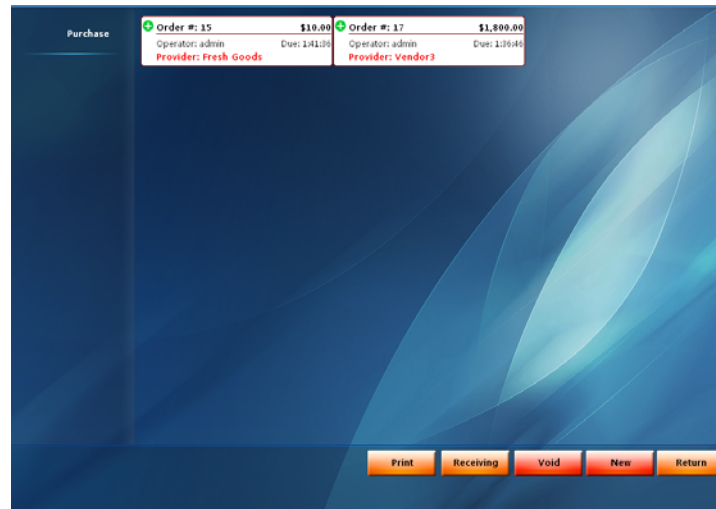
1. Click  System.
2. Click  to open the B.O.M. screen.
3. Double-click the **Group** box.
4. Double-click to select the menu group from the list.
5. Click the menu item to display the product items on the Product Item table.
6. Click the product item to delete.
7. Click **Delete**. A confirmation message appears.
8. Click **Yes** to confirm.
9. Click **Done** to close the B.O.M. screen.

5.3.6 Refresh Data

After creating or making any modifications, click  to refresh system data.

5.4 Purchasing Supplies

Click  **Purchase** to open the Purchase screen.



From this screen, you can do any of the following:

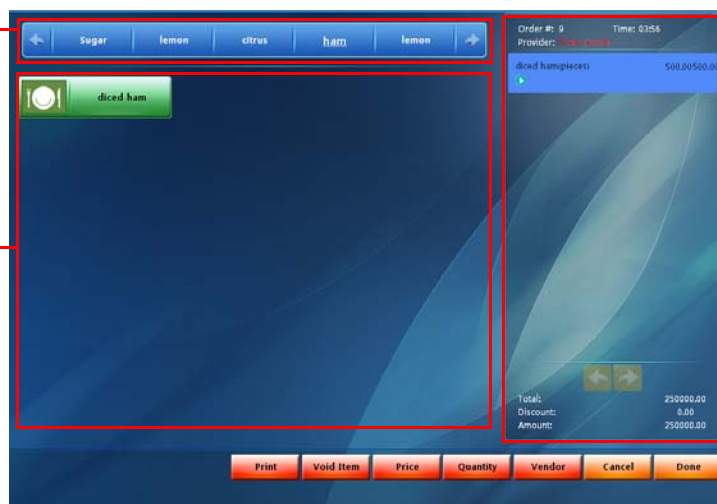
- To view a purchase order, click a purchase order.
- To print a purchase order report, click **Print**. See “Printing a Purchase Order” on page 128.
- To receive a purchase order, click **Receiving**. See “Receiving a Purchase Order” on page 127.
- To cancel a purchase order, click **Void**. See “Canceling a Purchase Order” on page 128.
- To create a new purchase order, click **New**. See “Creating a Purchase Order” on page 126.
- To go back to the main screen, click **Return**.

5.4.1 Creating a Purchase Order

1. Click  **Purchase**.
2. Click **New**.

Click a product line to display the product items. The underlined product line is currently selected.

Displays the product items of the selected product line.



Displays the purchase order details.

3. Select the product item to order.

NOTE: If the product item is not displayed on the screen, you may be on the wrong the product line. Select the correct product line on top of the screen.

4. Enter the price. See “On-Screen Keypad” on page 131 for using the on-screen keypad.

5. Enter the quantity to order.


6. Click **Vendor**, then select the vendor to make the purchase.

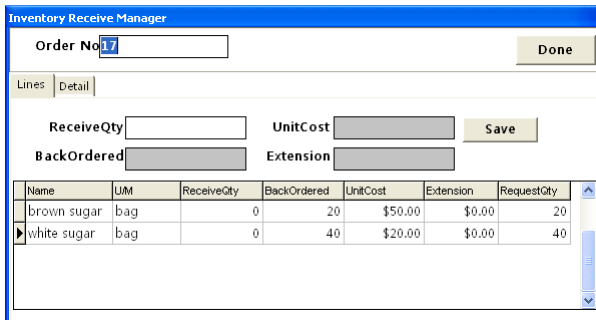
7. To order other product items from the same vendor, repeat steps 3 to 5.

8. Click **Done** when finished.

5.4.2 Receiving a Purchase Order

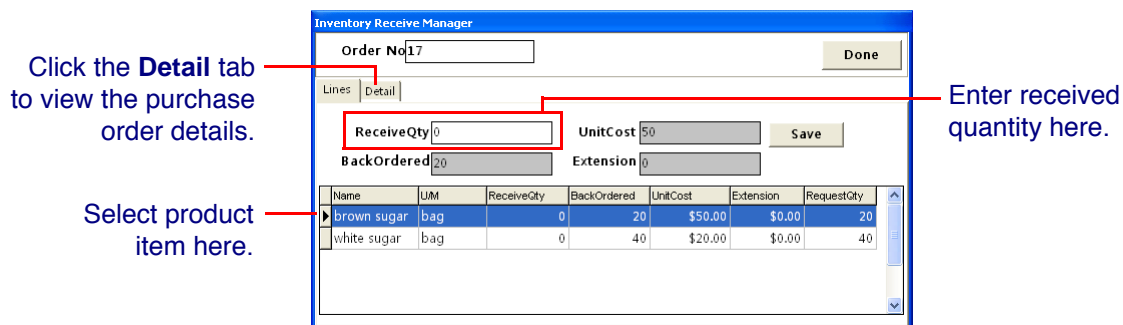
When orders are delivered, you must receive the orders in POS SCM to add the supplies in the inventory.

1. Click  **Purchase**.
2. Click **Receiving**.
3. Click the purchase order to receive. The Inventory Receive Manager screen appears.



NOTE: From this point, to cancel receiving of items and close the screen, click **Done**.

4. Click the product item from the table.



5. Enter the received quantity in the **ReceiveQty** box.

6. Click **Save**.

7. Repeat steps 4 to 6 to receive other product items.

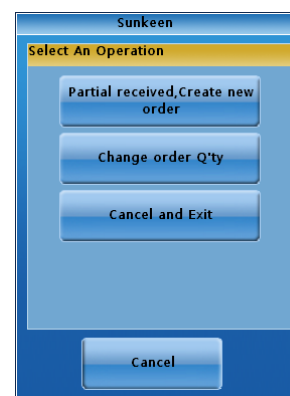
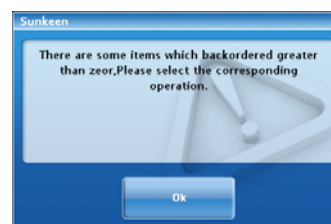
8. Click **Done** when finished.

Received and Ordered Quantity Discrepancy

When the received quantity is not the same as the ordered quantity, an error message is displayed after you click **Done**.


Click **Ok** to continue.

- To accept the received quantity and create a new order for the remaining quantity, click **Partial received, Create new order**.
- To accept the received quantity and change the ordered quantity, click **Change order Q'ty**.
- To cancel receiving of order, click **Cancel and Exit**.





5.4.3 Canceling a Purchase Order

To cancel a purchase order, do the following:


1. Click  **Purchase**.
2. Click **Void**.
3. Click the purchase order to cancel.
4. A confirmation message appears. Click **Yes** to cancel.

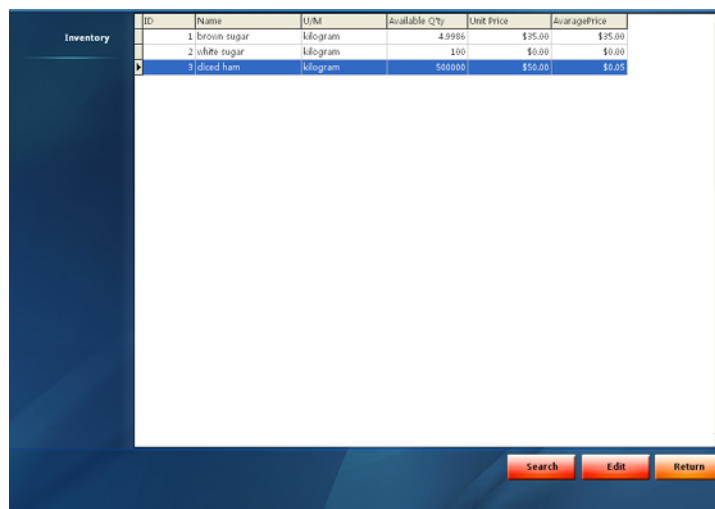
5.4.4 Printing a Purchase Order

To print a copy of the purchase order, do the following:

1. Click  **Purchase**.
2. Click **Print**.
3. Click the purchase order to print.
4. The purchase order information is displayed on screen. Click  to print the report.

5.5 Managing the Inventory

Click  **Inventory** to open the Inventory screen.



The screenshot shows the 'Inventory' screen with a table of inventory items. The table has columns: ID, Name, U.M, Available Qty, Unit Price, and Average Price. The data rows are:

ID	Name	U.M	Available Qty	Unit Price	Average Price
1	brown sugar	kilogram	4.9985	\$25.00	\$35.00
2	white sugar	kilogram	100	\$0.00	\$0.00
3	diced ham	kilogram	500000	\$50.00	\$0.00


At the bottom of the screen, there are three buttons: Search, Edit, and Return.

From this screen, you can do any of the following:


- To search for a product item, click **Search**. See “Search the Inventory” below.
- To modify the inventory of a product item, click **Edit**. See “Modify the Inventory” below.
- To go back to the main screen, click **Return**.

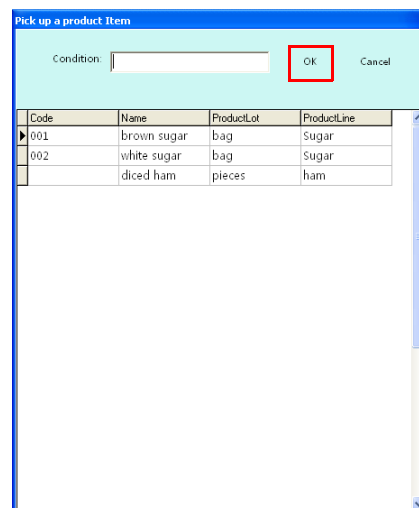
5.5.1 Modify the Inventory

You can manually modify the available quantity of the current inventory.

1. Click  **Inventory**.
2. Click the product item to modify.
3. Click **Edit**.
4. Enter the new quantity. See “On-Screen Keypad” on page 131 for using the on-screen keypad.

5.5.2 Search the Inventory

1. Click  **Inventory**.
2. Click **Search**.
3. Enter the keyword to search on the **Condition** box.
4. Click **OK**. The table displays matching product items.
5. Double-click the product item to view its inventory details.

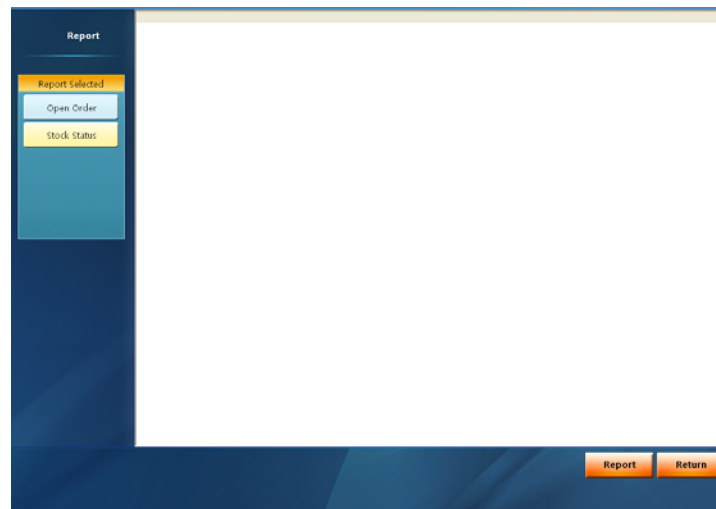


The screenshot shows the 'Pick up a product Item' dialog box. It has a 'Condition' text box and 'OK' and 'Cancel' buttons. Below the buttons is a table with columns: Code, Name, ProductLot, and ProductLine. The data rows are:

Code	Name	ProductLot	ProductLine
001	brown sugar	bag	Sugar
002	white sugar	bag	Sugar
	diced ham	pieces	ham

5.6 Printing Inventory Reports

1. Click  Reports to open the Report screen.



2. Click any of the following buttons:
 - **Open Order** — To print report of pending purchase orders.
 - **Stock Status** — To print report of current inventory.
3. Select the filter options, then click **Ok**.

Appears when **Open Order** is selected.

Appears when **Stock Status** is selected.

4. The report table is displayed on screen.

OrderId	CreateTime	LastOptTime	Amount	Operator	Creator	VendorCo...	Vendor	Telephone	LinkMan	Order
18	03-27-10	03-27-10	\$400.00	admin	admin	002	Vendor2			18
20	03-28-10	03-28-10	\$20.00	admin	admin	004	Frith Go...	02951236...	Ricky Mar...	20

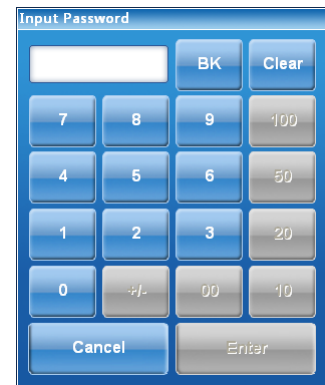
5. Click **Report**.
6. Click  to print the report.

Appendix

A. On-Screen Keypad

The on-screen keypad is used to enter numeric values.

- Touch the keys on the keypad to enter numbers.
- For incorrect entries, use the following buttons:
 - To delete one number at a time, touch **BK**.
 - To delete the whole entry, touch **Clear**.
- Touch **Enter** to confirm entry.
- To cancel entry and close the on-screen keypad, touch **Cancel**.



B. On-Screen Keyboard

The on-screen keyboard is used to enter alphanumeric values.



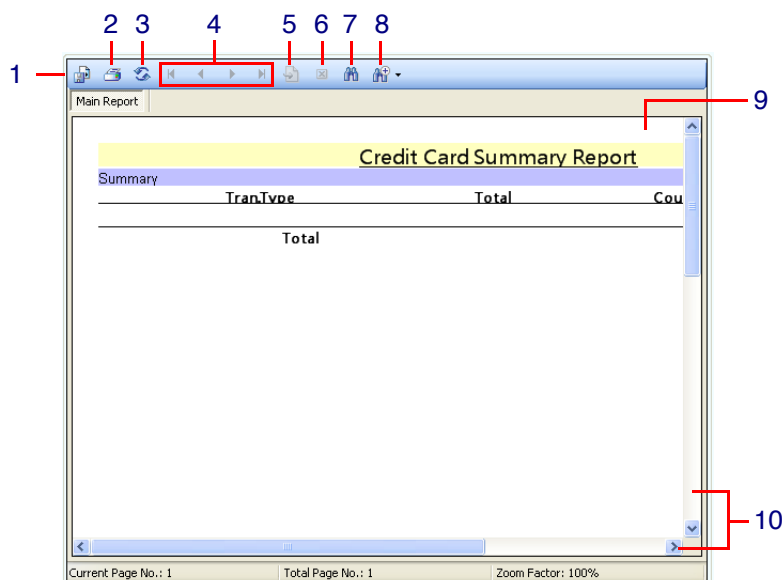
The on-screen keyboard looks similar to a computer keyboard.

- Touch the keys on the keyboard to enter text.
- Touch **Enter** to confirm entry.
- To type an upper case letter or symbols, touch **Shift** then the key.
- To type in lower case or numbers, touch **Shift** again.
- To insert space, touch **Space**.
- To delete one character at a time, touch **Back space**.
- To delete the whole entry, touch **Clear**.
- To cancel tax description entry, touch **Cancel**.

C. Reports Screen

Printing Reports in BackOffice

In BackOffice, the reports screen below appears whenever a function for printing reports is accessed.



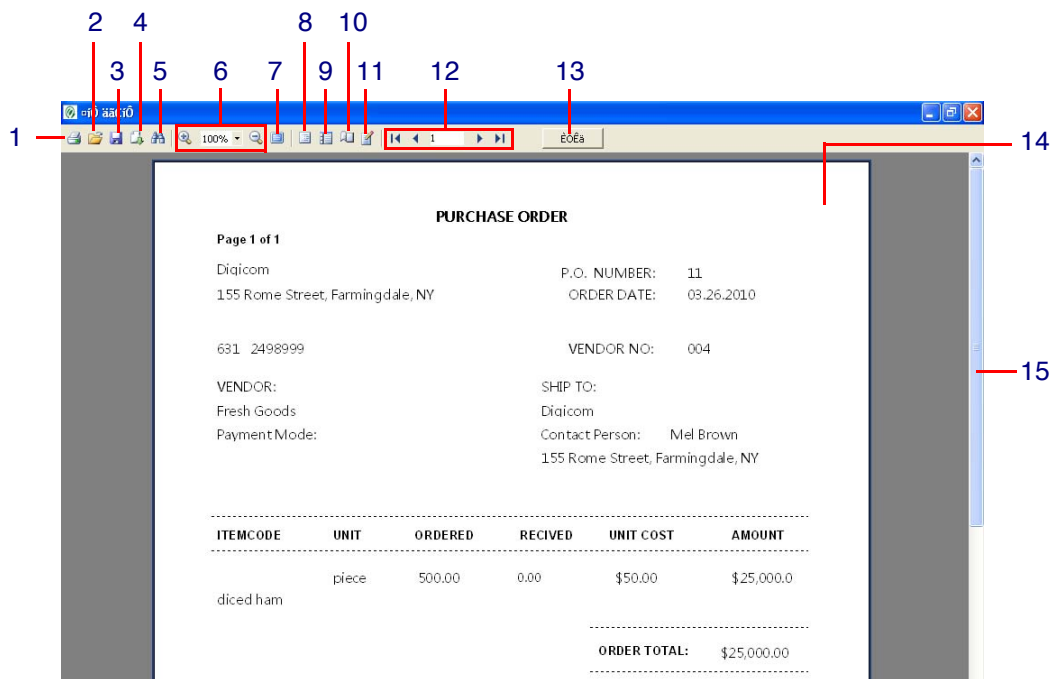
NOTE: The above report is for reference only. Displayed reports vary.

No.	Name	Description
1	Export icon	Click to save report to a different location or folder.
2	Print icon	Click to print the report.
3	Refresh icon	Click to refresh the report.
4	First/Previous/Next/Last icons	Click the icons to go to the first, previous, next, or the last page.
5	Go to Page icon	Click to go to a specified page directly.
6	Close Current View icon	If more than one view is opened, click to close the current view.
7	Find Text icon	Click to search for text in the report.
8	Zoom icon	Click to change the zoom option.
9	Report area	Displays the report.
10	Scroll bars	Use the scroll bars to scroll the report page.

NOTE: Some icons may not be applicable on the current function, thus disabled.

Printing Reports in POS SCM

In POS SCM, the reports screen below appears whenever a function for printing reports is accessed.



No.	Name	Description
1	Print icon	Click to print the report.
2	Open icon	Click to open other report files.
3	Save icon	Click to save the report to a different location.
4	Save As RTF icon	Click to save the report as an RTF file.
5	Find Text icon	Click to search for text in the report.
6	Zoom controls	Click the zoom in/out icon to zoom in/out or select zoom value to change zoom view.
7	Full screen icon	Click to view the report in full screen. Double-click in full screen mode to go back to normal view.
8	Bookmark icon	Click to view bookmarks on the left panel.
9	Page View icon	Click to view the page view on the left panel.
10	Print Properties icon	Click to change the print setup.
11	Designer icon	Click to open the report designer application and change the report layout.
12	Page Controls	Click the first / previous / next / last page icons or enter a specific page number to view the page.
13	Close button	Click to close the report screen.
14	Report area	Displays the report.
15	Scroll bar	Use the scroll bar to scroll through the report page.

NOTE: Some icons may not be applicable on the current function, thus disabled.