Oracle® Simphony Essentials

Point-of-Sale User Guide

F44996-12
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Oracle Simphony Essentials Point-of-Sale User Guide,

F44996-12

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Preface

The Oracle MICROS Simphony Cloud Service, Essentials Edition, is the point-of-sale solution for small- and medium-sized restaurants.

Purpose

This User Guide explains the daily use of Simphony Essentials at the POS client.

Audience

This document is intended for operators of Simphony Essentials.

Customer Support

To contact Oracle Customer Support, access the Customer Support Portal at:

https://iccp.custhelp.com/

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received and any associated log files
- Screen shots of each step you take

Documentation

Product documentation is available on the Oracle Help Center at https://docs.oracle.com/en/industries/food-beverage/.

Revision History

Date	Description of Change
September 2021	Initial publication for Release 19.3.
September 2022	Updated publication for Release 19.4.
November 2022	Updated Preface and Getting Started.
March 2023	Updated publication for Release 19.5.
January 2024	Updated publication for Release 19.6.
May 2024	Updated Copy Employee in the Manager Procedures chapter.
September 2024	Updated publication for Release 19.7.
February 2025	Updated publication for Release 19.8.

1 User Interfaces

Simphony Essentials offers three service types:

- Bar
- Quick Service Restaurant (QSR)
- Table Service Restaurant (TSR)

Simphony Essentials has two User Interfaces (UIs):

- UI for the larger workstations and tablets
- UI for the smaller screens on mobile phones and handheld devices

Landscape Layout

Workstations and tablets use a landscape orientation and support Bars, QSR, and TSR. The following devices run in landscape layout:

- Oracle MICROS 3, 6, and 8 Series Workstations
- Lenovo K10 Tablet
- Third Party Tablets

Portrait Layout

Mobile phones and handheld devices run in portrait orientation on various screen size resolutions, and support QSR and TSR. The following devices run in portrait layout:

- Oracle MICROS Handheld 500
- Adyen Castles S1F2
- Third Party Phone Form Factor Devices

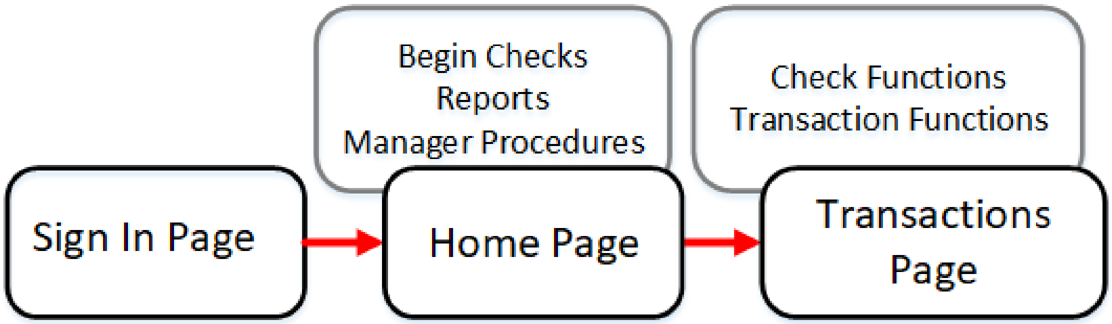
Landscape UI

The landscape UI is designed for workstations and tablets which support Bar, QSR, and TSR service types.

Bar Operations

Workflow

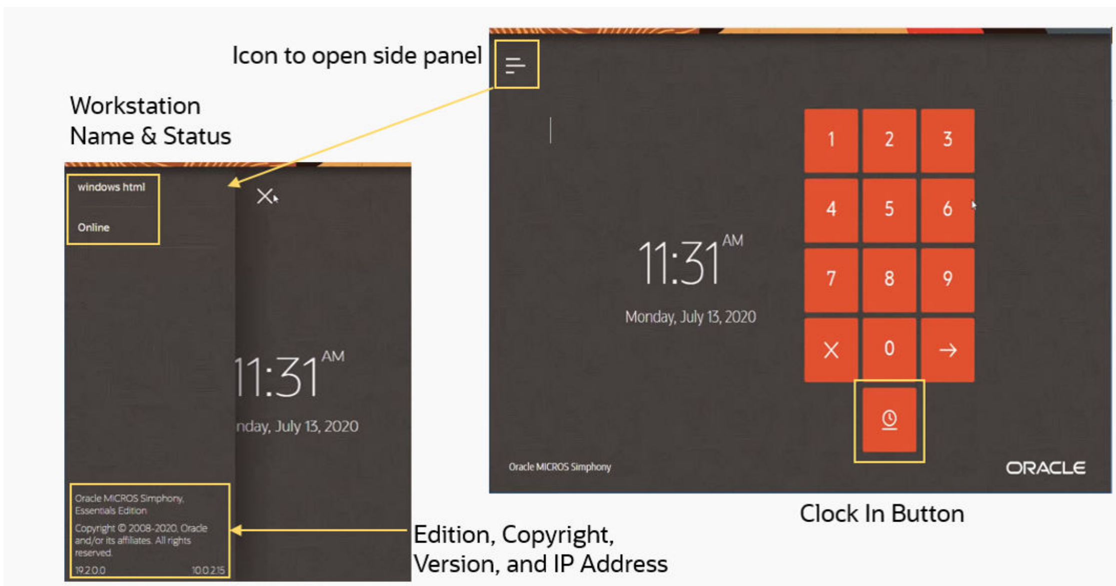
The Bar workflow provides speed of service for a busy bar, ensuring that bartenders and servers can identify menu items quickly and focus on customer service.



Sign In

The number pad's design matches smartphones with 123 appearing along the top. Use the **X** icon to clear entries and the forward arrow icon to confirm entries.

Figure 1-1 Sign In Panel on Workstations and Tablets



To sign in, enter your User ID number, and then press the arrow icon. Asterisks (*) appear above the number pad as the User ID is entered.

To clock in, click the Clock In icon
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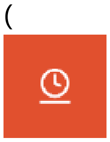
) on the Sign In page.

To activate the Information Panel, click the line icon
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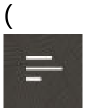
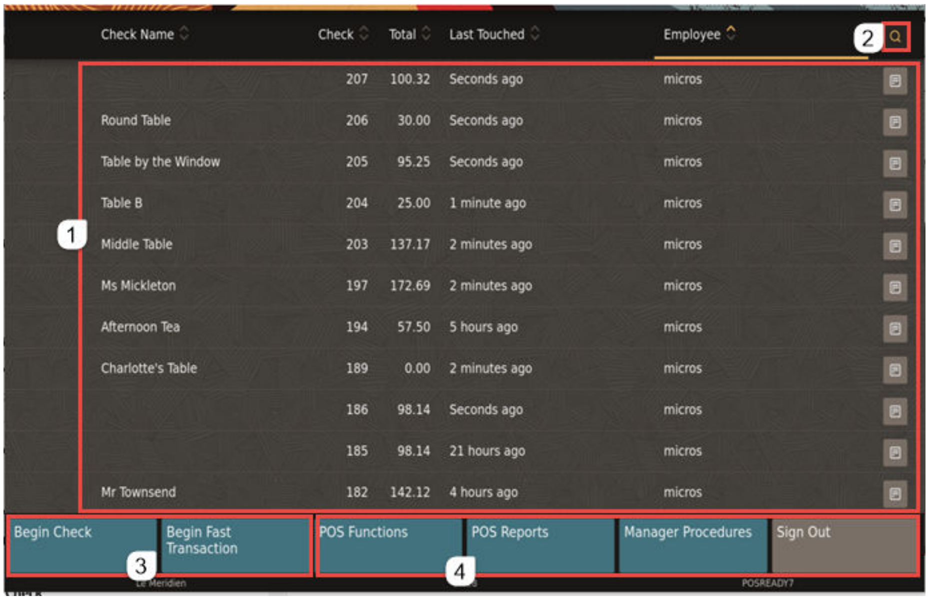

) in the top left corner of the Sign In page. The Information Panel displays information about

the workstation name and status, as well as the Simphony Essentials edition, version number, and IP address.

Home

After you sign in to the workstation, the home page appears. The home page shows a list of open checks.

Figure 1-2 Bar Home Page on Workstations and Tablets



The following table describes the areas called out in the image.

Table 1-1 Bar Home Page

Callout Number	Area	What You Use It For
1	Checks	Click the check line to open a check. View details such as the check name and number, total, and employee. Click the View Check icon () at the end of each check line to view check details.
2	Search	Look for checks by employee, check name, or total.

Table 1-1 (Cont.) Bar Home Page

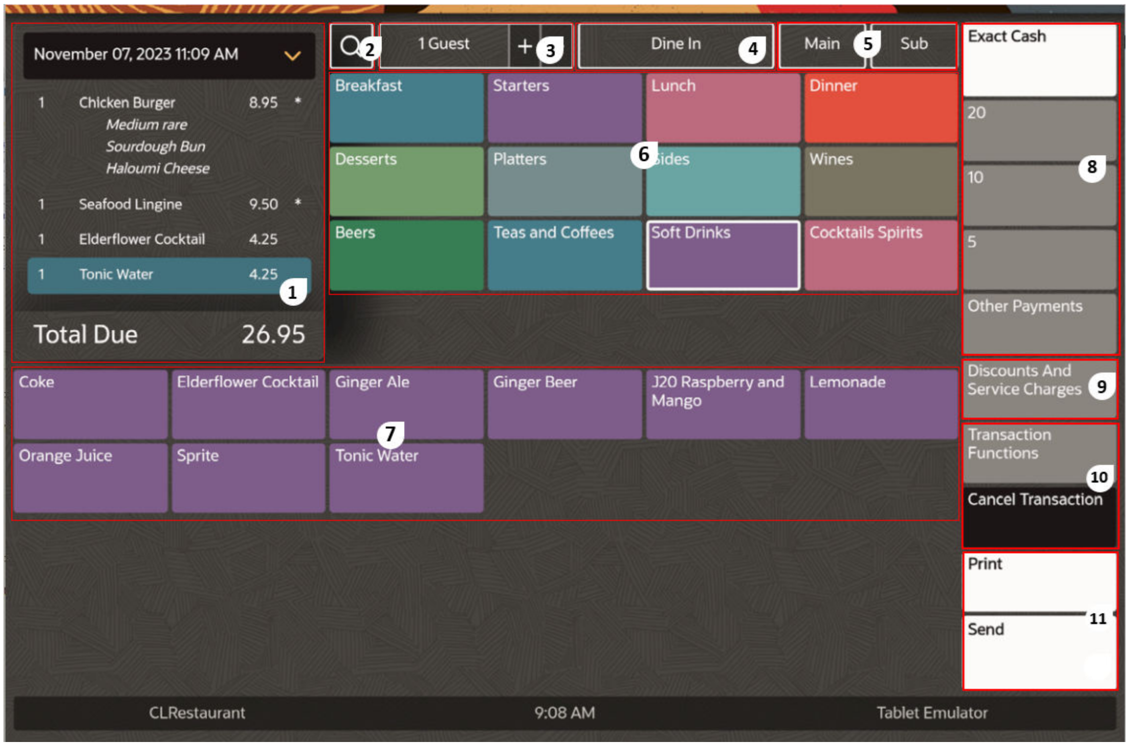
Callout Number	Area	What You Use It For
3	Begin check buttons	Click **Begin Check** to begin a check using a pre-authorized credit card. You can add menu items to the check after the pre-authorization has been applied. The pre-authorization appears on the Transaction page. If the credit card has a customer name, it is automatically used as the check name. Click **Begin Fast Transaction** to have the workstation automatically generate the next check number and move to the Transaction page.
4	Functions panel	Access non-check functions using **POS Functions**. For example, complete cash drawer operations and printing operations. Access reports such as financial reports and check reports using **POS Reports**. Access functions such as edit menu items and edit menu item availability using **Manager Procedures**. Return to the Sign In page using **Sign Out**.

Transactions

After you click **Begin Check** or **Begin Fast Transaction** on the home page, the transaction page appears. After clicking **Begin Check**, you may be prompted to enter the check name (if pre-authorization credit card payment is not defined, or if the pre-authorization does not return a name), and then you can enter a pre-authorization amount before accessing the transaction page. If a check name is not entered, the check number appears in the check header.

The transaction page shows menu items, family groups, pre-authorization, and other check functions.

Figure 1-3 Bar Transaction Page on Workstations and Tablets



The following table describes the areas called out in the image.

Table 1-2 Bar Transaction Page

Callout Number	Area	What You Use It For
1	Check detail	View check details, such as the date and time, menu items on the check, and total due. Click the drop-down arrow in the header to view the check number, employee, and order channel (if configured).
2	Search	Search for menu items. Click the Search icon () to use the onscreen keyboard. A search line appears at the top of the page. Enter the item name, and then click **OK**. Menu items appear in alphabetical order in groups. Upper and lower case can be used. To clear the search entry, click the blue cross.

Table 1-2 (Cont.) Bar Transaction Page

Callout Number	Area	What You Use It For
3	Guests	Select + and – to change the number of guests on the bar check. When you select + and the guest count is at 9 (the maximum value allowed), the number rolls to 1. To use the guest count number pad to enter a larger number of guests, click **Guest**, enter the number, and then click **OK**. The maximum number of guests is 9999.
4	Order type	Select the order type to change the value. In the image example, click **Dine In** to change the order type to another (such as **Take Out**).
5	Menu levels	Set the Main and Sub Menu Levels.
6	Family groups	Select a family group to see all available menu items assigned to a specific category (for example, Beer or Wine). Menu item buttons and the family group button are the same color, which cannot be changed. Family group names are automatically displayed in number order.
7	Menu items	Select a menu item to add it to the check. If sort priority is not used, menu items are listed in alphabetical order. In the image example, click Main to change the menu level from Main to another menu level.
8	Payment buttons	Payment buttons (for example $10.00) can be configured in the EMC. They are referred to as **Quick Payments**. More payments can be configured to appear in the **Other Payments** menu.
9	Discounts and Service Charges	Apply a discount or service charge to a check
10	Transaction Functions Cancel Transaction	Access additional functions that you can use while in a check. Cancel the current transaction and return to the Home page.

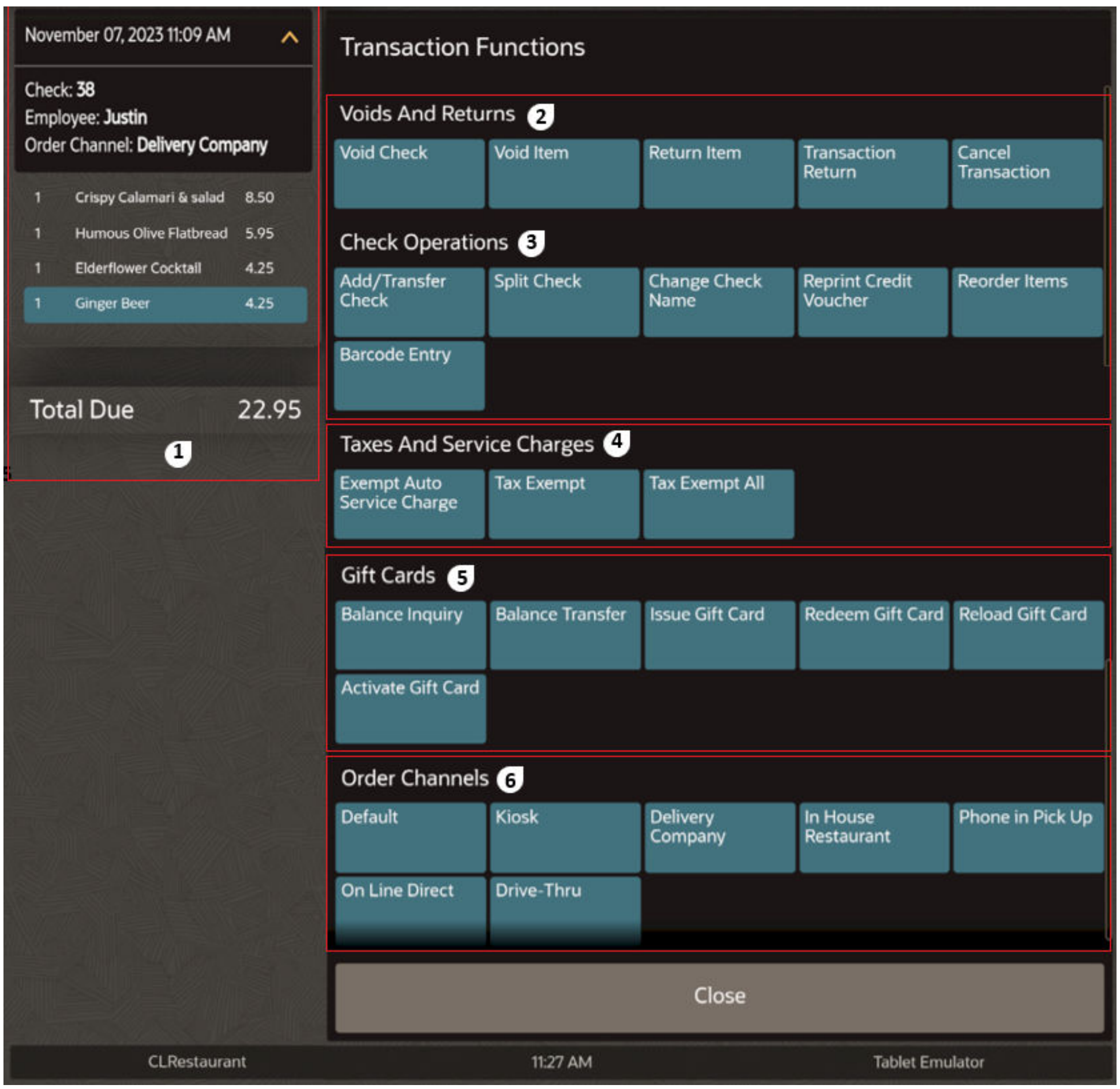
Table 1-2 (Cont.) Bar Transaction Page

Callout Number	Area	What You Use It For
11	Print Send	Print a check. Send menu items to the kitchen.

Transaction Functions

While in a bar transaction, you can perform voids, use various operations on the check, and apply taxes and service charges to the check. Gift card options appear if gift cards are configured. Order Channels appear if configured.

Figure 1-4 Bar Transaction Functions on Workstations and Tablets



The following table describes the areas called out in the image.

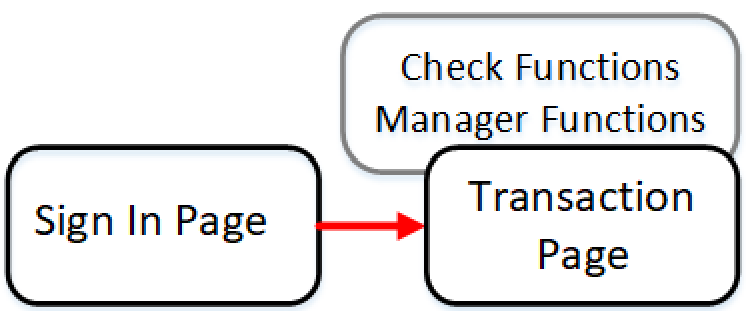
Table 1-3 Bar Transaction Functions

Callout Number	Area	What You Use It For
1	Check detail	View check details, such as menu items on the check and the total due.
2	Voids and Returns	Void transaction items from the current and previous service rounds. Return items that were rejected by a guest.
3	Check Operations	Perform operations on a check, including adding or transferring a check, handling payment, changing the check name, reprinting a credit voucher, reordering items, and entering barcodes.
4	Taxes and Service Charges	Apply an exempt auto service charge to a transaction, or use an exempt function key.
5	Gift Cards	Issue or activate gift cards. Look up the balance on a gift card. Transfer money from one gift card to another. Redeem money from a gift card or add money to a gift card.
6	Order Channels	Select a button to change the order channel.

Quick Service Restaurant Operations

Workflow

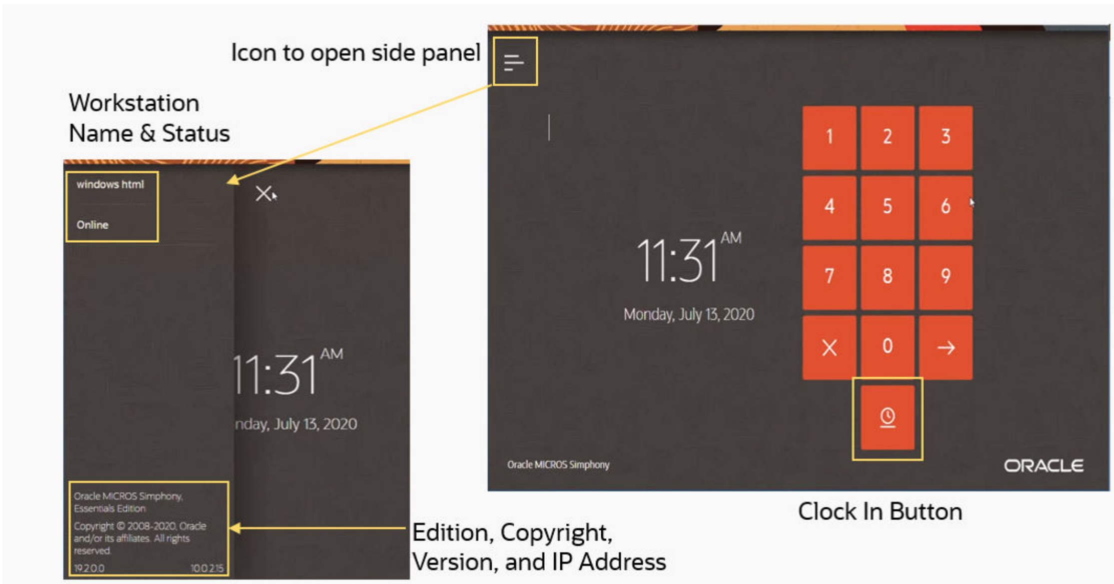
The QSR workflow allows rapid order intake with quick menu item identification.



Sign In

The number pad's design matches smartphones with 123 appearing along the top. Use the **X** icon to clear entries and the forward arrow icon to confirm entries.

Figure 1-5 Sign In Panel on Workstations and Tablets



To sign in, enter your User ID number, and then press the arrow icon. Asterisks (*) appear above the number pad as the User ID is entered.

To clock in, click the Clock In icon
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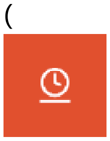
) on the Sign In page.

To activate the Information Panel, click the line icon
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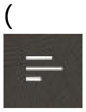
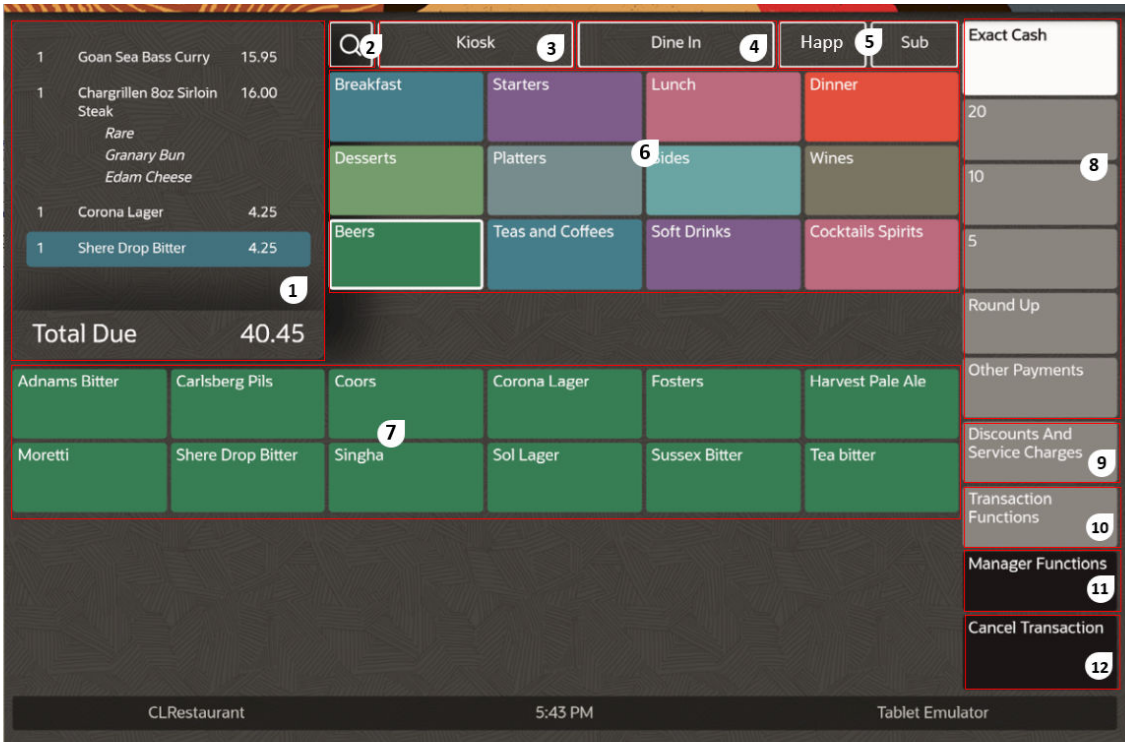

) in the top left corner of the Sign In page. The Information Panel displays information about the workstation name and status, as well as the Simphony Essentials edition, version number, and IP address.

Transactions

The QSR service type does not have a home page. For speed of service, the Sign In page leads directly to the QSR transaction page.

The transaction page shows menu items, family groups, check details, access to payments, discounts, service charges, manager functions, and other check handling functions.

Figure 1-6 QSR Transaction Page on Workstations and Tablets



The following table describes the areas called out in the image.

Table 1-4 QSR Transaction Page

Callout Number	Area	What You Use It For
1	Check detail	View check details, such as menu items on the check and the total due.
2	Search	Search for menu items. Click the Search icon () to use the onscreen keyboard. A search line appears at the top of the page. Enter the item name, and then click **OK**. Menu items appear in alphabetical order in groups. Upper and lower case can be used. To clear the search entry, click the blue cross.
3	Order channel	Select the order channel to change the value. In the image example, click **Kiosk** to change the order channel to another (such as Drive Thru).

Table 1-4 (Cont.) QSR Transaction Page

Callout Number	Area	What You Use It For
4	Order type	Select the order type to change the value. In the image example, click **Dine In** to change the order type to another (such as Take Out).
5	Menu levels	Set the Main and Sub Menu Levels. In the image example, click **Happ** to change the menu level from Happy Hour to another Menu Level.
6	Family Groups	Select a family group to see all available menu items assigned to a specific category (for example, Starters or Soups). Menu item buttons and the family group button are the same color, which cannot be changed. Family group names are automatically displayed in number order.
7	Menu items	Select a menu item to add it to the check. If sort priority is not used, menu items are listed in alphabetical order.
8	Payment buttons	Payment buttons (for example $10.00) can be configured in the EMC. They are referred to as **Quick Payments**. More payments can be configured to appear in the **Other Payments** menu.
9	Discounts and Service Charges	Apply a discount or service charge to a check.
10	Transaction Functions	Access additional functions that you can use while in a check.
11	Manager Functions	Access manager functions, POS reports, and non-check POS functions.
12	Sign Out/Cancel Transaction	The Sign Out button changes to **Cancel Transaction** when a transaction is started.

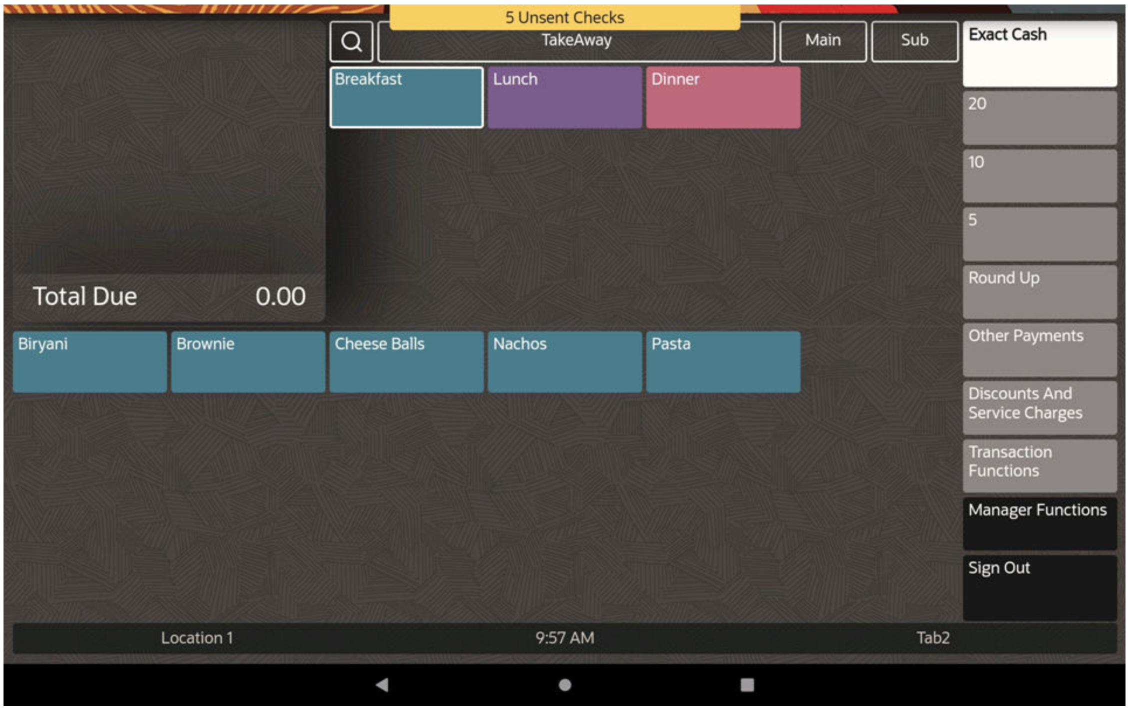
Unsent Checks Warning

Warning messages appear on POS clients when a device with unsent checks is disconnected from the Check and Posting Service (CAPS). The messages appear as a translucent yellow banner at the top of all pages outside a transaction. They do not appear when a transaction is in progress so as not to distract from, or slow down, the order taking process.

After posting a transaction, there is a 30-second delay to enable checks to send before a warning message appears. The warnings make the server aware of an issue so that they can either move the device back into network range or alert a manager that there is a connection issue.

The warning messages show the number of unsent transactions on the device so that when a solution is found, servers can see the number decrease and know that the issue has been resolved. Warnings appear on Android devices and Linux workstations for TSR, QSR, and Bar operations when the device is offline from CAPS. The warning messages appear by default and cannot be switched off.

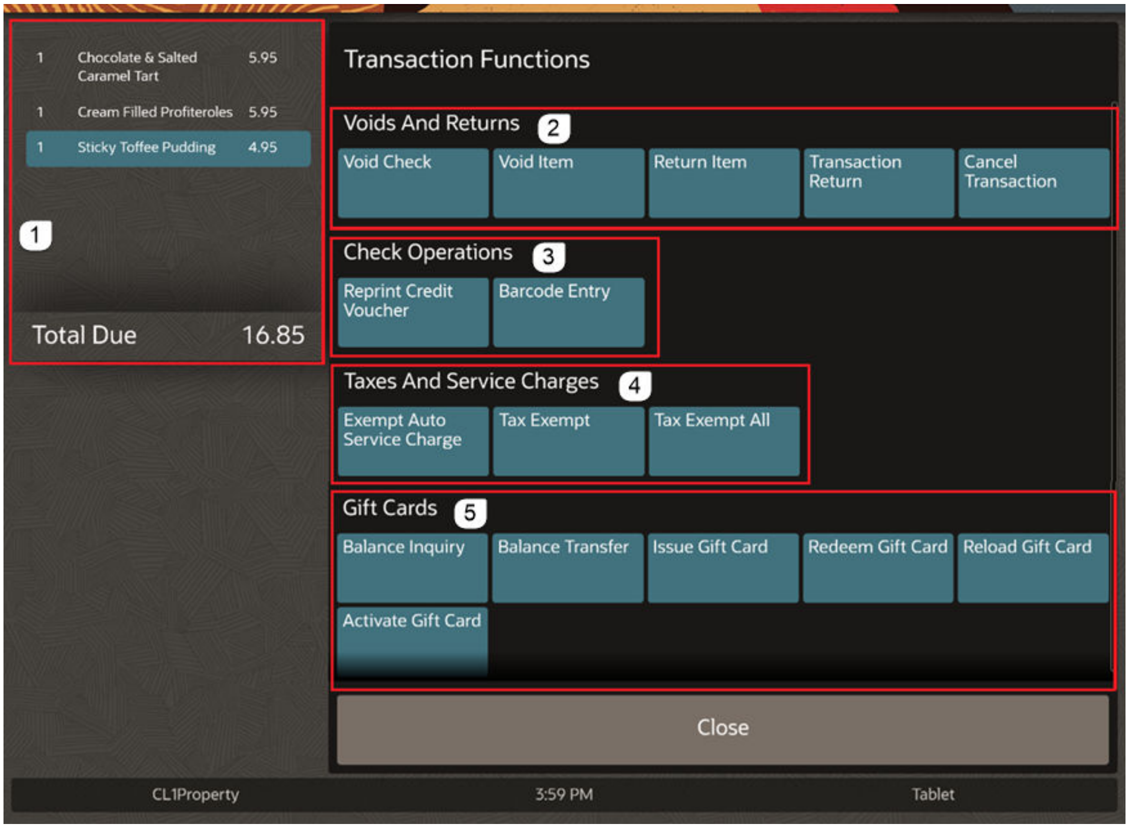
Figure 1-7 QSR Unsent Checks on Workstations and Tablets



Transaction Functions

While in a QSR transaction, you can perform voids and returns, reprint a credit card voucher, enter barcodes, and apply taxes and service charges to the check. Gift card options appear if gift cards are configured.

Figure 1-8 QSR Check Functions on Workstations and Tablets



The following table describes the areas called out in the image.

Table 1-5 QSR Check Functions

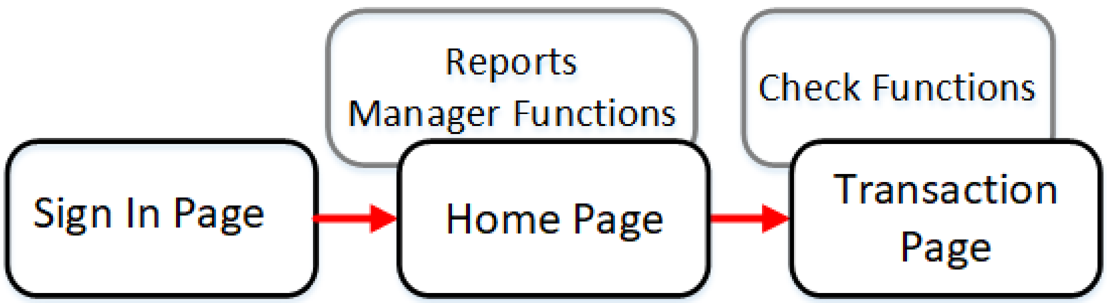
Callout Number	Area	What You Use It For
1	Check detail	View check details, such as menu items on the check and the total due.
2	Voids and Returns	Void transaction items from the current and previous service rounds. Return items that were rejected by a guest.
3	Check Operations	Reprint a credit card voucher to be signed by the customer, and enter barcodes.
4	Taxes and Service Charges	Apply tax exemptions or exempt auto service charges to a transaction.
5	Gift Cards	Issue or activate gift cards. Look up the balance on a gift card. Transfer money from one gift card to another. Redeem money from a gift card or add money to a gift card.

Table Service Restaurant Operations

Workflow

The TSR workflow provides speed of service for a dine-in restaurant, helping to improve efficiency and customer engagement.

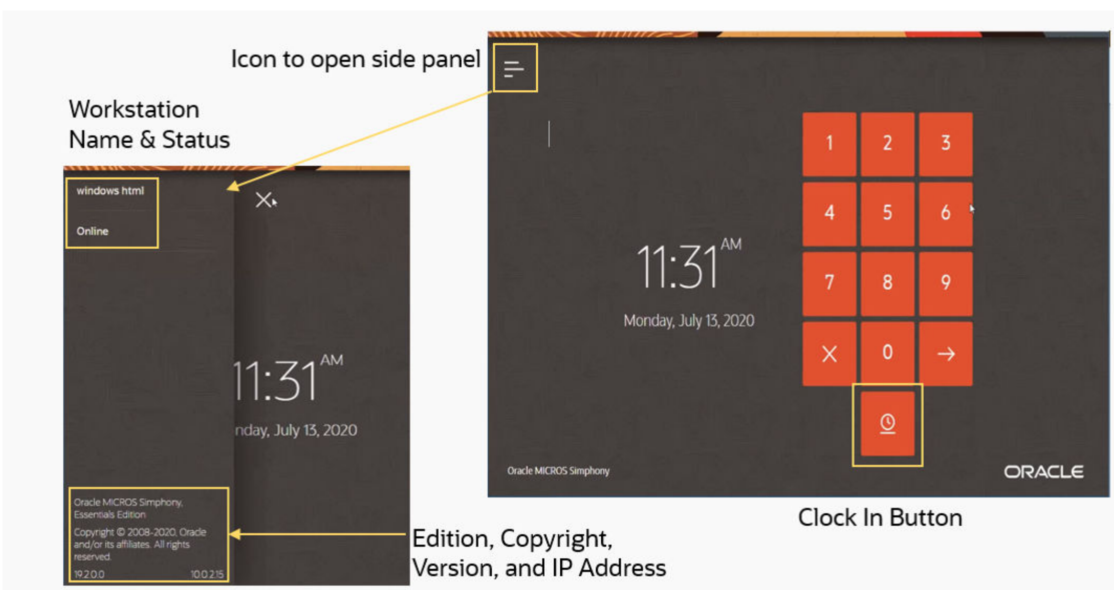
Functions that you can perform outside of a check are accessible from the Home Page. This includes Reports and Manager Functions. Functions that you can perform inside a transaction are accessible from the Transaction Page, including Check Functions.



Sign In

The number pad's design matches smartphones with 123 appearing along the top. Use the **X** icon to clear entries and the forward arrow icon to confirm entries.

Figure 1-9 Sign In Panel on Workstations and Tablets



To sign in, enter your User ID number, and then press the arrow icon. Asterisks (*) appear above the number pad as the User ID is entered.

To clock in, click the Clock In icon
(

) on the Sign In page.

To activate the Information Panel, click the line icon
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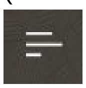
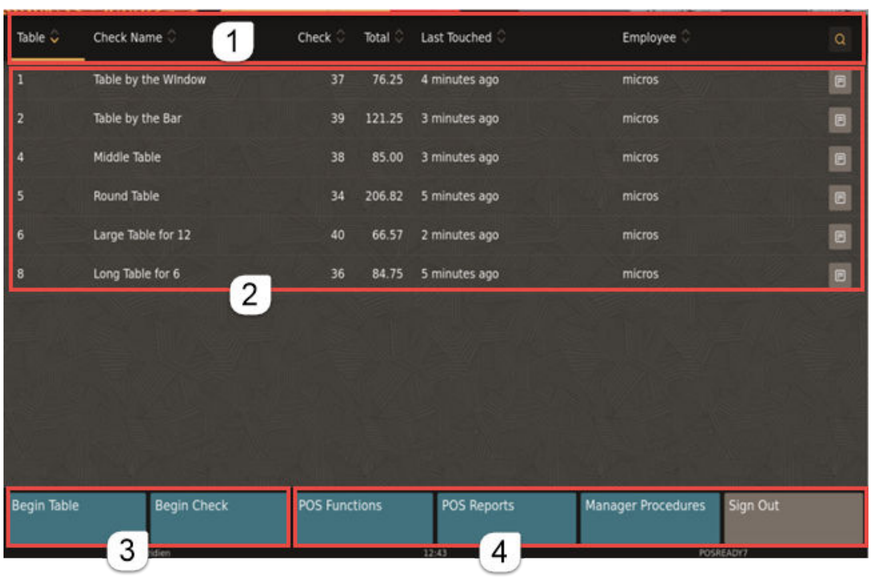

) in the top left corner of the Sign In page. The Information Panel displays information about the workstation name and status, as well as the Simphony Essentials edition, version number, and IP address.

Home

After you sign in to the workstation, the home page appears. The home page shows open check details and provides access to point-of-sale functions.

Figure 1-10 TSR Home Page on Workstations and Tablets



The following table describes the areas called out in the image.

Table 1-6 TSR Home Page

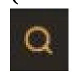
Callout Number	Area	What You Use It For
1	Header	Sort check details by tapping column headers. A yellow line appears beneath the column that is being sorted. Click the Search icon () to search in each column of the home page, and then click the column title. An onscreen keyboard appears. Click the blue cross to clear the search.
2	Check details	View details such as the table number, check name and number, total, and employee. If there are no checks with a table name, the Table column is not visible. If there are no checks with a table number, the Table Number column is not visible. If the Table and Check Name columns are all the same, the Check Name column is not visible. Click the View Check icon () at the end of each check line to view check details.
3	Begin check buttons	Click **Begin Table** to begin a check by table number or table ID. The system prompts for a table number or name, and then moves to the Transaction page. Click **Begin Check** to have the workstation automatically generate the next check number and move to the Transaction page.

Table 1-6 (Cont.) TSR Home Page

Callout Number	Area	What You Use It For
4	Functions panel	Access non-check functions using **POS Functions**. For example, complete cash drawer operations and printing operations. Access reports, such as financial reports and check reports using **POS Reports**. Access functions, such as edit menu items and edit menu item availability using **Manager Procedures**. Return to the Sign In page using **Sign Out**.

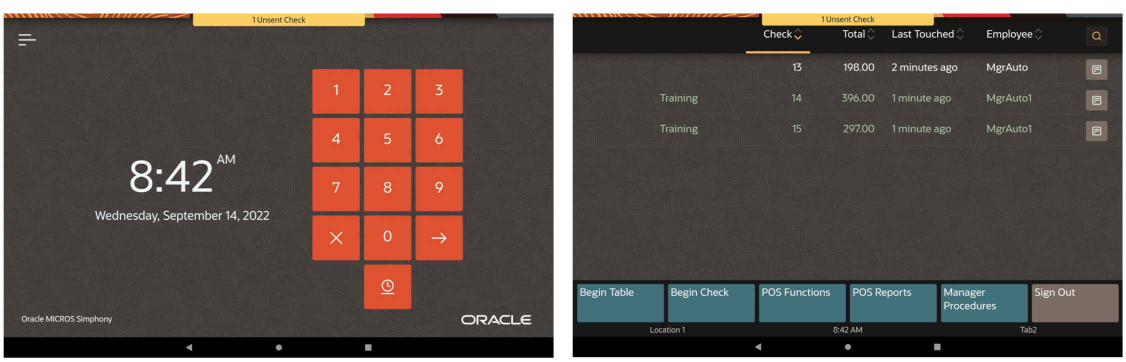
Unsent Checks Warning

Warning messages appear on POS clients when a device with unsent checks is disconnected from the Check and Posting Service (CAPS). The messages appear as a translucent yellow banner at the top of all pages outside a transaction. They do not appear when a transaction is in progress so as not to distract from, or slow down, the order taking process.

After posting a transaction, there is a 30-second delay to enable checks to send before a warning message appears. The warnings make the server aware of an issue so that they can either move the device back into network range or alert a manager that there is a connection issue.

The warning messages show the number of unsent transactions on the device so that when a solution is found, servers can see the number decrease and know that the issue has been resolved. Warnings appear on Android devices and Linux workstations for TSR, QSR, and Bar operations when the device is offline from CAPS. The warning messages appear by default and cannot be switched off.

Figure 1-11 TSR Unsent Checks on Workstations and Tablets



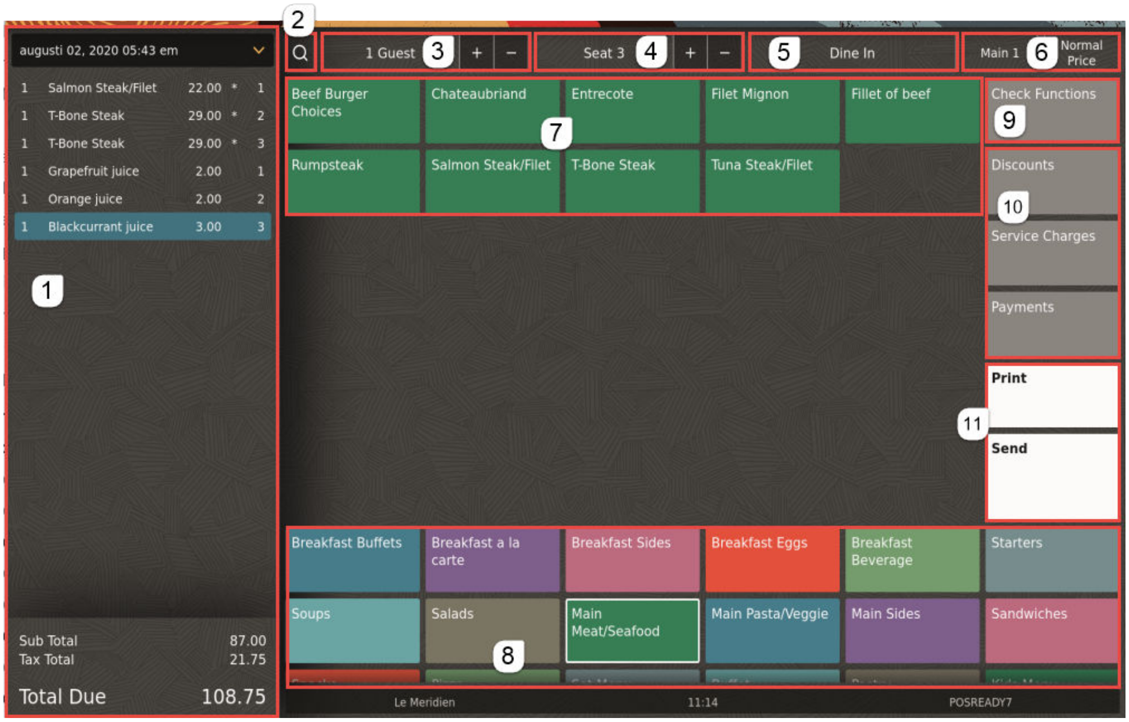
Transactions

After you click **Begin Table** or **Begin Check**, or after accessing a check using the View Check icon

(

) on the home page, the transaction page appears. The transaction page shows menu items, family groups, and other check functions.

Figure 1-12 TSR Transaction Page on Workstations and Tablets



The following table describes the areas called out in the image.

Table 1-7 TSR Transaction Page

Callout Number	Area	What You Use It For
1	Check detail	View check details, such as the date and time, menu items on the check, the subtotal, taxes, and total due. Click the drop-down arrow in the header to view the check number, employee, and order channel (if configured). The columns in the check detail show the quantity, menu item description, cost, and seat number. Other symbols are used, such as the asterisk for previous round items, V for voided items, and H for held items. You can also use gestures in the TSR check detail area.
2	Search	Search for menu items. Click the Search icon () to use the onscreen keyboard. A search line appears at the top of the page. Enter the item name, and then click **OK**. Menu items appear in alphabetical order in groups. Upper and lower case can be used. To clear the search entry, click the blue cross.
3	Guests	Select + and – to change the number of guests on the TSR check. When you select + and the guest count is at 9, the number rolls to 1. To use the Guest Count number pad to enter a larger number of guests, click **Guest**, enter the number, and then click **OK**. The maximum number of guests is 9999.
4	Seats	Select + and – to change the seat numbers on a TSR check. When you select + and the seat count is at 9, the number rolls to 1. To enter more than 9 seats, click **Seats**, enter the number, and then click **OK**. The maximum number of seats is 64.

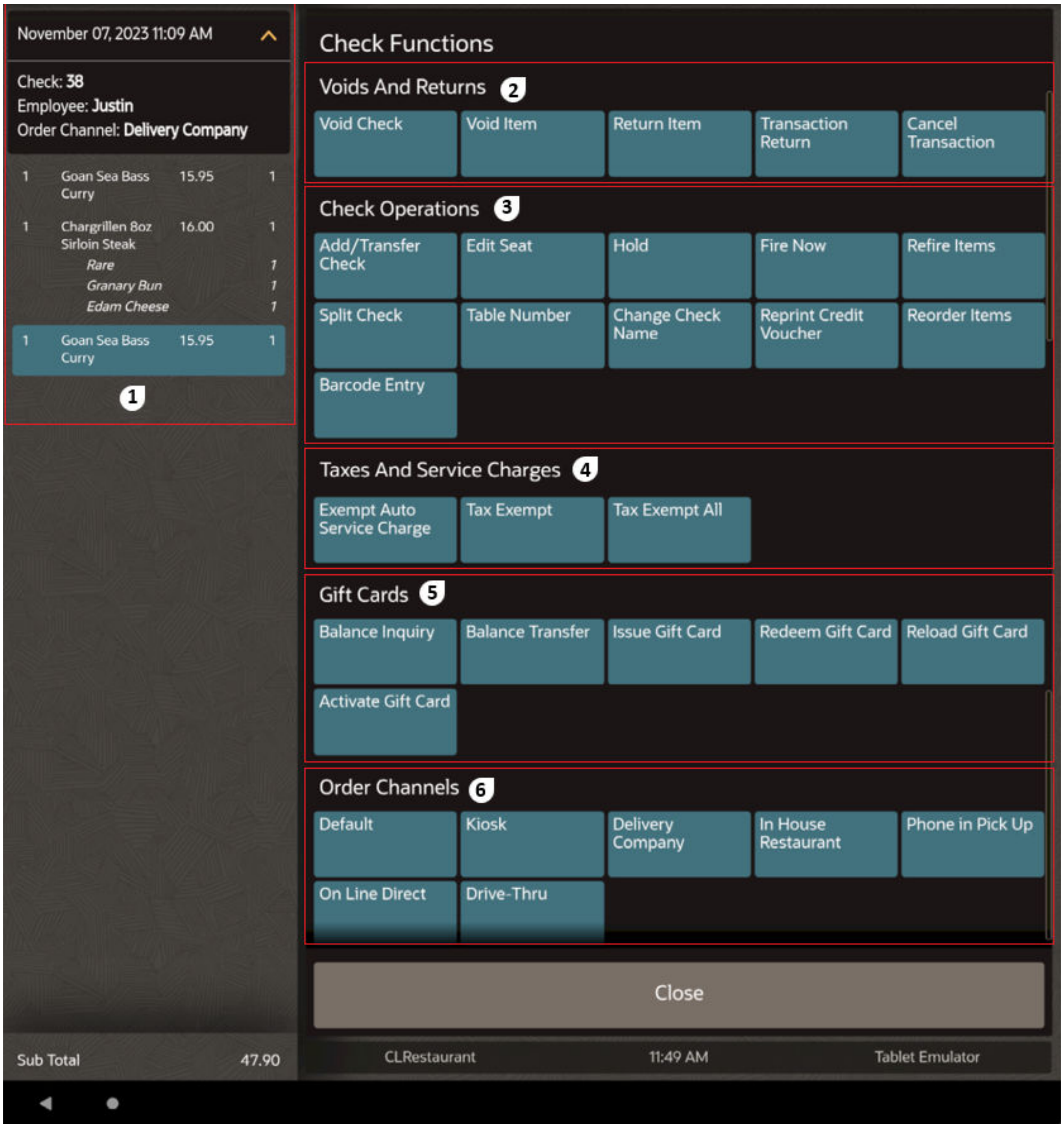
Table 1-7 (Cont.) TSR Transaction Page

Callout Number	Area	What You Use It For
5	Order type	Select the order type to change the value. A list of order types appears. In the image example, click **Dine In** to change the order type to another (such as Take Out).
6	Menu levels	Set the Main and Sub Menu Levels. A list of menu levels appears. In the image example, click **Main 1** to change the menu level to another.
7	Menu items	Select a menu item to add it to the check. If sort priority is not used, menu items are listed in alphabetical order.
8	Family groups	Select a family group to see menu items for that specific family group. Menu item buttons and the family group button are the same color, which cannot be changed. Family groups are listed at the bottom of the page and names are automatically displayed in number order.
9	Check Functions	Access additional functions that you can use while in a check. The Check Functions and Transaction Functions chapter contains more information.
10	Discounts, Service Charges, Payments	Apply a discount, service charge, or payment to a check. Discounts and service charges are configured in the EMC and listed in the relevant menus, if assigned to SLU 1.
11	Print, Send	Print the check or send (service total) menu items to the kitchen.

Functions

While in a TSR transaction, you can perform voids and returns, use various operations on the check, and apply taxes and service charges to the check. Gift card options appear if gift cards are configured. The check detail appears on the left pane.

Figure 1-13 TSR Check Functions on Workstations and Tablets



The following table describes the areas called out in the image.

Table 1-8 TSR Check Functions

Callout Number	Area	What You Use It For
1	Check detail	View check details, such as the date and time, menu items on the check, the subtotal, taxes, and total due. Click the drop-down arrow in the header to view the check number, employee, and order channel (if configured).

Table 1-8 (Cont.) TSR Check Functions

Callout Number	Area	What You Use It For
2	Voids and Returns	Void transaction items from the current and previous service rounds. Return items that were rejected by a guest. Cancel a check that has not been sent (service totalled).
3	Check Operations	Change various parts of a check, such as seat handling, menu item firing, payment, table number, check name, and barcodes.
4	Taxes and Service Charges	Apply an exempt auto service charge to a transaction, or use an exempt function key.
5	Gift Cards	Issue or activate gift cards. Look up the balance on a gift card. Transfer money from one gift card to another. Redeem money from a gift card or add money to a gift card.
6	Order Channels	Select a button to change the order channel.

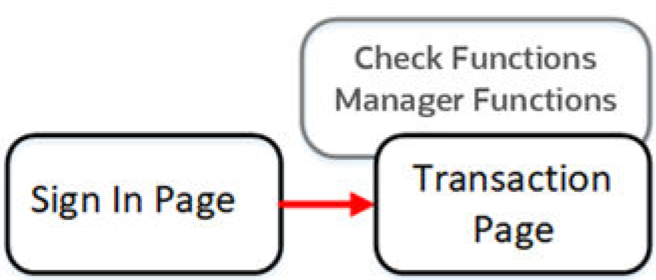
Portrait UI

The portrait UI is designed for mobile phones and handheld devices which support QSR and TSR service types.

Quick Service Restaurant Operations

Workflow

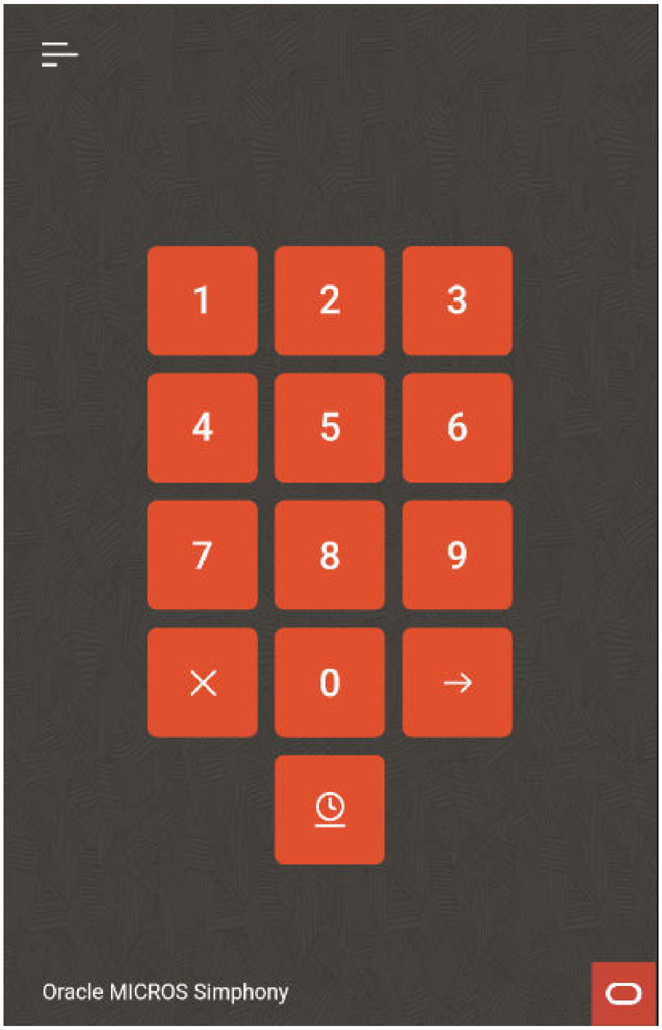
The QSR workflow allows rapid order intake with quick menu item identification.

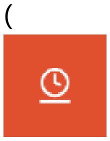


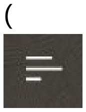
Sign In

To sign in on an Android mobile payment device, enter your User ID number, and then press the arrow icon. Asterisks (*) appear above the number pad as the User ID is entered.

Figure 1-14 Sign In Number Pad on Mobile Phones and Handheld Devices

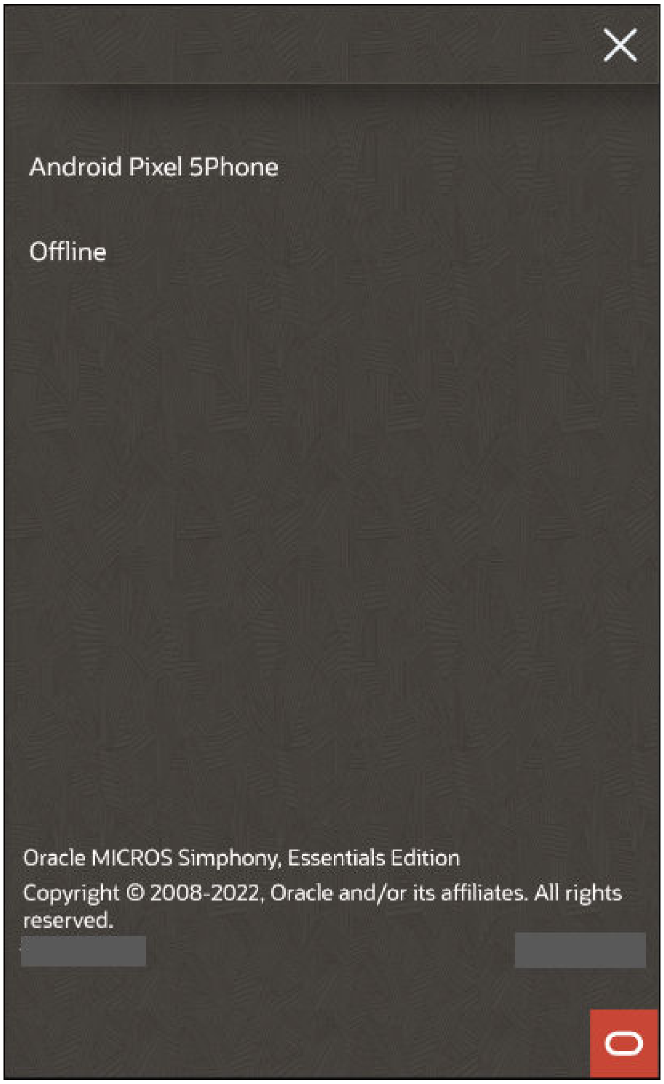


To clock in, click the Clock In icon
(

) on the Sign In page.

To view the Information Panel, click the line icon
(

) in the top left corner of the Sign In page. The Information Panel displays information about

the mobile device name and connection status, as well as the Simphony Essentials edition, version number, and IP address.

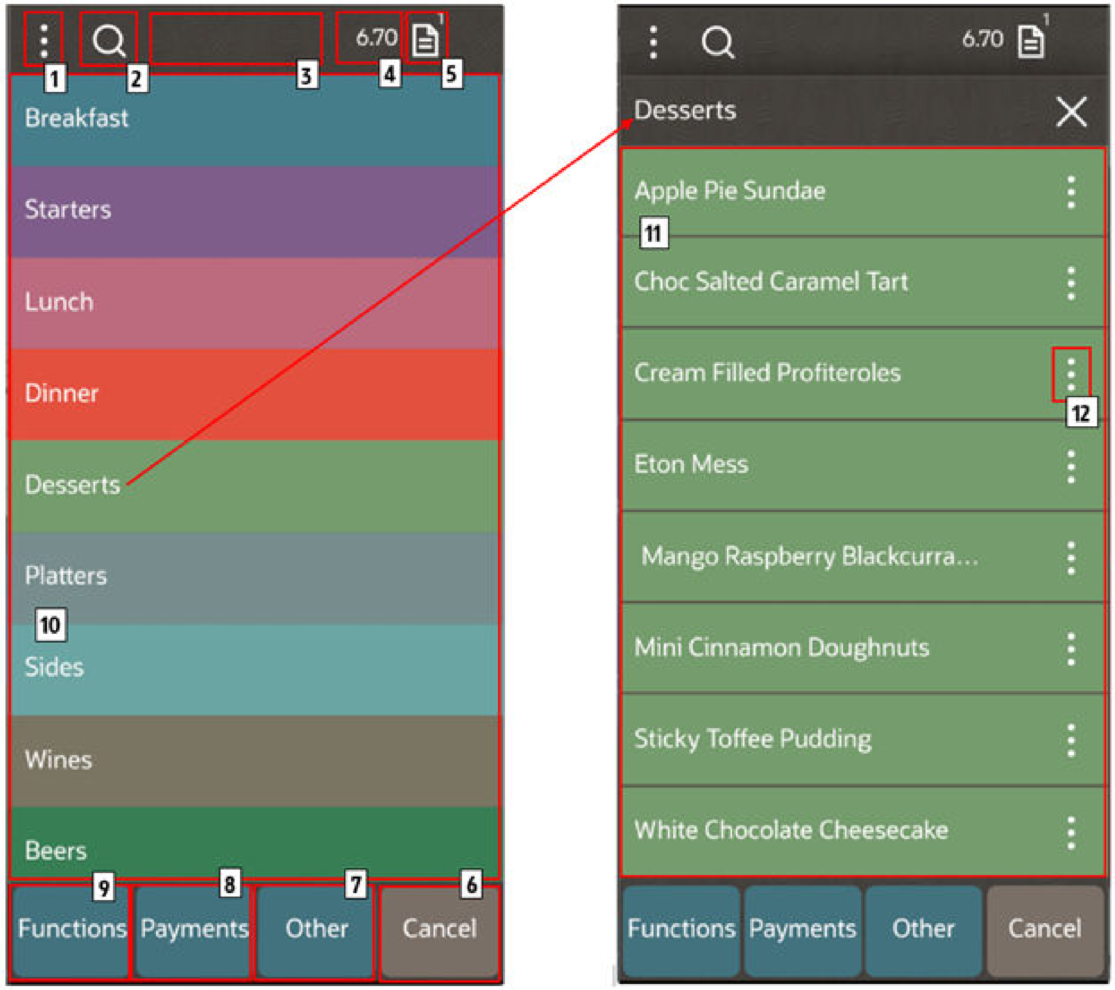
Figure 1-15 Information Panel on Mobile Phones and Handheld Devices



Transactions

When using a mobile phone or handheld device, after you sign in, a list of menu item categories (SLU Groups) appears. Select a category to see a list of menu items associated with the SLU Group. In the following figure, clicking the **Desserts** category opens the list of menu items associated with the Desserts SLU Group.

Figure 1-16 QSR Transaction SLU Groups and Menu Items on Mobile Phones and Handheld Devices



The following table describes the areas called out in the image.

Table 1-9 QSR Transaction Page

Callout Number	Area	What You Use It For
1	Check Attributes Icon	Set the following: • Order Type • Order Channel • Menu Levels

Table 1-9 (Cont.) QSR Transaction Page

Callout Number	Area	What You Use It For
2	Search	Search for menu items. Click the Search icon () to use the onscreen keyboard. A search line appears at the top of the page. Start entering the menu item upper or lower case), and matching items will appear in alphabetical order in groups. To clear the search entry, click the blue cross.
3	Information line	The last item sold flashes on this line so that the server can verify the sale. If the server taps the line, the last four items sold appear in a window.
4	Total Due	Shows the total due for the check.
5	Check Detail Icon	The number of items on the check appears next to this icon. Click to view the Check Detail.
6	Sign Out/Cancel	Sign out if not in a transaction. If you are in a transaction, the button name changes to Cancel, allowing you to cancel the transaction.
7	Other	View a list of discounts and service charges. Apply a discount, service charge, or payment to a check. Discounts and service charges are configured in the EMC and listed in the relevant menus if assigned to SLU 1.
8	Payment Methods	View a list of payment methods.
9	Functions	Access additional functions that you can use while in a check (for example, voids). The Check Functions chapter contains more information.

Table 1-9 (Cont.) QSR Transaction Page

Callout Number	Area	What You Use It For
10	Family Groups	Select a family group to see menu items for that specific family group (for example, Starters or Lunch). Menu item buttons and the family group button are the same color and cannot be changed. Family group names are automatically displayed in number order.
11	Menu Items	Select a menu item to add it to the check. If sort priority is not used, menu items are listed in alphabetical order.
12	Menu Attributes Icon	After clicking the Menu Attributes icon, you can perform the following: • Add one or more quantities of this item • Void one or more quantities of this item • Return one or more quantities of this item

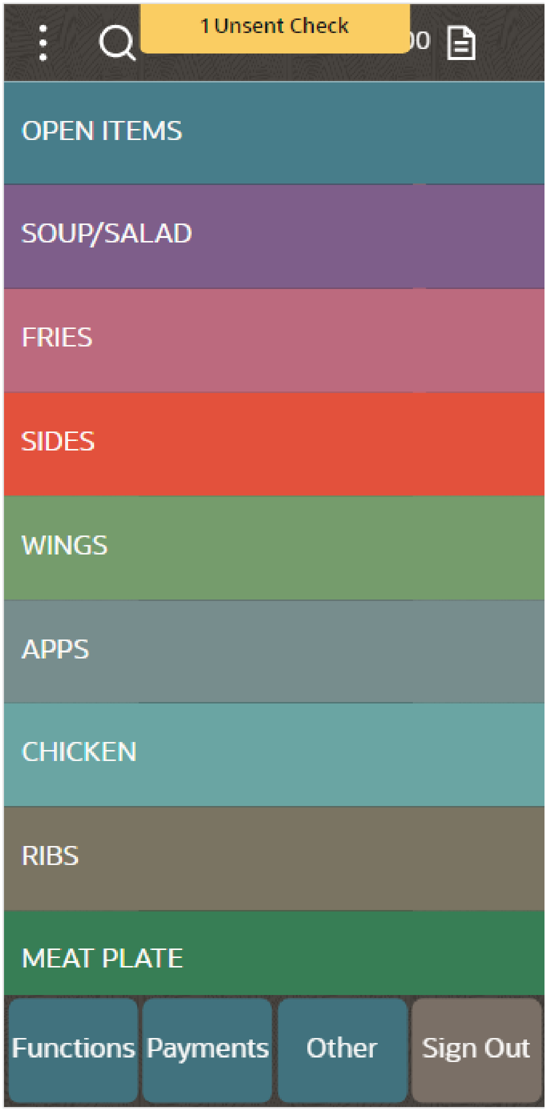
Unsent Checks Warning

Warning messages appear on POS clients when a device with unsent checks is disconnected from the Check and Posting Service (CAPS). The messages appear as a translucent yellow banner at the top of all pages outside a transaction. They do not appear when a transaction is in progress so as not to distract from, or slow down, the order taking process.

After posting a transaction, there is a 30-second delay to enable checks to send before a warning message appears. The warnings make the server aware of an issue so that they can either move the device back into network range or alert a manager that there is a connection issue.

The warning messages show the number of unsent transactions on the device so that when a solution is found, servers can see the number decrease and know that the issue has been resolved. Warnings appear on Android devices and Linux workstations for TSR, QSR, and Bar operations when the device is offline from CAPS. The warning messages appear by default and cannot be switched off.

Figure 1-17   QSR Unsent Checks on Mobile Phones and Handheld Devices

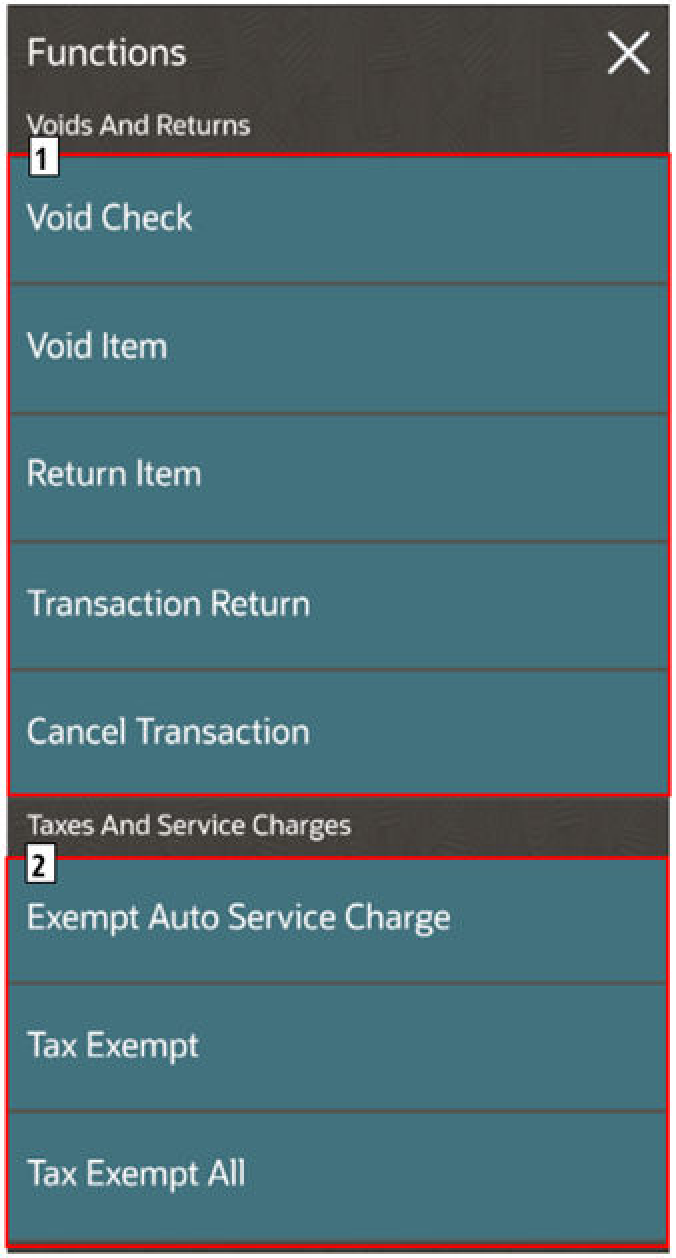


Functions

QSR Transaction Functions

While in a QSR transaction, you can perform voids and returns, and apply taxes and auto service charges to the check. Gift card options appear if gift cards are configured.

Figure 1-18 QSR Check Functions on Mobile Phones and Handheld Devices



The following table describes the areas called out in the image.

Table 1-10 QSR Transaction Functions

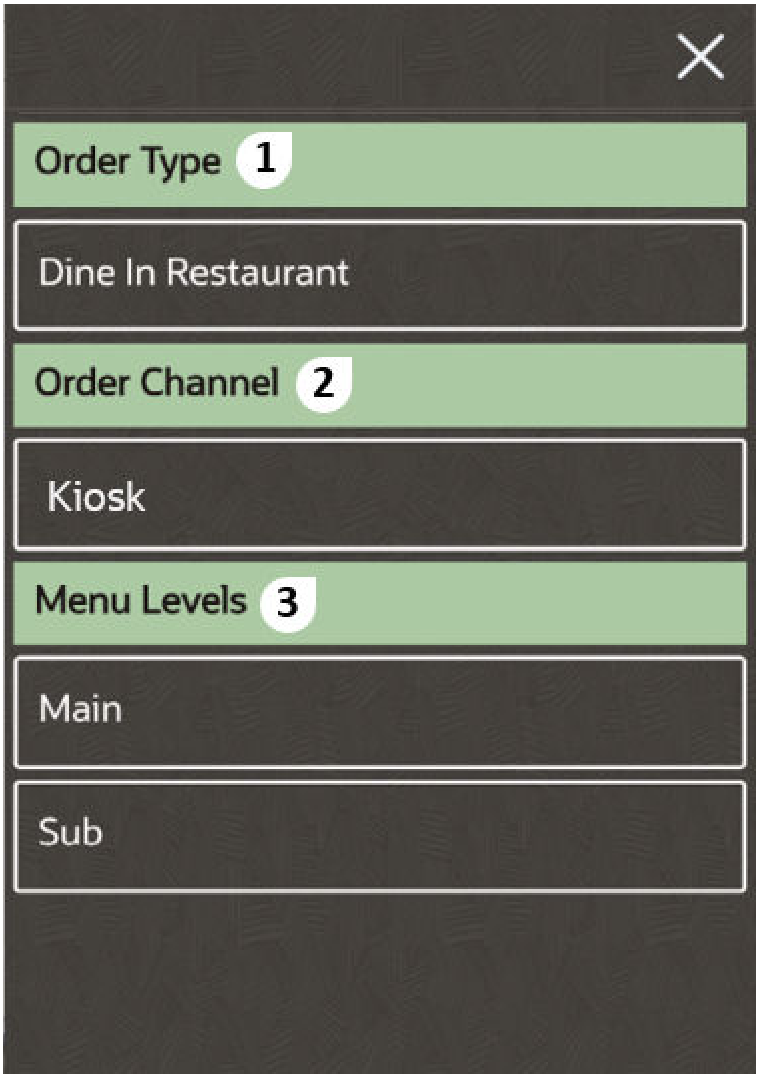
Callout Number	Area	What You Use It For
1	Voids and Returns	Void transaction items from the current and previous service rounds. Return items that were rejected by a guest. Cancel a check that has not been sent (service totalled).
2	Check Operations	Change various parts of a check, such as seat handling, menu item firing, payment, table number, check name, and barcodes.
Gift Cards (if configured)		Gift Card functions, such as issuing a card, looking up the balance, redeeming or adding money, and transferring money from one gift card to another.

Check Attributes

Click the attributes icon
(

) in the upper left area of the Transaction page or the check detail. The QSR Check Attributes page shows information about the check, such as the order type, and allows you to change the information.

Figure 1-19 QSR Mobile Device Check Attributes



The following table describes the areas called out in the image.

Table 1-11 QSR Check Attributes

Callout Number	Area	What You Use It For
1	Order Type	Select the order type to change the value. In the image example, click **Dine In Restaurant** to change the order type to another (such as Take Out).
2	Order Channel	Select the order channel to change the value. In the image example, click **Kiosk** to change the order channel to another (such as Drive Thru). This only appears if configured.

Table 1-11 (Cont.) QSR Check Attributes

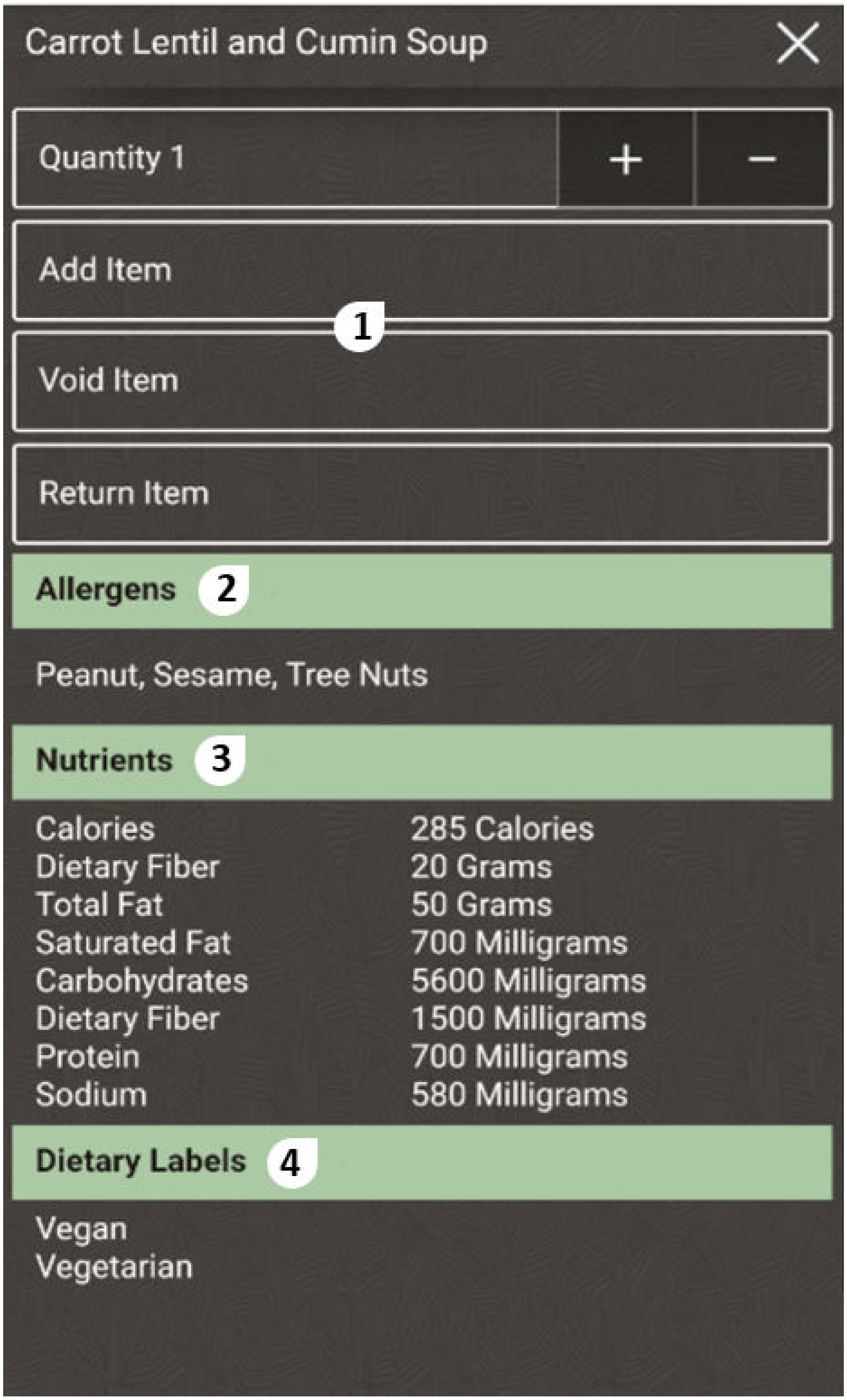
Callout Number	Area	What You Use It For
3	Menu Levels	Select the Main and Sub Menu Levels to change the value. In the image example, click **Main** to change the menu level to another.

Item Attributes

Click the attributes icon
(

) adjacent to a menu item. The Item Attributes page appears and allows multiple quantities of an item to be sold, voided, or returned, and displays EMC Allergens, Nutrients and Dietary Labels (if configured).

Figure 1-20 QSR Mobile Device Item Attributes



The following table describes the areas called out in the image.

Table 1-12 QSR Item Attributes

Callout Number	Area	What You Use It For
1	Quantity Add, Void, and Return Item	Click the **Quantity** button to enter a number and then click **Add Item**, **Void Item**, or **Return Item**. For example, entering a quantity of 20 and clicking **Add Item** sells 20 of the items. Entering a quantity of 15 and selecting **Void Item** voids 15 of the items.
2	Allergens	Allergens appear if configured.
3	Nutrients	Nutrients appear if configured.
4	Dietary Labels	Dietary labels appear if configured.

Table Service Restaurant Operations

Workflow

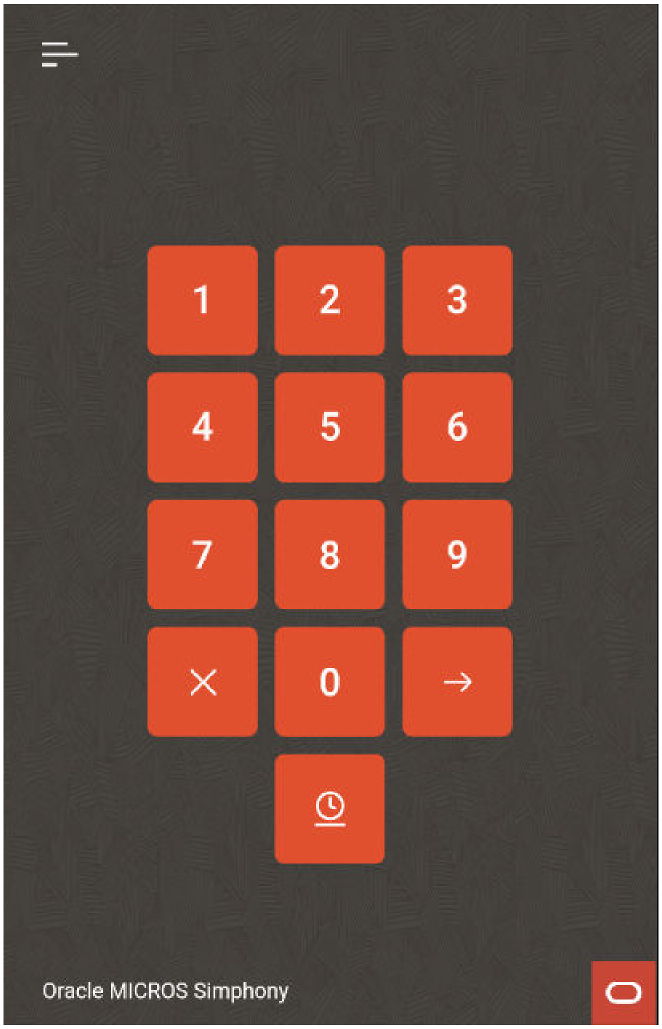
The TSR workflow provides speed of service for a dine-in restaurant, helping to improve efficiency and customer engagement.

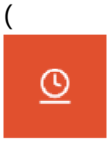
Functions that you can perform outside of a check are accessible from the Home Page. This includes POS and Manager Functions. Functions that you can perform inside a transaction are accessible from the Transaction Page, including Check Functions.

Sign In

To sign in on an Android mobile payment device, enter your User ID number, and then press the arrow icon. Asterisks (*) appear above the number pad as the User ID is entered.

Figure 1-21   Sign In Number Pad on Mobile Phones and Handheld Devices



To clock in, click the Clock In icon
(

) on the Sign In page.

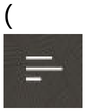
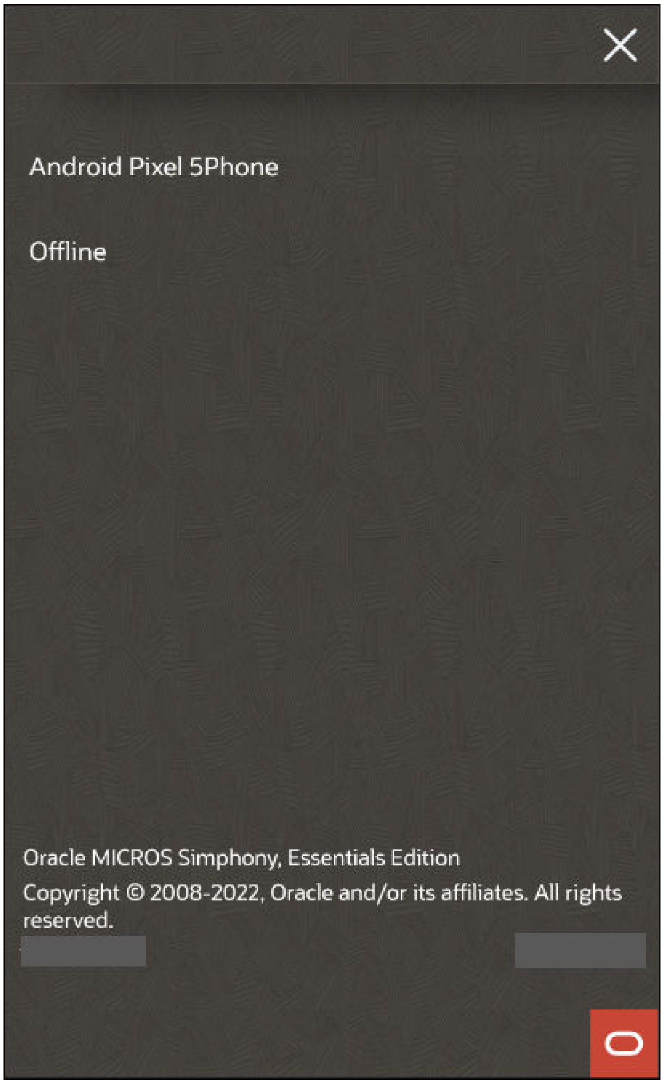
To view the Information Panel, click the line icon
(

) in the top left corner of the Sign In page. The Information Panel displays information about the mobile device name and connection status, as well as the Simphony Essentials edition, version number, and IP address.

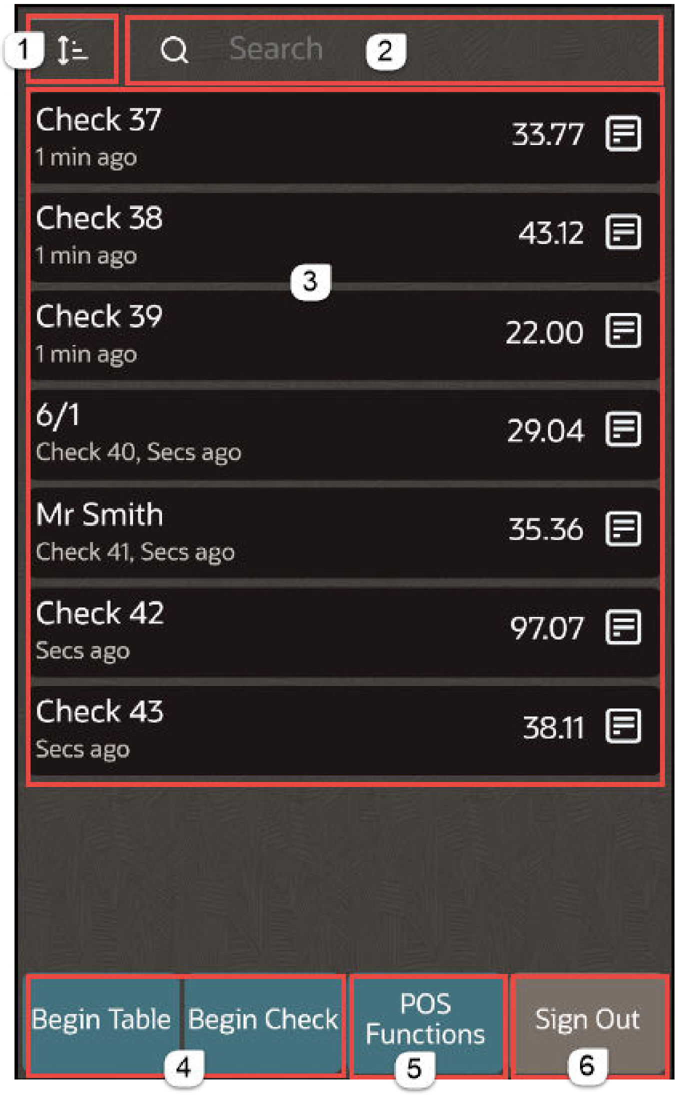
Figure 1-22 Information Panel on Mobile Phones and Handheld Devices



Home

After you sign in to a mobile phone or handheld device, the home page appears. The home page shows open checks as buttons, and you can use the sort icon to access the sort page.

Figure 1-23 TSR Home Page on Mobile Phones and Handheld Devices



The following table describes the areas called out in the image.

Table 1-13 Mobile Device TSR Home Page Description

Callout Number	Area	What You Use It For
1	Sort icon	Click the Sort icon () to go to the Sort Checks page, and then click a sort field to change the order to ascending or descending.

Table 1-13 (Cont.) Mobile Device TSR Home Page Description

Callout Number	Area	What You Use It For
2	Search	Click in the Search field () to search all fields of the mobile TSR home page. An onscreen keyboard appears. Click **X** to clear the search.
3	Open Checks buttons	View details such as the table number, check name and number, and total. Click the View Check icon () at the end of each check line to view check details. Click the pencil icon () to edit a check.
4	Begin check buttons	Click **Begin Table** to begin a check by table number or table ID. The system prompts for a table number or name, and then moves to the Transaction page. The Transaction page shows the seat number selector when a table number or ID is entered against a check. Click **Begin Check** to have the mobile device automatically generate the next check number and move to the Transaction page.
5	POS Functions button	Access closed check functions using **POS Functions** (for example, check and printing operations). Access Manager Procedure functions, such as updating and reloading the database, opening the Property Management Console (PMC) to view log files, and closing the Simphony Essentials mobile application.
6	Sign Out button	Return to the Sign In page using **Sign Out**.

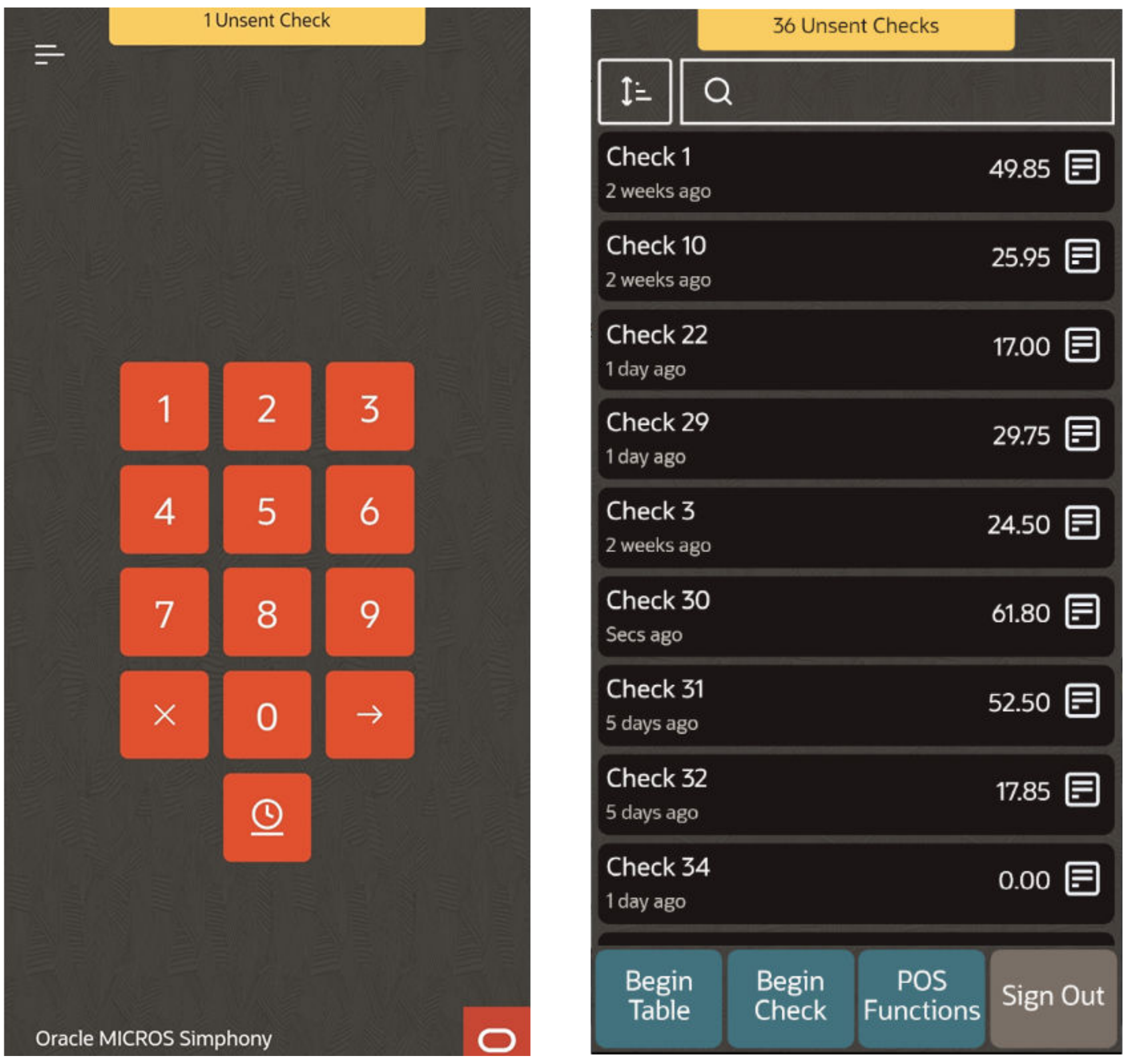
Unsent Checks Warning

Warning messages appear on POS clients when a device with unsent checks is disconnected from the Check and Posting Service (CAPS). The messages appear as a translucent yellow banner at the top of all pages outside a transaction. They do not appear when a transaction is in progress so as not to distract from, or slow down, the order taking process.

After posting a transaction, there is a 30-second delay to enable checks to send before a warning message appears. The warnings make the server aware of an issue so that they can either move the device back into network range or alert a manager that there is a connection issue.

The warning messages show the number of unsent transactions on the device so that when a solution is found, servers can see the number decrease and know that the issue has been resolved. Warnings appear on Android devices and Linux workstations for TSR, QSR, and Bar operations when the device is offline from CAPS. The warning messages appear by default and cannot be switched off.

Figure 1-24 TSR Unsent Checks on Mobile Phones and Handheld Devices

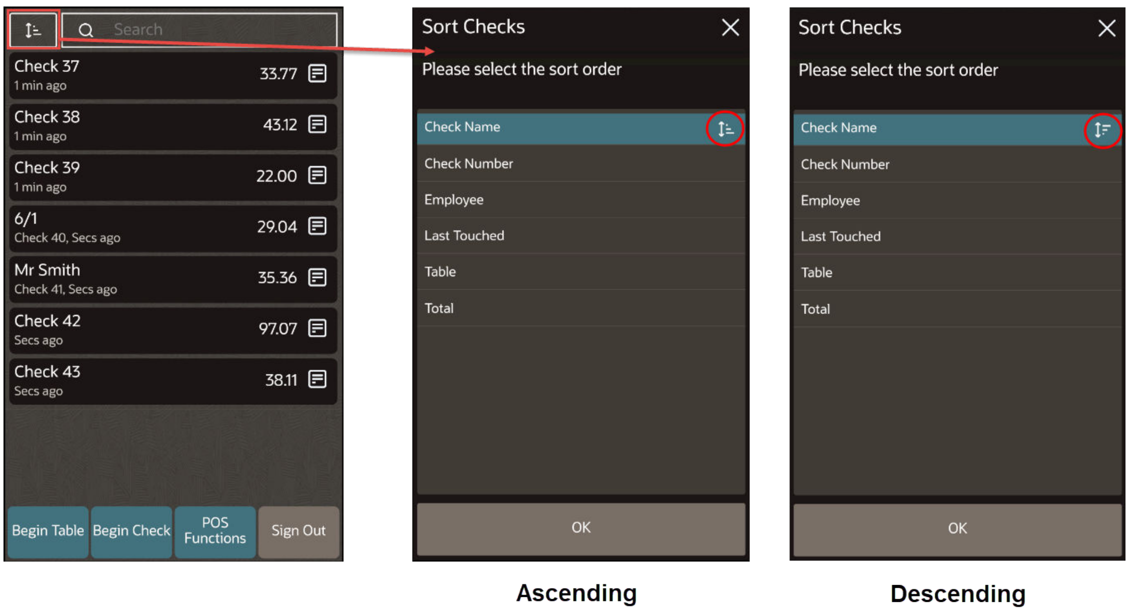


Sort Checks

You can click the Sort icon
(

) to view the Sort Checks page. Click a sort order to change the order to ascending or descending, and then click **OK**. To exit the Sort Checks page without saving the sort order, click **X**.

Figure 1-25   Sort Checks Dialog on Mobile Phones and Handheld Devices

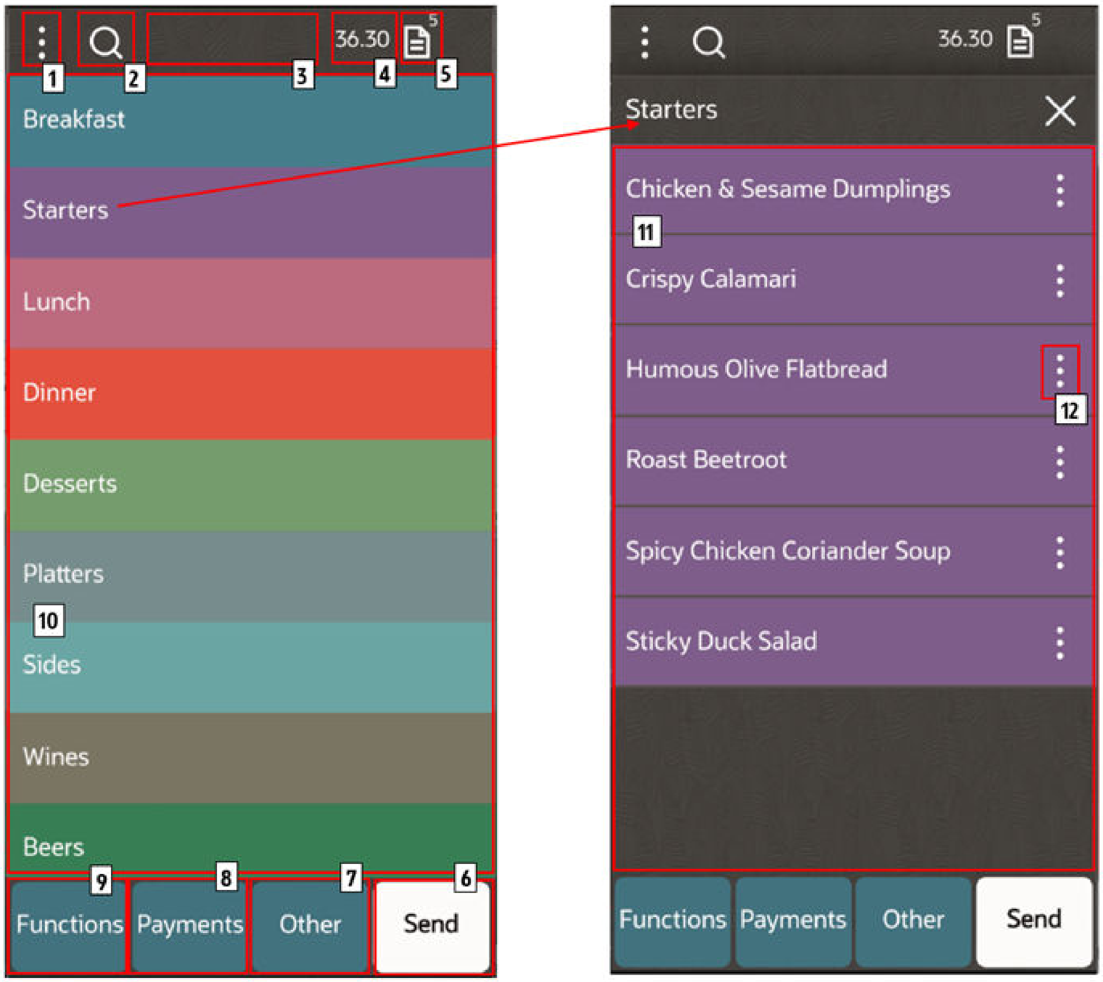


Transactions

When using a mobile phone or handheld device, after you click **Begin Table** or **Begin Check**, or after accessing a check using the View Check icon
(

) on the home page, a list of menu item categories (SLU Groups) appears. Select a category to see a list of menu items associated with the SLU Group. In the following figure, clicking the **Starters** category opens the list of menu items associated with the Starters SLU Group.

Figure 1-26 TSR Transaction SLU Groups and Menu Items on Mobile Phones and Handheld Devices



The following table describes the areas called out in the image.

Table 1-14 TSR Transaction Page

Callout Number	Area	What You Use It For
1	Check Attributes Icon	Set the following: • Check Name • Table Number • Number of Guests • Order Type • Order Channel • Menu Levels

Table 1-14 (Cont.) TSR Transaction Page

Callout Number	Area	What You Use It For
2	Search	Search for menu items. Click the Search icon () to use the onscreen keyboard. A search line appears at the top of the page. Start entering the menu item upper or lower case), and matching items will appear in alphabetical order in groups. To clear the search entry, click the blue cross.
3	Information line	The last item sold flashes on this line so that the server can verify the sale. If the server taps the line, the last four items sold appear in a window.
4	Total Due	Shows the total due for the check.
5	Check Detail Icon	The number of items on the check appears next to this icon. Click to view the Check Detail.
6	Send	Send (service total) menu items to the kitchen.
7	Other	View a list of discounts and service charges. Apply a discount, service charge, or payment to a check. Discounts and service charges are configured in the EMC and listed in the relevant menus if assigned to SLU 1.
8	Payment Methods	View a list of payment methods.
9	Functions	Access additional functions that you can use while in a check (for example, voids). The Check Functions chapter contains more information.
10	Family Groups	Select a family group to see menu items for that specific family group (for example, Starters or Lunch). Menu item buttons and the family group button are the same color and cannot be changed. Family group names are automatically displayed in number order.

Table 1-14 (Cont.) TSR Transaction Page

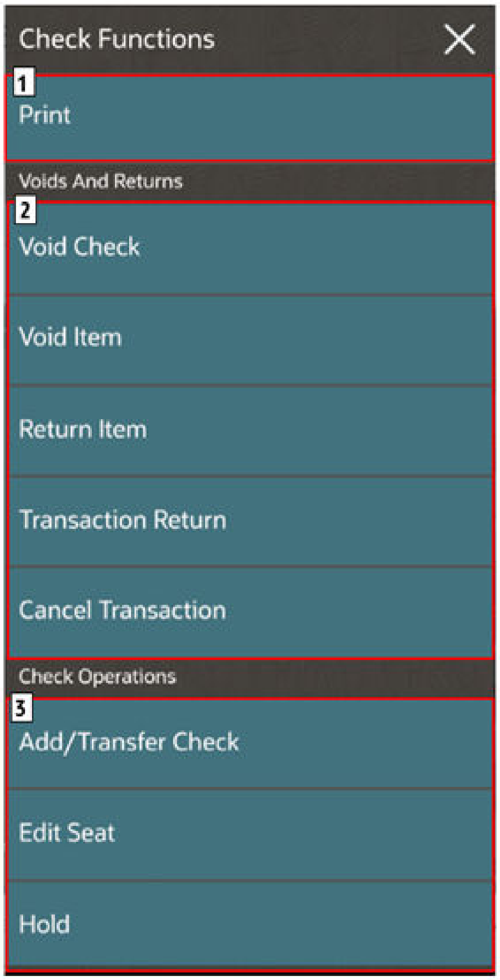
Callout Number	Area	What You Use It For
11	Menu Items	Select a menu item to add it to the check. If sort priority is not used, menu items are listed in alphabetical order.
12	Menu Attributes Icon	After clicking the Menu Attributes icon, you can perform the following: • Add one or more quantities of this item • Void one or more quantities of this item • Return one or more quantities of this item

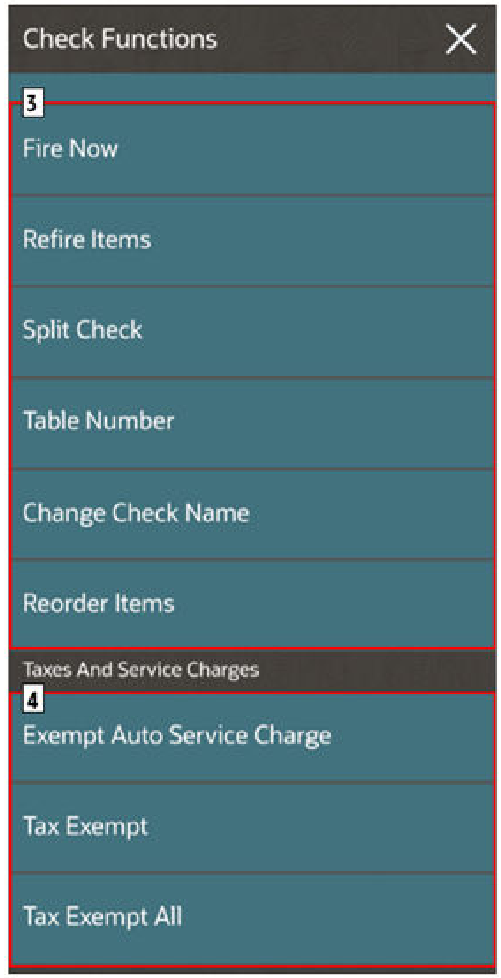
Check Functions

TSR Check Functions

You can access check functions from the POS Functions button. While in a TSR transaction, you can perform voids and returns, use various operations on the check, and apply taxes and service charges to the check. Gift card options appear if gift cards are configured.

Figure 1-27 TSR Check Functions on Mobile Phones and Handheld Devices





The following table describes the areas called out in the image.

Table 1-15 TSR Check Functions

Callout Number	Area	What You Use It For
1	Print	Print and send the check.
2	Voids and Returns	Void transaction items from the current and previous service rounds. Return items that were rejected by a guest. Cancel a check that has not been sent (service totalled).
3	Check Operations	Change various parts of a check, such as seat handling, menu item firing, payment, table number, check name, and barcodes.

Table 1-15 (Cont.) TSR Check Functions

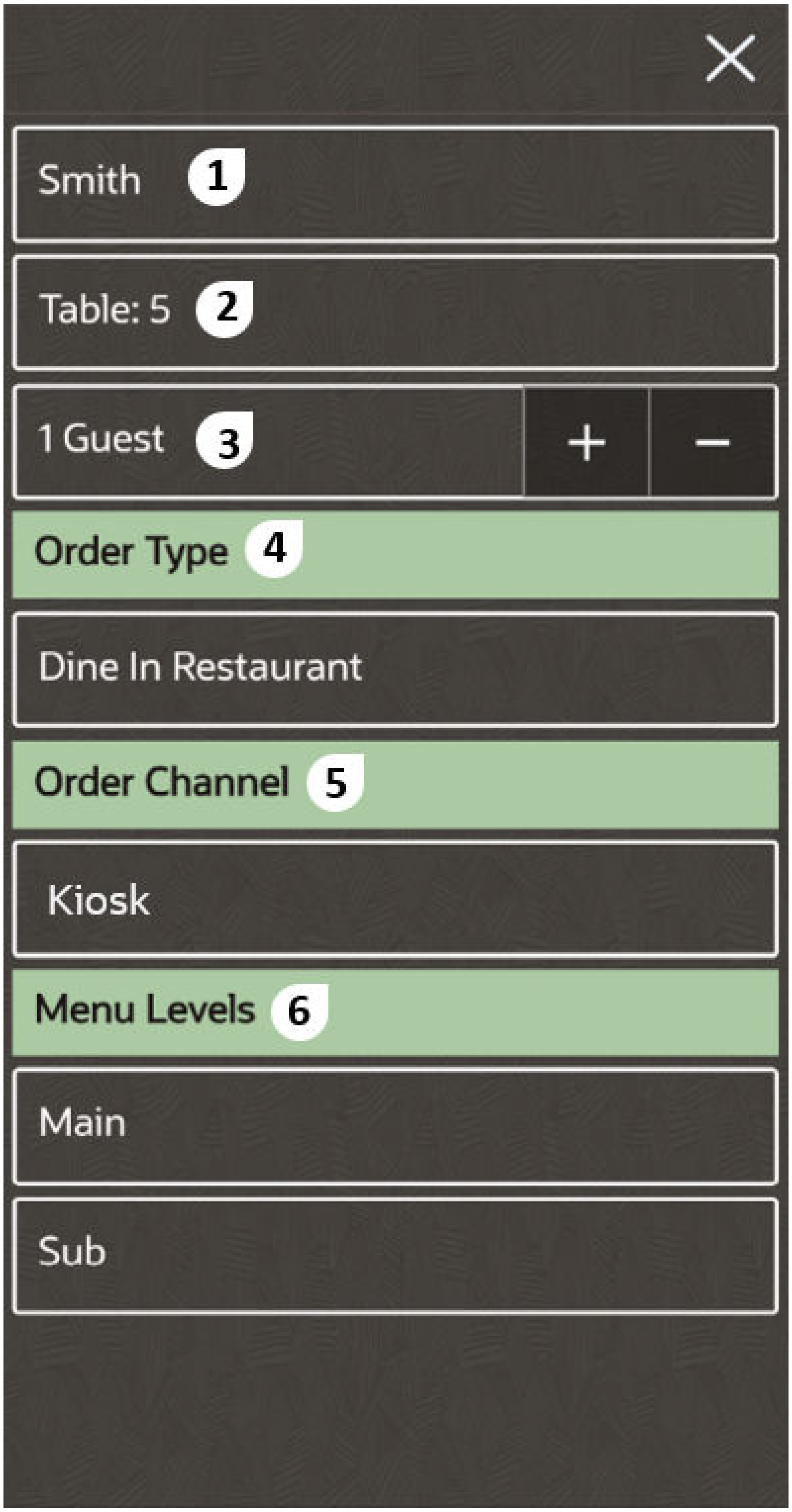
Callout Number	Area	What You Use It For
4	Taxes and Service Charges	Apply an exempt auto service charge to a transaction, or use an exempt function key.
Gift Cards (if configured)		Gift Card functions, such as issuing a card, looking up the balance, redeeming or adding money, and transferring money from one gift card to another.

Check Attributes

Click the attributes icon
(

) in the upper left area of the Transaction page or the check detail.

Figure 1-28 TSR Mobile Device Check Attributes



The following table describes the areas called out in the image.

Table 1-16 TSR Check Attributes

Callout Number	Area	What You Use It For
1	Check Name	Enter a name for the check. This is often the customer name (optional). If a name is entered, it appears on the check detail.
2	Table Number	Enter the table number to assign to the check (optional). Entering a table number displays the seat selection on Transaction pages.
3	Guest	Enter the number of guests; the default value is 1.
4	Order Type	Select the order type to change the value. In the image example, click **Dine In Restaurant** to change the order type to another (such as Take Out).
5	Order Channel	Select the order channel to change the value. In the image example, click **Kiosk** to change the order channel to another (such as Drive Thru). This only appears if configured.
6	Menu Levels	Select the Main and Sub Menu Levels to change the value. In the image example, click **Main** to change the menu level to another.

Item Attributes

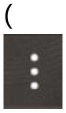
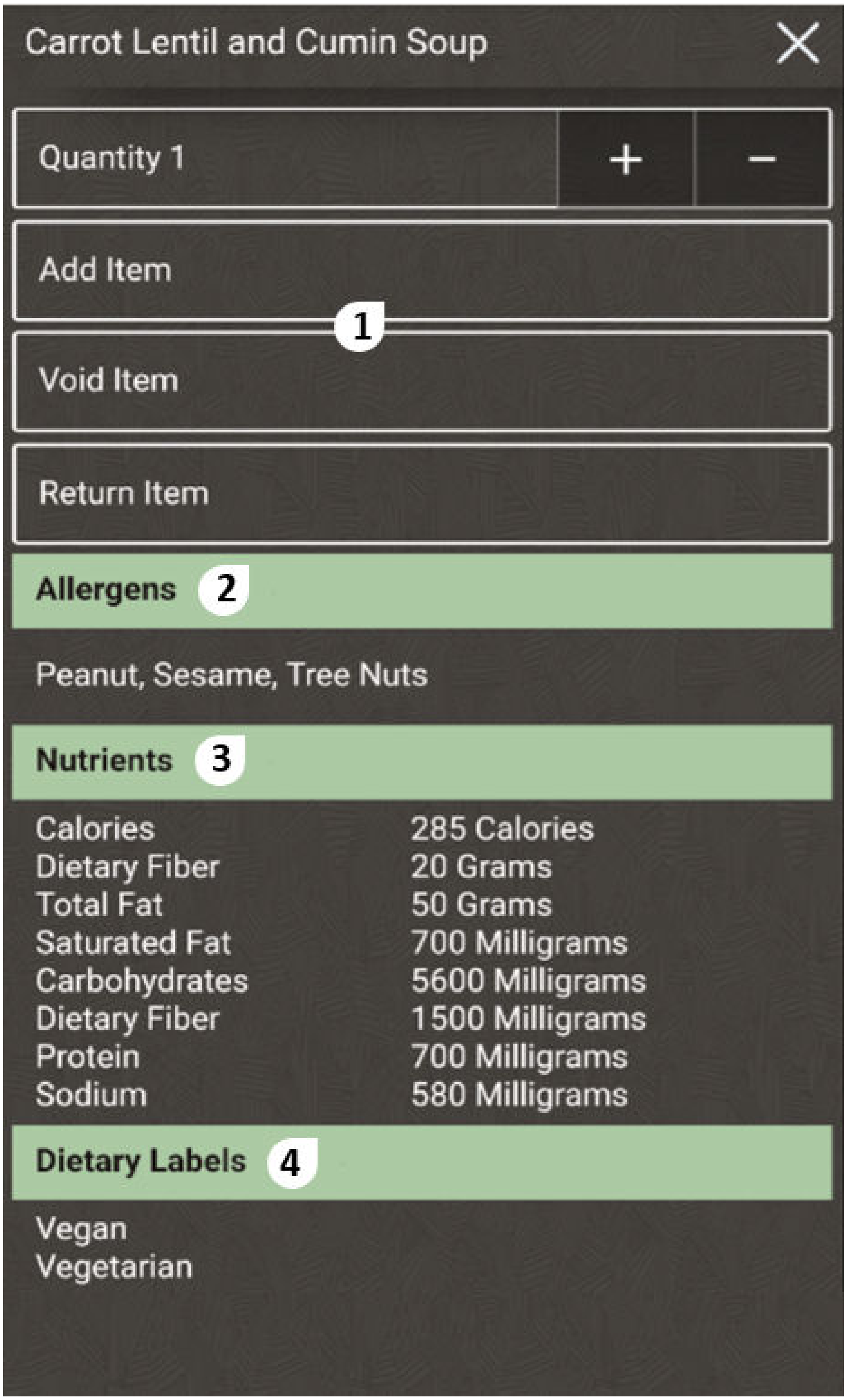
Click the attributes icon
(

) adjacent to a menu item. The Item Attributes page appears and allows multiple quantities of an item to be sold, voided, or returned, and displays EMC Allergens, Nutrients and Dietary Labels (if configured).

Figure 1-29   TSR Mobile Device Item Attributes



The following table describes the areas called out in the image.

Table 1-17 TSR Item Attributes

Callout Number	Area	What You Use It For
1	Quantity Add, Void, and Return Item	Click the **Quantity** button to enter a number, and then click **Add Item**, **Void Item**, or **Return Item**. For example, entering a quantity of 20 and clicking **Add Item** sells 20 of the items. Entering a quantity of 15 and selecting **Void Item** voids 15 of the items.
2	Allergens	Allergens appear if configured.
3	Nutrients	Nutrients appear if configured.
4	Dietary Labels	Dietary labels appear if configured.

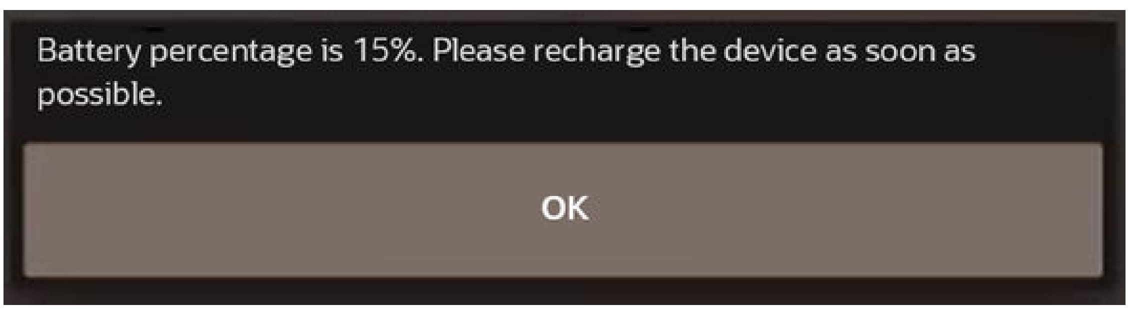
Support

Low Battery Warnings

Battery indicator warning messages appear on Android devices if the battery percentage is 15% or less, advising the server to recharge the device. The warning messages appear by default and cannot be switched off.

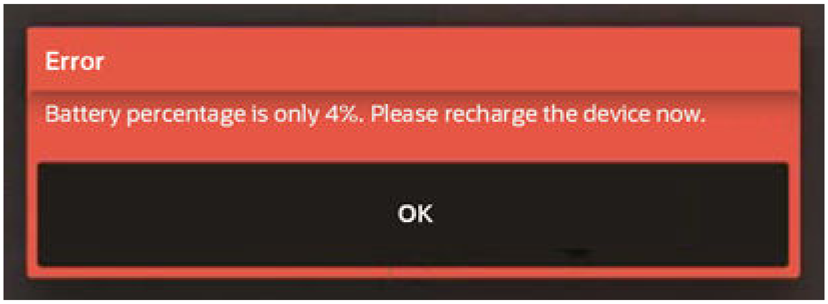
If the battery life on a device is greater than 5% and less than or equal to 15%, a warning message appears after the workstation operator signs in to the POS and when a function is selected that starts a check. The message shows the battery life percentage and advises the operator to recharge the device as soon as possible. The message must be acknowledged by the operator before continuing, and the acknowledgement is logged.

Figure 1-30 Low Battery Warning



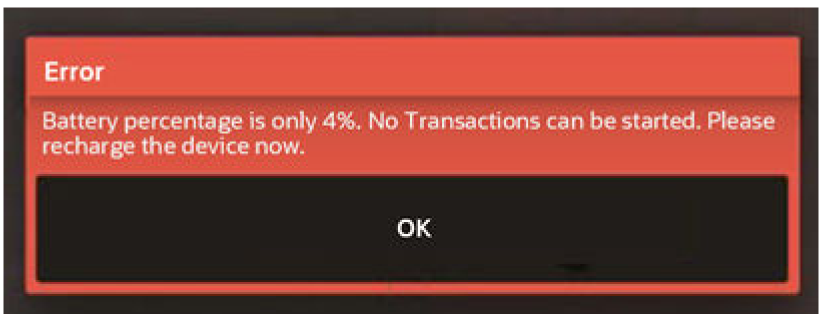
If the battery life on a device is equal to or less than 5%, an error message appears after the workstation operator signs in to the POS, informing the operator to recharge the device now.

Figure 1-31 Critical Battery Warning at Less Than 5 %



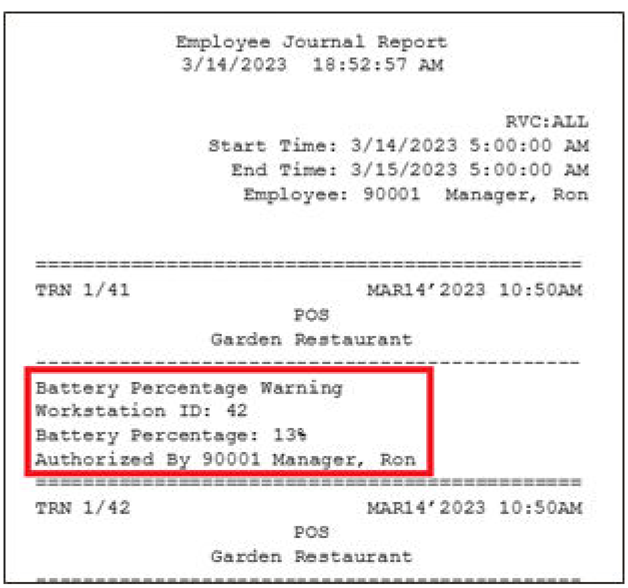
An error message appears when a function is selected that opens a check. The operator is prevented from opening the check until the battery percentage is more than 5%.

Figure 1-32 Critical Battery Warning on Open Check Function



A Battery Percentage Warning entry is written to the Employee Journal Report when the battery life is greater than 5% and less than or equal to 15%. An error message is written to the Employee Journal Report when the battery life is equal to or less than 5%. The journal entry logs the battery percentage and the operator that selected **OK** to the message.

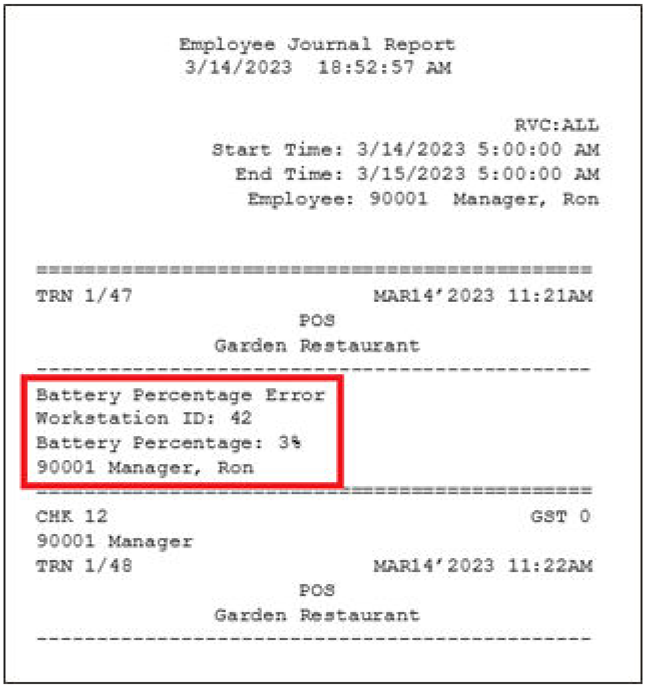
Figure 1-33 Battery Percentage Warning



```
Employee Journal Report
3/14/2023   18:52:57 AM

RVC:ALL
Start Time: 3/14/2023 5:00:00 AM
End Time: 3/15/2023 5:00:00 AM
Employee: 90001   Manager, Ron

==============================================
TRN 1/41                  MAR14'2023 10:50AM
POS
Garden Restaurant
----------------------------------------------
Battery Percentage Warning
Workstation ID: 42
Battery Percentage: 13%
Authorized By 90001 Manager, Ron
==============================================
TRN 1/42                  MAR14'2023 10:50AM
POS
Garden Restaurant
----------------------------------------------
```

A Battery Percentage Error is written to the Employee Journal Report when the operator opens a check and the battery life is equal to or less than 5%. The journal entry logs the battery percentage and the operator that selected **OK** to the message.

Figure 1-34 Battery Percentage Error

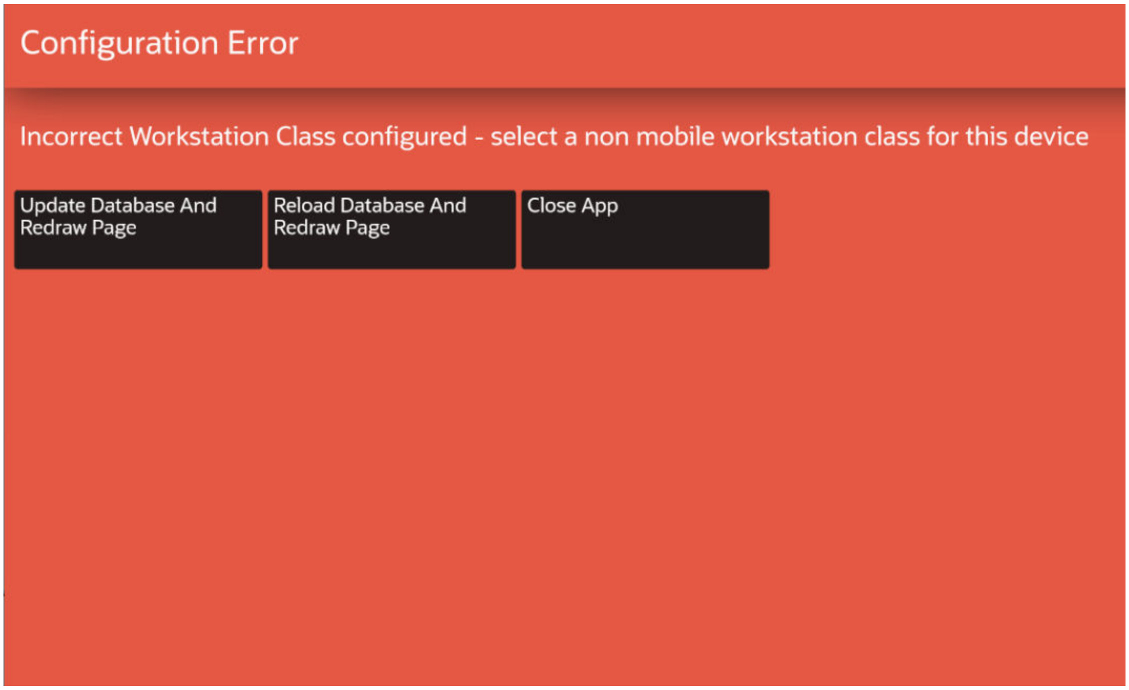


```
               Employee Journal Report
               3/14/2023   18:52:57 AM

                                        RVC:ALL
                 Start Time: 3/14/2023 5:00:00 AM
                   End Time: 3/15/2023 5:00:00 AM
                    Employee: 90001  Manager, Ron

==============================================
TRN 1/47                  MAR14'2023 11:21AM
                      POS
               Garden Restaurant
----------------------------------------------
Battery Percentage Error
Workstation ID: 42
Battery Percentage: 3%
90001 Manager, Ron
==============================================
CHK 12                                  GST 0
90001 Manager
TRN 1/48                  MAR14'2023 11:22AM
                      POS
               Garden Restaurant
----------------------------------------------
```

Incorrect Workstation Class Error

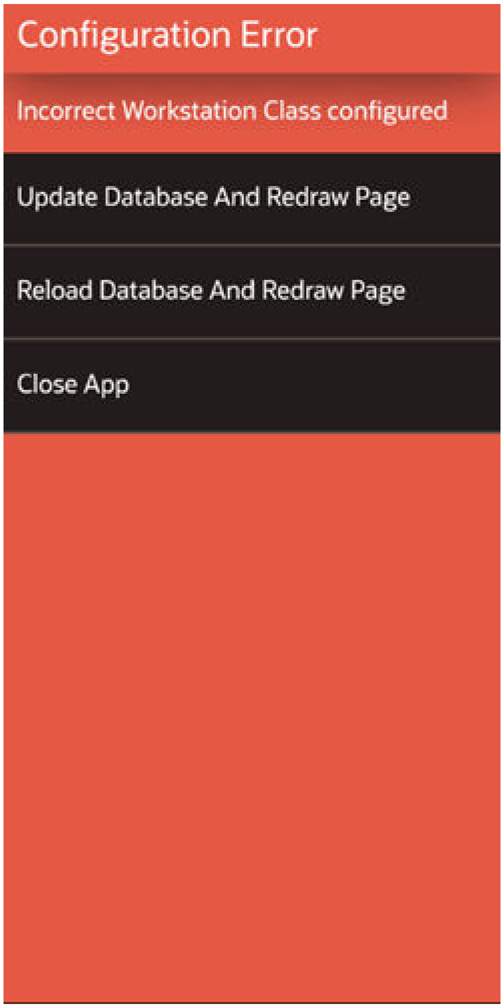
Workstations and tablets (landscape UI) use the non-mobile Workstation Classes. If a workstation is incorrectly configured (for example, **Workstation Class 4 - Mobile Table Service Restaurant** is configured in the EMC for a workstation or tablet), the following page appears before the sign in page on the POS client device.

Figure 1-35 Workstation Class Error on Workstations and Tablets



If a mobile phone or handheld device is incorrectly configured (for example, **Workstation Class 1 - Table Service Restaurant** is configured in the EMC for a mobile phone), the following page appears before the sign in page on the POS client device.

Figure 1-36 Workstation Class Error on Mobile Phones and Handheld Devices



To resolve the error, a system administrator or manager needs to correct the **Workstation Class** in the EMC, and then click **Update Database And Redraw Page** on the POS client device. Alternatively, click **Close App** on the device and change the Workstation Class at a later time.

See **Add a Workstation** in the *Oracle MICROS Simphony Essentials Configuration Guide* for more information on the Workstation Class settings.

2
POS Functions

POS functions are performed outside of a check. These include the following types of operations:

- Assigning and unassigning a cash drawer, and performing a No Sale operation.
- Adjusting and reopening a closed check, transferring checks, and picking up a check.
- Printing closed checks and timecards.
- Entering cash operations, including pickup and loan tenders. The Cash Operations section only appears when buttons are configured for your operation.
  - Pickup tender types are used to record money that is being removed from the cash drawer. These tenders are typically used to give staff tips in cash, or to buy products from a local vendor (petty cash).
  - Loan tender types are used to record money that is put into the cash drawer, such as floats.
- Performing gift card operations, including balance inquiry and transfer, and cashing out a gift card. The Gift Card Operations section only appears when buttons are configured for your operation.

Assign and Unassign Cash Drawer

You can assign a cash drawer using **Assign Cash Drawer** if one is not already assigned to you and if there are cash drawers available to be assigned.

You can unassign a cash drawer using **Unassign Cash Drawer**.

These functions are not available on mobile phones, handheld devices, and tablets as no cash drawers are attached.

Use No Sale Key

The No Sale operation allows a privileged workstation operator to open the cash drawer outside of a transaction without performing other operations. The workstation operator typically uses this function key to make change for a customer.

This function is not available on mobile phones, handheld devices, or tablets as no cash drawers are attached.

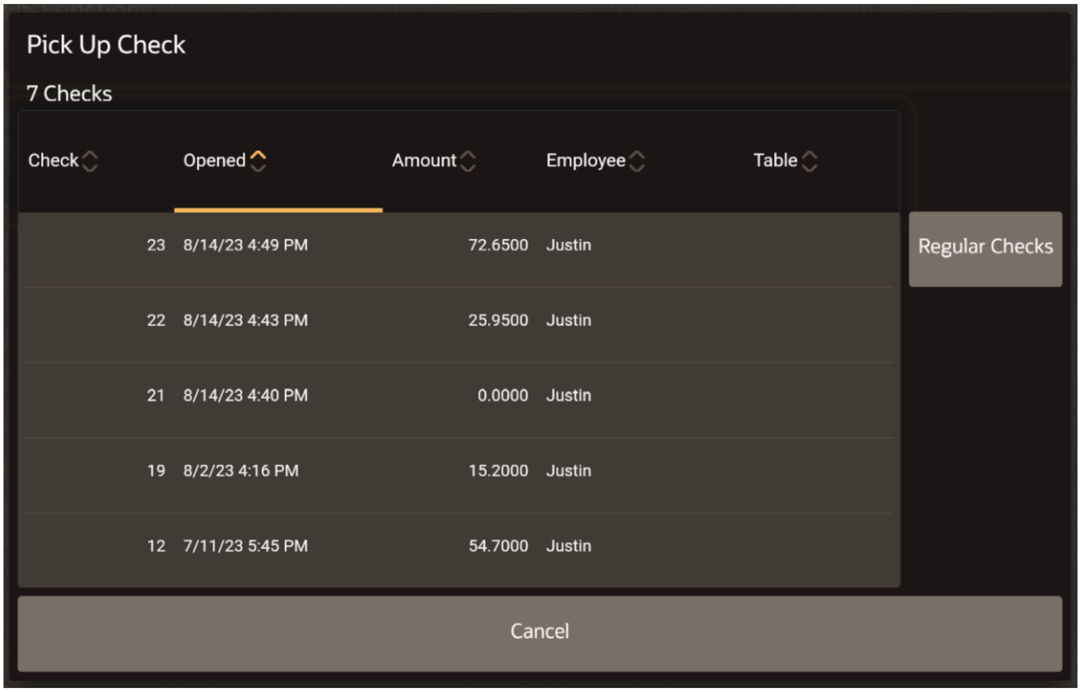
1. Click **No Sale**.
2. Enter the employee ID number, and then click **OK**.

Adjust Closed Check

After a check has been closed, you can adjust it within 14 days. When you adjust a closed check, the check remains closed (you do not reopen it) and you cannot change menu items. You can only adjust the payments and guest count. You need to have the appropriate privileges to perform this operation.

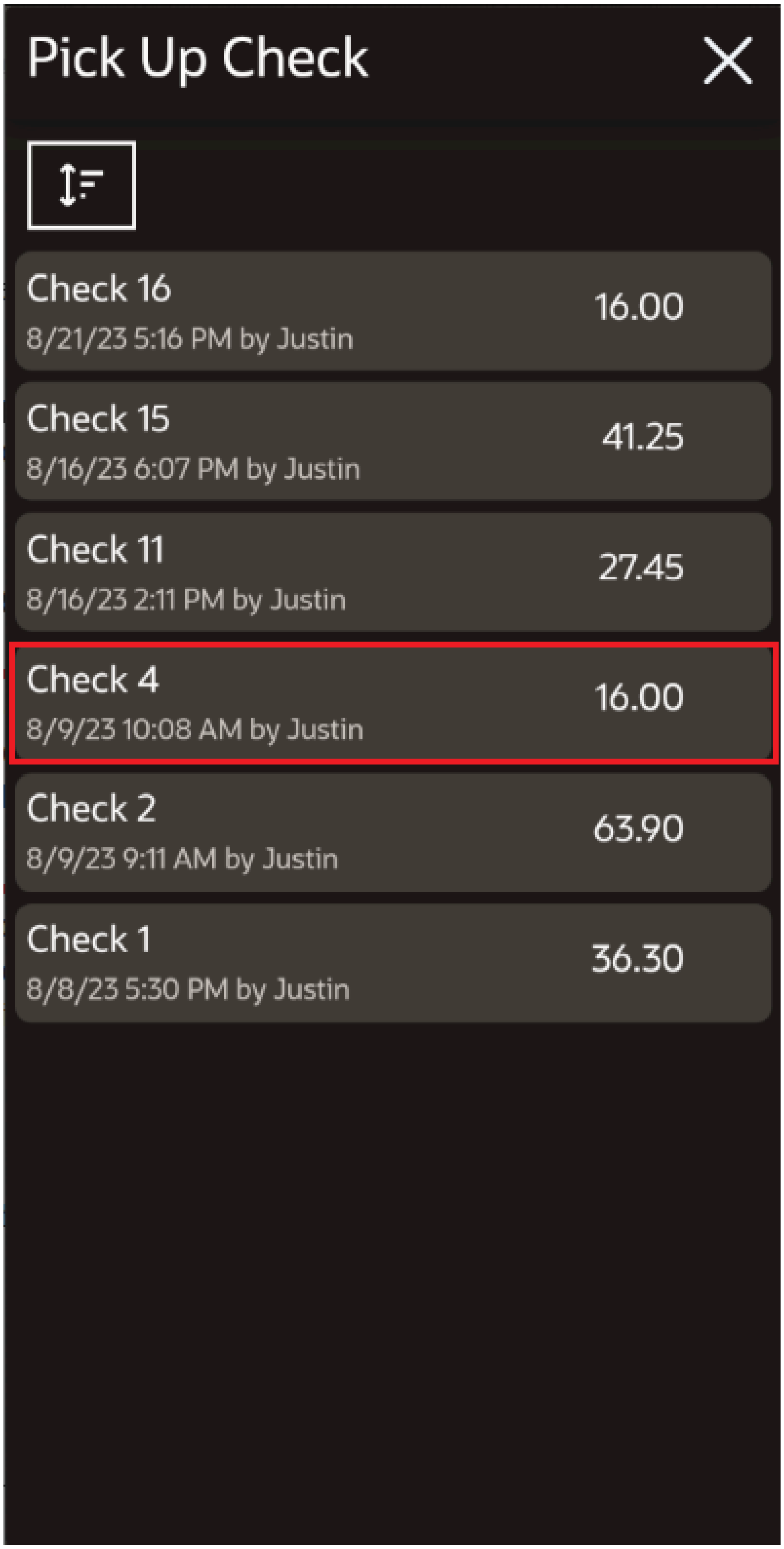
1. Click **Adjust Closed Check**.
2. Select the check from the list.

Figure 2-1 Pick Up Check on Workstations and Tablets



When using the mobile phone and handheld device UI, you can adjust or reopen a closed check from the POS Functions page by clicking the check you want to pick up.

Figure 2-2 Pick Up Check on Mobile Phones and Handheld Devices



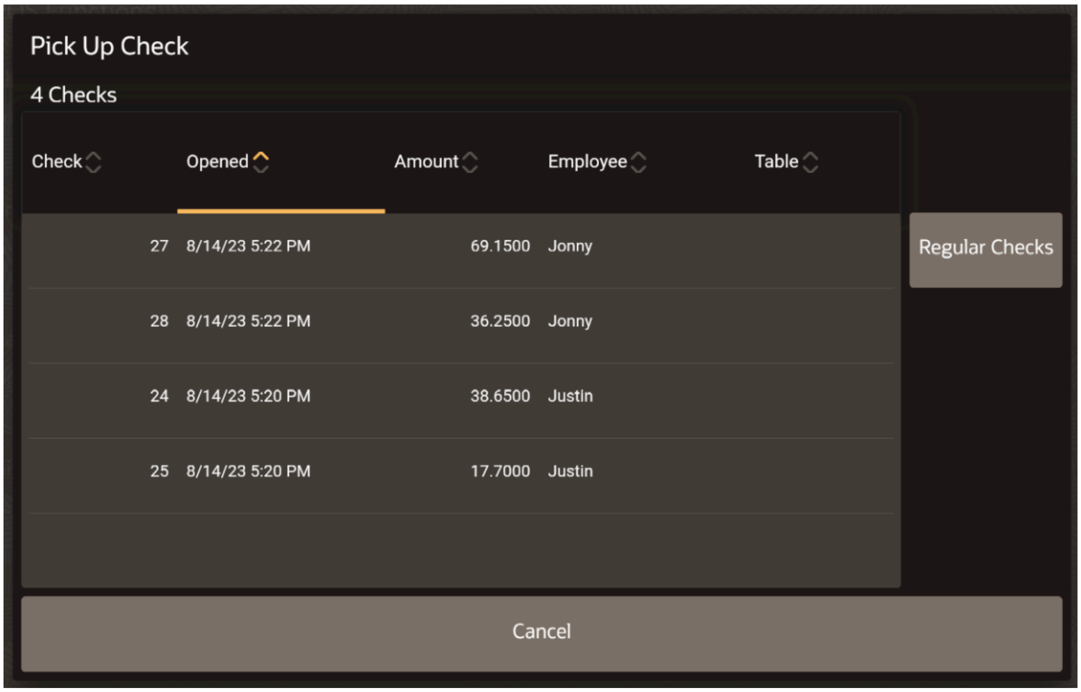
3. Change the number of guests, if required.
4. Pay the check with a new tender type or select the original payment tender.

Reopen Closed Check

After a check has been closed, you can reopen it in the current business day. Only checks for the current business day can be reopened or reprinted.

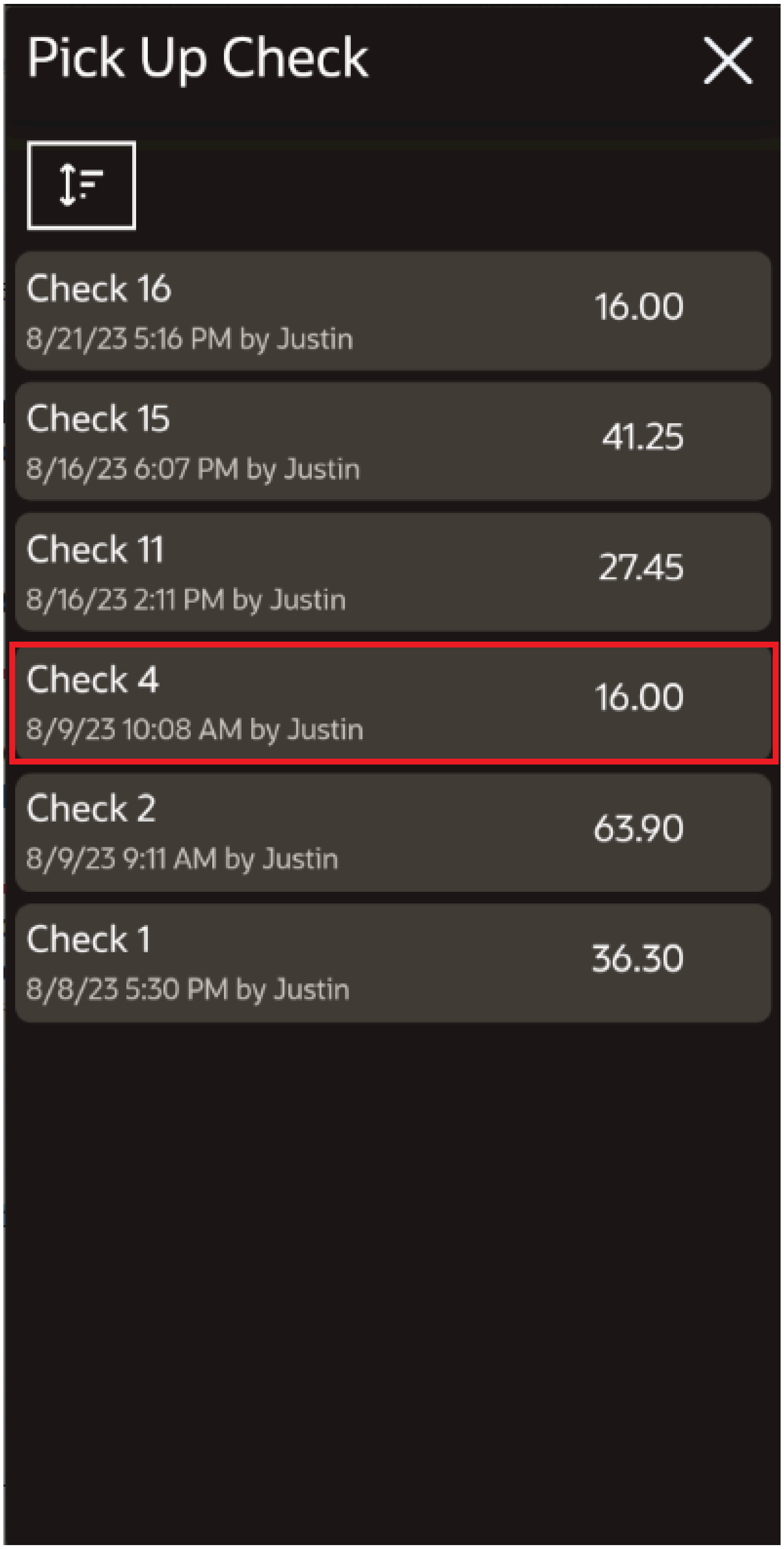
1. Click **Reopen Closed Check**.
2. Select the check from the list.

Figure 2-3 Pick Up Check on Workstations and Tablets



When using the mobile phone and handheld device UI, you can adjust or reopen a closed check from the POS Functions page by clicking the check button for the check you want to pick up.

Figure 2-4 Pick Up Check on Mobile Phones and Handheld Devices



3. Pay the check with a new tender type or select the original payment tender.

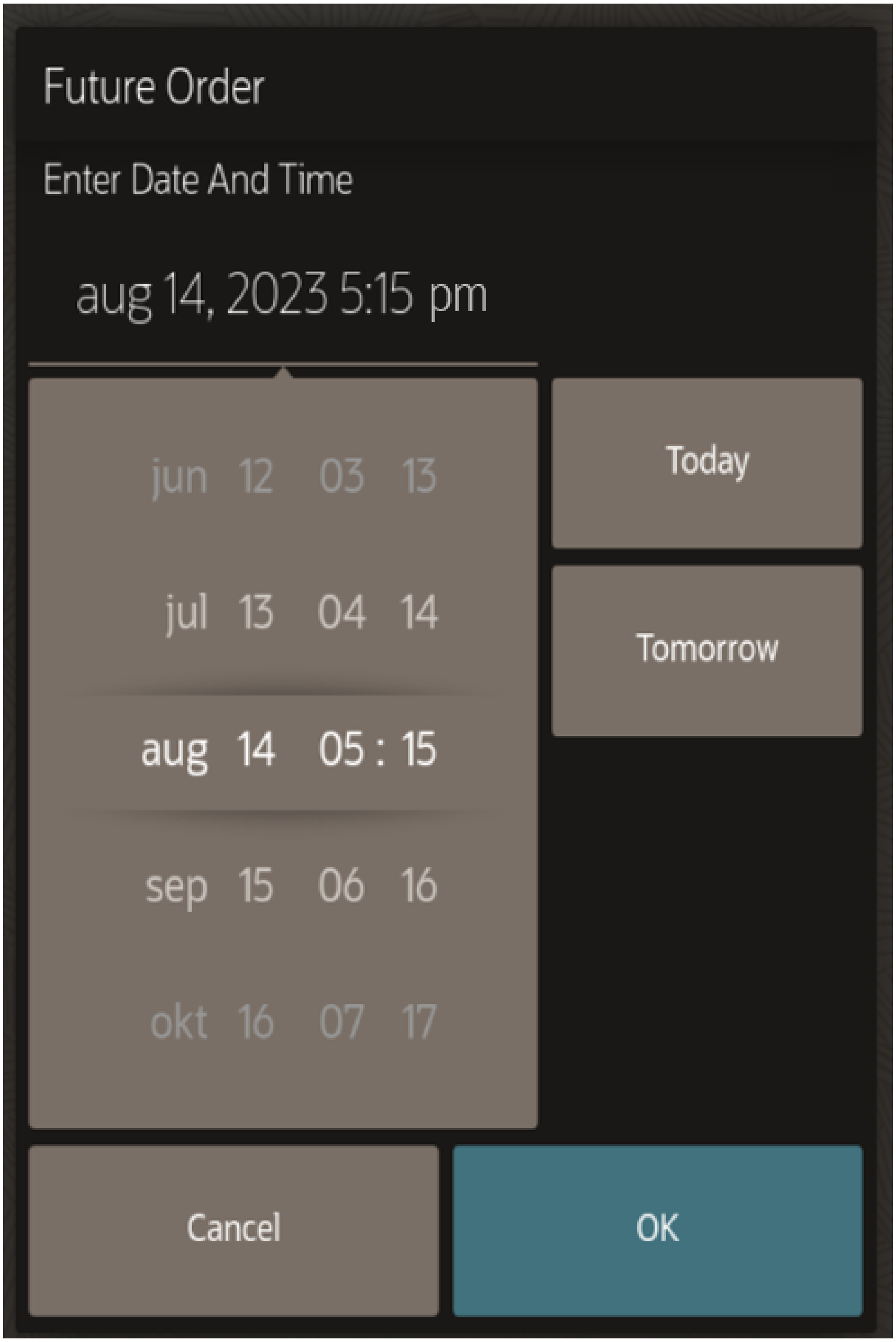
Begin Future Order

If configured, you can have checks sent to the kitchen at a specific date and time. These are called Future Orders.

This function is not available on mobile phones and handheld devices.

1. Click **Begin Future Order**.
2. Select the date and time for the order to automatically fire, and then click **OK**. At the designated date and time, the check is fired to the kitchen.

Figure 2-5 Future Order



Future checks do not appear in the list of checks on the home page until they have been fired. You can open future checks using the **Pick Up Check** POS function until they are fired.

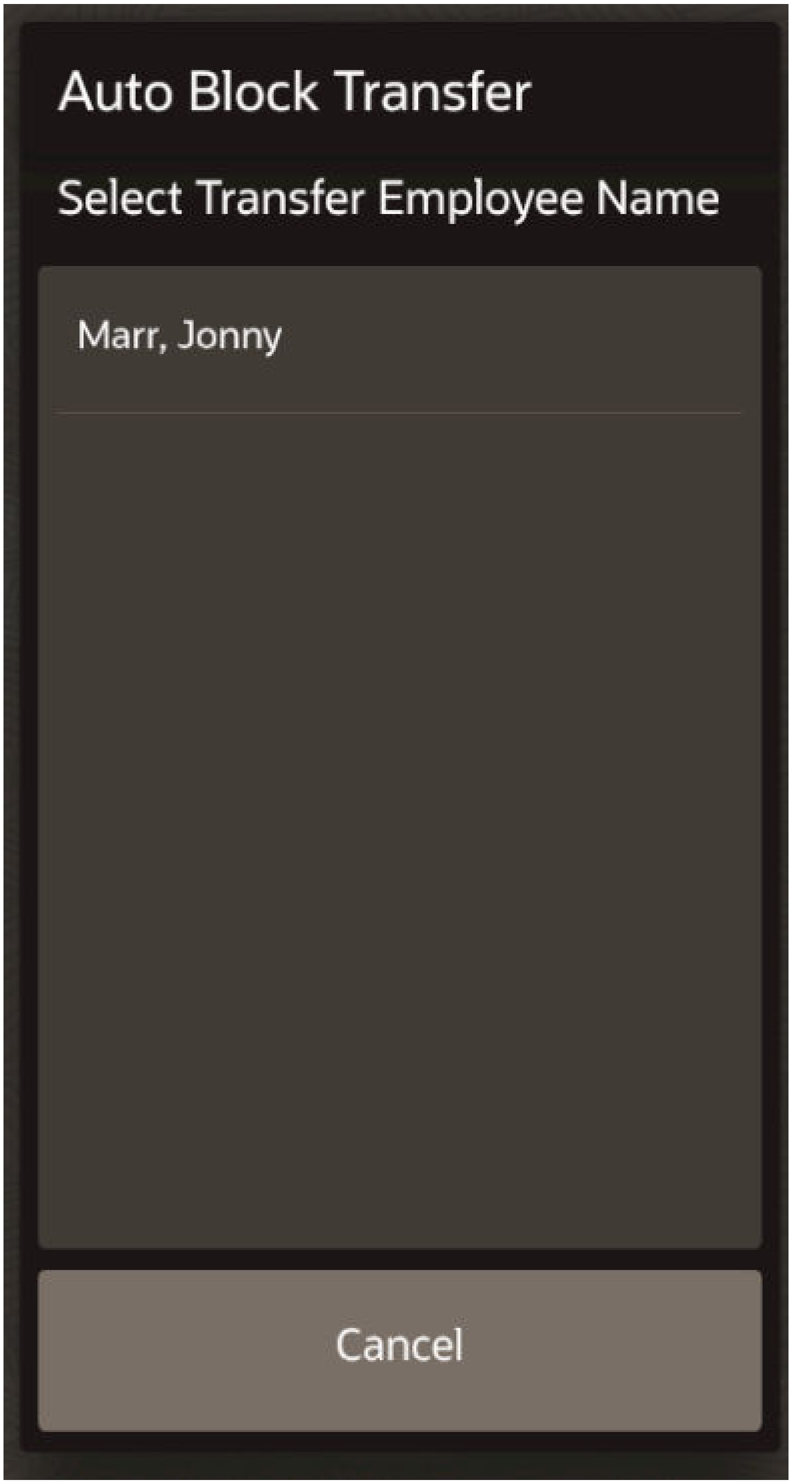
Auto Block Transfer Checks

You can transfer checks from one employee to another using the Auto Block Transfer Checks function. This is typically used at the end of a shift for one employee to transfer the open checks to another employee.

This function is not available on mobile phones and handheld devices.

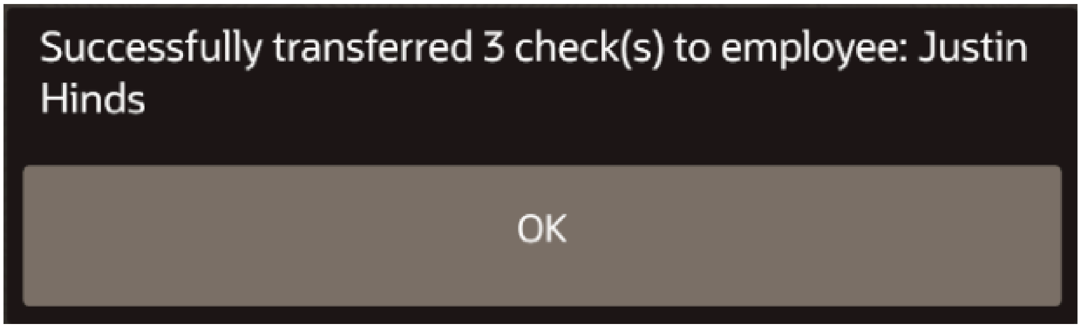
1. Click **Auto Block Transfer Checks**.
2. Select the employee to transfer checks from. The checks are transferred.

Figure 2-6 Auto Block Transfer Select Employee



3. At the successfully transferred checks to employee message, click **OK**.

Figure 2-7 Auto Block Transfer Success Message



Pick Up Check

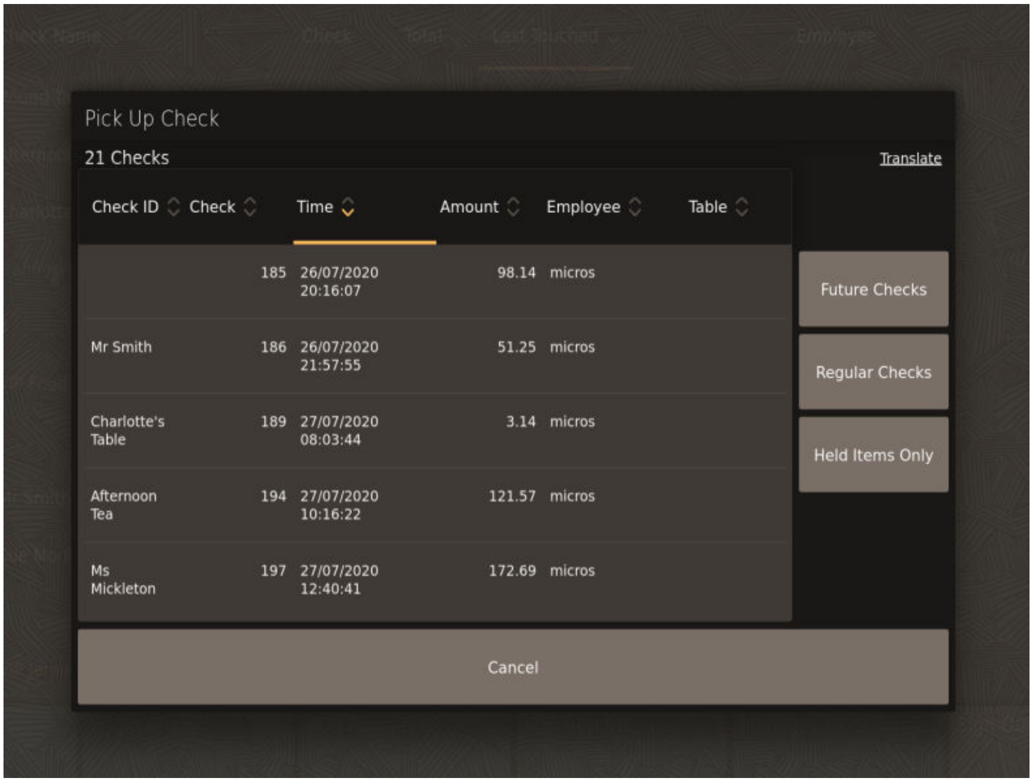
You can pick up an open check from the home page or from the POS Functions page for TSR and Bar operations. Future checks can be only be picked up from the POS functions page.

The Pick up Check POS function is not available on mobile phones and handheld devices.

1. To pick up a check from the home page, click the record line for the check you want to pick up.
2. To pick up a check from the POS Functions page:
    a. Click **Pick Up Check**.
    b. On the Pick Up Check list, click the record line for the check you want to pick up.

       To filter the types of checks shown, click one of the following:
       - **Future Checks** (if configured)
       - **Regular Checks**
       - **Held Items Only**

Figure 2-8 Pick Up Check List of Checks



Reprint Closed Check

The **Reprint Closed Check** function lets you reprint the check for a closed transaction in the current or previous business dates.

1. Click **Reprint Closed Check**.
2. Select the check to print, and then click **Print**.
3. If multiple printers are available, you are prompted to select the printer.

Reprint Previous Closed Check

The **Reprint Previous Closed Check** function lets you reprint a receipt for the last closed check.

1. Click **Reprint Previous Closed Check**.
2. If multiple printers are available, you are prompted to select the printer.
3. Click **Print**.

Print Time Card

The **Print Timecard** function lets you print an employee time card chit.

1. Click **Print Timecard**.
2. Enter the employee ID number, and then press **OK**.

Perform Paid-Out (Pickup)

Paid-out transactions are required when money is removed from the cash drawer, such as tips paid to employees in cash or payments to vendors for products. Pickup transactions appear on the Employee and Property Financial Reports in the configured Report Group sections.

This function is not available on mobile phones, handheld devices, and tablets as no cash drawers are attached.

1. In the Cash Operations section, click the configured button for a paid-out transaction (for example, Tips Paid, Petty Cash, or Vendor).
2. Enter the amount of the transaction, and then click **OK**.
3. If prompted, enter the paid-out information (for example, Tips for [employee name]), and then click **OK**.
4. If prompted, enter the employee ID number, and then click **OK**.
5. If prompted, select the pickup reason.

Perform Paid-In (Loan)

Paid-in transactions are required when money is added to the cash drawer, such as floats or loans. Loan transactions appear on the Employee and Property Financial Reports in the configured Report Group sections.

This function is not available on mobile phones, handheld devices, and tablets as no cash drawers are attached.

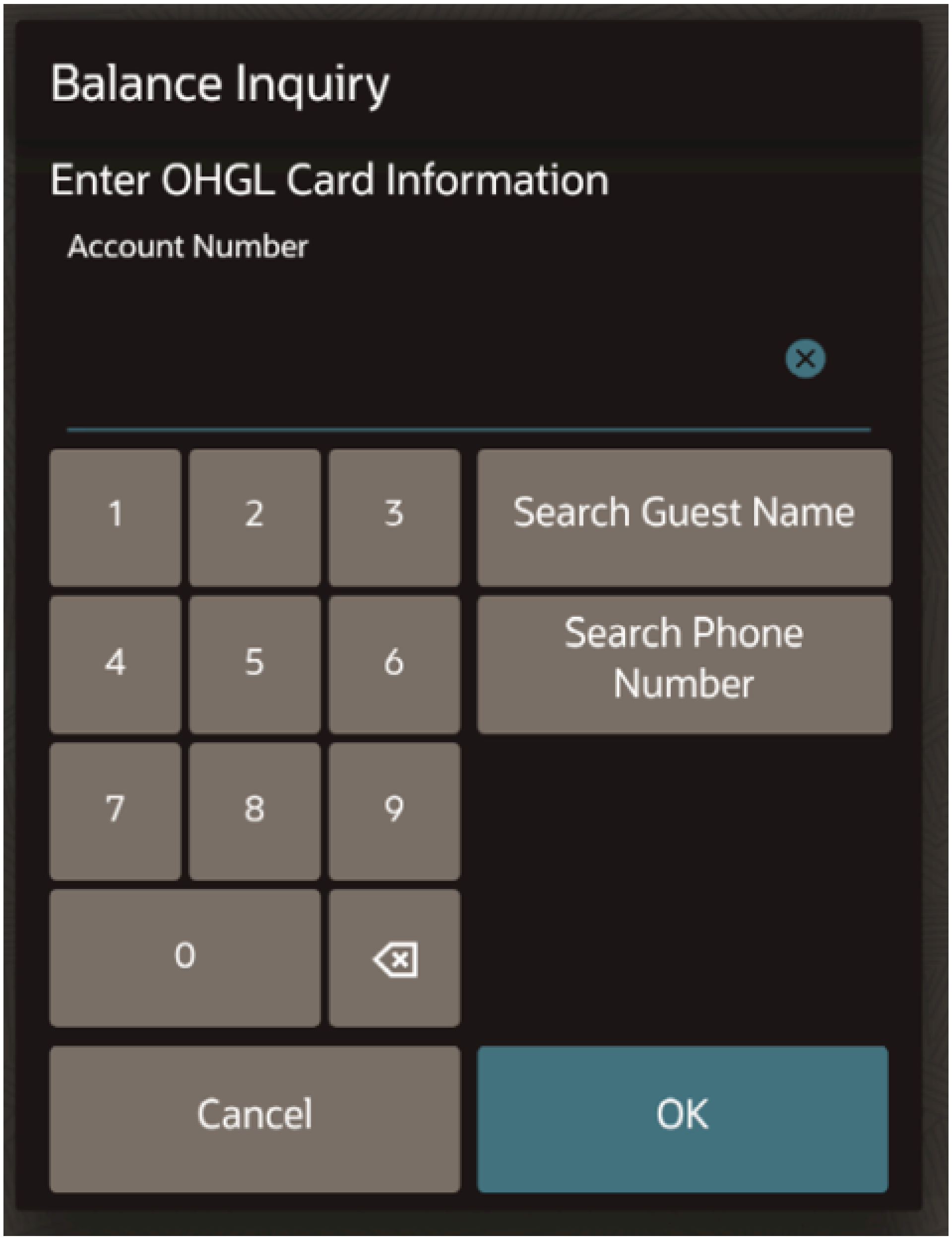
1. In the Cash Operations section, click the configured button for a paid-in transaction (for example, Morning Float).
2. Enter the amount of the transaction, and then click **OK**.
3. If prompted, enter the paid-in information (for example, the workstation name and float amount), and then click **OK**.
4. If prompted, enter the employee ID number, and then click **OK**.
5. If prompted, select the loan reason.

Perform Gift Card Balance Inquiry

If gift cards are configured, you can perform a gift card balance inquiry from either the POS Functions page or the Check Functions/Transaction Functions page.

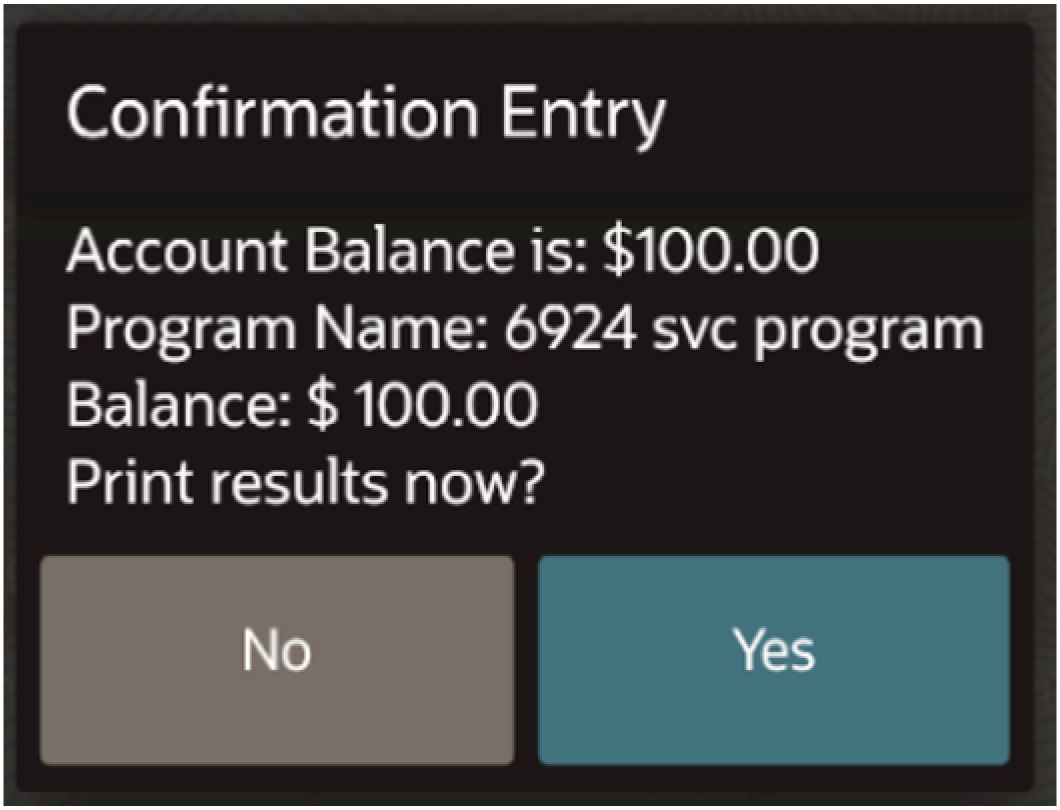
1. Click **Balance Inquiry**.
2. Swipe the card, enter the card number, or look up the account by guest name or phone number.

Figure 2-9 Balance Inquiry



3. A message appears showing the monetary value available on the card. Click **Yes** on the Confirmation Entry dialog to print the chit (if configured).

Figure 2-10 Balance Confirmation



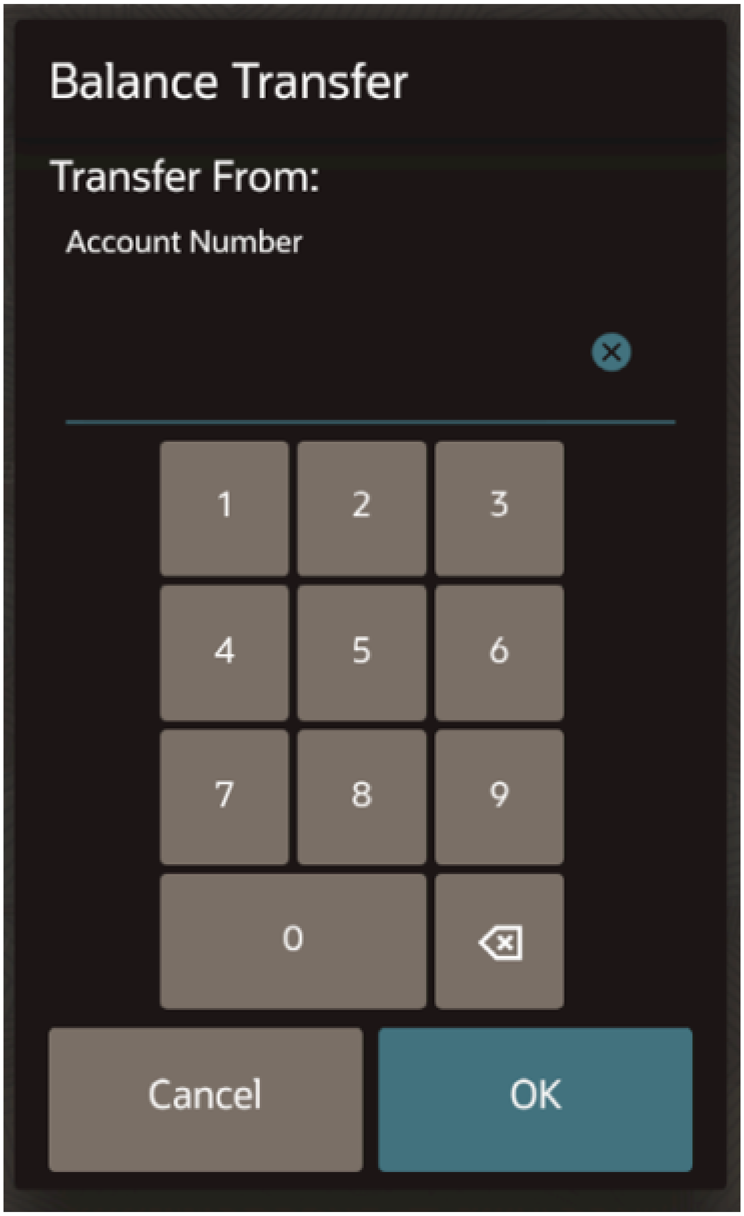
Transfer Gift Card Balance

If gift cards are configured, the **Balance Transfer** button appears on the POS Functions page or the Check Functions/Transaction Functions page. Both funds and personal information (if available) transfer.

After the balance has been transferred, the transfer from account can no longer be used.

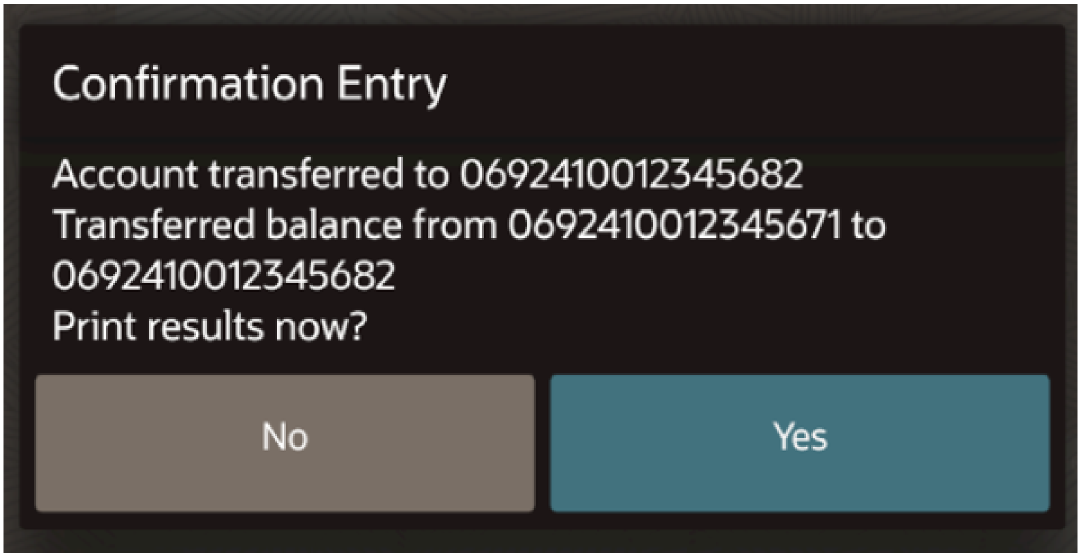
1. Click **Balance Transfer**.
2. Swipe the card or enter the card number of the account to transfer from, and then click **OK**.

Figure 2-11 Balance Transfer



3. Swipe the card or enter the card number of the account to transfer to, and then click **OK**. A message appears showing the transfer account numbers.
4. Click **Yes** on the Confirmation Entry dialog to print the chit (if configured).

Figure 2-12 Balance Transfer Confirmation Entry

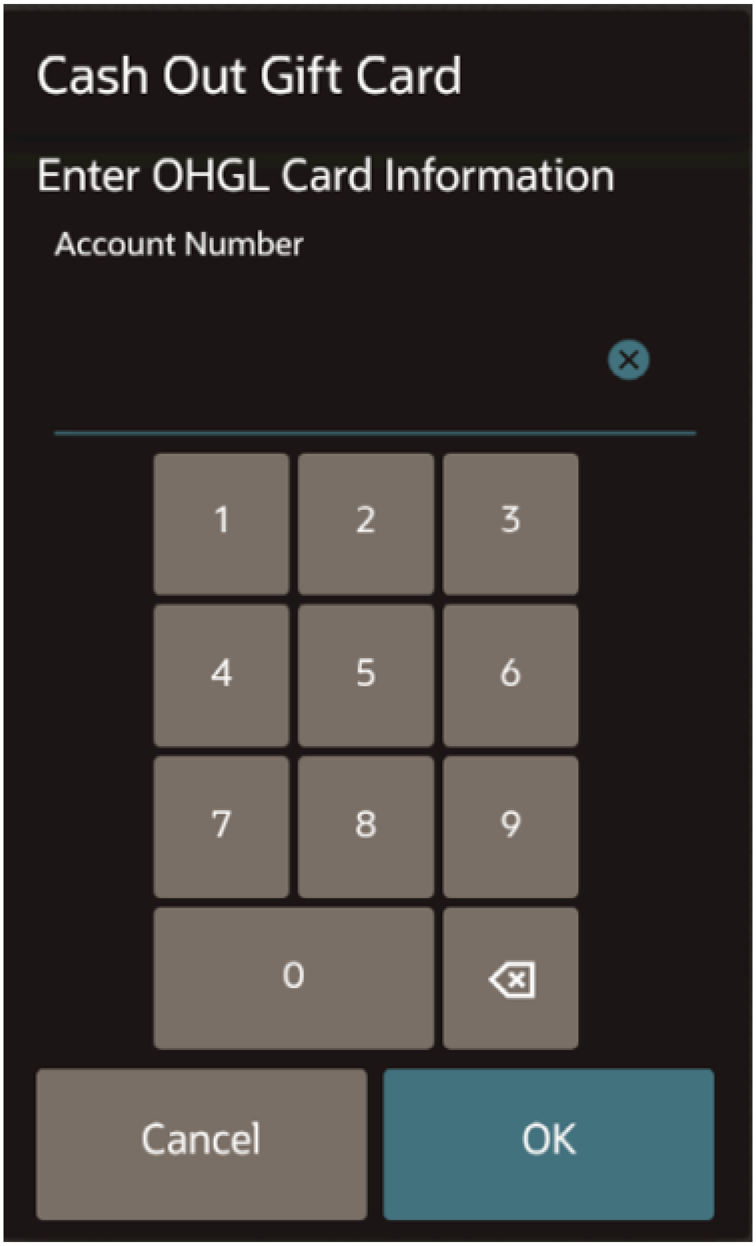


Cash Out Gift Card

If gift cards are configured, you can cash out a gift card from the POS Functions page.

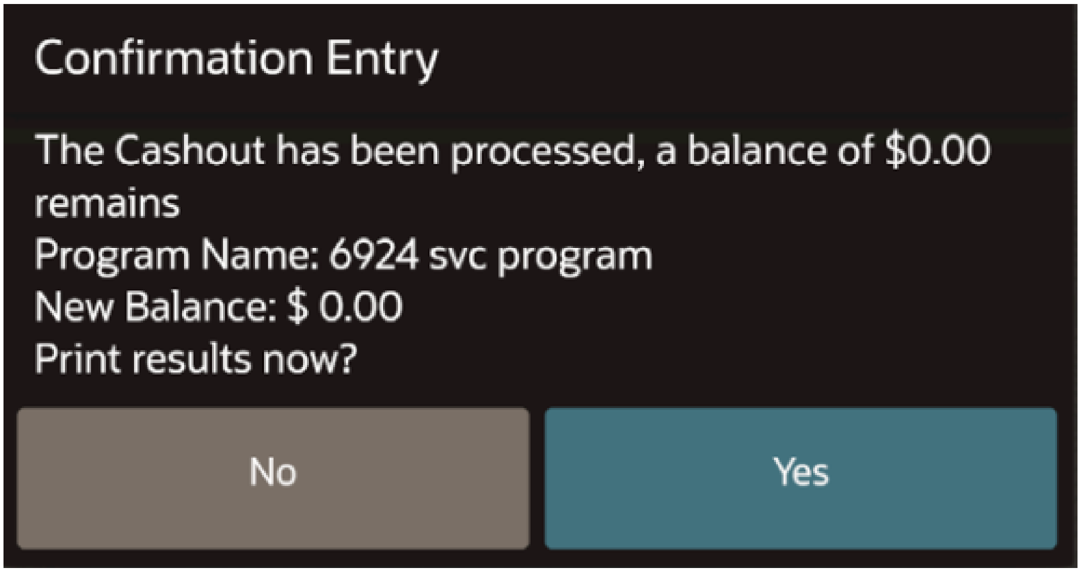
1. Click **Cash Out Gift Card**.
2. Swipe the card or enter the card number, and then click **OK**.

Figure 2-13 Cash Out Gift Card



3. A message shows the current account balance. Click **OK**, and then click **Yes** twice to confirm the cashout operation and then to print the chit showing the balance of 0.00 (if configured).

Figure 2-14   Cash Out Confirmation Entry

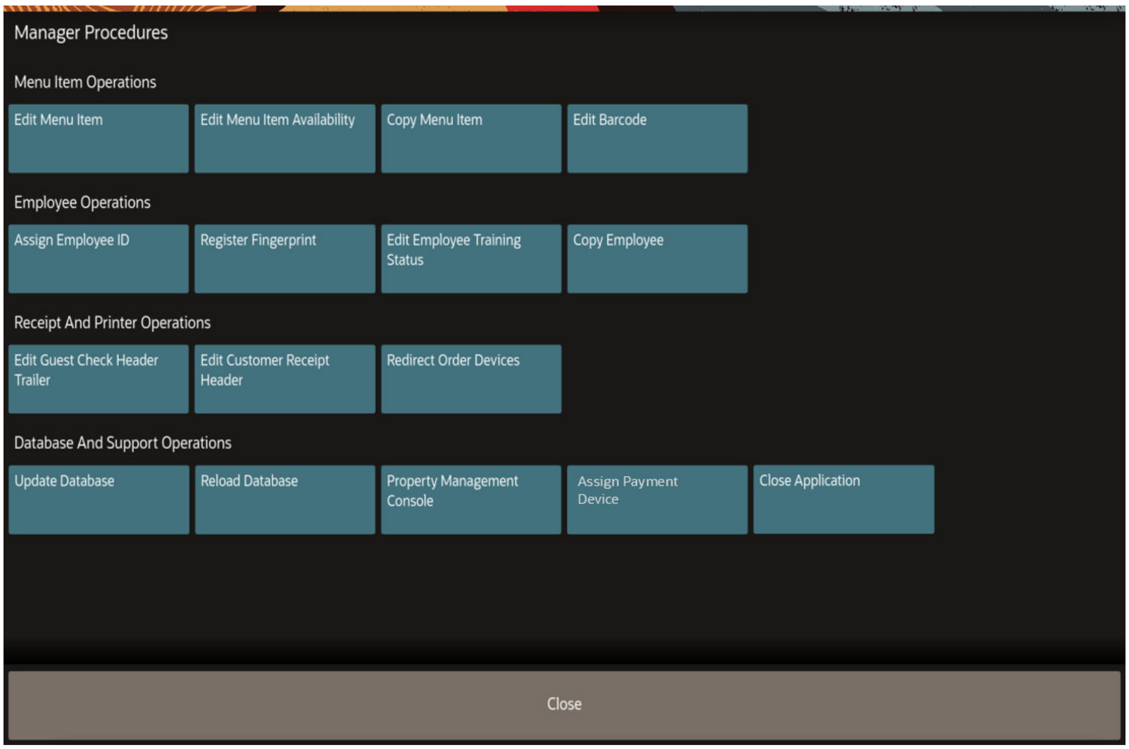


4. Pay the card balance as cash due to the guest.

3 Manager Procedures

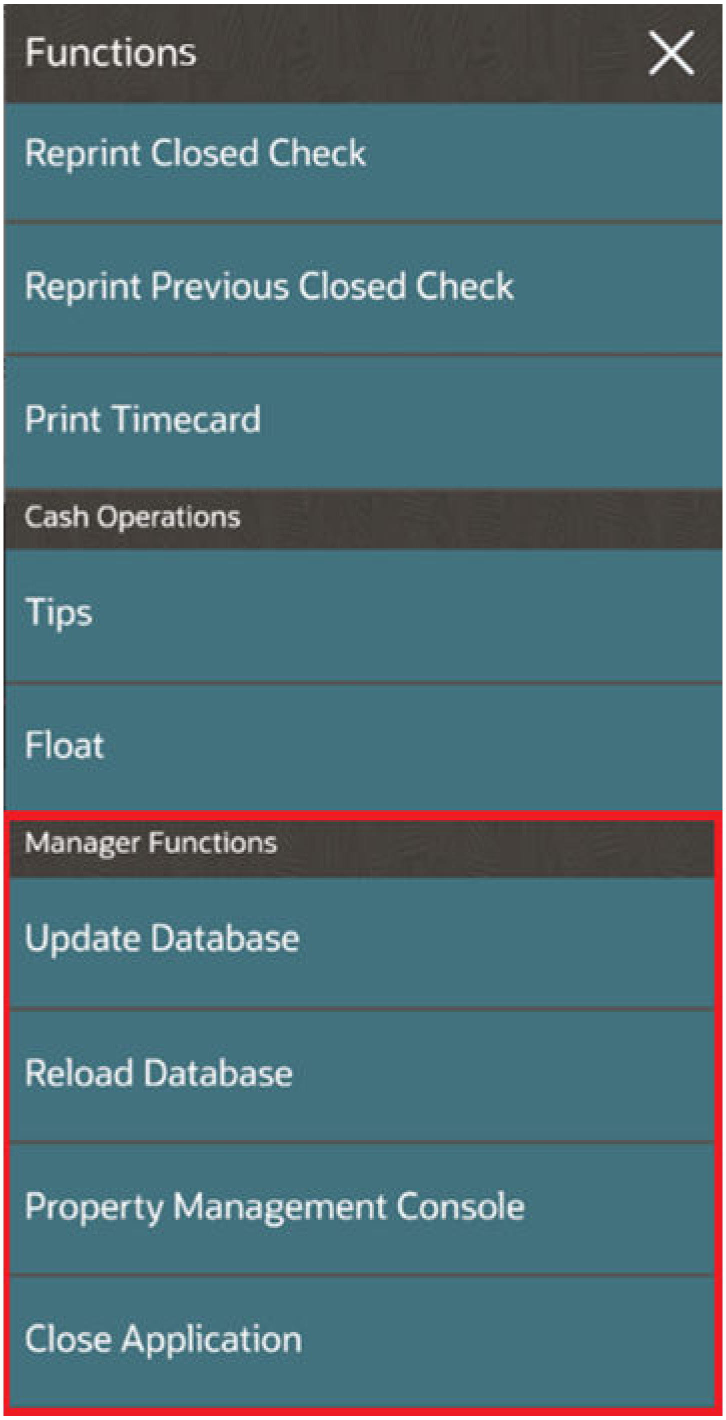
Managers can access and perform special functions at the workstation for employees, menu items, order devices, receipts, and workstations without having to go into Labor Management or EMC. The functions are grouped together on the Manager Procedures page.

Figure 3-1 Manager Procedures Page on Workstations and Tablets



Tablets have the same Manager Procedures as workstations shown above, with the exception of Register Fingerprint and Assign Payment Device.

Figure 3-2   Manager Functions on Mobile Phone and Handheld Devices



Mobile phones and handheld devices show Manager Functions in a separate section on the POS Functions page for TSR, and on the Functions page for QSR. Some functions are not supported on mobile phones and handheld devices because they can be performed more easily on larger devices.

Edit Menu Item

You can make changes to an existing menu item.

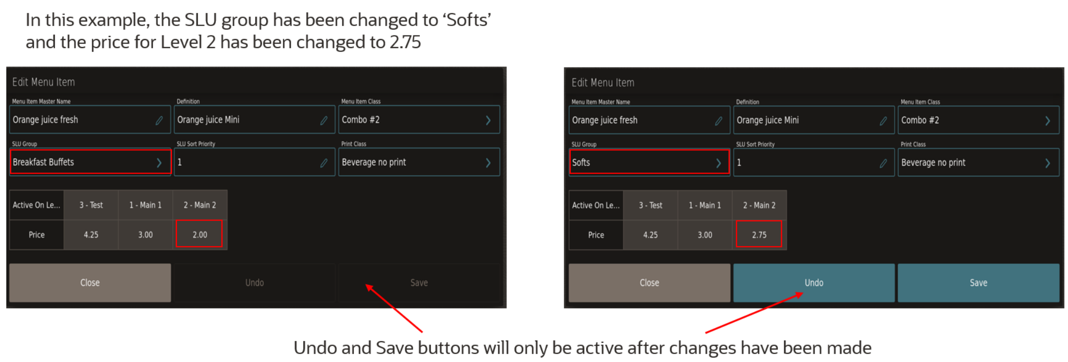
This function is not available on mobile phones and handheld devices.

1. Click **Edit Menu Item**. A list of the first 100 menu item definitions appears.
2. Filter the menu items as needed. Each time the details are filtered, the application returns the first 100 menu items that match the search criteria.
3. Select the menu item from the list. The Edit Menu Item dialog appears.
4. Change the appropriate information.

   You can change the **Menu Item Master Name**, **Definition**, **Menu Item Class**, **SLU Group**, **SLU Sort Priority**, **Print Class**, and **Price**.
5. Click **Save**, click **Yes** to confirm, and then click **OK**. The transaction pages are updated immediately with your changes.

   The **Undo** and **Save** buttons become active after you make a change in a field. Click **Undo** to abandon changes made to an item and reset everything to the original values.

Figure 3-3 Example of Editing a Menu Item



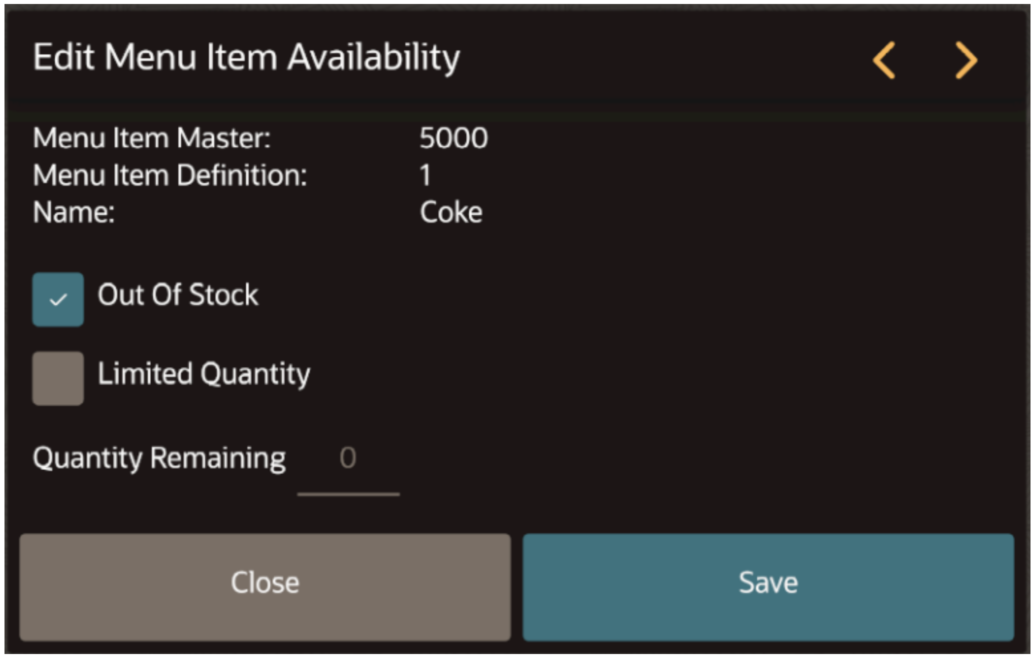
Edit Menu Item Availability

You can change the availability for menu items that are out of stock or have limited quantity.

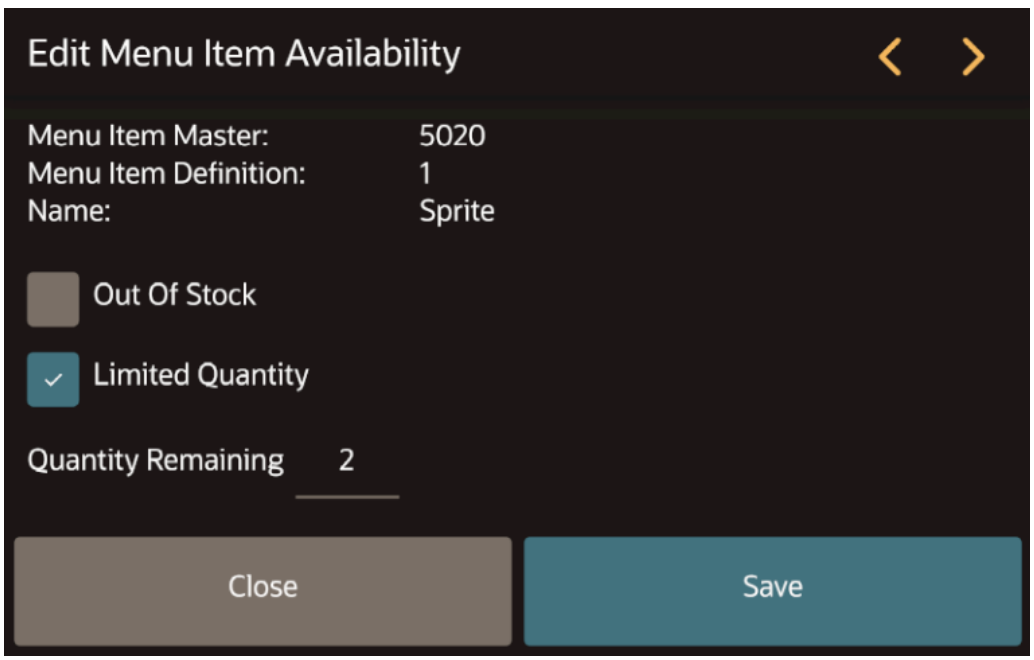
This function is not available on mobile phones and handheld devices.

1. Click **Edit Menu Item Availability**.
2. Select the menu item.

   Use the filters to limit the results shown in the menu item list (Name, SLU, Major Group, Family Group, or Menu Item Class).
3. Select one of the following options:
   - **Out Of Stock**



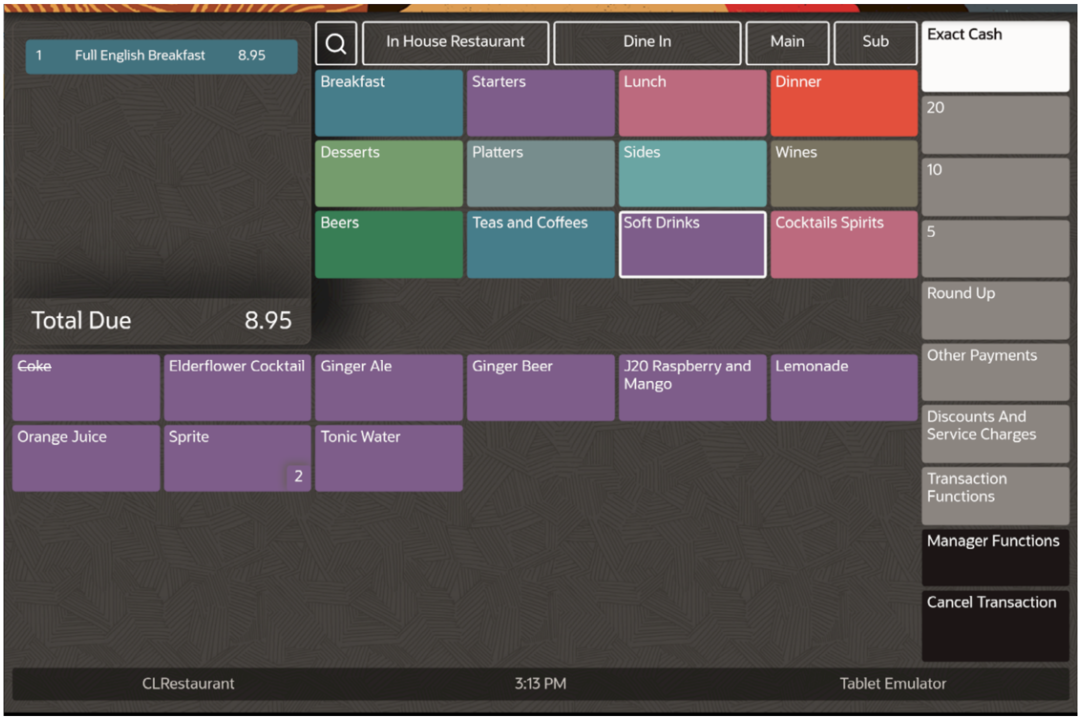
- **Limited Quantity**: Enter the **Quantity Remaining**.



4. Click **Save**.
5. Use the arrow icons at the top (**<** and **>**) to make changes to the next or previous item, or click **Close**.

   On the Transaction page, limited quantity items show the quantity in the lower right hand corner of the menu item button, and out of stock items appear with a line through the item name.

Figure 3-4 Out of Stock and Limited Stock Status on Workstations and Tablets



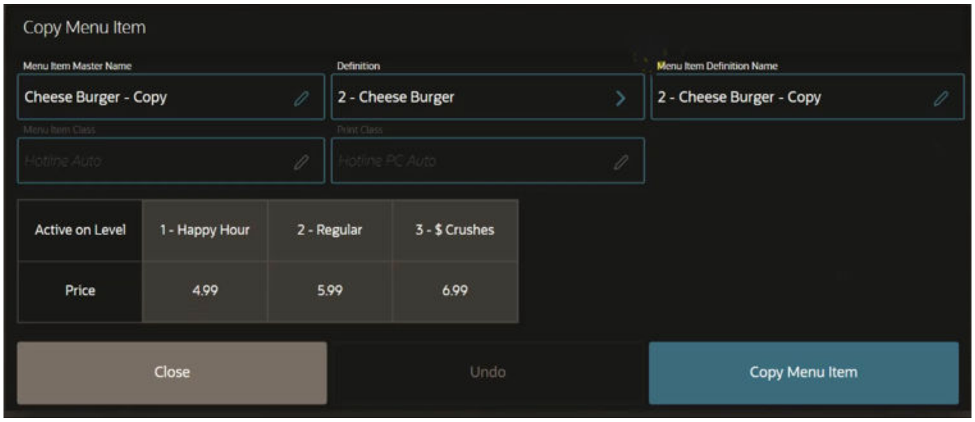
Copy Menu Item

You can add a new menu item by using a current menu item as a template. The new menu item is placed in the same SLU Group as the menu item being copied.

This function is not available on mobile phones and handheld devices.

1. Click **Copy Menu Item**. A list of the first 100 menu items appears.
2. Filter the menu items as needed. Each time the details are filtered, the application returns the first 100 menu items that match the search criteria.
3. Select the menu item from the list. When selected, the Menu Item **Name** has the text '-copy' appended to the end.
4. Change the name and edit the price as needed. A Price number pad appears if you are editing the price.

Figure 3-5 Copy Menu Item Page



If there are multiple definitions for a Menu Item Master, these are also copied. To change the name of other definitions, select the definition and then change the name.

Click **Undo** to reset everything to the original values.

5. Click **Copy Menu Item** to save the menu item as a new record, click **Yes** to confirm, and then click **OK**.

Edit Barcode

You can assign barcodes to menu items so that they can be sold using a barcode scanner.

This function is not available on mobile phones and handheld devices.

To add or edit menu item barcodes:

1. Click **Edit Barcode**.
2. Scan or enter a barcode number, and then click **Find**.
3. If the barcode number does not exist and you want create it and link it to a menu item, click **Yes** when prompted.
4. Click the **>** icon adjacent to the Menu Item field to show a list of items. You can use the filters to streamline the list.
5. Select a menu item from the list. The details appear in the Definition section.
6. (Optional) Enter an **Alternate Price** to be used when a barcode is scanned. Enter **0.00** to use the menu item price.

   The **Alternate Prep Cost** is not used in Simphony Essentials.
7. Click **Save**, and then click **Close** to exit the Edit Barcode dialog.

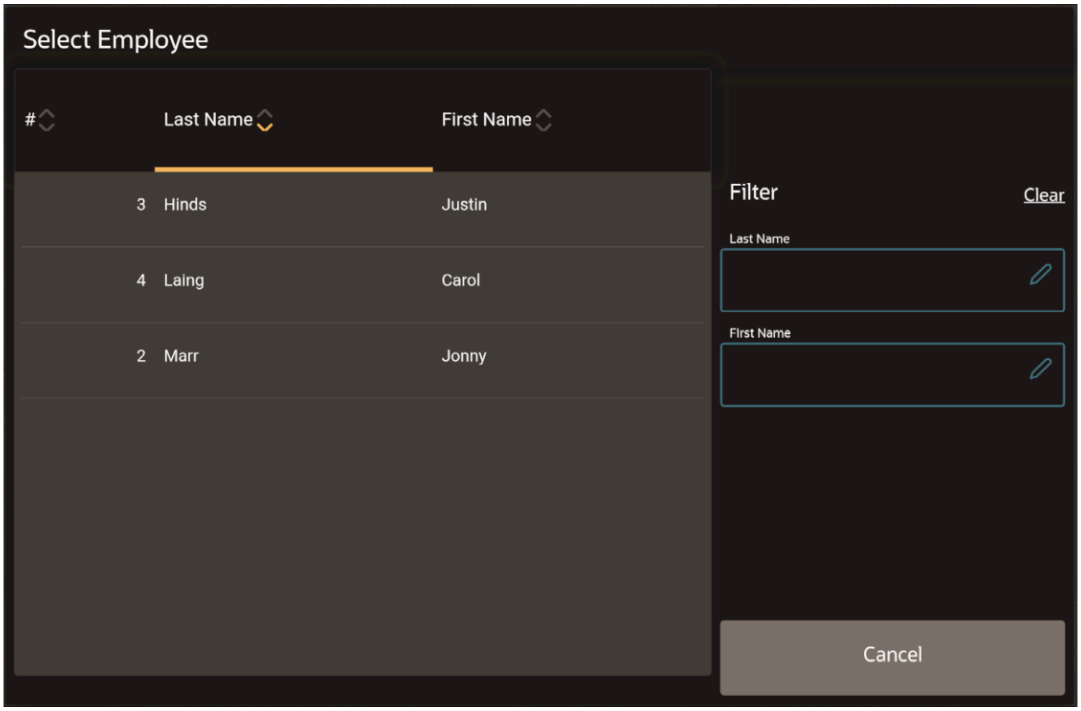
Assign Employee ID

This function is not available on mobile phones and handheld devices.

1. Click **Assign Employee ID**.
2. Click the employee in the list.

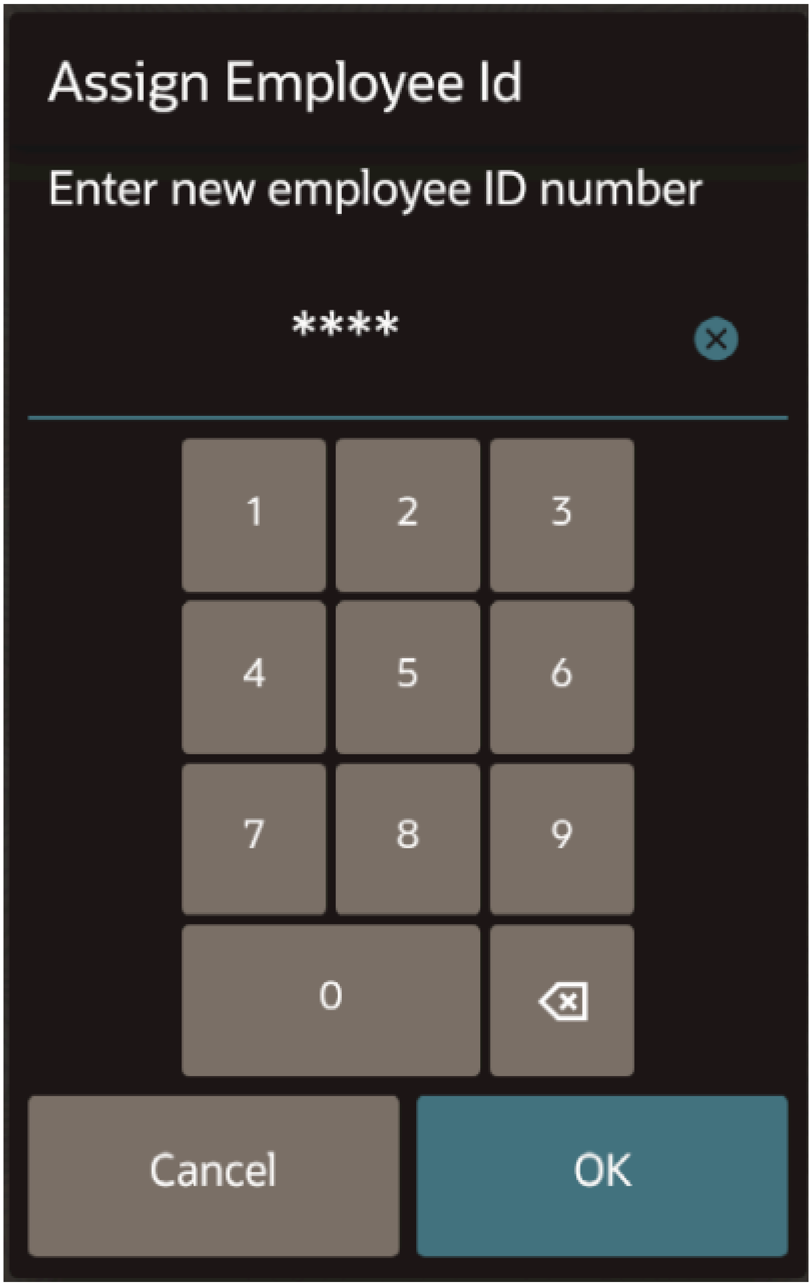
   To filter the list, enter the employee’s first and last name.

Figure 3-6 Select Employee Page



3. Enter the new employee ID number, and then click **OK**.

Figure 3-7   Assign Employee ID Page



Register Fingerprints

Scan fingerprints to allow employees to sign in to Simphony Essentials using a fingerprint reader. Three fingers can be enrolled.

This function is not available on mobile phones, handheld devices, and tablets.

1. Click **Register Fingerprint**.
2. Select the employee whose fingerprints need to be scanned.
3. Click **Enroll Fingerprint**.
4. Click **Yes** to scan a fingerprint four times when prompted.

5. Place the employee's finger on the fingerprint reader and remove it when the scan is complete. The scanner flashes red while scanning and then turns blue when complete. Remove the finger from the scanner after it turns blue. Repeat this step for each finger.

Edit Employee Training Status

When a training employee signs in to Simphony Essentials, a light green Training Mode banner appears at the top and bottom of all pages. Training checks appear in green text in the check list and on the Home page, and the text 'Training' is automatically added to the check name.

The function to put employees in training mode is not available on mobile phones and handheld devices.

Figure 3-8   Training Mode Checks List

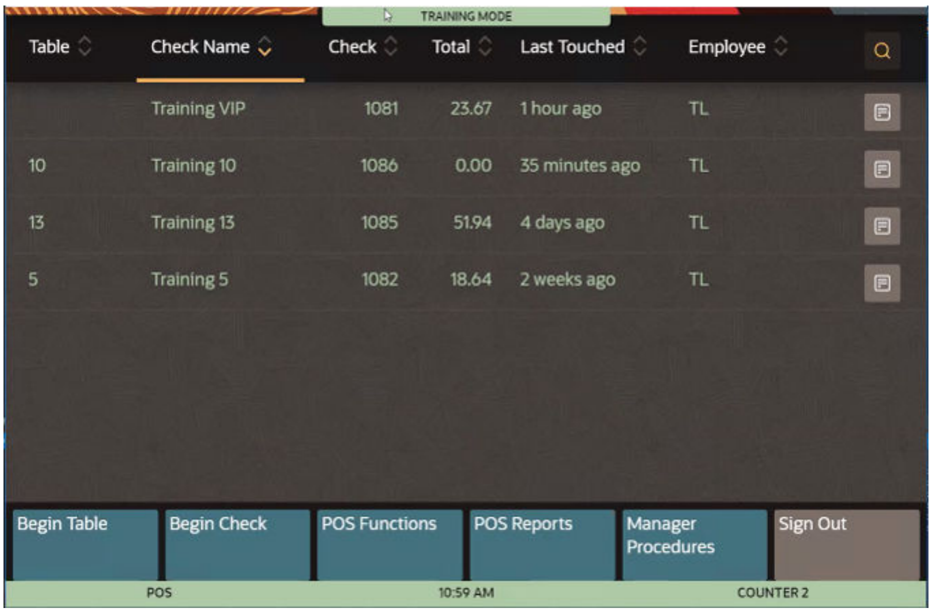
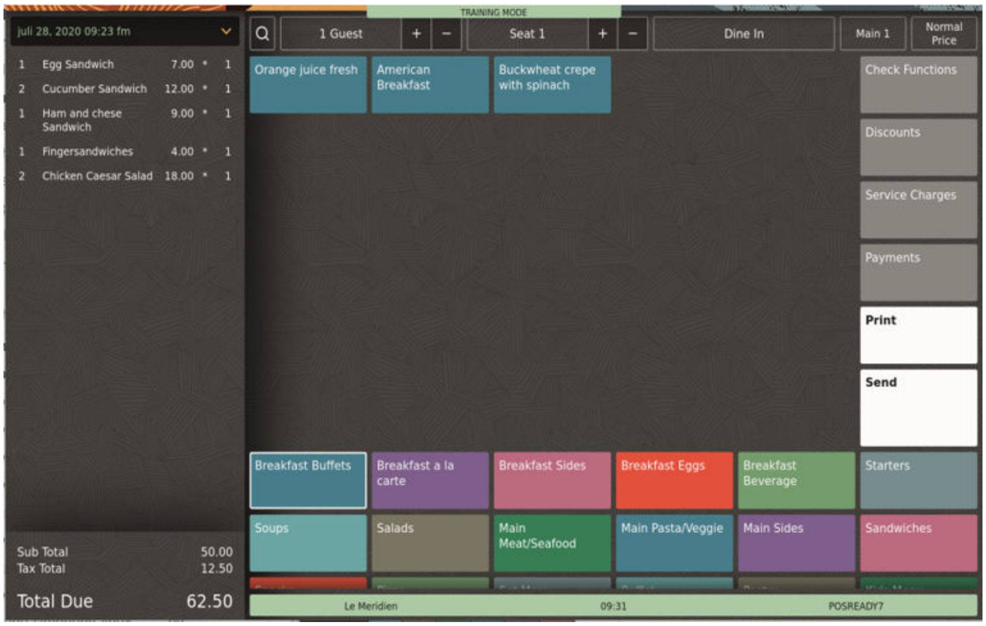


Figure 3-9 Training Mode Banners



To change employee training status:

1. Click **Edit Employee Training Status**.
2. To add employees to Training Mode, select the **Training** check box adjacent to the employee name, and then click **Save**.
3. To remove employees from Training Mode, deselect the **Training** check box adjacent to the employee name, and then click **Save**.

Copy Employee

If you are using Labor Management, you can add an employee in Simphony Essentials by using a current employee as a template. The name of the new employee, date of birth, and hire date are required. You can also add magnetic card ID and fingerprints, change pay rates, or deactivate employees.

You need valid user credentials for Labor Management to add an employee through Simphony Essentials.

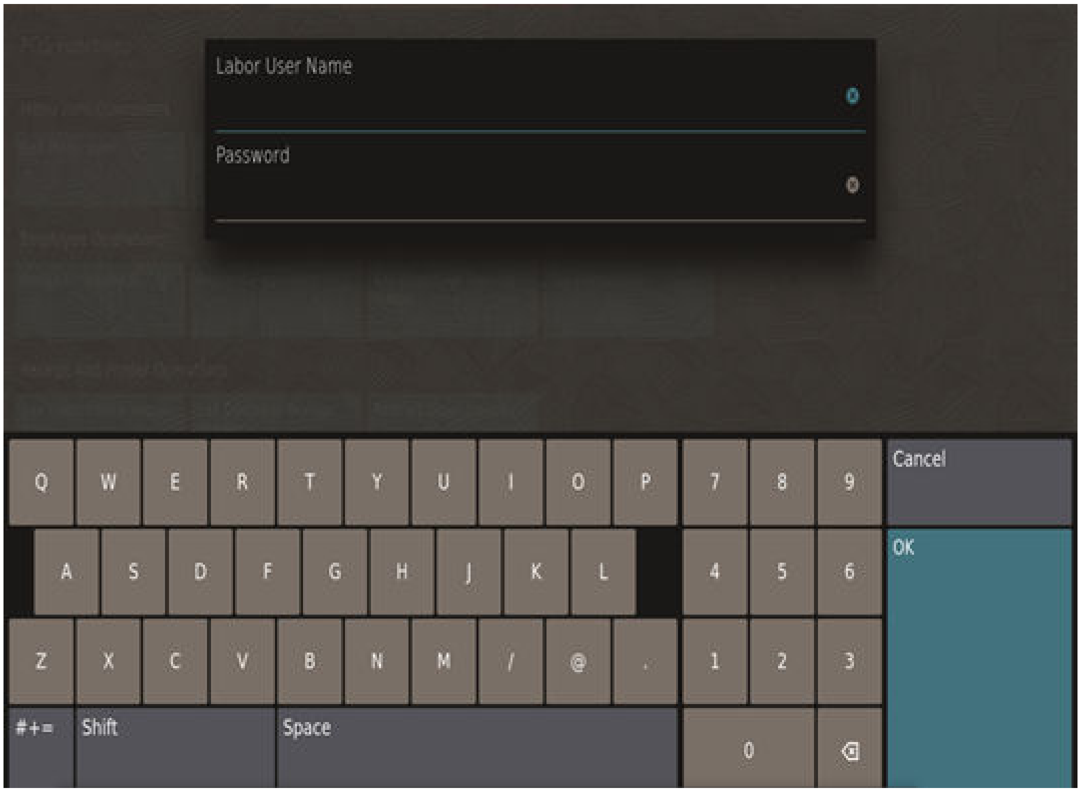
This function is not available on mobile phones and handheld devices.

This feature is not available if you have migrated to People Management. The button will be visible, but if selected, the following message appears:

If you are using People Management, the following message appears: `Please use People Management, located in Simphony Home, to perform this operation.`

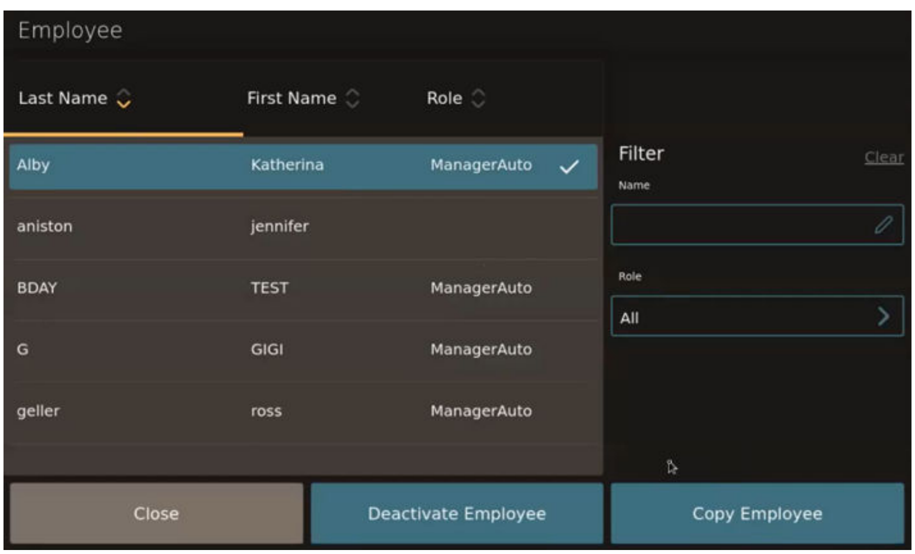
1. Click **Copy Employee**.
2. Sign in with your Labor Management **User Name** and **Password**, and then click **OK**.

Figure 3-10 Copy Employee Sign In Page



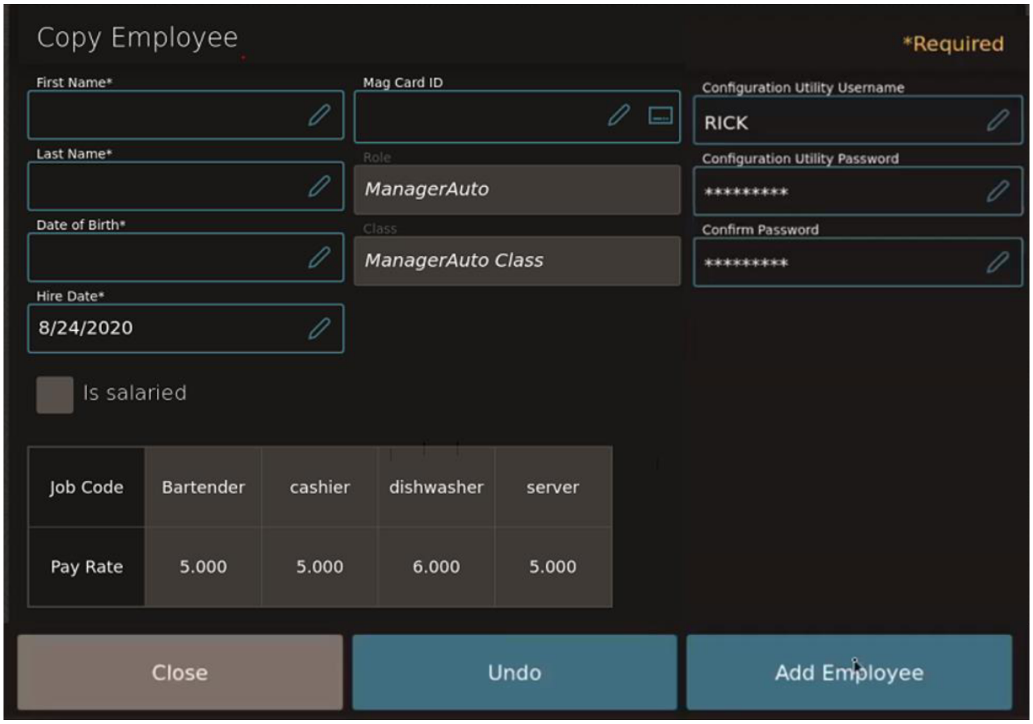
3. Select an existing employee from the list.
   a. Click **Copy Employee**.

Figure 3-11 Copy Employee Button on Employee Page



   b. Enter the **First** and **Last Name**, **Date of Birth**, **Hire Date**, for the new employee.

Figure 3-12 Copy Employee Page for Employee Information



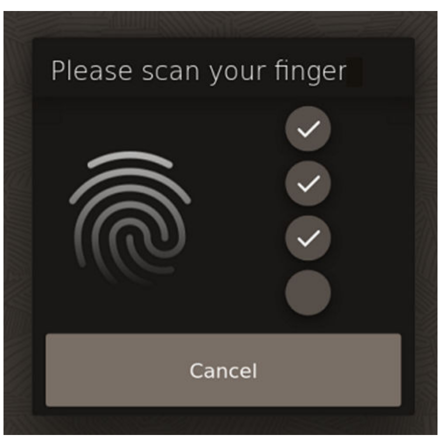
c. If the location uses employee ID cards, enter the **Mag Card ID** number.

d. If the location uses fingerprint readers, click the fingerprint icon in the **Fingerprint** field.

   Follow the prompts to enroll a fingerprint. Place the finger to scan on the fingerprint reader, and then remove it when the scan is complete. Each finger is scanned four times. The scanner flashes while scanning and remains lit after the scan is complete.

   The following status appears when a fingerprint is being scanned:

Figure 3-13 Scan Fingerprint Dialog



e. (Optional) Select or enter other details about the employee as applicable.

f. Click **Add Employee**, click **Yes** to confirm, and then click **OK**.

4. To deactivate an employee:

   a. Select the employee.

b. Click **Deactivate Employee**.

c. Click **Yes** to confirm the deactivation.

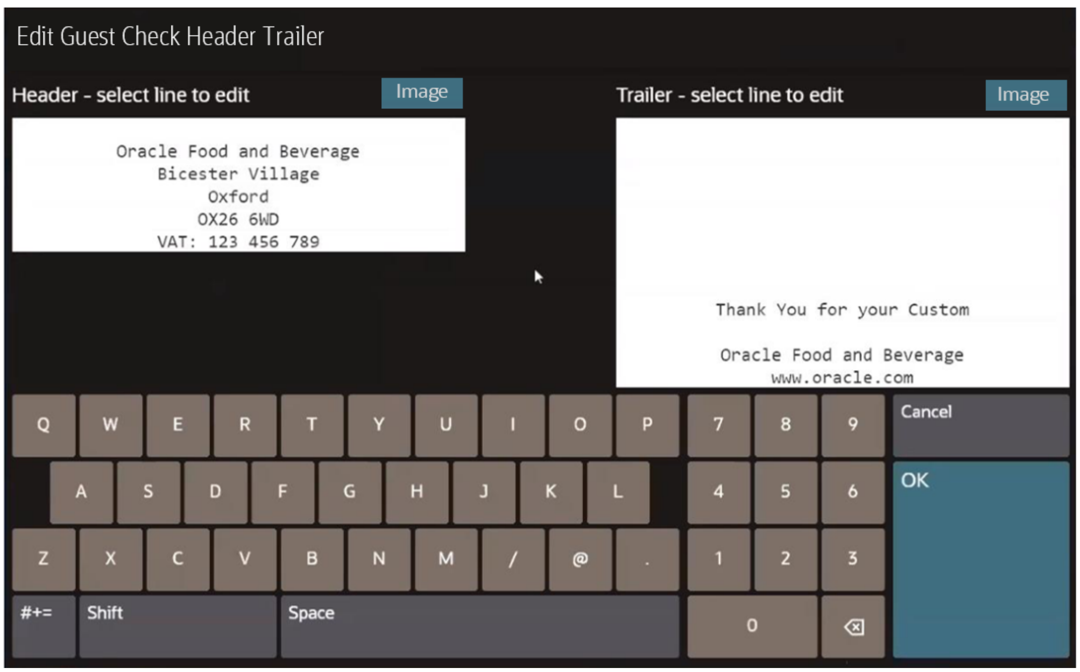
Edit Guest Check Header and Trailer

Guest check headers and trailers are leading and trailing lines that print on guest checks. Typically, the header lines include the name of the property or revenue center and address. The trailer lines generally show gratitude or promotional information about upcoming events.

This function is not available on mobile phones and handheld devices.

1. Click **Edit Guest Check Header Trailer**.
2. Use the onscreen keyboard to enter the details to print on the header in the **Header** text field, and then enter the details to print on the trailer in the **Trailer** text field.

Figure 3-14 Edit Guest Check Header Trailer Page



3. To load images from EMC that will appear in the header or trailer:
   a. Place the cursor in the **Header** or **Trailer** text field, and then click **Image**.
   b. Select an image logo from the preview.

      The image appears slightly distorted on the workstation. Print the guest check to ensure that the image appears as required on the receipt.
4. Click **OK**.

Edit Customer Receipt Header

You can print the logo of your Enterprise, property, or revenue center on customer receipts. You can only import logos that have already been imported through the Enterprise Management Console (EMC). See **Introduction to Logo Printing** in the *Oracle MICROS Simphony Essentials Configuration Guide* for more information about the logos.

This function is not available on mobile phones and handheld devices.

1. Click **Edit Customer Receipt Header**.
2. Enter the details to print on the receipt in the **Header** text field.
3. To insert or change a logo for the header:
    a. Select a Header text field, and then click **Image**.
    b. Select an image logo from the preview.
4. Click **OK**, and then click **Yes**.
5. Click **OK** on the Save successful message.

Redirect Order Devices

You can use this function to change the device to which an order is being sent. For example, at lunchtime the main bar is closed, so drink orders are redirected to a kitchen device.

This function is not available on mobile phones and handheld devices.

1. Click **Redirect Order Devices**.
2. Select the order device from the list, and then click **Edit**.
3. Select the device to which you want to redirect the orders that come to the device you selected in Step 2, and then click **OK**.

Update Database

Updating the workstation database refreshes the data that appears in the workstation. This allows you to obtain the latest business day information from the Enterprise database.

To update the workstation database, click **Update Database**.

Reload Database

Reloading the workstation database updates the local data stored on a workstation.

1. Click **Reload Database**.
2. Click **Yes**.

Use Property Management Console

The Property Management Console (PMC) lets managers perform specific functions, and provides support (such as logs, workstations, and network).

Functions

The following functions are available for workstations:

- Replay checks stored in the workstations
- Register fingerprints
- Perform workstation device diagnostics

Device Diagnostics is the only function available for tablets.

PMC functions are not available on mobile phones and handheld devices.

1. Click **Property Management Console**.
2. Click **Functions**.
3. To replay checks:
    a. Click **Replay Checks**.
    b. Select the workstation, the date, and the time period for which you want to replay the checks.
    c. Click **Replay Checks**, and then click **OK**.
4. To register fingerprints:
    a. Click **Register Fingerprint**.
    b. Select the employee whose fingerprints need to be scanned.
    c. Click **Enroll Fingerprint**.
    d. Click **Yes** to scan a fingerprint four times when prompted.
    e. Place the employee's finger on the fingerprint reader and remove it when the scan is complete. The scanner flashes red while scanning and then turns blue when complete. Remove the finger from the scanner after it turns blue. Repeat this step for each finger.
5. To perform workstation diagnostics, click **Device Diagnostics**.

    Workstation diagnostics assist in troubleshooting and testing the workstation's connection to peripheral devices.
    a. To check the functionality of the cash drawers, click **Open Drawer 1** and **Open Drawer 2**.
    b. To check the status of the cash drawers, click **Status**.
    c. To test the customer display, click **Write**. A dialog box shows the number of lines currently on the customer display.
    d. To clear the customer display, click **Clear**.
    e. To see the display settings, click **Current Brightness**.
    f. To change the display intensity level, click **Lighter** or **Darker**.
6. When you are finished using PMC functions, click **Close**.

View Log Files

Several support functions are available on workstations and tablets on the PMC Support page.

The only support functions on mobile phones and handheld devices are for Log files.

1. On the POS Functions page, click **Property Management Console**.
2. Click **Support**.
3. On the Support page, click **Log Files**. The Log Files dialog appears.

Figure 3-15   Log Files on Workstations and Tablets

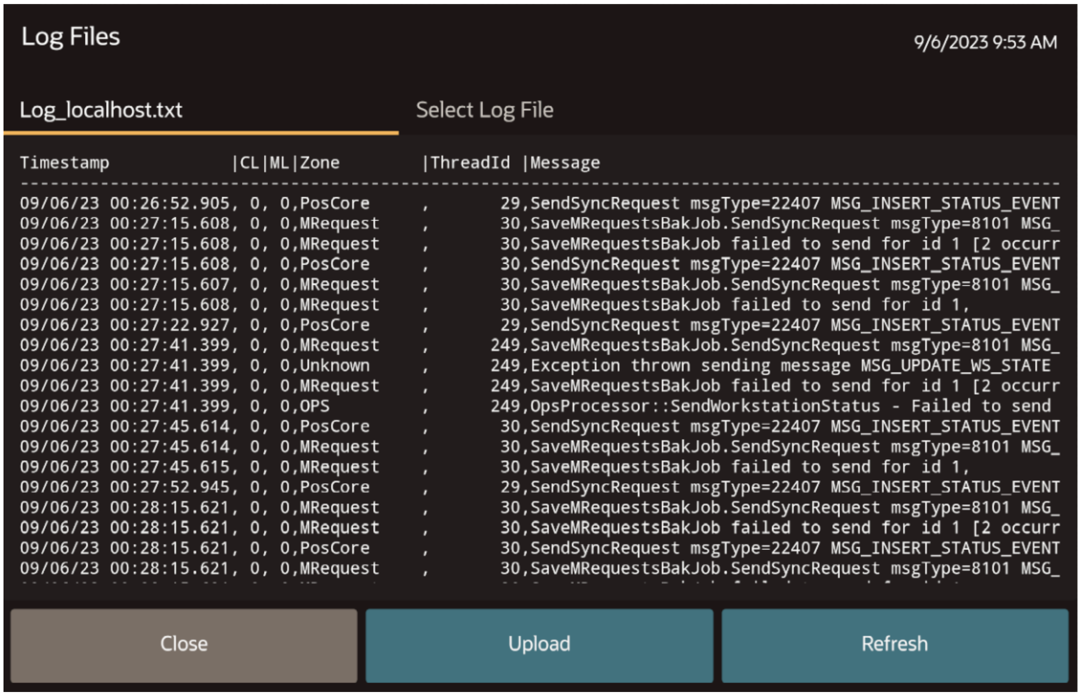
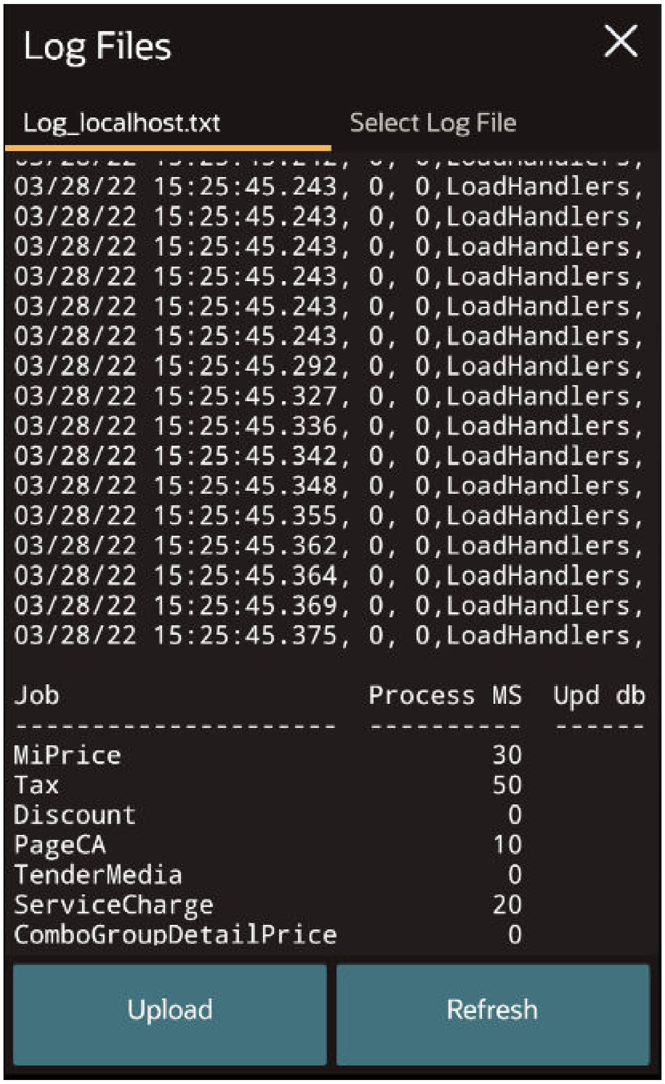


Figure 3-16 Log Files on Mobile Phones and Handheld Devices



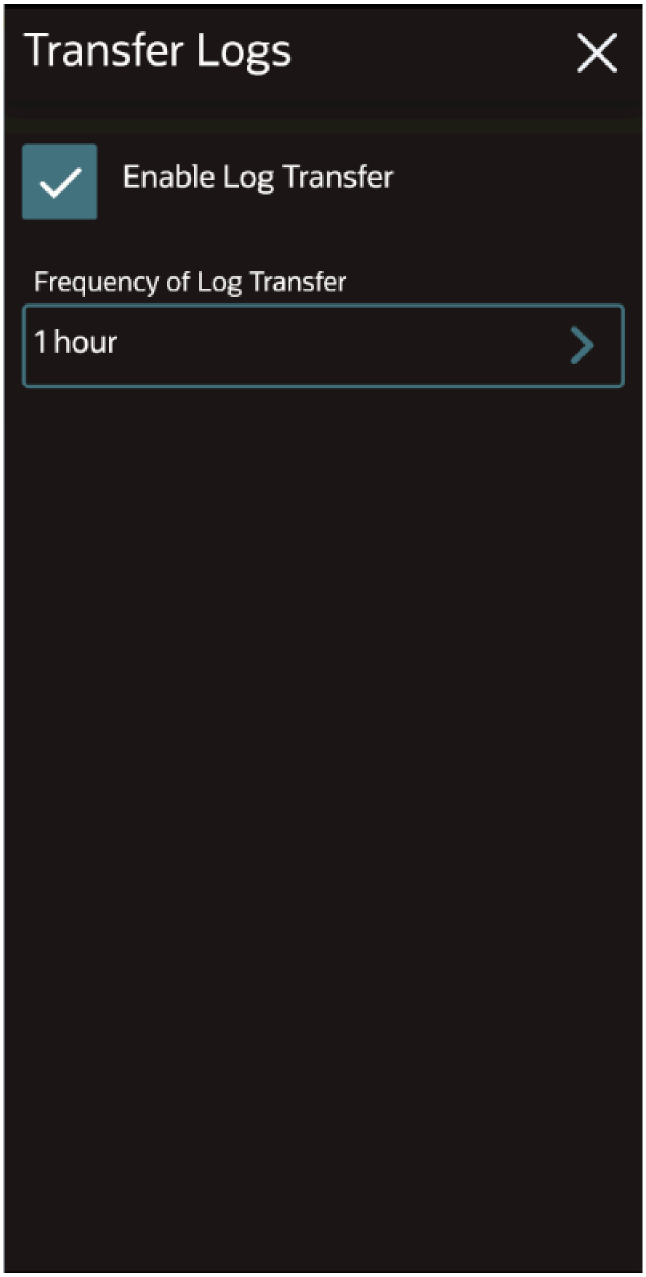
Transfer Logs

You can enable the automatic transfer of logs from mobile phones or handheld devices to the main workstation (known as the Check and Posting Server or CAPS) for support purposes. The frequency of the transfer can be set from 30 minutes up to every 8 hours.

This functionality allows log files to be retained on the CAPS machine for a longer time period than they may be available on the mobile phone or handheld device. They can also be easily accessed and viewed on CAPS to ensure that the devices are working properly, or to analyze issues.

1. On the POS Functions page, click **Property Management Console**.
2. Click **Support**.
3. On the Support page, click **Transfer Logs**. The Transfer Logs dialog appears.

Figure 3-17 Transfer Logs on Mobile Phones and Handheld Devices

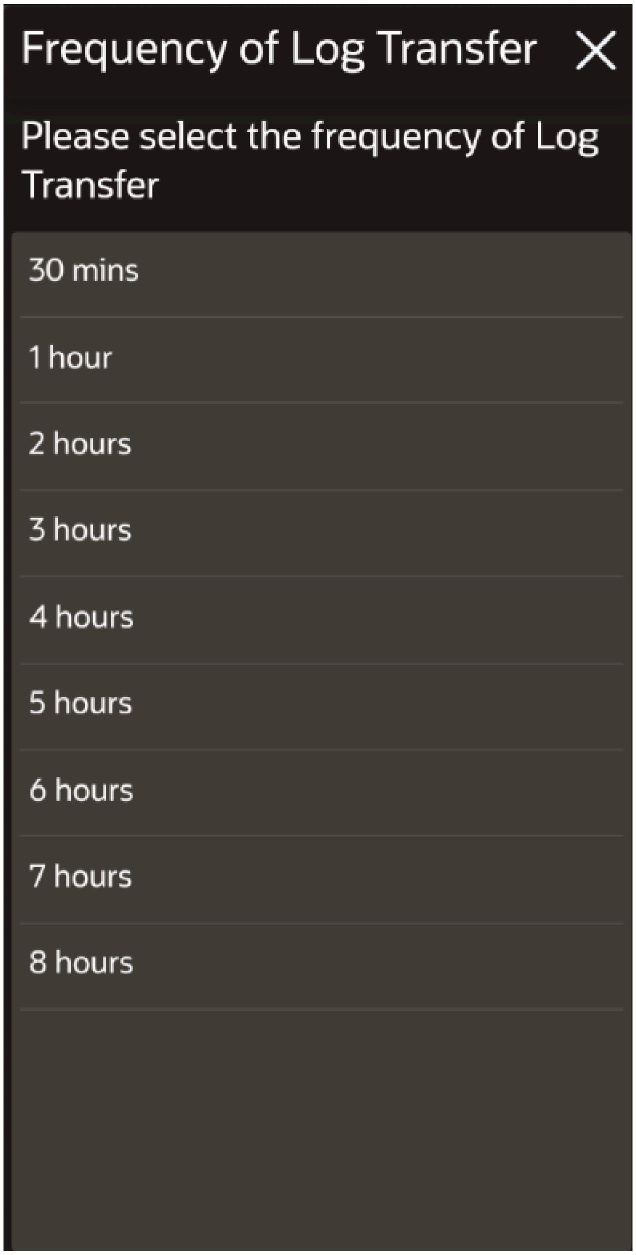


4. Click **Enable Log Transfer**, and then select the **Frequency of Log Transfer**.

   By default, **Enable Log Transfer** is checked, and the **Frequency of Log Transfer** is set to 1 hour.

   When the logs are rotated on the Android device, the two most recent archived log files are zipped and then transferred to the CAPS machine based on the **Frequency of Log Transfer**. These logs are stored in the …\EGatewayLog\POSClientLogs folder on the CAPS machine.

Figure 3-18 Frequency of Log Transfer on Android Devices



5. Close the PMC.

Assign Payment Device

If you are using the Oracle MICROS Payment Cloud Service (PCS), you need to configure payment terminals (for example, Verifone p400) to post funds into the store. Use the **Assign Payment Device** button in Manager Procedures, which initiates a function on the POS client that assigns the PIN Entry Device (PED) to the location.

This option is not available on mobile phones, handheld devices, and tablets.

1. Click **Assign Payment Device**.
2. Scan the QR code shown on the Assign Payment Device dialog, and follow the steps shown there to continue setup.

Close Application

1. Click **Close Application**.
2. Click **Yes**.

4 Check Functions and Transaction Functions

You can access check functions while in a transaction. For workstations and tablets, if you are using a TSR service type, click **Check Functions** on the TSR Transaction page. If you are using a QSR or Bar service type, click **Transaction Functions** on the QSR Transaction page or Bar Transaction page.

Figure 4-1 TSR Check Functions Page on Workstations and Tablets

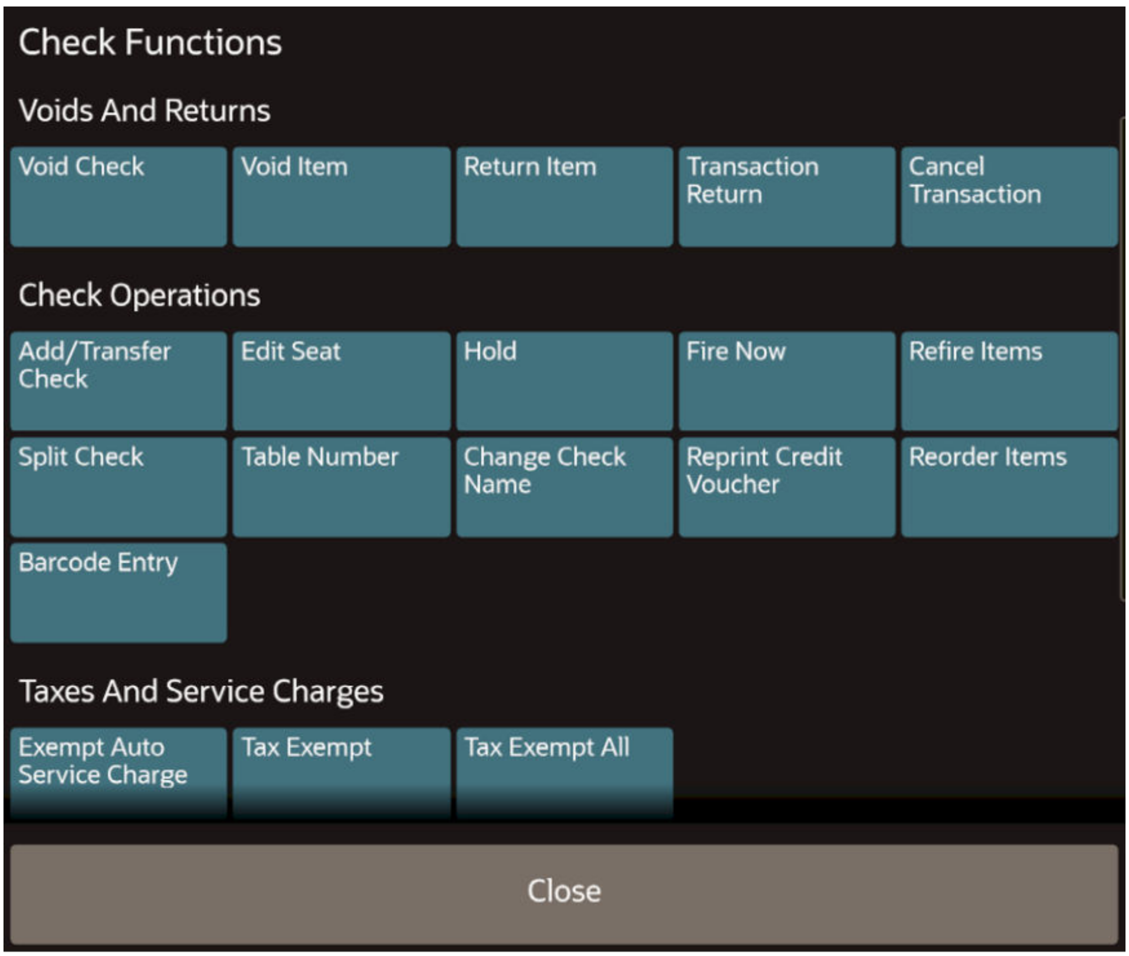


Figure 4-2 QSR Transaction Functions Page on Workstations and Tablets

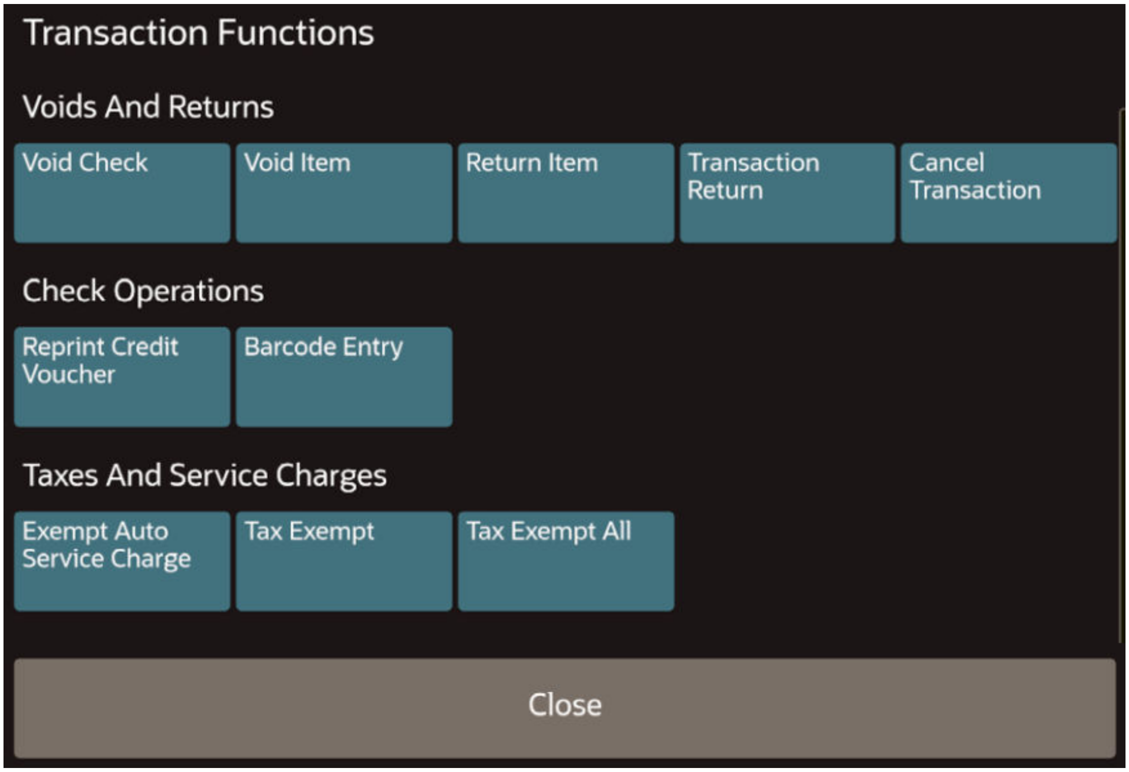
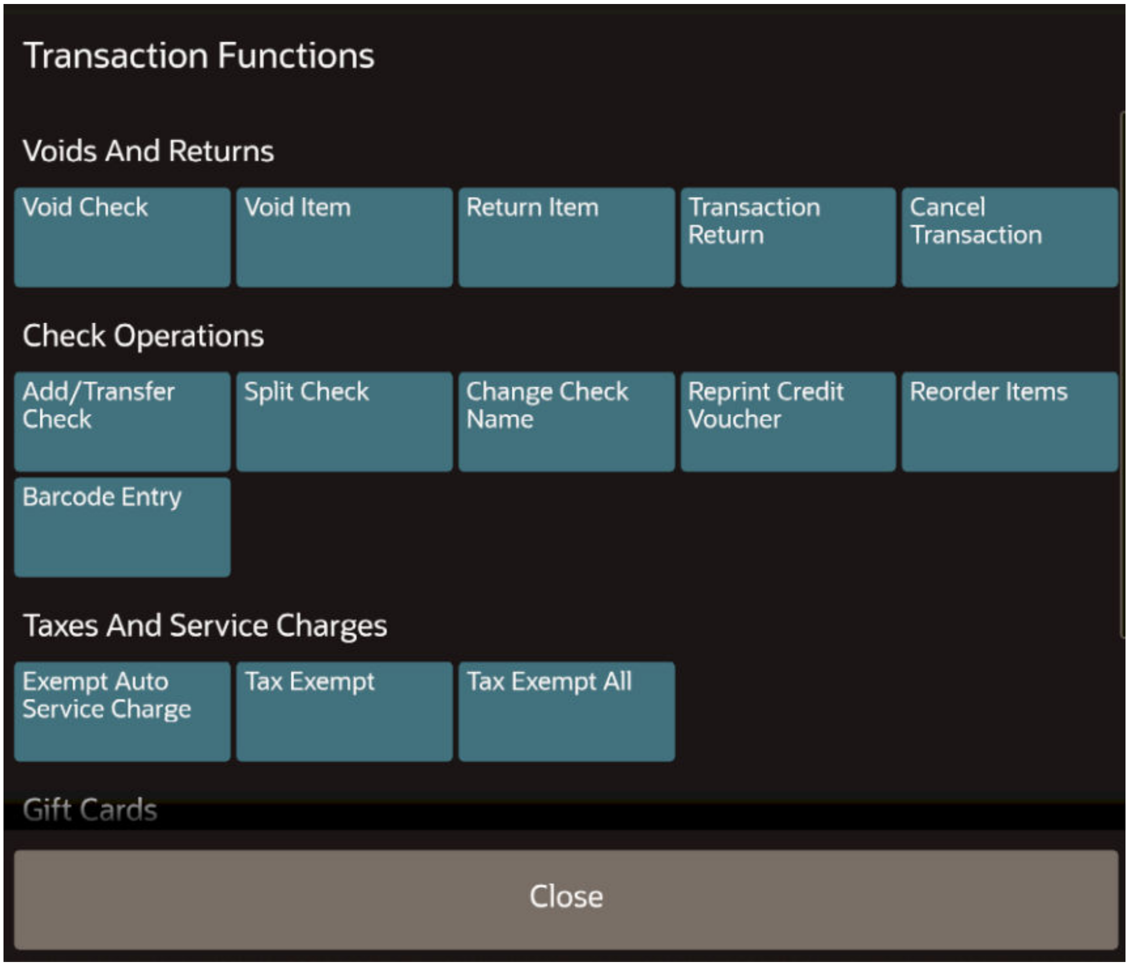


Figure 4-3 Bar Transaction Functions Page on Workstations and Tablets



For mobile phones and handheld devices, click the **Functions** button. These devices support the same check functions as workstations and tablets, with the exception of Reprint Credit Voucher and Barcode Entry. In addition, a Print button appears on the Check Functions for TSR workflows. Gift card options appear if configured.

Figure 4-4 TSR Check Functions Page on Mobile Phones and Handheld Devices

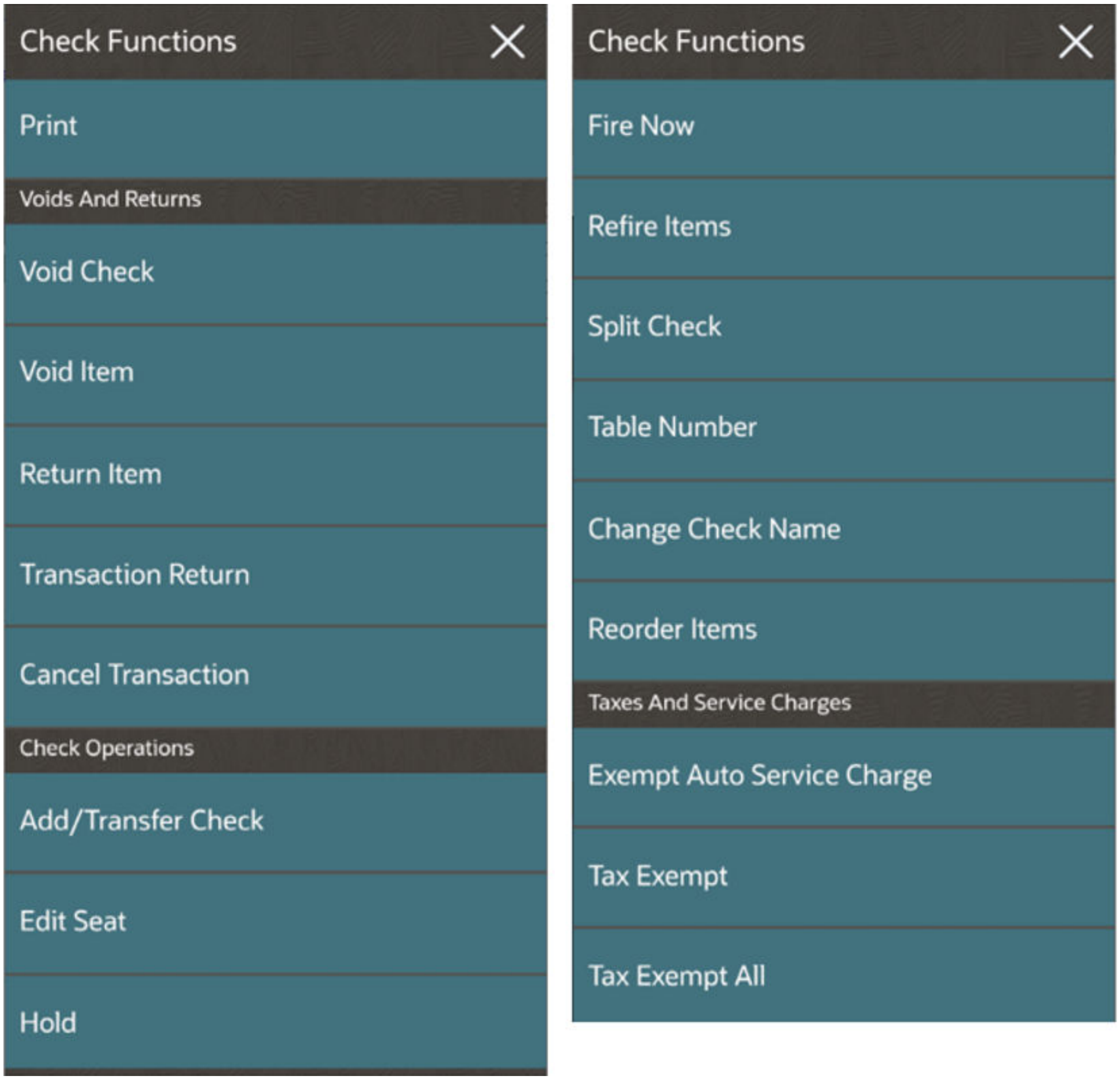
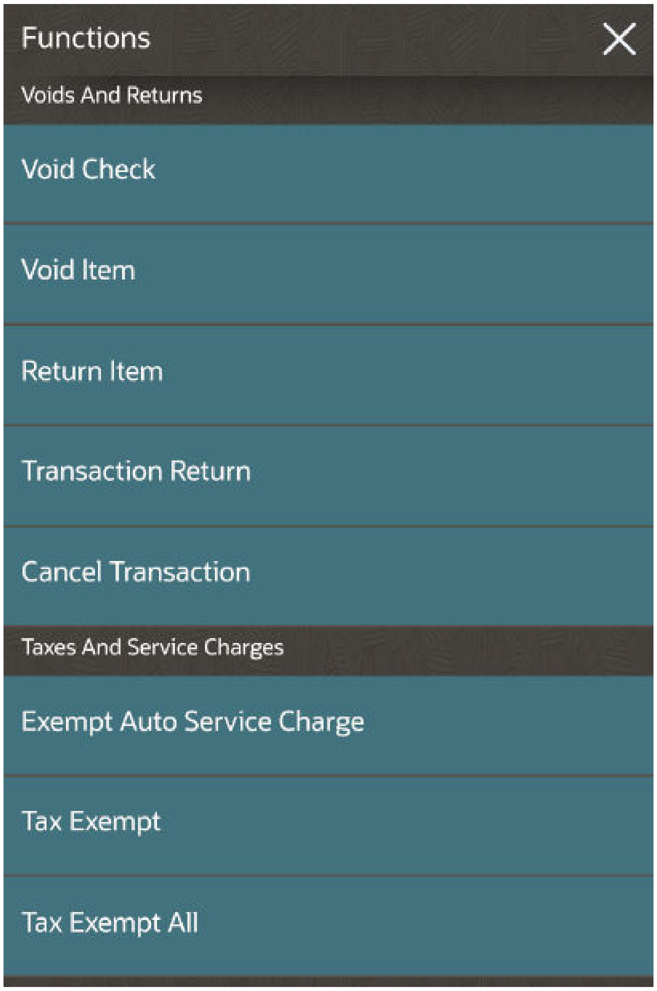


Figure 4-5   QSR Functions Page on Mobile Phones and Handheld Devices



Void Check

You can use the **Void Check** function to void all detail lines on a check for previous rounds.

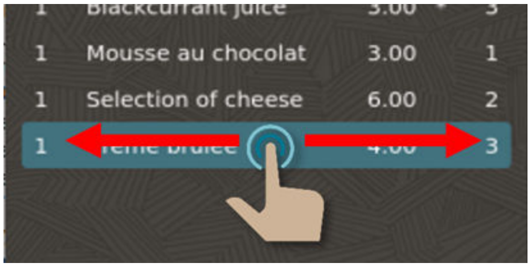
1. Pick up a check.
2. On workstations and tablets, click **Check Functions** (TSR) or **Transaction Functions** (QSR and Bar). On mobile phones and handheld devices, click **Functions**.
3. Click **Void Check**.
4. If configured, select the reason for the void. The check detail area appears blank.

Void Item

Perform one of the following to void a menu item:

1. If using gestures, select the menu item to void in the check detail area, and then swipe right or left on the item description. An Item Voided message appears briefly.

Figure 4-6 Void Gesture



2. On workstations and tablets, select the menu item to void in the check detail area, click **Check Functions** (TSR) or **Transaction Functions** (QSR/Bar), and then click **Void Item**. On mobile phones and handheld devices, select the menu item to void in the check detail area, click **Functions**, and then click **Void Item**.

   If void reasons are configured, you are prompted to select the reason for the void (for example, Guest Changed Mind).

   If no items were selected in the check detail area before clicking **Void Item**, the Void mode is activated with a banner above the check detail, as shown in the following image. The next item selected will show as a negative quantity on the check with a V adjacent to the item. If configured, select the void reason.

Figure 4-7 Void Banner on Workstations and Tablets

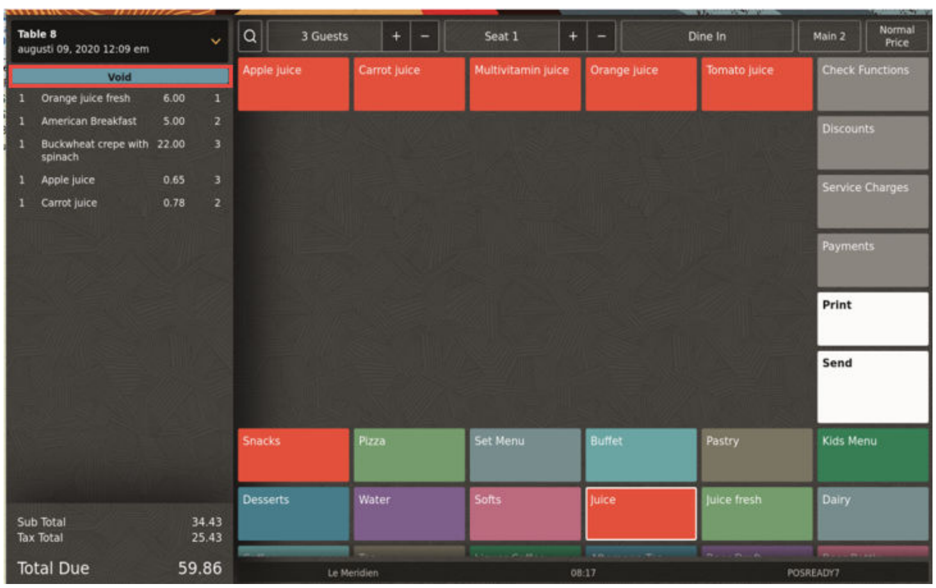


Figure 4-8 Void Banner on Mobile Phones and Handheld Devices

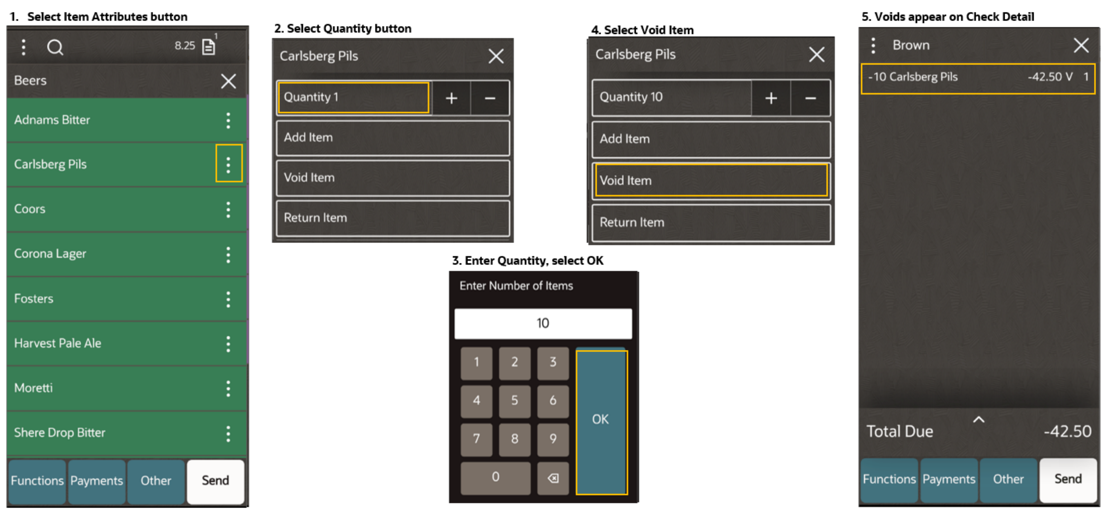
Alternative Void Method for Mobile Phones and Handheld Devices

From the menu item buttons, you can void multiples of an item using a number pad. Click the item attributes icon
(

) adjacent to a menu item.

Using Void on this page is a shortcut rather than going to the Functions page. To void an item, click the **Void Item** button, and then select the void reason (if prompted). You can void large quantities of the same item on the check using a number pad rather than clicking the menu item button multiple times. This saves time and is more accurate. For large numbers, click the **Quantity** button, enter the number of items on the number pad, click **OK**, and then click the **Void** button.

Figure 4-9 Void Item Workflow



Return Item

A return may be required for various reasons, such as when the wrong item was ordered, the guest changed their mind, an item is cold rather than hot, an order is spilled or is out of stock. You can use the **Return Item** function to return a highlighted menu item.

This function takes the check into a Return mode, but only allows the return of one item; the **Transaction Return** function allows multiple returns until the Return mode is deselected.

1. Pick up a check or begin a new check.
2. For workstations and tablets, click **Check Functions** (TSR) or **Transaction Functions** (QSR/Bar). For mobile phones and handheld devices, click **Functions**.
3. Click **Return Item**. A Return mode banner appears above the check detail.

Figure 4-10 Return Banner on Workstations and Tablets

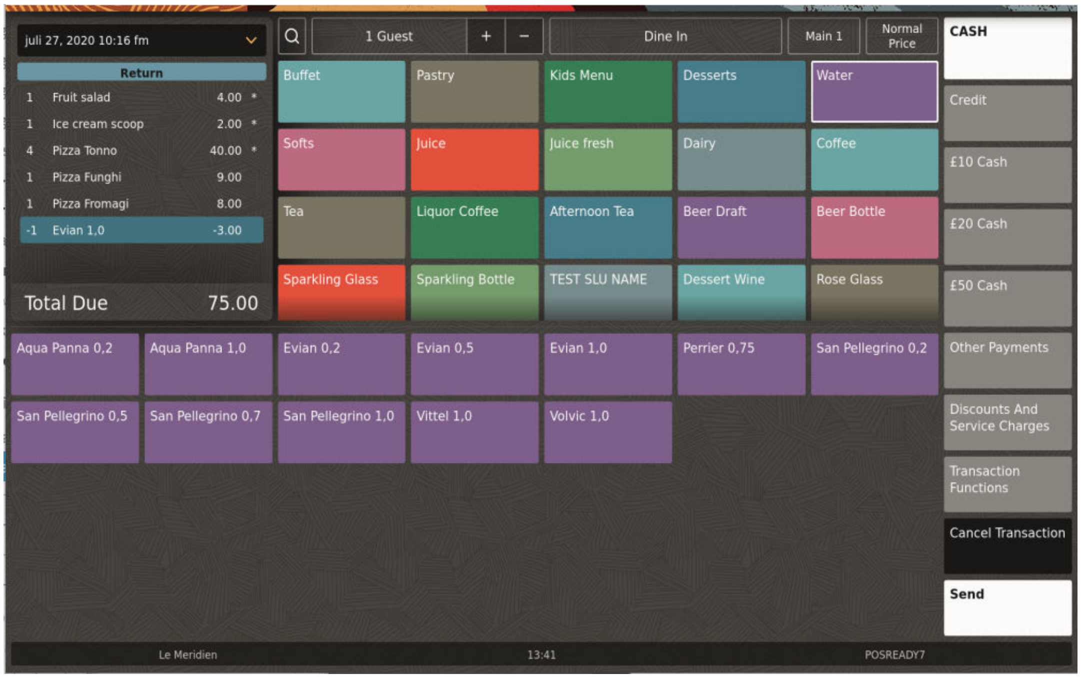
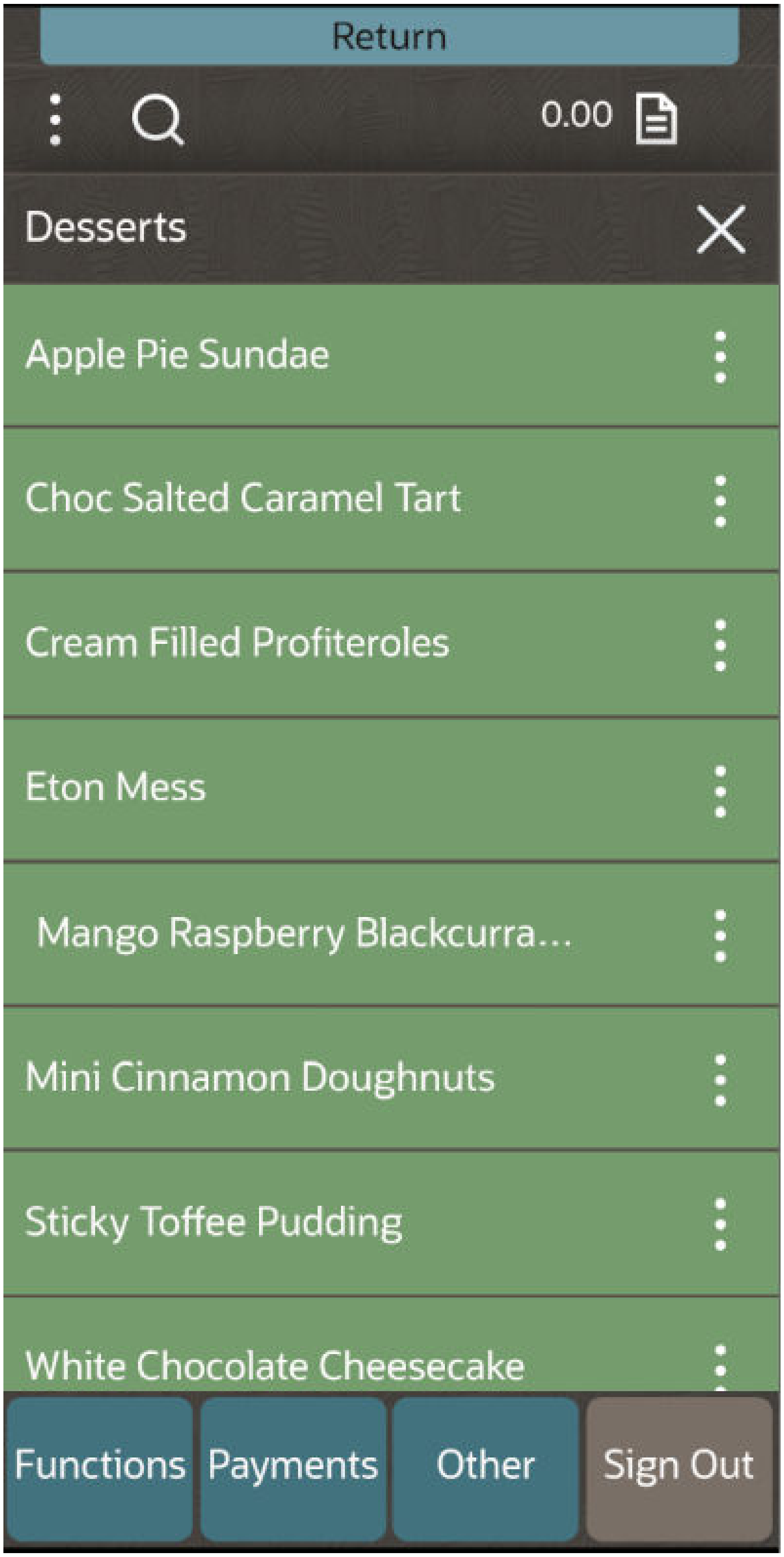


Figure 4-11 Return Banner on Mobile Phones and Handheld Devices



4. The next menu item added to the check after this point is considered a return. The returned menu item shows a negative quantity in the check detail area. When you select an item, the Return mode is switched off.

5. If configured, select the return reason.

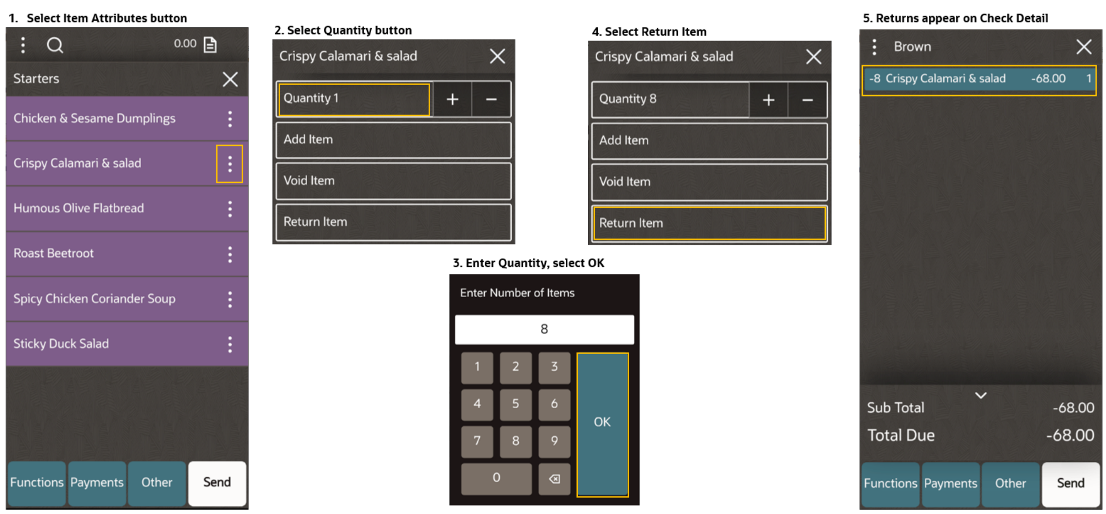
Alternative Return Method for Mobile Phones and Handheld Devices

From the menu item buttons, you can return multiples of an item using a number pad. Click the item attributes icon
(

) adjacent to a menu item.

Using Return on this page is a shortcut rather than going to the Functions page. To return an item, click the **Return Item** button, and then select the return reason (if prompted). You can return large quantities of the same item on the check using a number pad rather than clicking the menu item button multiple times. This saves time and is more accurate. For large numbers, click the **Quantity** button, enter the number of items on the number pad, click **OK**, and then click the **Return** button.

Figure 4-12 Return Item Workflow



Use Transaction Return Key

The **Transaction Return** function takes the check into a Return mode, like the **Return Item** function. However, **Transaction Return** allows multiple returns until the Return mode is deselected. **Return Item** only allows the return of one item.

1. Pick up a check or begin a new check.
2. For workstations and tablets, click **Check Functions** (TSR) or **Transaction Functions** (QSR/Bar). For mobile phones and handheld devices, click **Functions**.
3. Click **Transaction Return**. A Return mode banner appears above the check detail.

   All menu items added to the check after this point are considered returns and show as a negative quantity on the check. If you click **Transaction Return** again, the Return mode stops.
4. If configured, select the return reason.

Cancel Transaction

You can use the **Cancel Transaction** function to cancel a check if it has not been sent (service totalled). It only cancels new menu items on a sent check. The check is left open.

For workstations and tablets, the **Cancel Transaction** button is on the Check Functions menu for TSR workflows and on the Transaction Functions menu for Bar workflows. For mobile phones and handheld devices, the **Cancel Transaction** button is on the Functions menu.

The **Sign Out** button changes to **Cancel Transaction** after a transaction is started for QSR workflows.

Click **Cancel Transaction** to cancel the transaction, and then click **Yes** to confirm.

Add/Transfer Check

In TSR operations you can use the **Add/Transfer Check** function to transfer one check to another check. When transferring checks, both checks must have the same Order Type or Order Channel assigned.

1. Pick up a check or begin a new check. This will be the final destination check.
2. Click **Check Functions**, **Transaction Functions**, or **Functions**, and then click **Add/ Transfer Check**.
3. To view regular checks, click **Regular Checks**. To view future checks, click **Future Checks**.
4. Select the transferring check from the list. The check detail area shows the combined checks. The Home page shows only one check, which is the final destination check.

Figure 4-13 Add Check on Workstations and Tablets

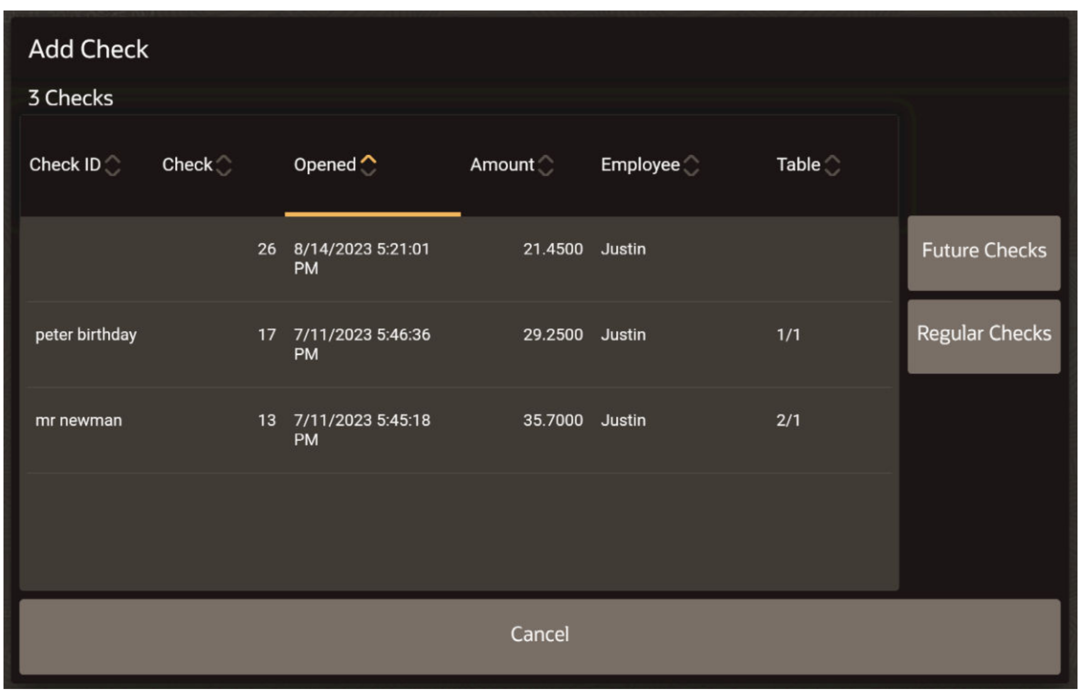
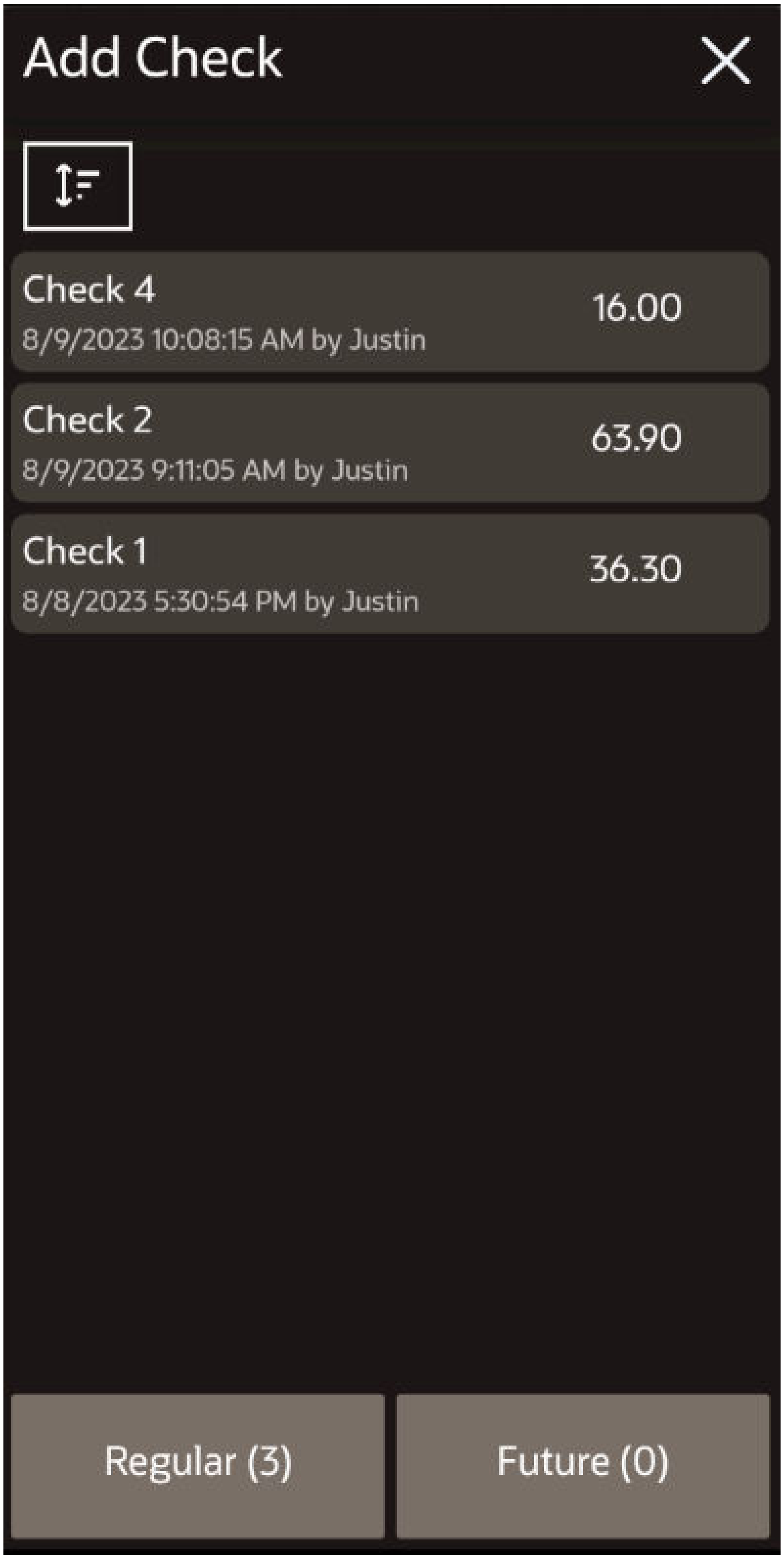


Figure 4-14 Add Check on Mobile Phones and Handheld Devices



For mobile phones and handheld devices, click **X** in the upper right corner to cancel the Add/Transfer Check function.

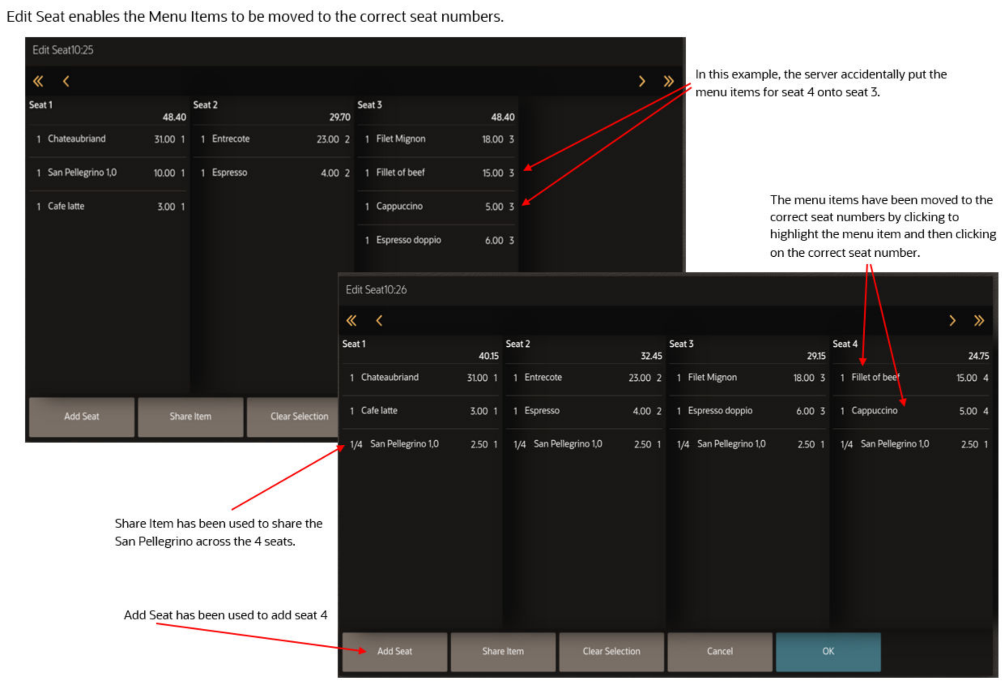
To view regular checks, click the **Regular** button in the lower area of the page. To view future checks, click the **Future** button.

Edit Seat

In TSR and Bar operations you can use the **Edit Seat** function to change the seat number of a menu item. Items can be assigned to seats so the server knows where to place the food on the table. You can increment seats on the transaction page, and edit seats using the **Edit Seat** function on the check functions page.

1. For workstations and tablets:
    a. Click **Check Functions** (TSR) or **Transaction Functions** (Bar), and then click **Edit Seat**.
    b. Click and highlight the items to be moved, click the destination seat number, and the items will be moved there.

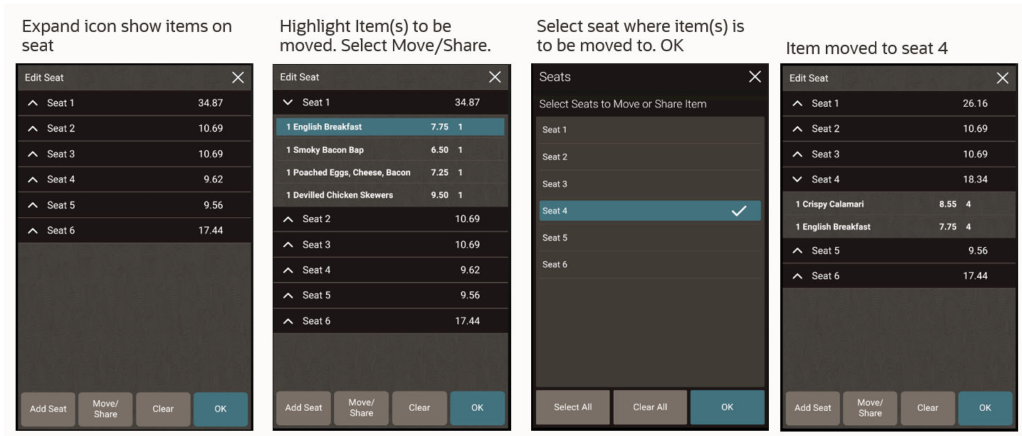
Figure 4-15 Example of Edit Seat Function on Workstations and Tablets



    c. To add another seat, click **Add Seat**.
    d. To share a menu item between seats (if the item is set as shareable in the EMC), click the menu item to be shared, click **Share Item**, select one or more seats, and then click **OK**.
2. For mobile phones and handheld devices:
    a. Click **Functions**, and then click **Edit Seat**.
    b. Expand the seat to show the item details.
    c. Select one or more menu items, and then click **Move/Share**.
    d. Click the destination seat number.

If one check is selected, the items are moved. If multiple checks are selected, the items are shared.

Figure 4-16 Example of Edit Seat Function on Mobile Phones and Handheld Devices



e. To add another seat, click **Add Seat**.

Hold Items

In TSR operations you can use this function to stop items from being sent immediately to an order device. The customer may have asked for the starters to be delayed if one member of their party has not arrived yet.

1. Click **Check Functions** or **Functions**, and then click **Hold**. The Hold mode activates and a banner appears above the check detail.
2. Select the menu item to hold. An H appears adjacent to the menu item in the check detail.

Figure 4-17 Hold Banner on Workstations and Tablets

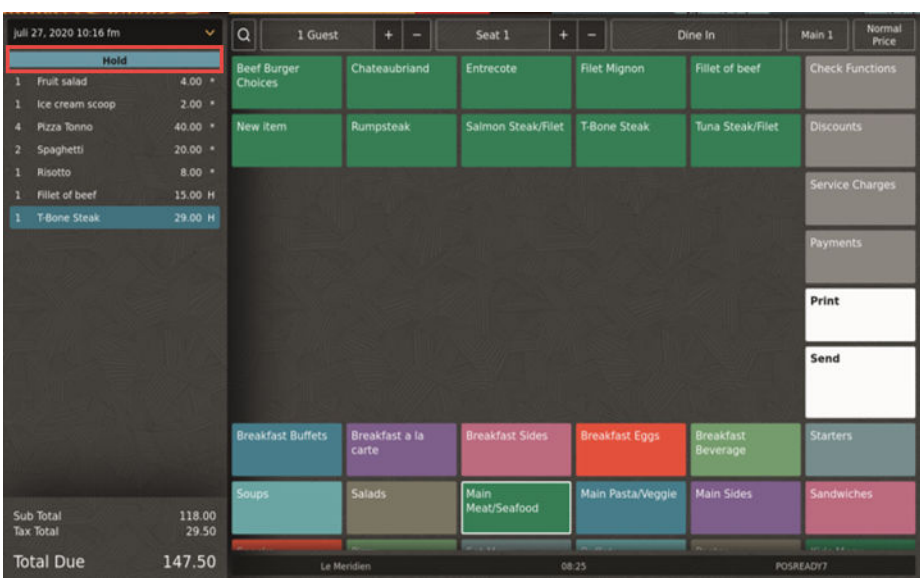


Figure 4-18 Hold Banner on Mobile Phones and Handheld Devices

3. Click **Hold** again to switch the Hold mode to off.

Fire Items

In TSR operations you can use this function to send unsent menu items to the order device immediately rather than waiting for the check to be sent. Menu items can be sent individually, by seat, by major group, or by family group.

1. Click **Check Functions** or **Functions**, and then click **Fire Now**. Unfired menu items are listed.
2. Fire items using one of the following methods:
   - Select individual menu items.
   - Select **Fire by Seat**, and then select a seat number.
   - Select **Fire by Major Group**, and then select a major group.
   - Select **Fire by Family Group**, and then select a family group.
3. Click **Fire**. The menu items appear on the check detail with an asterisk to show they have been sent.

Figure 4-19 Example of Fire Items Function on Workstations and Tablets

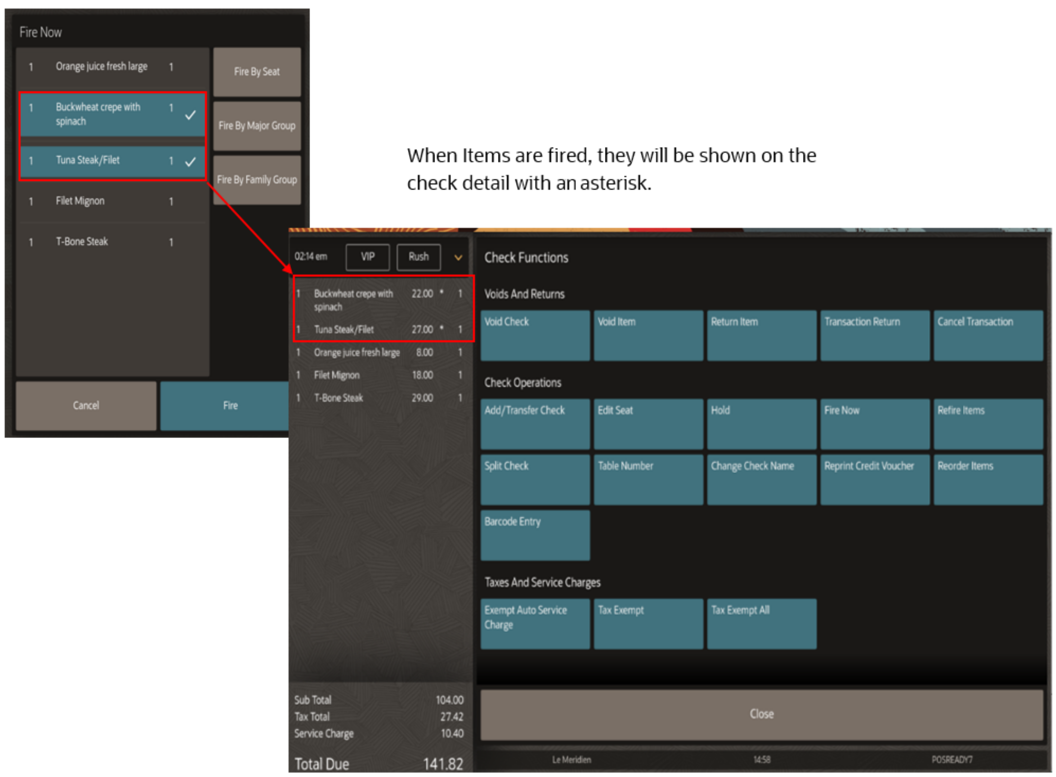
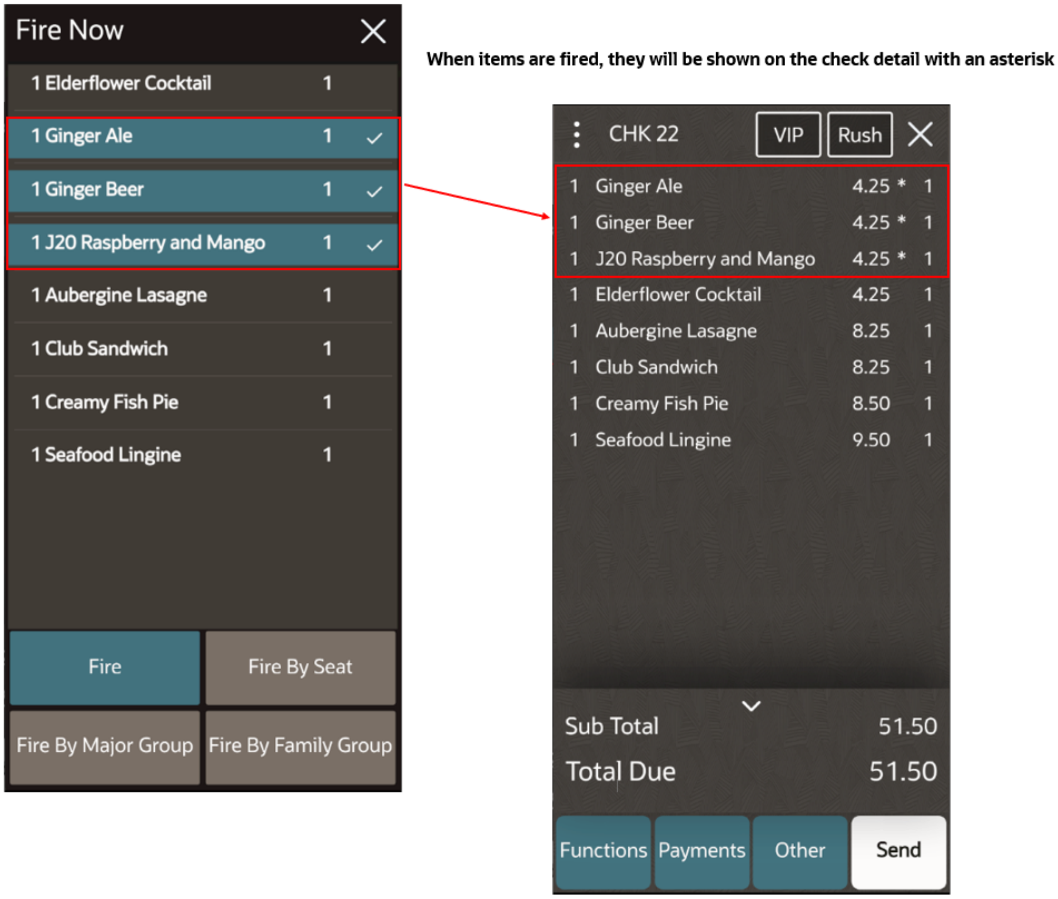


Figure 4-20   Fire Items Function on Mobile Phones and Handheld Devices



Refire Items

In TSR operations this function allows menu items from a check that has already been sent to an order device to be sent again.

1. Pick up the check that was sent and contains the menu items to refire.
2. Click **Check Functions** or **Functions**, and then click **Refire Items**.
3. Select the menu items to refire, then click **Refire**.

Figure 4-21 Refire Items on Workstations and Tablets

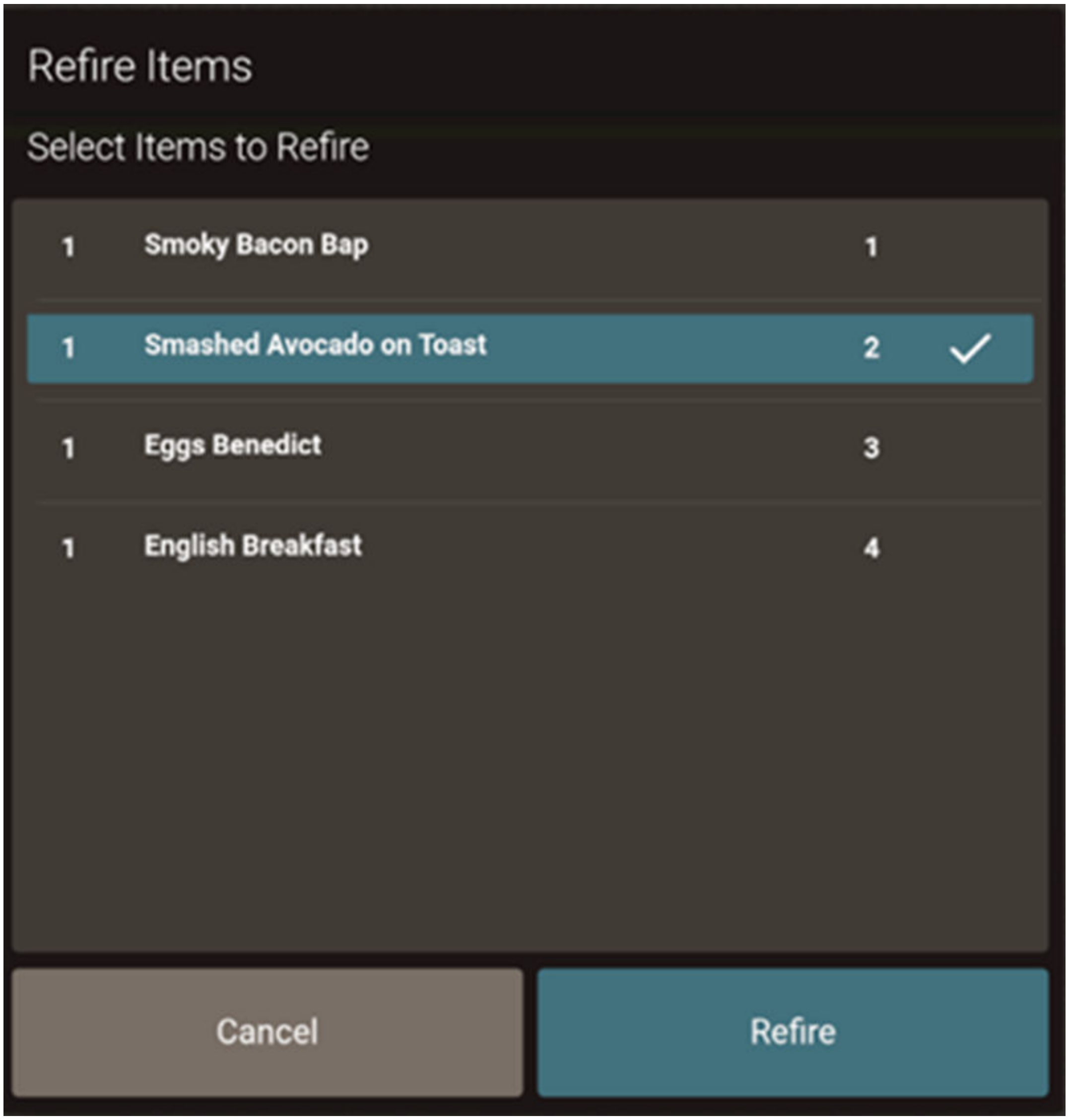
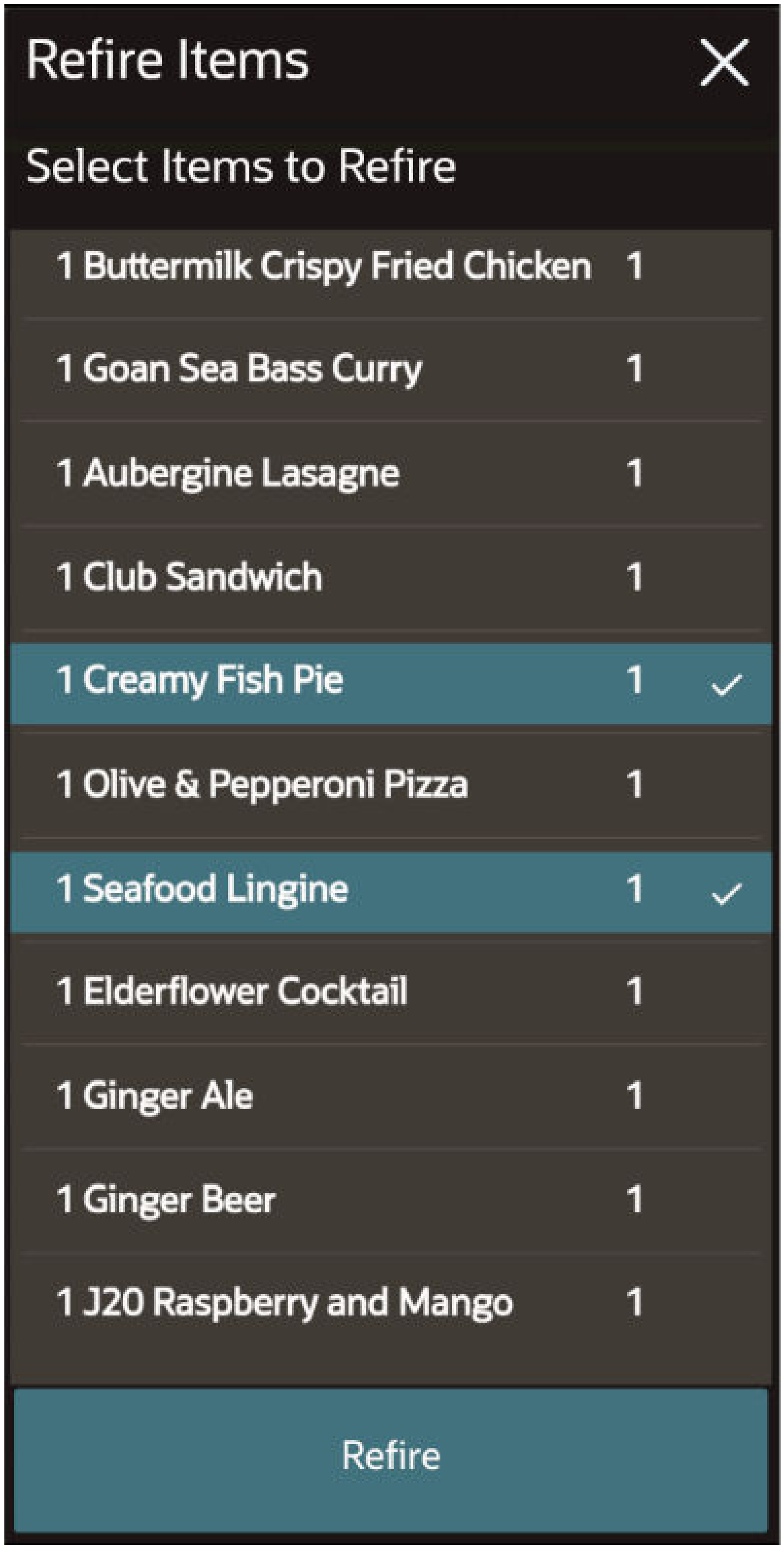


Figure 4-22 Refire Items on Mobile Phones and Handheld Devices

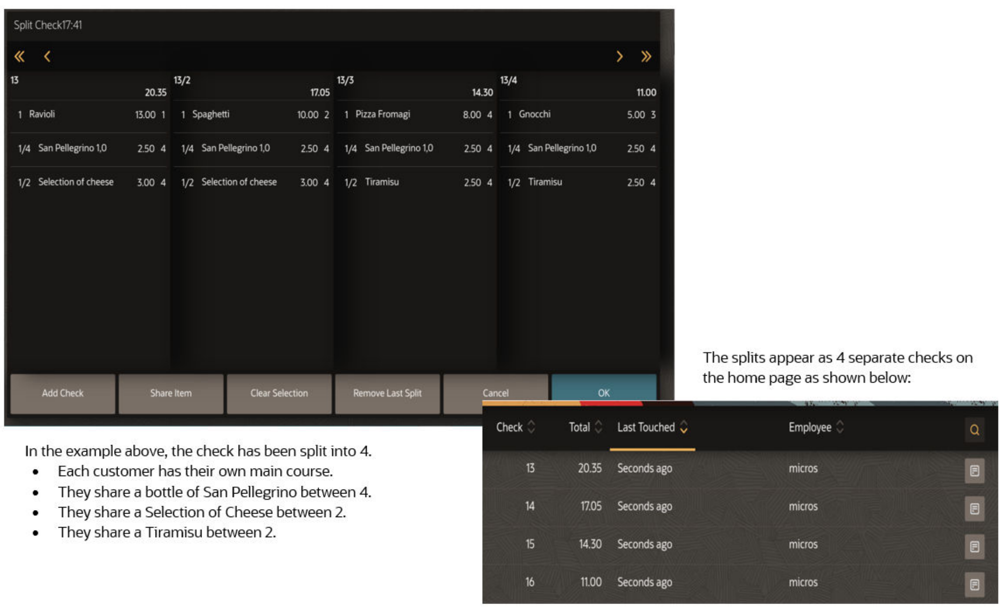


Split Check

In TSR and Bar operations you can use the **Split Check** function after sending a check to separate the check by menu item so that customers can pay for the items they consumed. The splits are not equal. You can transfer portions of a guest check detail to a new check, which is then assigned its own check number. The new check can be modified independently from the original check.

1. For workstations and tablets
   a. Click **Check Functions** (TSR) or **Transaction Functions** (Bar).
   b. Click **Split Check**.
   c. Select one or more menu items.
   d. Click the check to move the item or items to.

Figure 4-23 Example of Split Check Function on Workstations and Tablets

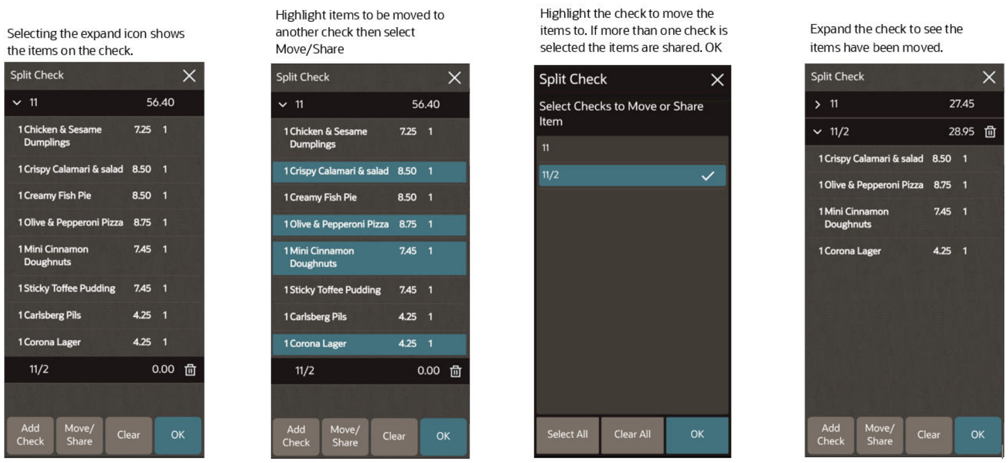


   e. To add more checks, click **Add Check**.
   f. To share a menu item click **Share Item**.
   g. To deselect multiple menu items, click **Clear Selection**.
   h. To remove the last menu item split, click **Remove Last Split**.
2. For mobile phones and handheld devices:
   a. Click **Functions**.
   b. Click **Split Check**.
   c. Expand the check to show the item details.
   d. Select one or more menu items.
   e. Click **Move/Share**.

f. Click the check to move the item or items to or to share items with.

   If one check is selected, the items are moved. If multiple checks are selected, the items are shared.

Figure 4-24 Example of Split Check Function on Mobile Phones and Handheld Devices



g. To add more checks, click **Add Check**.

h. To remove the split check and return the items to the original check, click the trash icon.

i. Once saved, the split checks will appear as different checks on the home page.

Use Table Number Key

In TSR operations, you can add a table number to a guest check that does not already have one. A table number can only be assigned once.

1. Click **Check Functions** or **Functions**, and then click **Table Number**.
2. Enter the table number, and then click **OK**.

Change Check Name

In TSR and Bar operations you can change the check name or add a name to a guest check that does not already have one.

1. For workstations and tablets, click **Check Functions** (TSR) or **Transaction Functions** (Bar). For mobile phones and handheld devices, click **Functions**.
2. Click **Change Check Name**.
3. Enter the new check name, and then click **OK**.

Reprint Credit Voucher

You can use this function to reprint a credit card voucher that needs to be signed by the customer. This function is not available on mobile phones and handheld devices.

To print a credit card voucher, click **Check Functions** (TSR) or **Transaction Functions** (QSR/Bar), and then click **Reprint Credit Voucher**.

Reorder Items

You can use the **Reorder Items** function to sell menu items on the check again. This saves time if a guest asks for the same item again (for example, in a bar when the same round is ordered multiple times).

1. For workstations and tablets, click **Check Functions** (TSR) or **Transaction Functions** (QSR/Bar). For mobile phones and handheld devices, click **Functions**.
2. Click **Reorder Items**.
3. In the Select Items to Reorder dialog, select the menu items to be ordered again, and then click **Reorder**.

Figure 4-25 Reorder Items on Workstations and Tablets

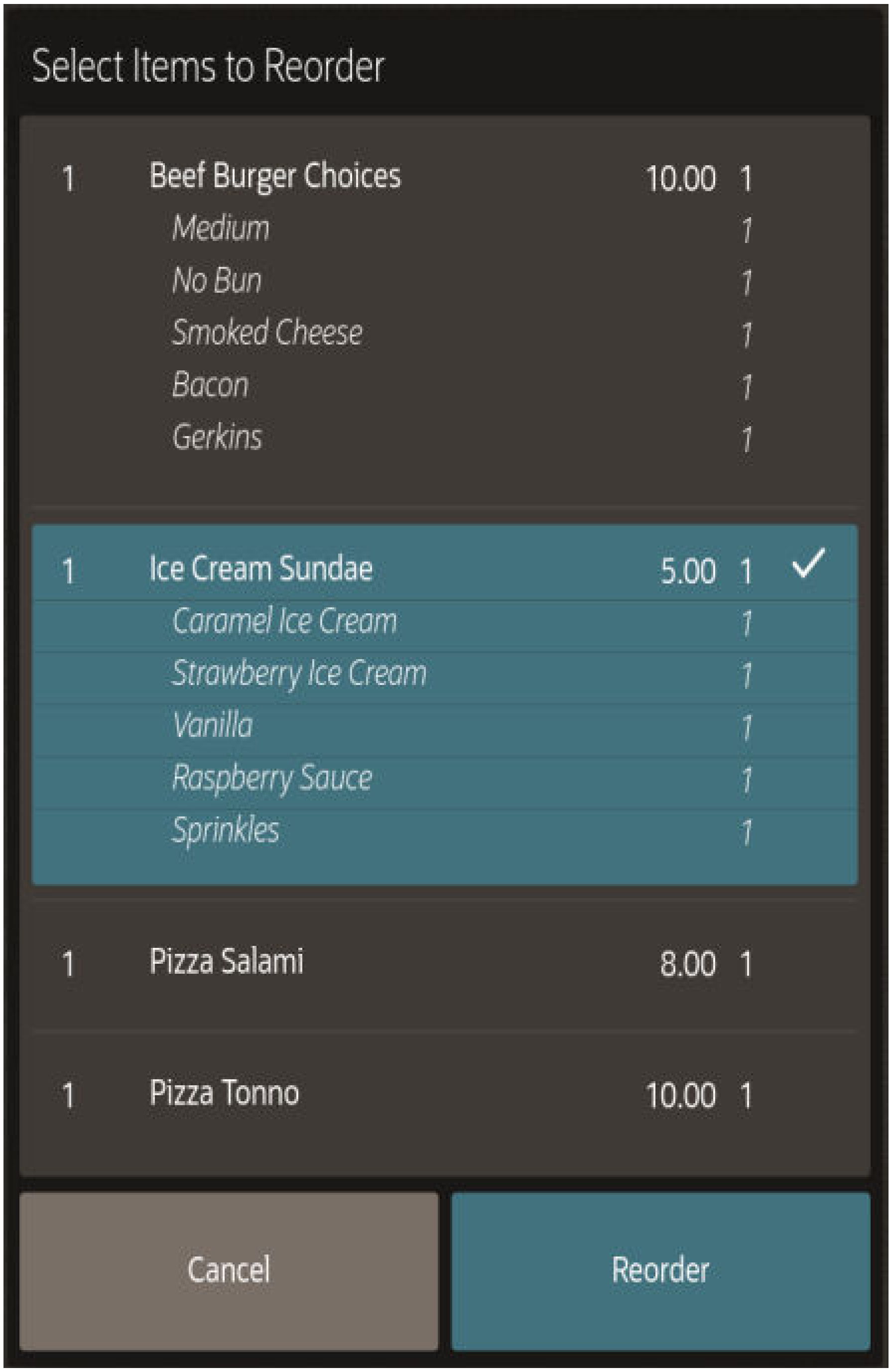
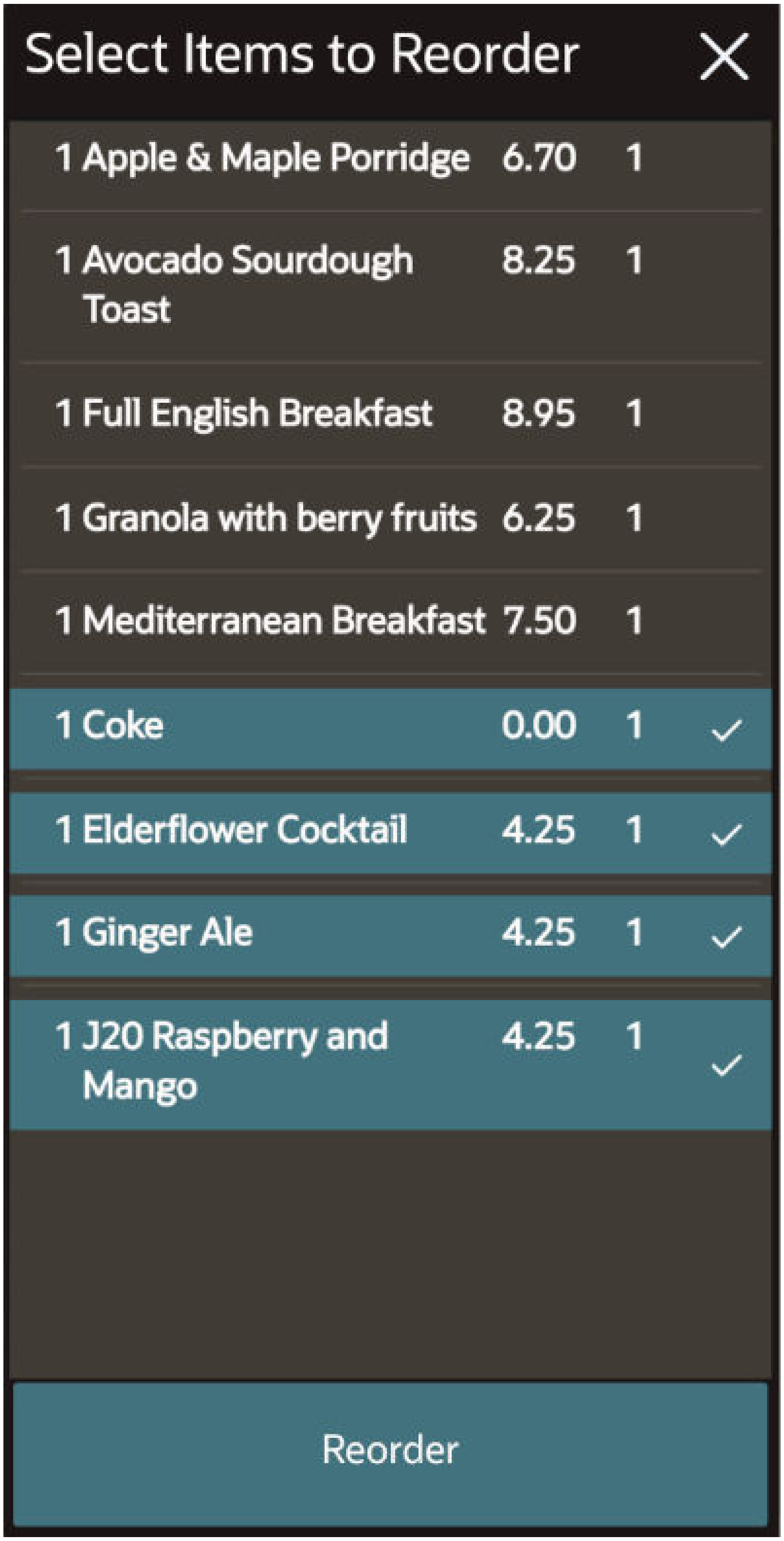


Figure 4-26 Reorder Items on Mobile Phones and Handheld Devices



Enter Barcode

You can add menu items by scanning or entering a barcode. This function is not available on mobile phones and handheld devices.

1. Click **Check Functions** (TSR) or **Transaction Functions** (QSR/Bar).
2. Click **Barcode Entry**.
3. Scan the item using a barcode reader or manually enter the barcode on the number pad, and then click **OK**. The menu item appears in the check detail area.

Use Exempt Auto Service Charge Key

If an automatic service charge is active, you can use the **Exempt Auto Service Charge** function to remove the service charge from the check.

1. For workstations and tablets, click **Check Functions** (TSR) or **Transaction Functions** (QSR/Bar). For mobile phones and handheld devices, click **Functions**.
2. Click **Exempt Auto Service Charge**. The service charge is removed from the check detail area.

Use Tax Exempt Key

You can use the **Tax Exempt** function to change the highlighted menu item on the check to be free from tax.

1. For workstations and tablets, click **Check Functions** (TSR) or **Transaction Functions** (QSR/Bar). For mobile phones and handheld devices, click **Functions**.
2. Click **Tax Exempt**. The check detail area shows the updated Tax Total.
3. Select the option again to reapply the tax. You may be required to enter a description of the tax.

Use Tax Exempt All Key

You can use the **Tax Exempt All** function to change all menu items on the check to be free from tax.

1. For workstations and tablets, click **Check Functions** (TSR) or **Transaction Functions** (QSR/Bar). For mobile phones and handheld devices, click **Functions**.
2. Click **Tax Exempt All**. The check detail area shows no Tax Total.
3. Select the option again to reapply the tax. You may be required to enter a description of the tax.

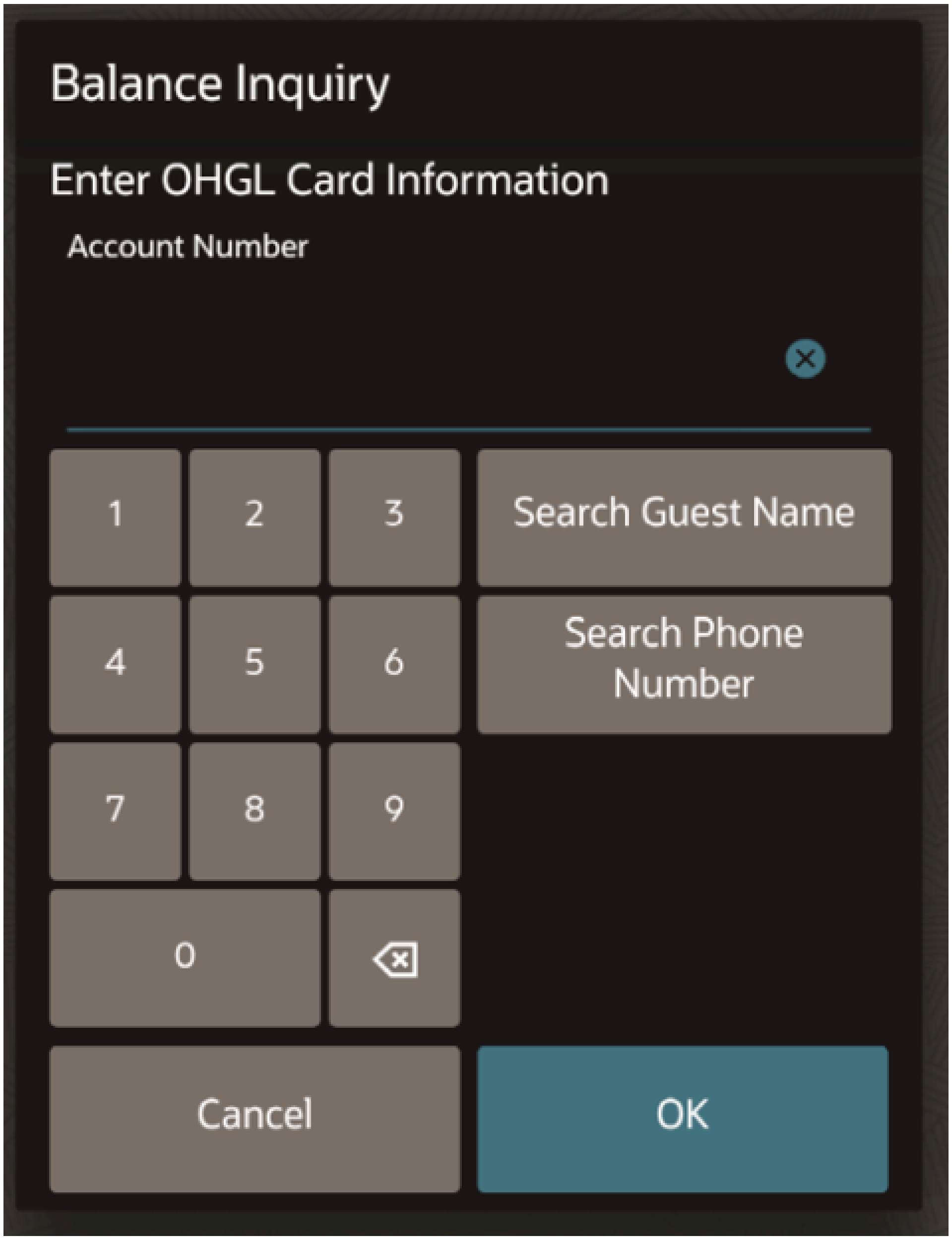
Perform Gift Card Balance Inquiry

If gift cards are configured, you can perform a gift card balance inquiry from either the POS Functions page or the Check Functions/Transaction Functions page.

1. Click **Balance Inquiry**.

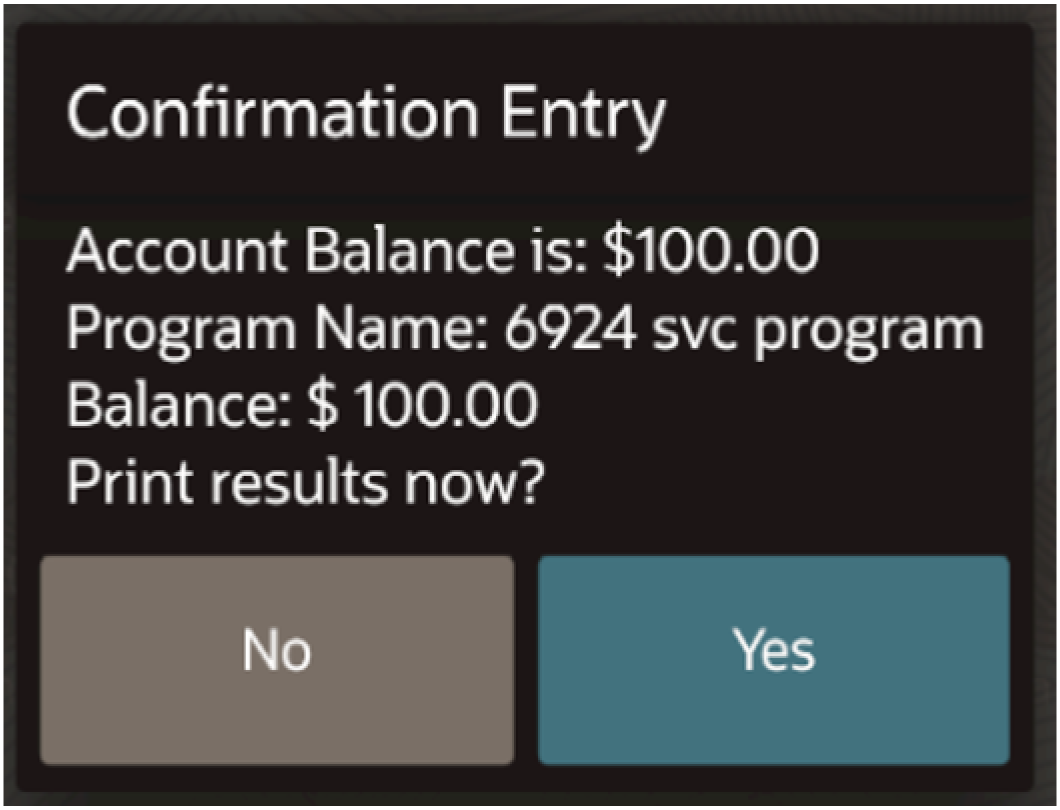
2. Swipe the card, enter the card number, or look up the account by guest name or phone number.

Figure 4-27 Balance Inquiry



3. A message appears showing the monetary value available on the card. Click **Yes** on the Confirmation Entry dialog to print the chit (if configured).

Figure 4-28   Balance Confirmation



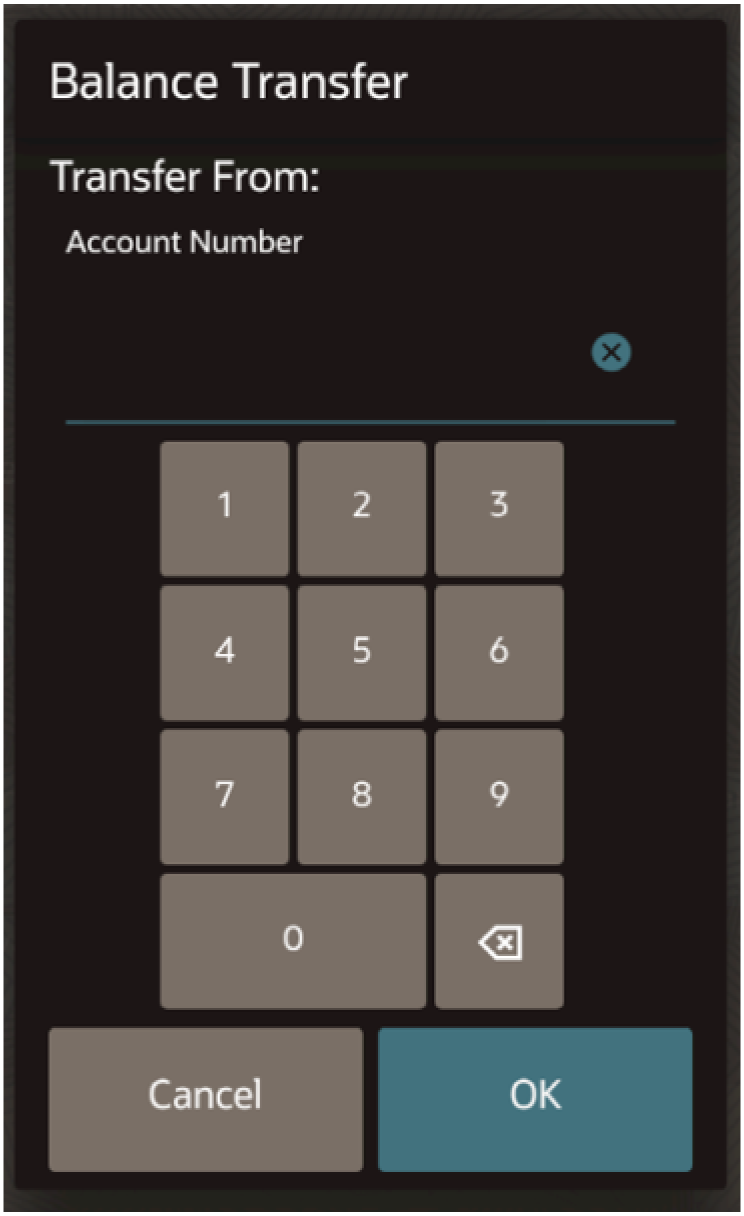
Transfer Gift Card Balance

If gift cards are configured, the **Balance Transfer** button appears on the POS Functions page or the Check Functions/Transaction Functions page. Both funds and personal information (if available) transfer.

After the balance has been transferred, the transfer from account can no longer be used.

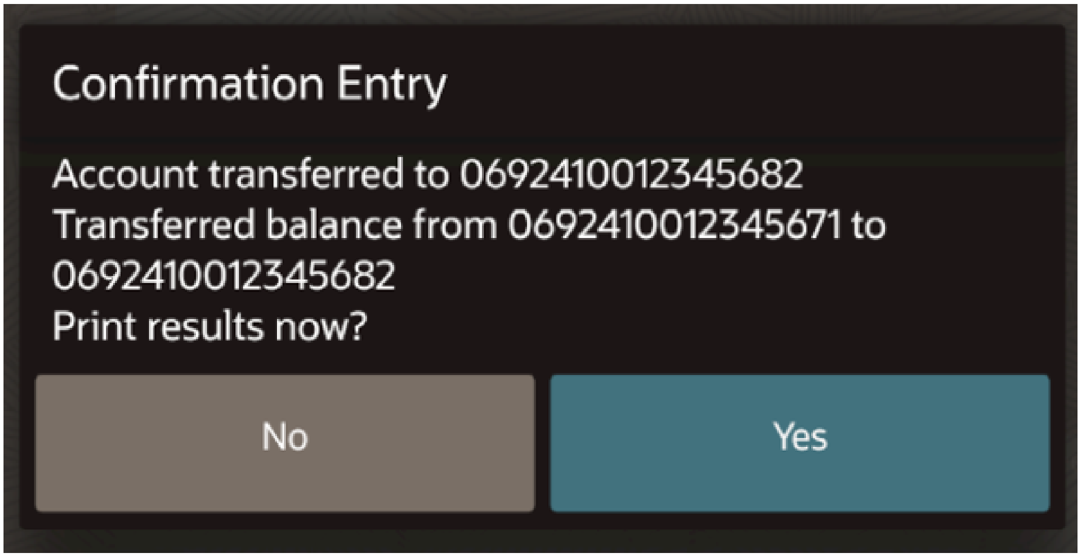
1. Click **Balance Transfer**.
2. Swipe the card or enter the card number of the account to transfer from, and then click **OK**.

Figure 4-29 Balance Transfer



3. Swipe the card or enter the card number of the account to transfer to, and then click **OK**. A message appears showing the transfer account numbers.
4. Click **Yes** on the Confirmation Entry dialog to print the chit (if configured).

Figure 4-30 Balance Transfer Confirmation Entry



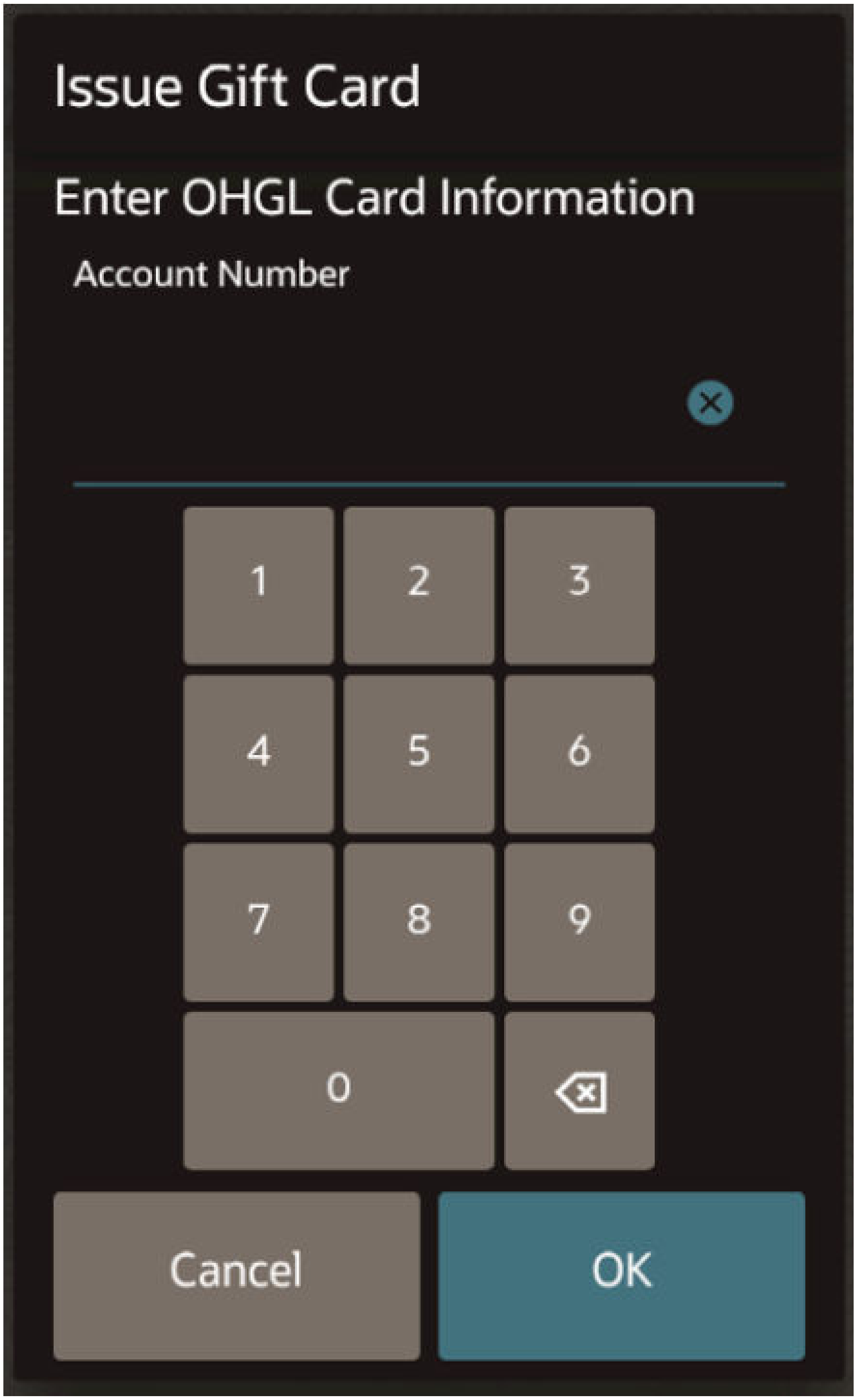
Issue Gift Card

If gift cards are configured, the **Issue Gift Card** button appears on the Check Functions/ Transactions page. Gift cards need to be issued with an amount, and you can issue a card from the Gift and Loyalty portal or on the POS workstation.

To issue a card on the POS workstation from the Check Functions/Transactions page:

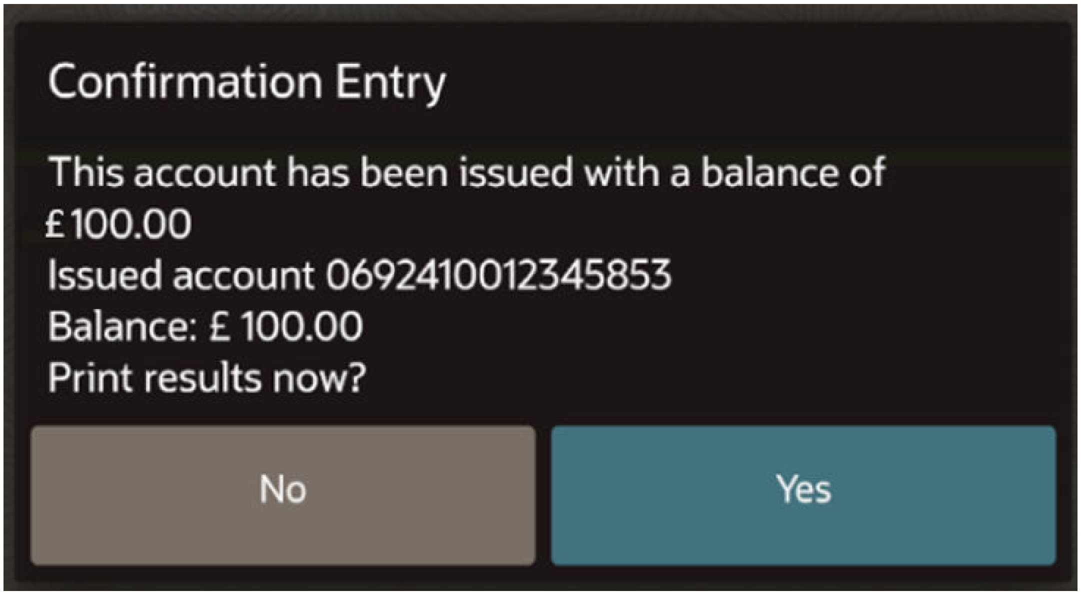
1. Click **Issue Gift Card**.
2. Enter the card number, and then click **OK**.

Figure 4-31 Issue Gift Card



3. Enter the issue amount, and then click **Yes** to print the chit.

Figure 4-32 Confirmation of Issue Gift Card



4. Once confirmed, the issue amount appears on the check against the service charge that has been configured. Pay the check to a tender, such as cash or credit card.

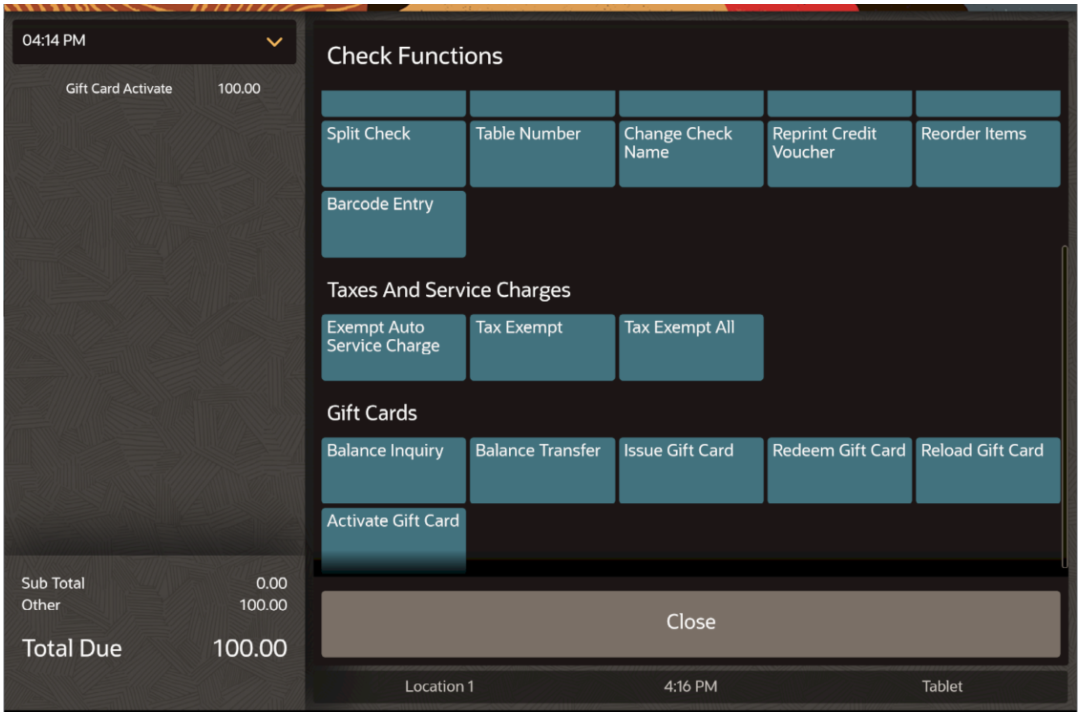
Activate Gift Card

If gift cards are configured, the **Activate Gift Card** button appears on the Check Functions/ Transaction Functions page. Gift card accounts that have been pre-activated in the Gift and Loyalty portal are not redeemable until they have been activated in a location on the POS.

1. Click **Activate Gift Card**.
2. Swipe the card or enter the card number, and then click **OK**.
3. Enter the activation amount, and then click **OK**.
4. Click **Yes** on the Confirmation Entry dialog.

   The Gift Card Activate amount appears on the check against the configured service charge.

Figure 4-33 Gift Card Activate on Check Detail on Workstations and Tablets in TSR



If an account is not activated and Redeem is selected, the following message appears: This Account has not been activated and must be activated first.

If an account is not activated and Issue is selected, the following message appears: Account has been set up and is awaiting activation.

5. Pay the check to a tender, such as cash or credit card.

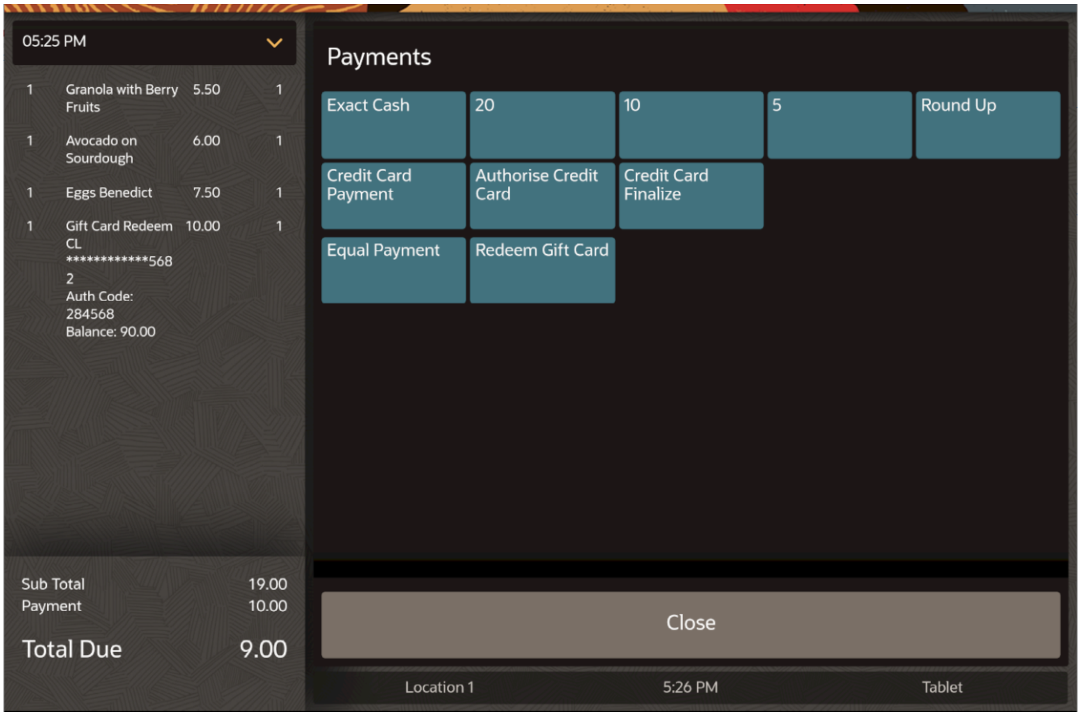
Redeem Gift Card

Guests can use a gift card to pay for some or all of their check. Menu items must be on the check before redeeming a card. If gift cards are configured, you can click the **Redeem Gift Card** button from either the Payments page or the Check Functions/Transactions page.

1. Begin a check and add menu items.
2. On the Payments or Check Functions/Transactions page, click **Redeem Gift Card**.
3. Swipe the card or enter the card number, and then click **OK**.
4. Enter the amount to redeem from the card, and then click **OK**.
5. Click **Yes** on the Confirmation Entry dialog.

   The Gift Card Redeem amount appears on the check against the configured Tender/Media.

Figure 4-34 Gift Card Redeem on Check Detail on Workstations and Tablets in TSR



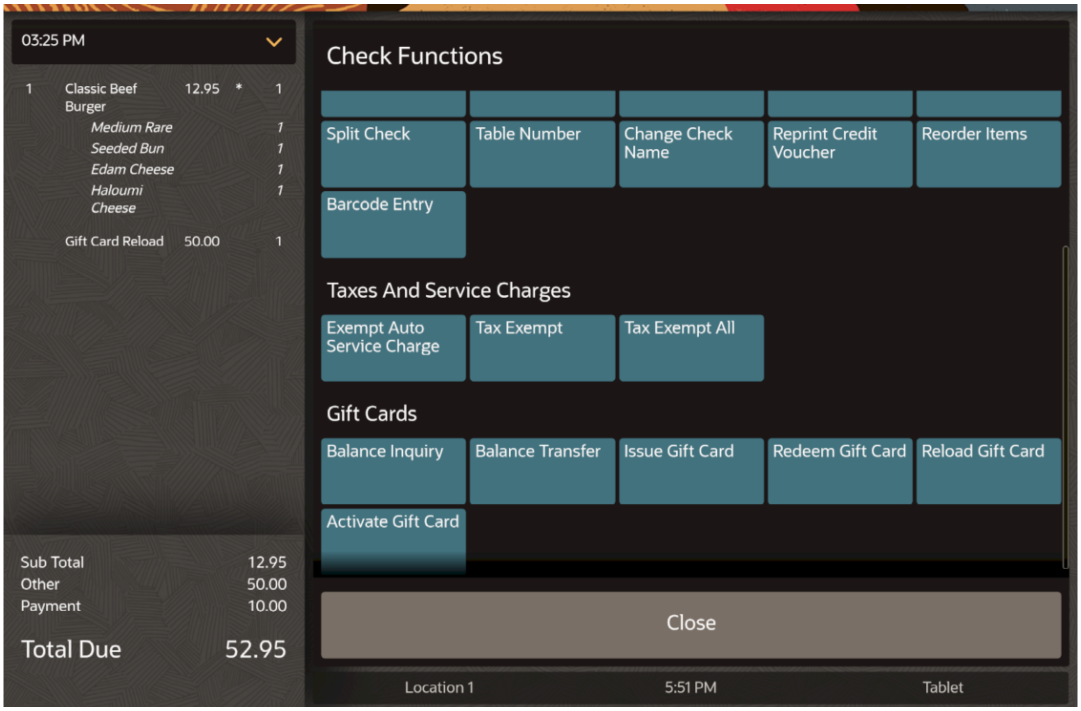
Reload Gift Card

If gift cards are configured, the **Reload Gift Card** button appears on the Check Functions/ Transaction Functions page, letting you add money to a gift card.

1. Click **Reload Gift Card**.
2. Swipe the card or enter the card number, and then click **OK**.
3. Enter the amount to add to the card, and then click **OK**.
4. Click **Yes** on the Confirmation Entry dialog.

   The Gift Card Reload amount appears on the check against the configured Tender/Media.

Figure 4-35 Gift Card Reload on Check Detail on Workstations and Tablets in TSR



5. Pay the check to a tender, such as cash or credit card.

Change Order Channel

If active order channels are configured, they appear as buttons in a section in the lower area of the Check Functions or Transaction Functions page for the following operations:

- TSR workstations and tablets
- Bar workstations and tablets

Select an Order Channel button to change the order channel for the service round.

For QSR workstations and tablets, you can change the order channel from a selection box at the top of the transaction page.

For TSR and QSR mobile phones or handheld devices, you can change the order channel from a selection box on the Check Attributes page.

5

Condiment Orderer

Some menu items are configured with groups of condiments. For example, a steak can be configured with a choice of cooking methods (rare, medium, or well done) and a choice of potato types (skinny chips, mashed, or wedges) and a choice of extras (onion rings or mushrooms). These items are all condiments, and the steak is called the parent menu item. Condiments can be required, which means that you are forced to choose one of the selections, or allowed, which means that you do not have to select one.

If a parent menu item has required condiments, or allowed and required condiments, the Condiment Orderer appears to guide you through the selections.

If a parent menu item has only allowed condiments, the Condiment Orderer is not automatically displayed. In this case, when the parent item is sold, it is added to the check. To view or add allowed condiments, click the menu item on the check detail, and the Condiment Orderer appears.

The Condiment Orderer provides a tabbed workflow that automatically advances through required condiments when adding menu items. There are two methods of entering condiments:

1. Start with the first tab and move automatically to the next tab when the required condiments have been fulfilled.
2. Jump ahead to any tab and move around the Condiment Orderer independently, rather than being guided through from start to finish.

Figure 5-1 Condiment Workflow on Workstations and Tablets

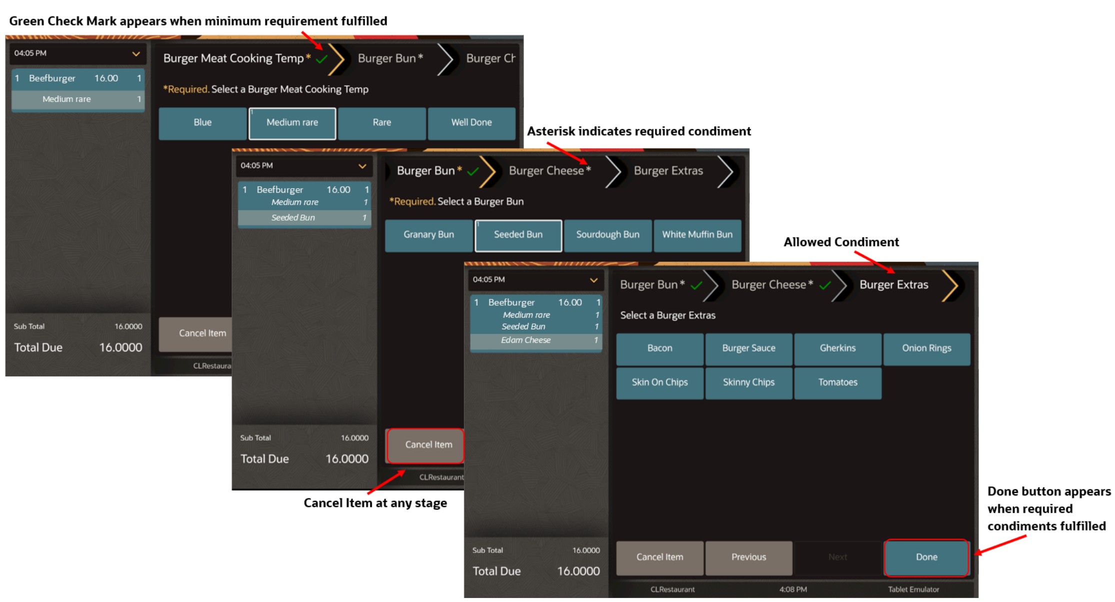
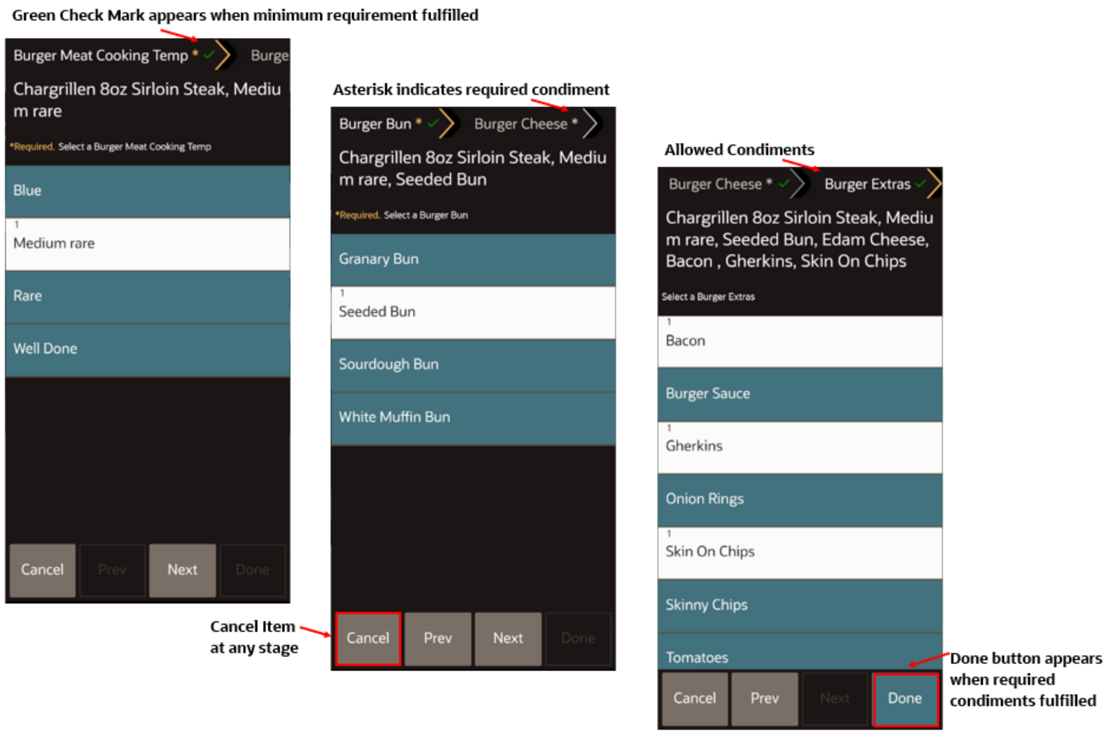


Figure 5-2 Condiment Workflow on Mobile Phones and Handheld Devices



An asterisk indicates the required condiment tabs, and the word Required appears before the selection instructions.

Click **Previous** and **Next** to navigate through the Condiment Orderer. Click the tab header to jump from one tab to another.

The **Cancel Item** button appears throughout, and cancels the menu item and all condiments. If you click **Cancel Item** when changing an existing item with condiments, a message appears warning that the item and condiments will be voided from the check. This is to prevent users from accidentally voiding items and their condiments. No warning message appears for menu items with condiments that have not already been saved to the check.

The **Done** button appears only after the required condiments have been entered. You can either click **Done**, or enter allowed condiments (for example, Burger Extras).

Tabs are marked with a green check mark if a selection has been made from the tab.

The Condiment Orderer is not displayed for menu items that only have allowed condiments. The menu item is added to the check, and you can add other items without using the Condiment Orderer. To view or add the allowed condiments, click the menu item on the check detail, and the Condiment Orderer appears.

Use the Condiment Orderer

1. Select a parent menu item that has required condiment groups (for example, Beef Burger). The Condiment Orderer tabs appear.

Figure 5-3 Condiment Orderer Tabs After Selecting Parent Menu Item with Required Condiments on Workstations and Tablets

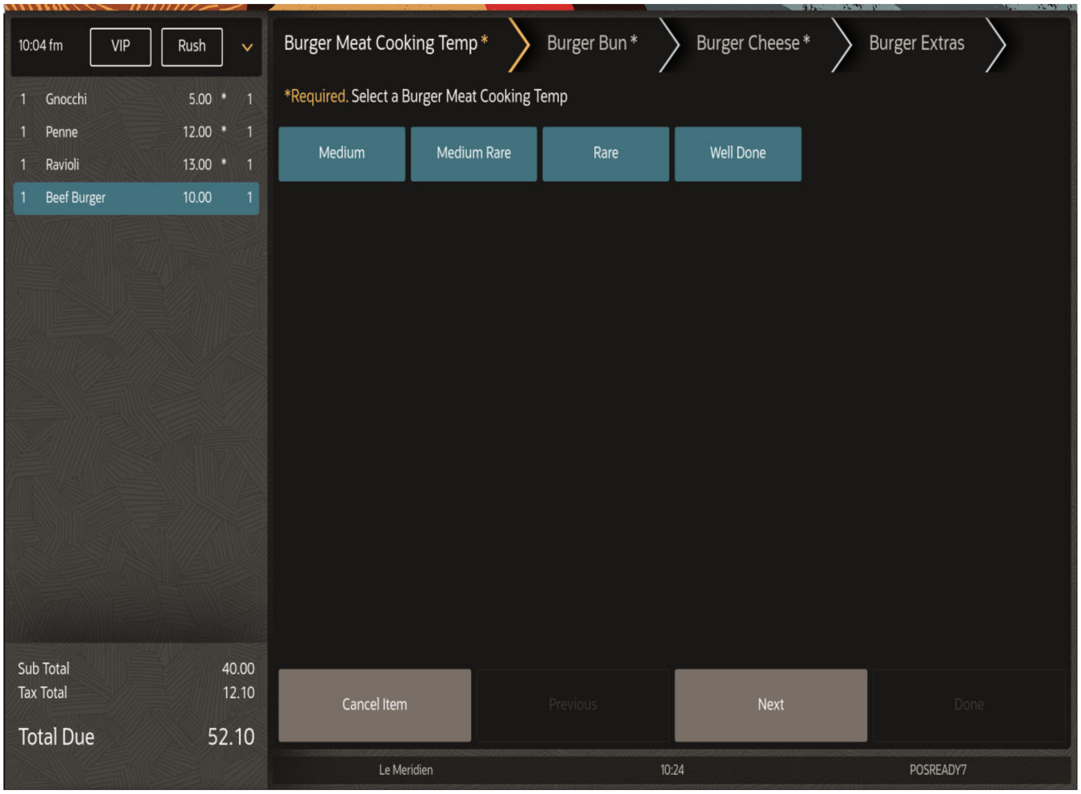
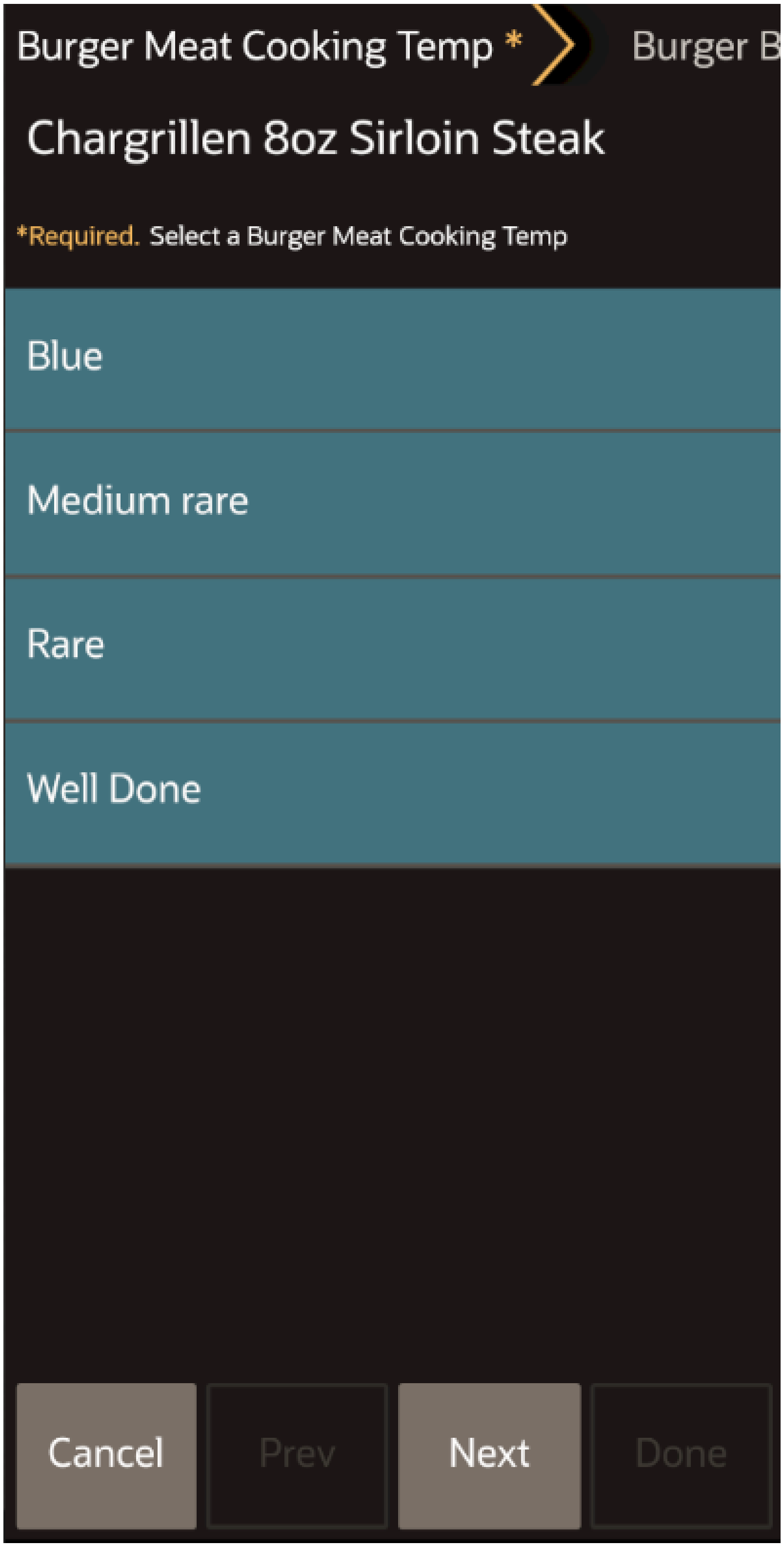


Figure 5-4 Condiment Orderer Options After Selecting Parent Menu Item with Required Condiments on Mobile Phones and Handheld Devices



2. Select a required condiment. When the group is fulfilled, a green check appears and the Condiment Orderer automatically advances to the second tab, and so on until you have selected the required number of condiments from all tabs.

You can also manually select the tabs; this stops the Condiment Orderer from automatically advancing through the tabs. The **Previous** and **Next** buttons help with navigation. While in the Condiment Orderer, the selected condiments appear in the check detail area on workstations and tablets. On mobile phone and handheld devices, the condiments appear at the top due to limited space.

Figure 5-5 Select Required Condiments on Workstations and Tablets

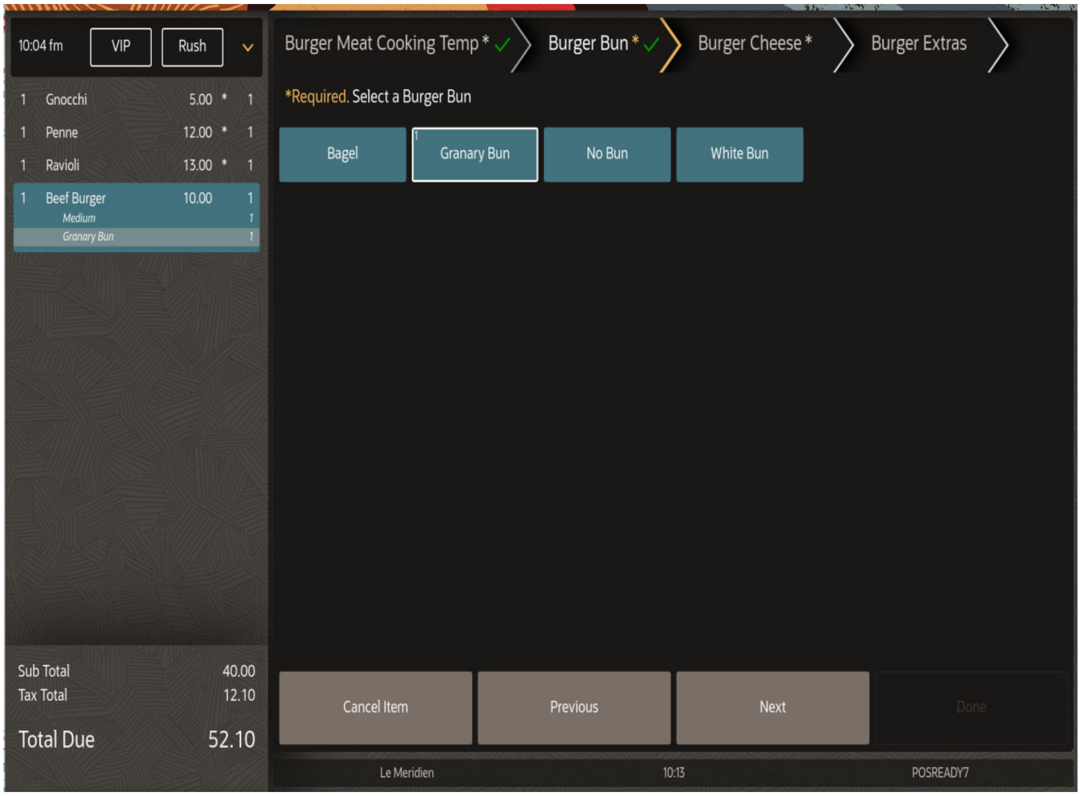
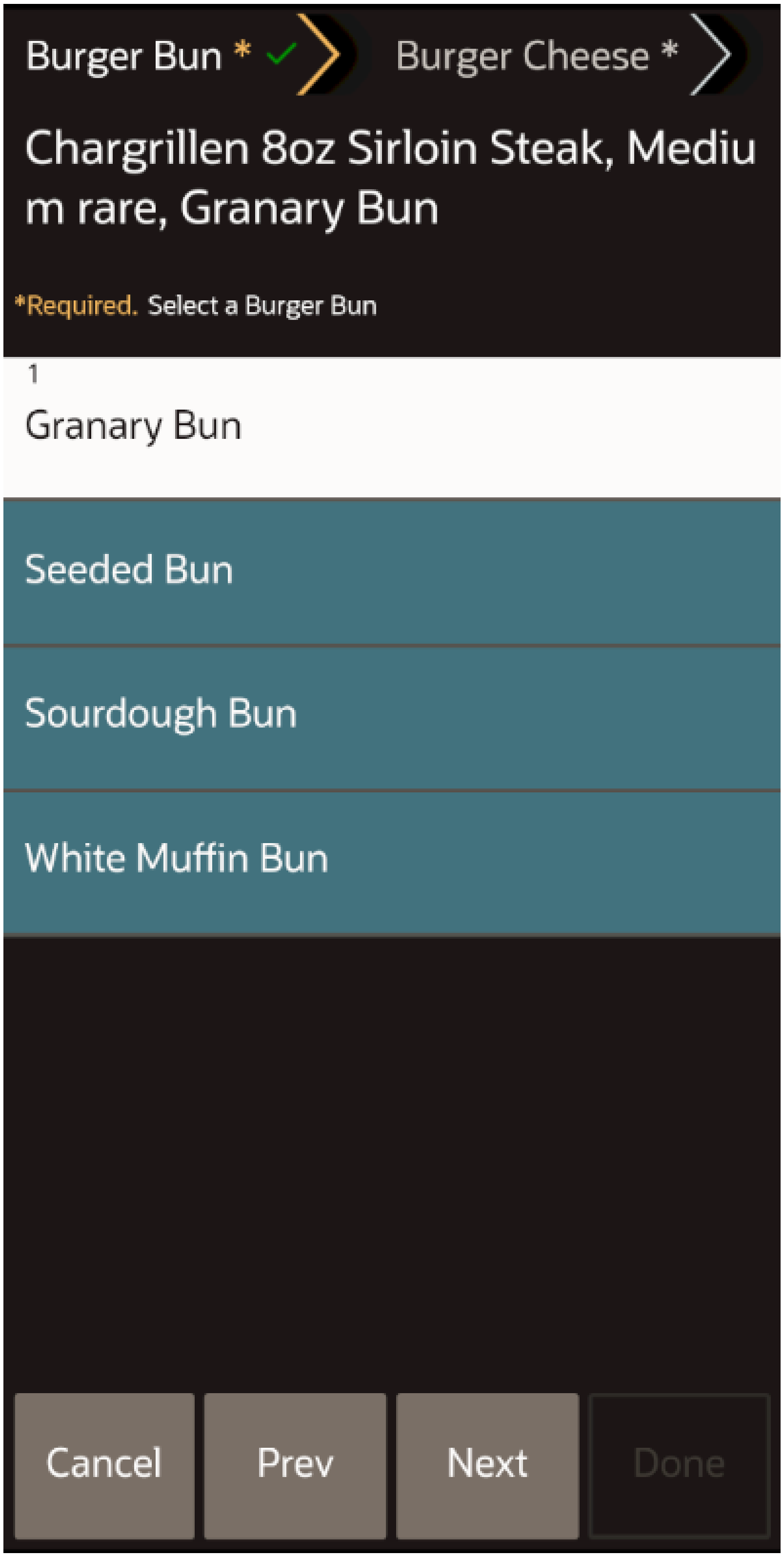


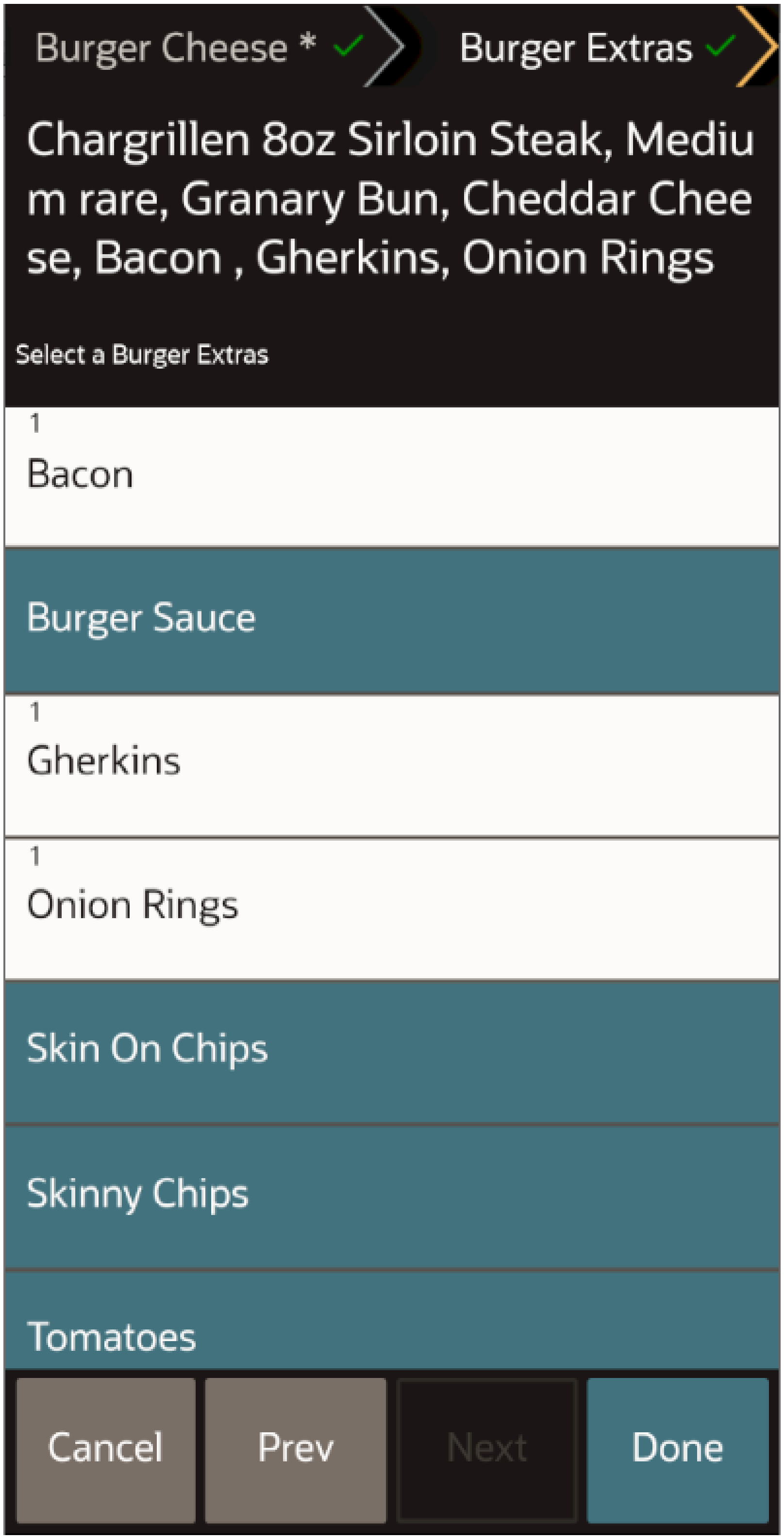
Figure 5-6 Select Required Condiments on Mobile Phones and Handheld Devices



3. After you fulfill the required condiments, the **Done** button is active. Enter the allowed condiments or click **Done** to save the item and close the Condiment Orderer.

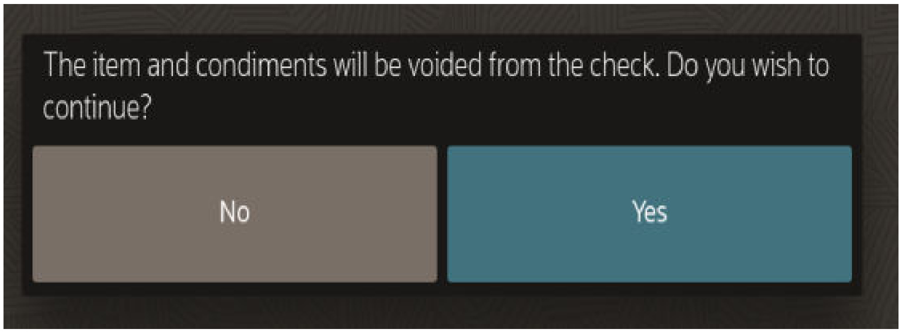
Figure 5-7 Condiment Orderer Done on Workstations and Tablets

Figure 5-8 Condiment Orderer Done on Mobile Phones and Handheld Devices



4. To cancel the item and condiments from the check, click **Cancel** or **Cancel Item**. This removes the item from the check. The following message appears if **Cancel** is selected when changing a condiment item that has already been added to the check.

Figure 5-9 Cancel Item and Condiments



6
VIP and Rush Checks

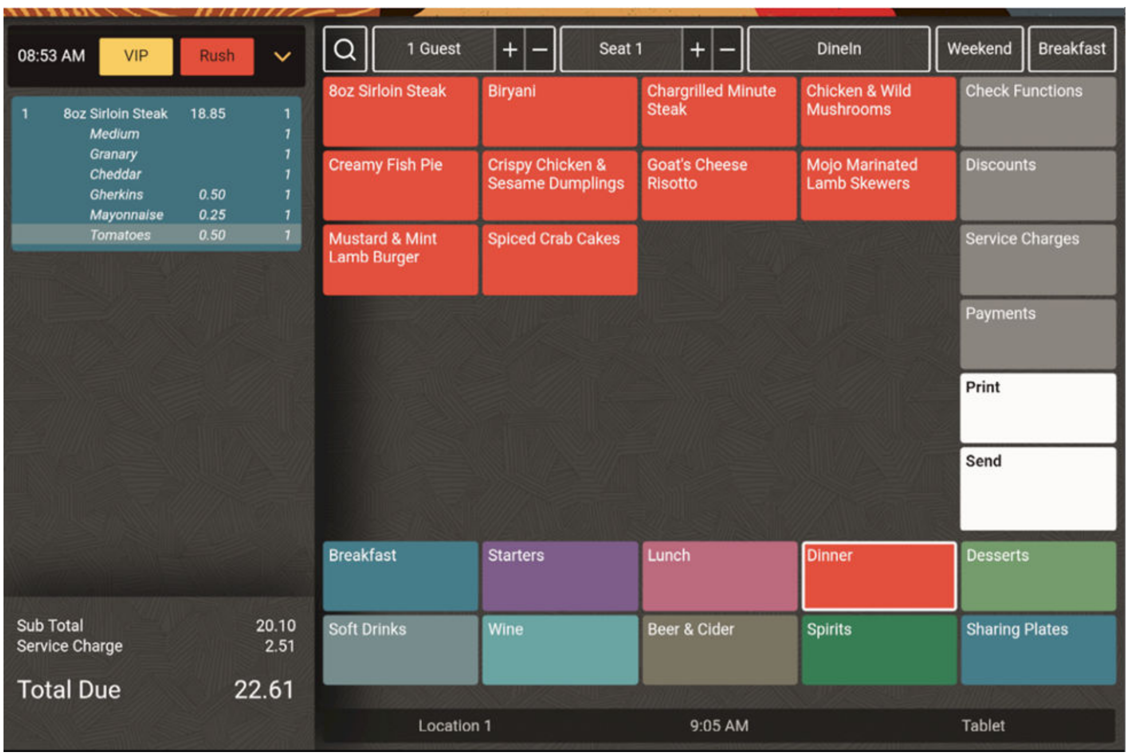
You can add information to TSR and Bar checks to inform the kitchen that the order must be prepared quickly (Rush) or that the order is for important guests (VIP).

Handle VIP Checks

If you are using a Kitchen Display System (KDS), the check header for TSR and Bar shows a **VIP** button. A VIP check means that the guests must be well looked after.

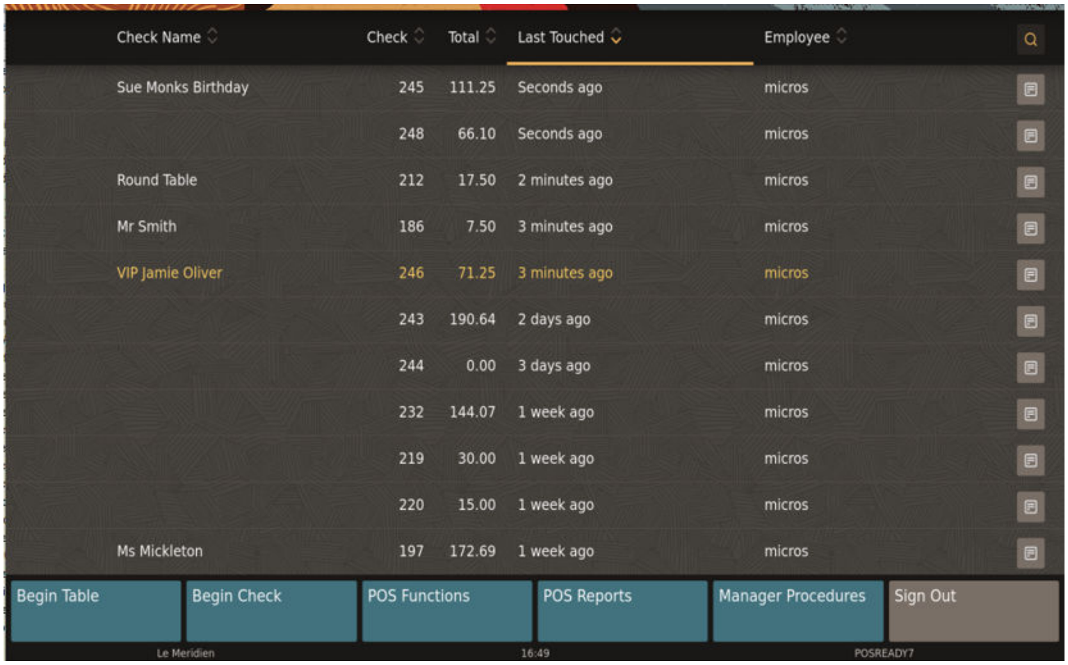
To change a check to VIP status, click **VIP**. You can switch the VIP status on and off.

Figure 6-1 VIP Button on Workstations and Tablets



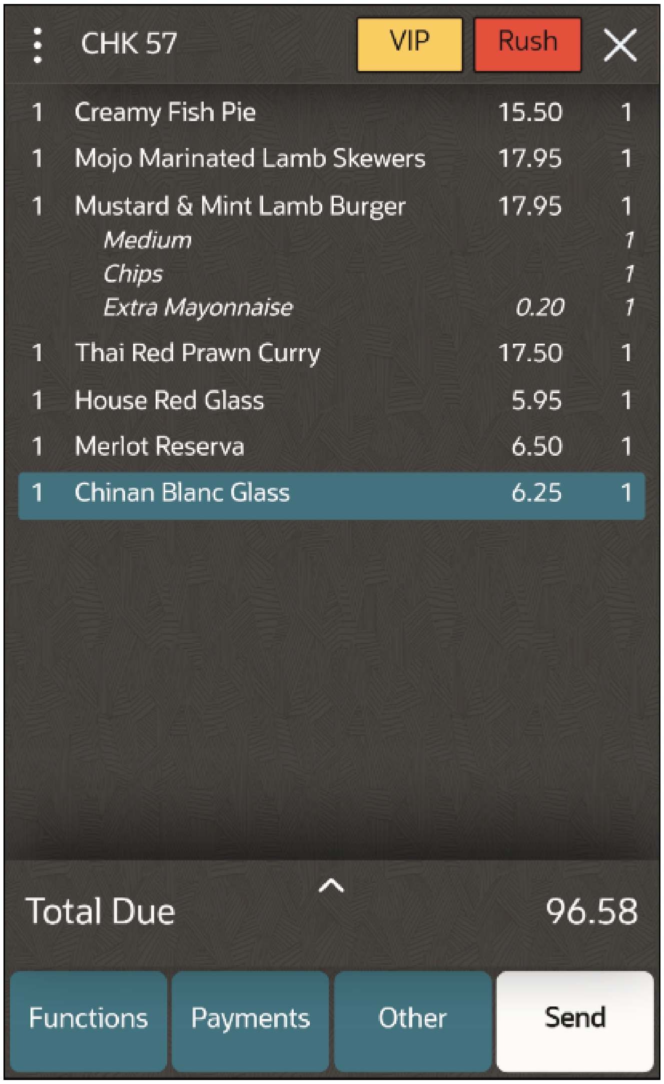
The VIP button changes to gold color, and the check appears in gold on the Home page. If the check name is blank, the name changes to VIP. If the check name was entered, VIP is appended at the beginning of the check name.

Figure 6-2 VIP Check on Workstations and Tablets



When using the mobile phone and handheld device UI, the **VIP** and **Rush** buttons are available only from the check detail area.

Figure 6-3 Mobile Device VIP and Rush Buttons on Mobile Phones and Handheld Devices



On the TSR Home page, VIP checks appear in gold font.

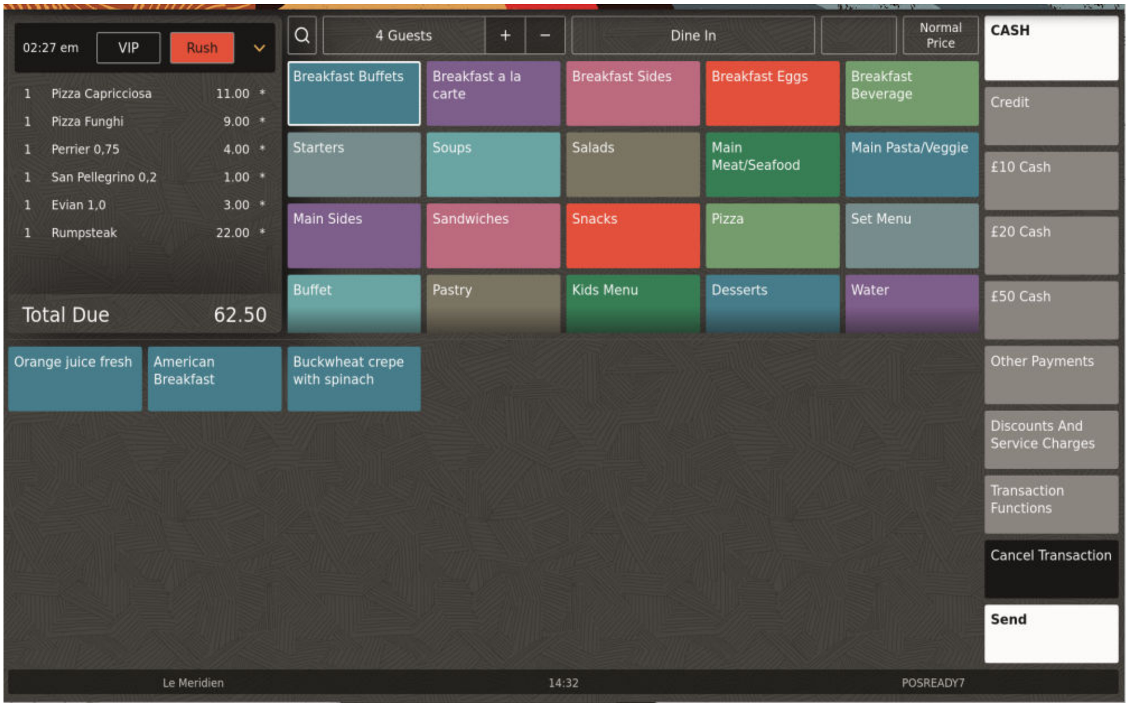
Figure 6-4 Mobile Device VIP Check on Mobile Phones and Handheld Devices

Handle Rush Order Checks

If you are using a Kitchen Display System (KDS), the check header for TSR and Bar shows a **Rush** button. The **Rush** button lets the kitchen or bar know that an order must be prepared quickly.

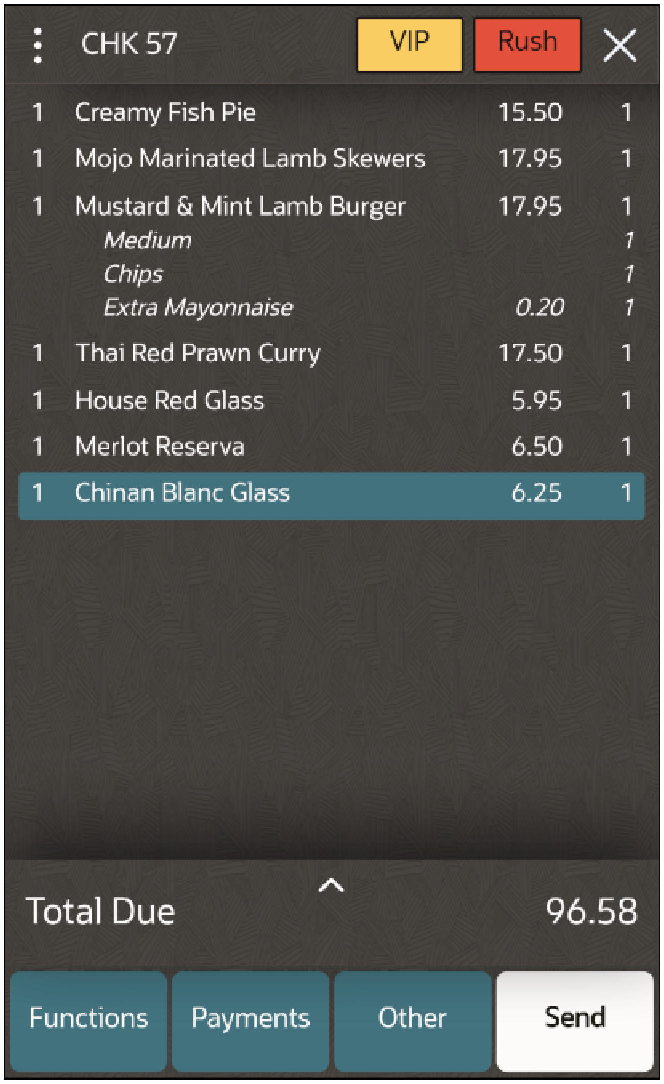
To change a check to Rush status, click **Rush**. You can switch the Rush status on and off.

Figure 6-5 Rush Button on Workstations and Tablets



The Rush button changes to red, and the check appears the same as other checks on the home page. The check name does not change, although you can manually change it to Rush Order.

Figure 6-6 Mobile Device VIP and Rush Buttons on Mobile Phones and Handheld Devices



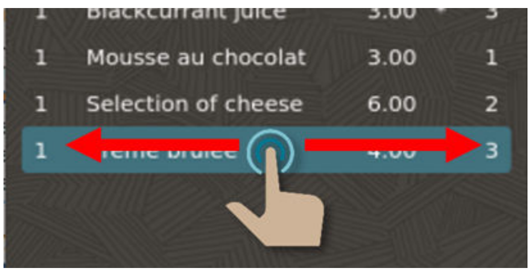
7 Gestures

Use Void and Quantity Gestures

From the check detail area, you can use gestures to void menu items or to change the quantity of a menu item.

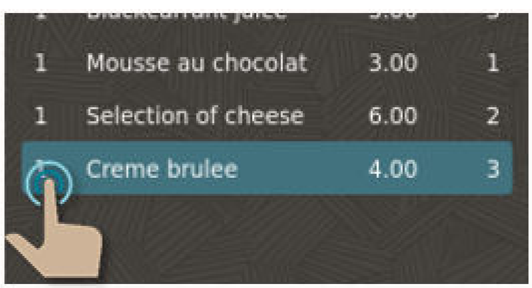
1. To void a menu item:
    a. Highlight the item in the check detail.
    b. Swipe left or right on the item description. When swiping, a message appears briefly stating Item Voided.

Figure 7-1 Void Gesture



2. To change the menu item quantity in the current round only:
    a. Highlight the item in the check detail to increase the number by 1.
    b. Perform a long click (long hold) to reset the quantity to the original value.

Figure 7-2 Quantity Gesture



You cannot change the quantity for a shared menu item in the current or previous rounds. Shared menu items appear as fractions in the check detail (for example, 1/2 or 1/3, depending on the number of guests sharing the item). The following figure shows an example of shared item quantity in the check detail area.

Figure 7-3 Shared Item Quantity

To change the menu item quantity for a previous round item, use the Void function.

Use Seat Gesture

From the TSR check detail area, you can use gestures to change the seat number of a menu item. To change the seat number:

1. Highlight the item in the check detail to increase the number by 1.
2. Perform a long click (long hold) to reset the seat number to the original value.

Figure 7-4 Seat Gesture

Use Guest Pay Quick Gestures on Adyen Castles S1F2 Android Payment Device

Gestures provide a quick way to pay checks in full using Guest Pay. To go to the full payment workflow using the Adyen Castles S1F2 payment device, swipe left or right from one of the following:

- On an open check from the TSR home page
- On the **Guest Pay** button from the Payments page

If multiple languages are configured, this gesture takes the guest to the Language page; otherwise the check detail appears.

Figure 7-5 Swipe Gesture on Open Check from TSR Home Page

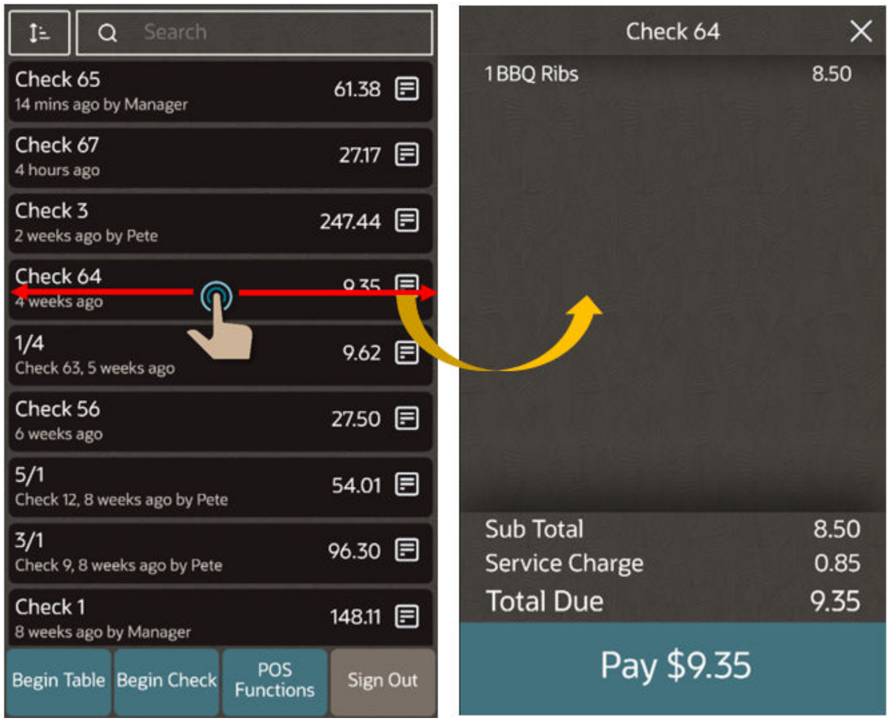
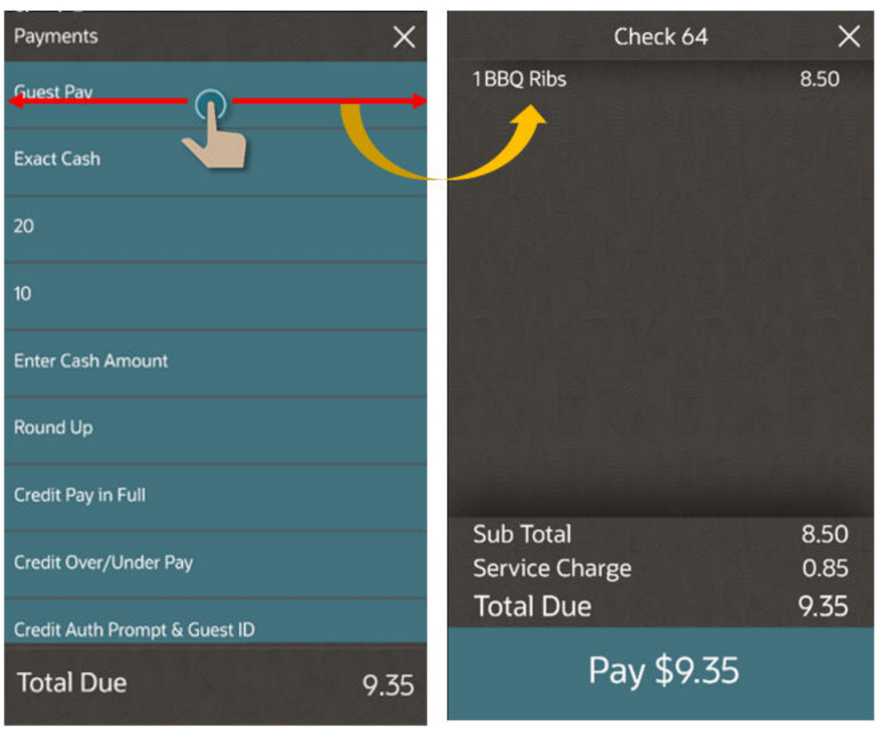


Figure 7-6 Swipe Gesture on Guest Pay Button from Payments Page



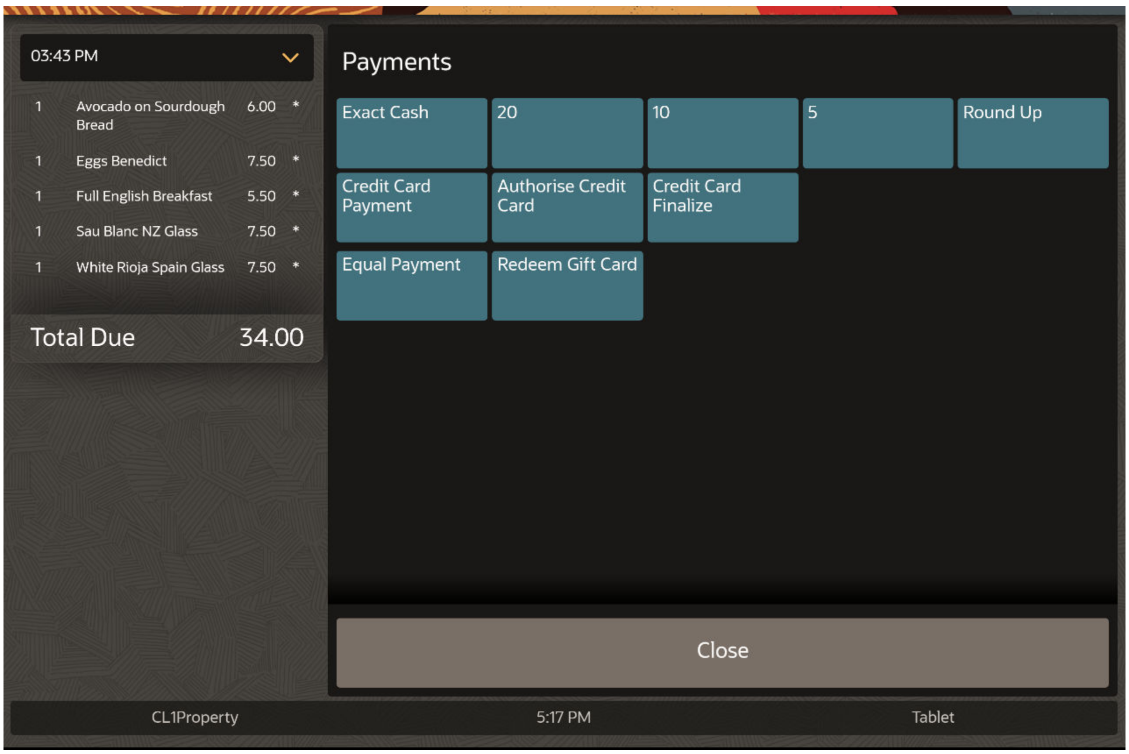
See Use Guest Pay to Pay a Check for more information about Guest Pay.

8 Payments

You can access the Payments page from the Transaction page. It is called **Payments** in TSR and **Other Payments** in the bar and QSR workflows on workstation and tablets. On mobile phone and handheld devices, it is called **Payments**. The payment functions required for your operation appear as buttons on this page. The **Redeem Gift Card** button appears if gift cards are configured.

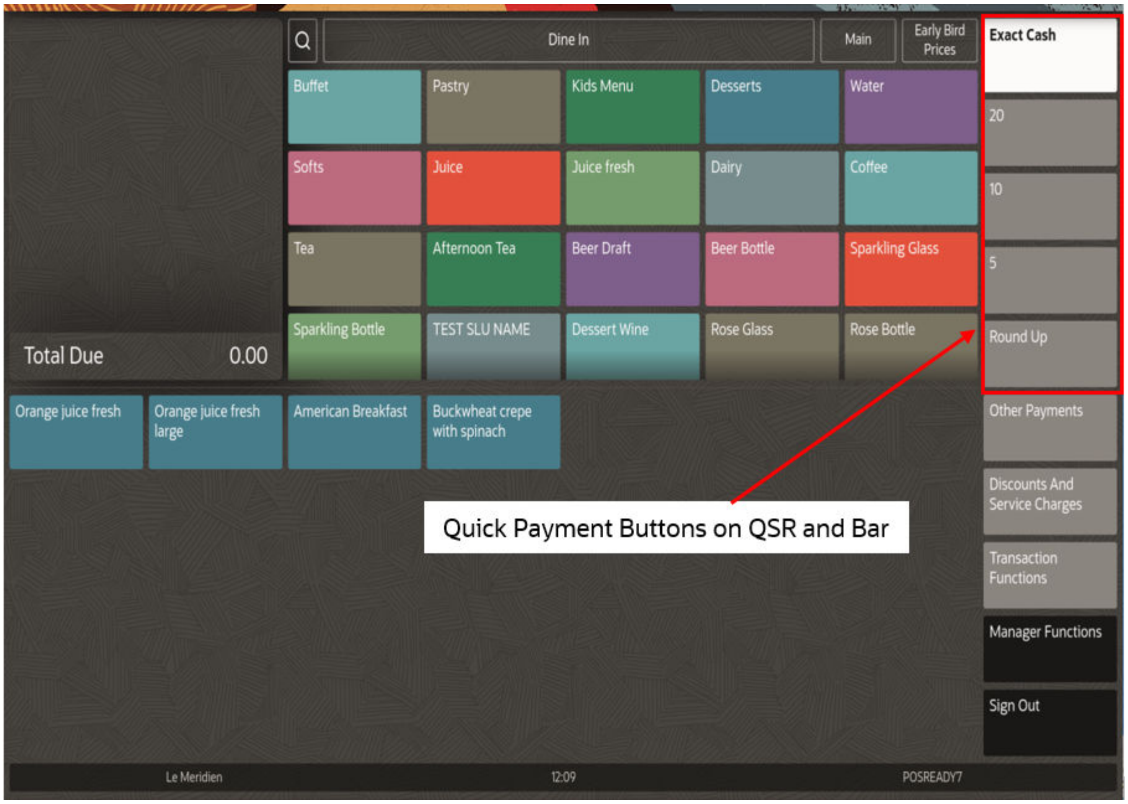
This is an example of the Payments page:

Figure 8-1 Payments Page on Workstations and Tablets



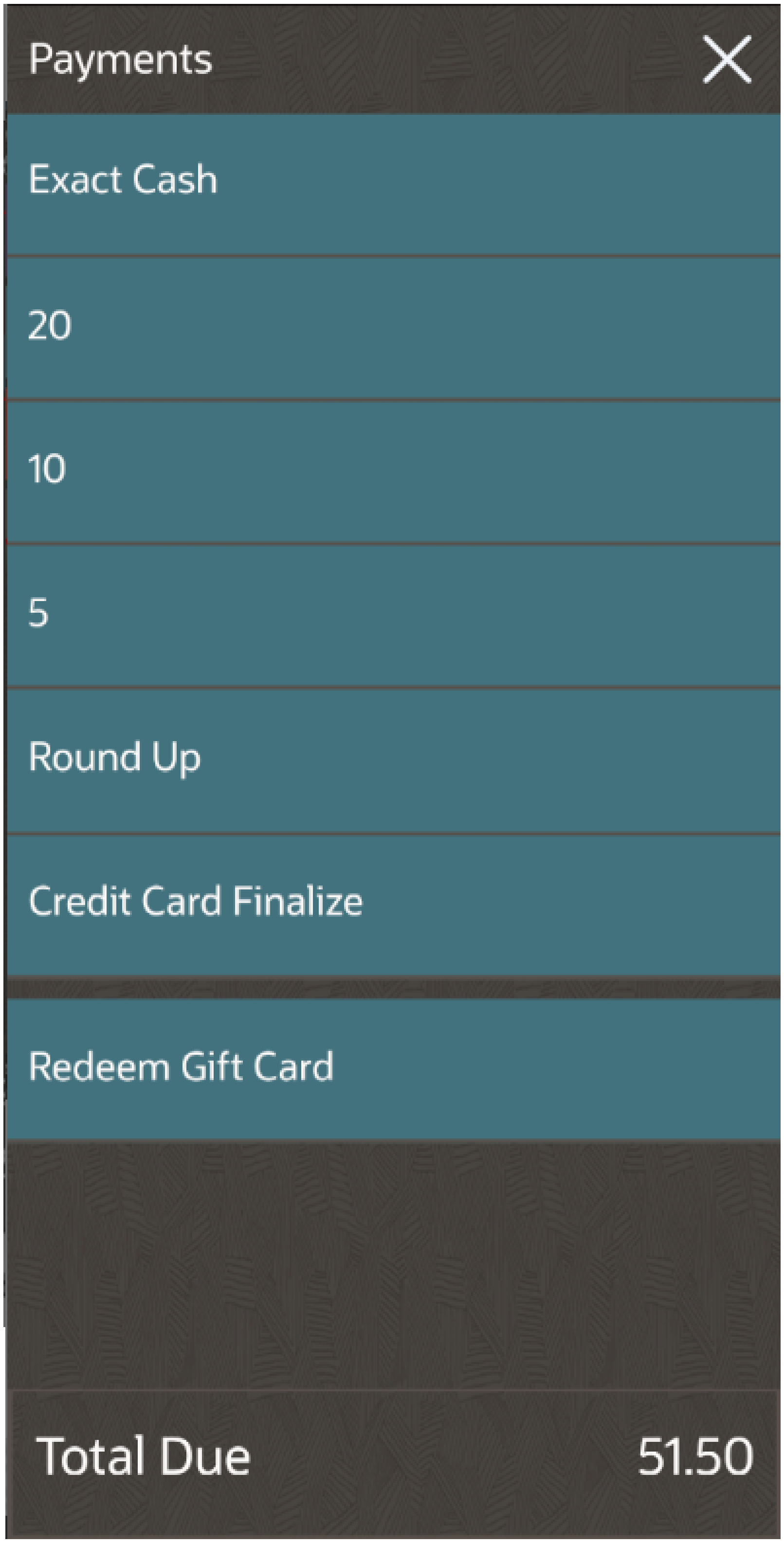
There are five buttons that can be configured as Quick Payments. These appear on the Transaction page of the QSR and bar workflows for the workstation and tablet UI. They are easily accessed to increase the speed of service.

Figure 8-2 Quick Payment Buttons on Workstations and Tablets



For mobile phones and handheld devices, all payments are accessible from the Payments page.

Figure 8-3   Payments Page on Mobile Phones and Handheld Devices



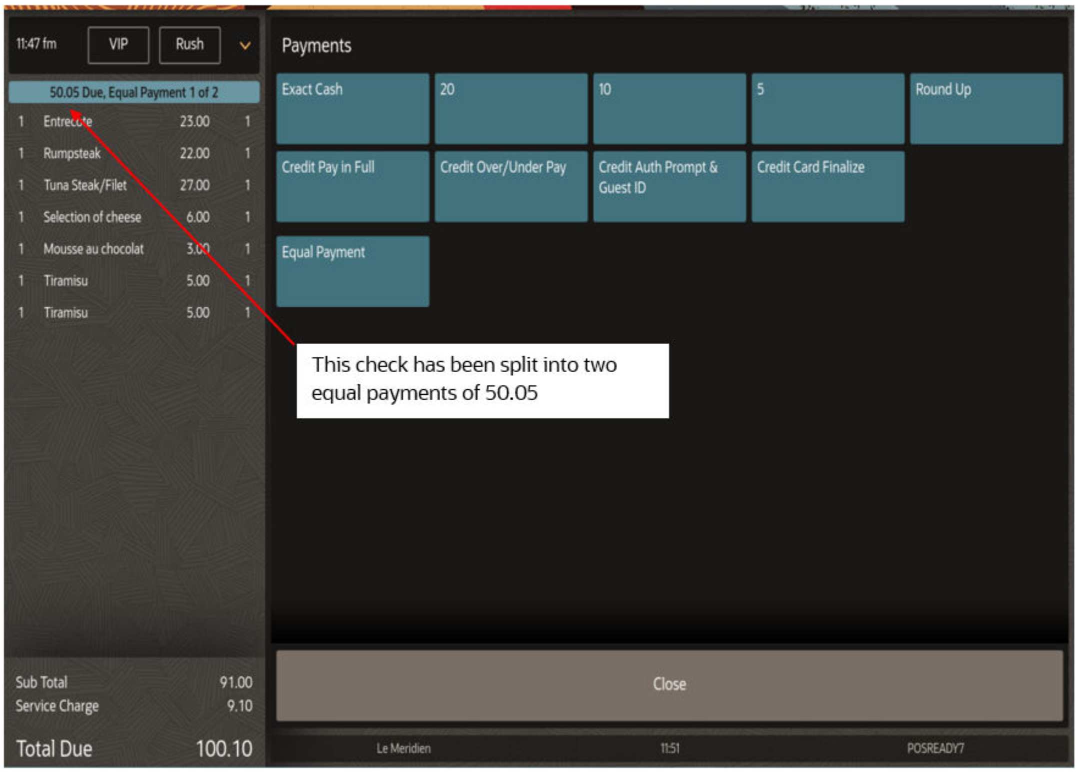
Use Equal Payment Key

The **Equal Payment** key appears on the payments page, and allows you to split the check into equal parts that can then be paid off.

1. Click **Payments** (TSR) or **Other Payments** (QSR/Bar).
2. Click **Equal Payment**.
3. On the number pad, select the number of equal payments for the check. The check detail area shows a blue banner with the amount due for Equal Payment 1 of X. After payment 1 is tendered, the system shows Equal Payment 2, and so on until all payments are complete.

   The following figure shows an example of two equal payments.

Figure 8-4   Example of Two Equal Payments



9 Reports

Various reports are accessible from the Simphony Essentials POS workstation on the Reports page.

POS Reports

Managers tasks include actions necessary to conclude business activity. For example, at the end of a shift, each employee needs to know their tips, the chef may need to know how many specials were sold, and managers need to know the net sales. All of these activities require information from the Simphony Essentials system, which is provided in separate, pre-defined reports generated from stored point-of-sale data files on the POS client.

These reports can be generated from the POS Reports page. You can access the POS Reports page for TSR and Bar operations from the home page. For QSR operations, access it from the Manager Functions button and then the POS Reports tab.

Reports are not supported on mobile phones and handheld devices.

Figure 9-1 Example of POS Reports Page for TSR

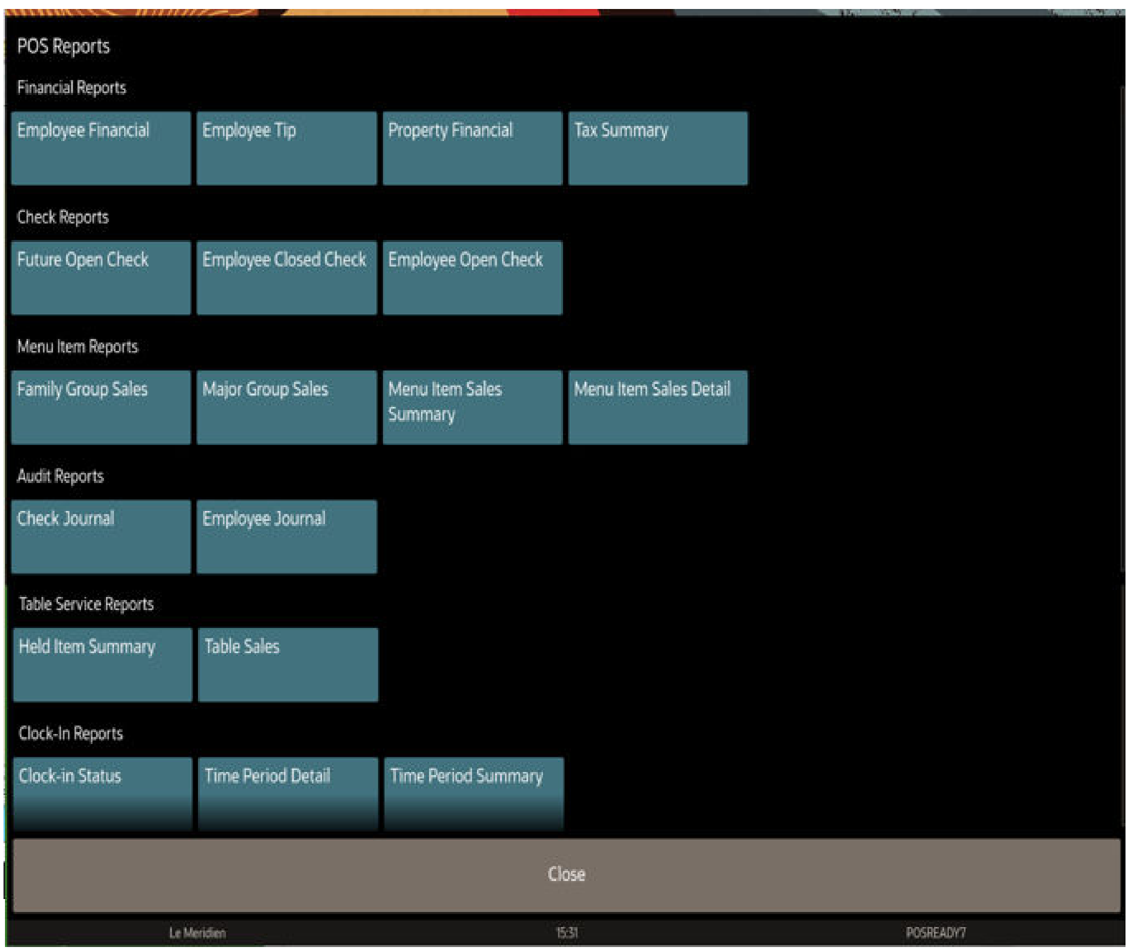


Figure 9-2   Example of POS Reports Page for QSR and Bar

All Simphony Essentials POS reports may be either displayed on screen or printed.

The following table lists the main types of reports available on the POS client from the POS Reports page.

Table 9-1   POS Report Types

Report Type	Description	Report Name
Financial Reports	Provides financial reporting for an employee or property, or tax summary.	• Employee Financial • Employee Financial - VAT • Employee Tip • Property Financial • Property Financial - VAT • Tax Summary
Check Reports	Provides a list of all open, closed, and future open checks (also called Autofire checks) belonging to an employee at the time the report is taken.	• Future Open Check • Employee Closed Check • Employee Open Check
Menu Item Reports	Provides sales and food cost totals for each menu item.	• Family Group Sales • Major Group Sales • Menu Item Sales Summary • Menu Item Sales Detail

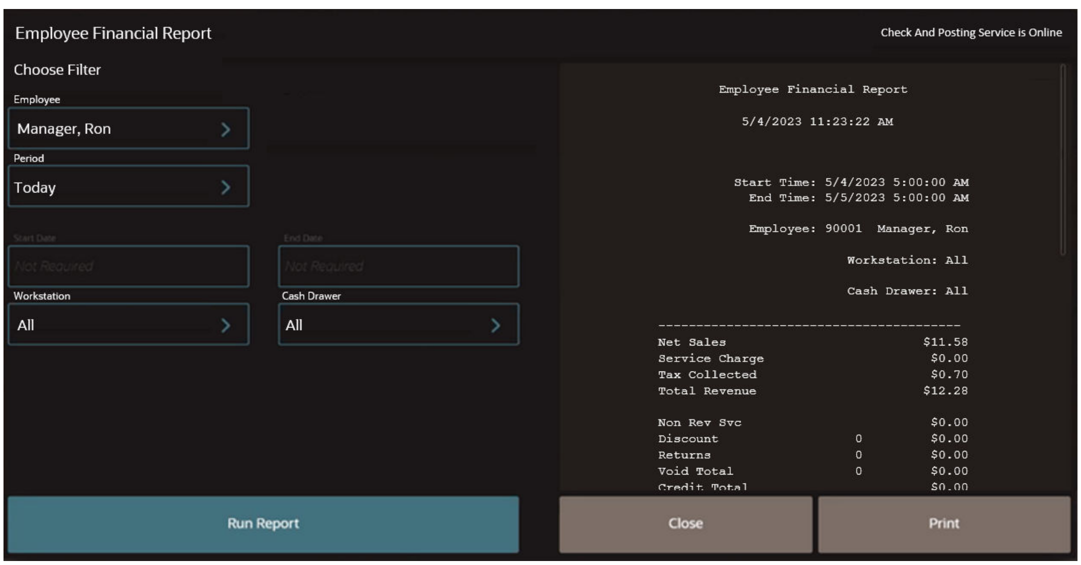
Table 9-1 (Cont.) POS Report Types

Report Type	Description	Report Name
Audit Reports	Provides a journal of all sales transactions by a specific employee shown in a check detail area, and by check detail area.	• Check Journal • Employee Journal
Table Service Reports	Provides sales totals for each table in a revenue center.	• Held Item Summary • Table Sales
Clock In Reports	If option **90 - Hide Clock In/Out Button on Sign In Screen** is disabled in the EMC Enterprise Parameters module, the Clock In reports are available.	• Clock In Status • Time Period Detail • Time Period Summary

To run a POS Report:

1. Click the appropriate report name on the POS Reports page.
2. Select the filters to limit the results shown in the report (for example, View, Employee, Date, Workstation, Cash Drawer, and so on).

Figure 9-3 POS Reports Filters



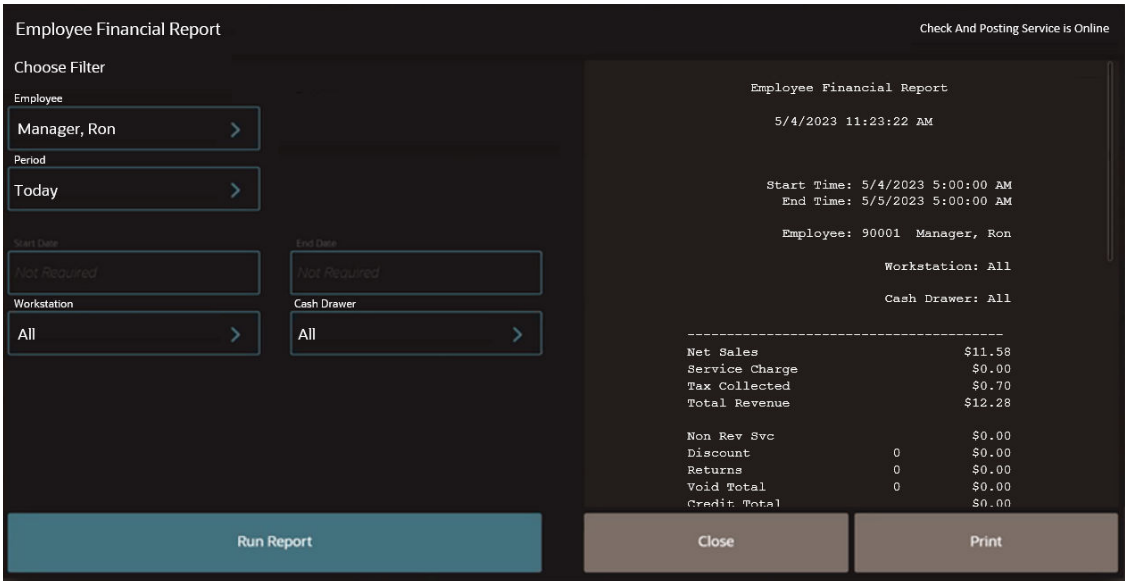
3. Click **Run Report**.
4. To print the report, click **Print**.

Employee Financial Report

The Employee Financial Report provides financial reporting by employee. The report is based on all sales-related entries, such as checks opened, menu items ordered, and the number and amount of service charges, discounts, and tenders applied. The report also shows paid-out (pickup) and paid-in (loan) transactions. The totals reflect each employee's activity. You can use this report to balance the server's bank, and to track individual performance.

This report may cover all employees, or a selected employee.

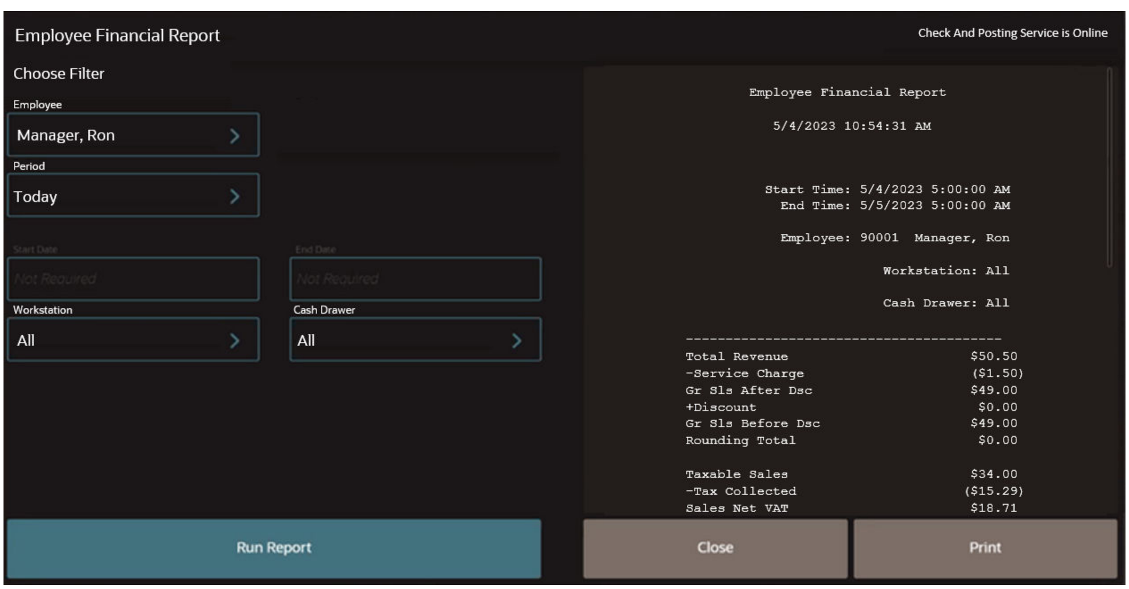
Figure 9-4   Employee Financial Report



Employee Financial Report - VAT

The Employee Financial Report - Value Added Tax (VAT) is similar to the Employee Financial Report, with Sales Net VAT included. VAT reports must be enabled in the EMC for Simphony Essentials; otherwise they are hidden on the Reports page.

Figure 9-5   Employee Financial Report - VAT

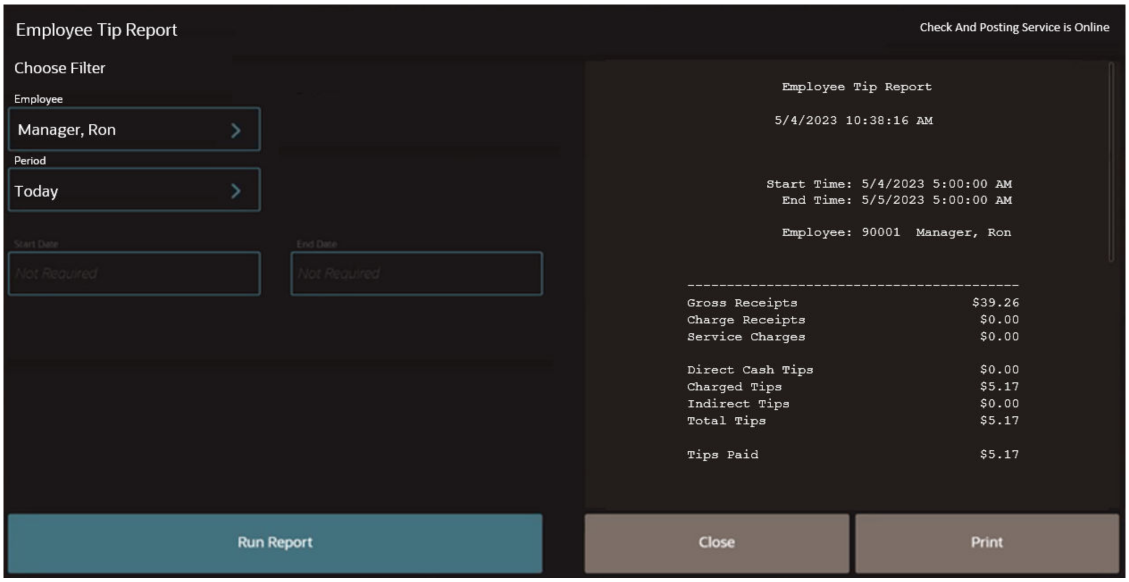


Employee Tip Report

The Employee Tip Report summarizes the total tip activity by employee. This report provides a list of tippable sales in the form of gross receipts from Food and Beverage, charge tips, service charges, tips paid, direct and indirect tip declaration, and percent of tips to sales.

This report may cover all employees, or a selected employee. The totals reflect each employee's tip summary for the system.

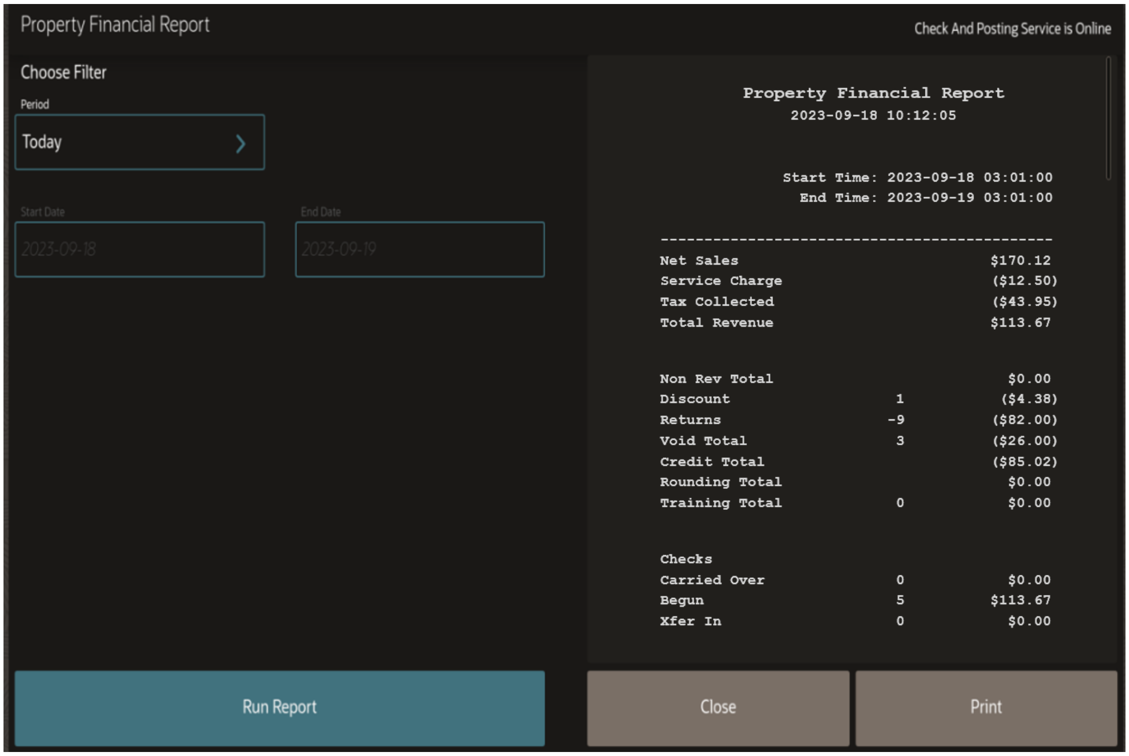
Figure 9-6 Employee Tip Report



Property Financial Report

The Property Financial Report serves as a report card for the entire location/property. First, the report allows managers to see the property's effectiveness in generating revenue. In addition, the report provides operational statistics, such as average turn time and average check amount, which indicate how efficiently these revenues were gained. The report also shows paid-out (pickup) and paid-in (loan) transactions.

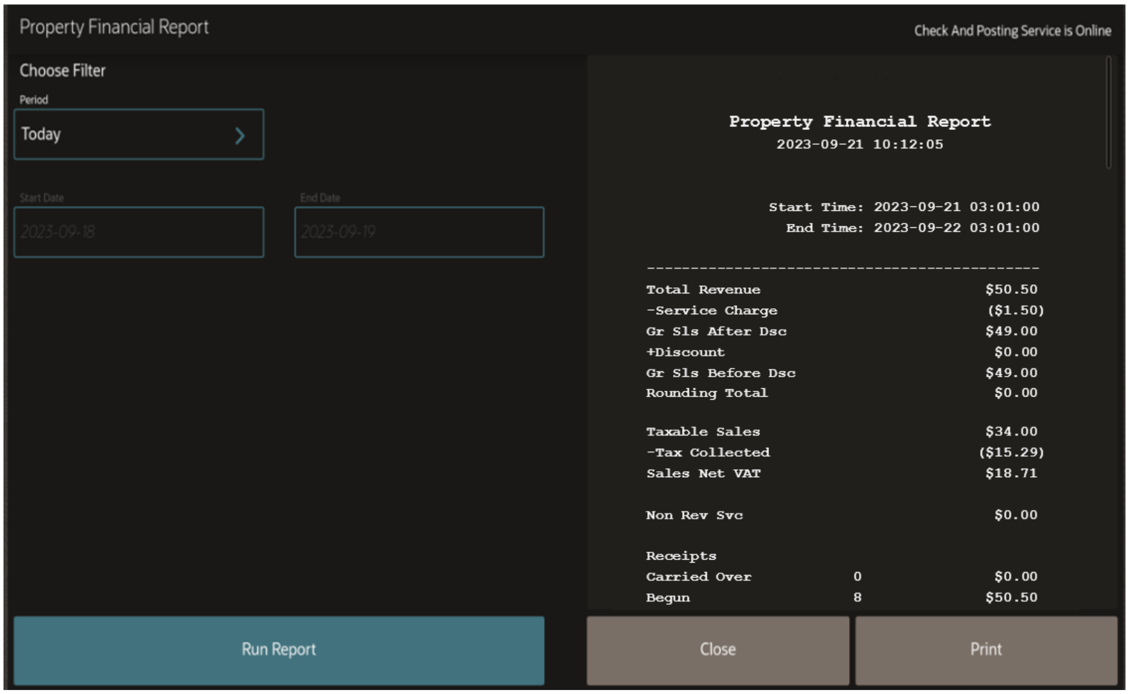
Figure 9-7 Property Financial Report



Property Financial Report - VAT

The Property Financial Report - Value Added Tax (VAT) is similar to the Property Financial Report, with Sales Net VAT included. VAT reports must be enabled in the EMC for Simphony Essentials; otherwise they are hidden on the Reports page.

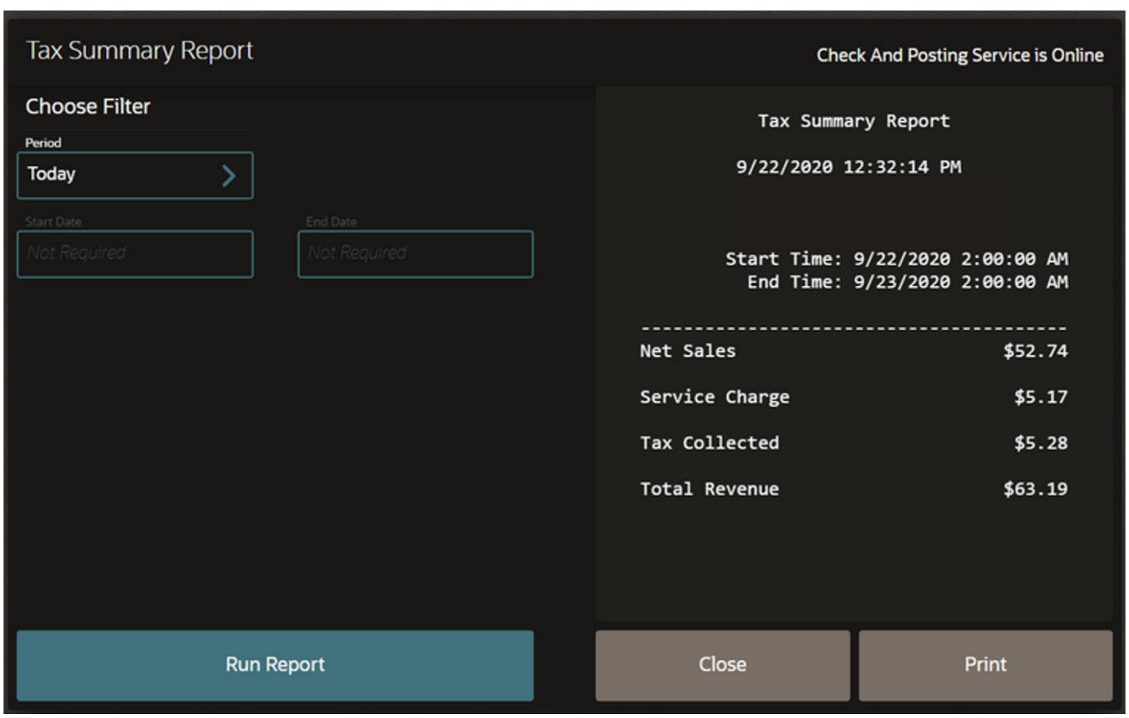
Figure 9-8   Property Financial Report - VAT



Tax Summary Report

The Tax Summary Report summarizes tax collections by active tax rate for the property. Tax rates that are inactive (that is, those for which the Tax Rate **Type** field is set to 0 in the Tax Rates module) do not print on this report.

Figure 9-9   Tax Summary Report



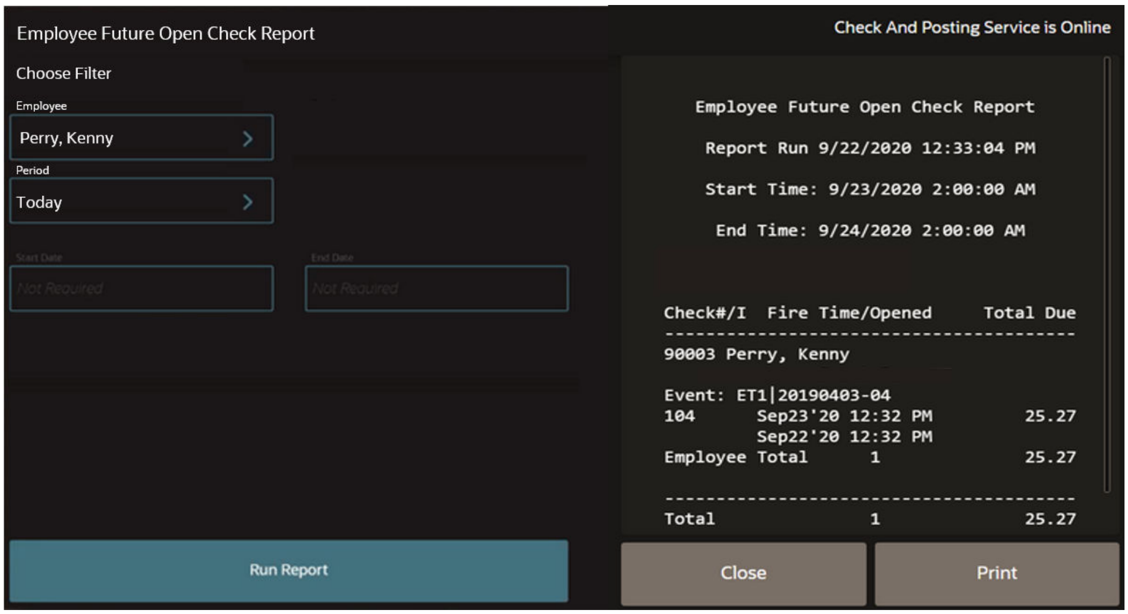
Future Open Check Report

If configured, the Future Open Check Report lists all checks that are scheduled for autofire at the time the report is run. Checks appear by employee and are sorted by scheduled date and time.

This report may cover all employees, or a selected employee.

Each future check is identified by check number. Each line entry includes the date/time the check was opened, and the date/time the check is scheduled to be fired. Each line also includes the current subtotal, tax, service charges, and the total due.

Figure 9-10 Employee Future Open Check Report



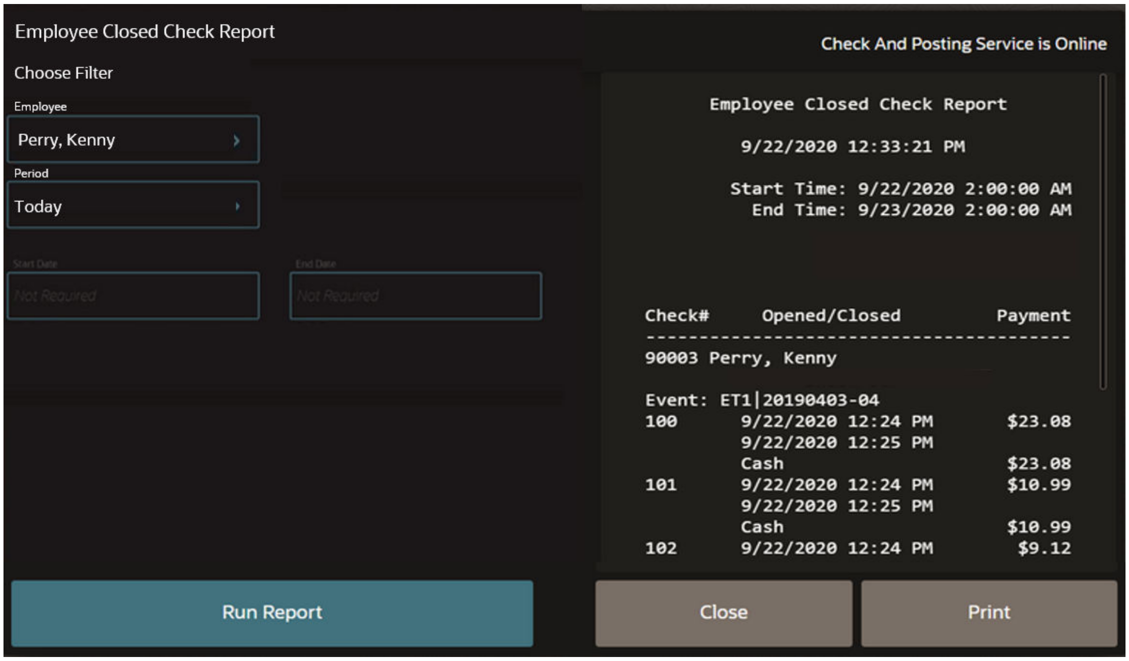
Employee Closed Check Report

The Employee Closed Check Report lists all checks that have been closed by an employee, including reopened checks that were closed again, and checks closed as memo checks. In addition, special symbols indicate whether the check was transferred, re-opened, split, or added. This information can be used as an employee audit trail, and can be helpful if the hard copy of the check is lost.

This report lists all closed checks posted to each employee that were closed during the period covered by the report.

This report may cover all employees, or a selected employee.

Figure 9-11 Employee Closed Check Report



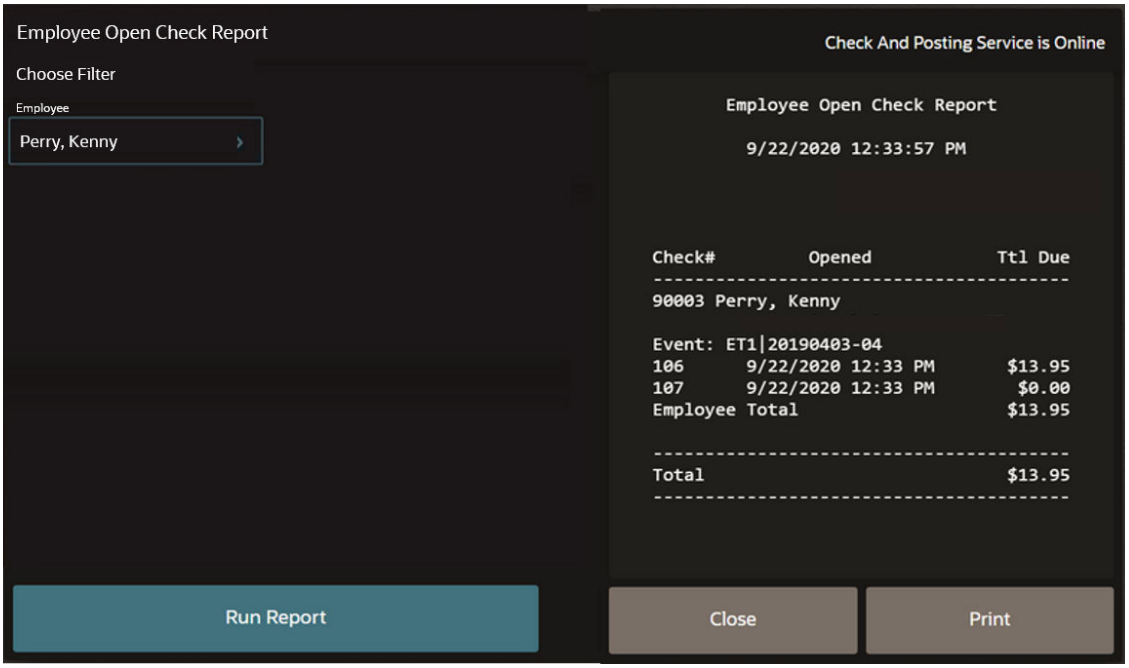
Employee Open Check Report

The Employee Open Check Report lists all open checks belonging to an employee at the time the report is taken. If there are open checks, they must be closed (paid-in-full) prior to resetting the financial reports in order to maintain a properly balanced report. In 24-hour operations, the Carried Over and Outstanding figures need to be used to balance your report.

All open checks for the property are covered by this report.

This report may cover all employees, or a selected employee.

Figure 9-12 Employee Open Check Report



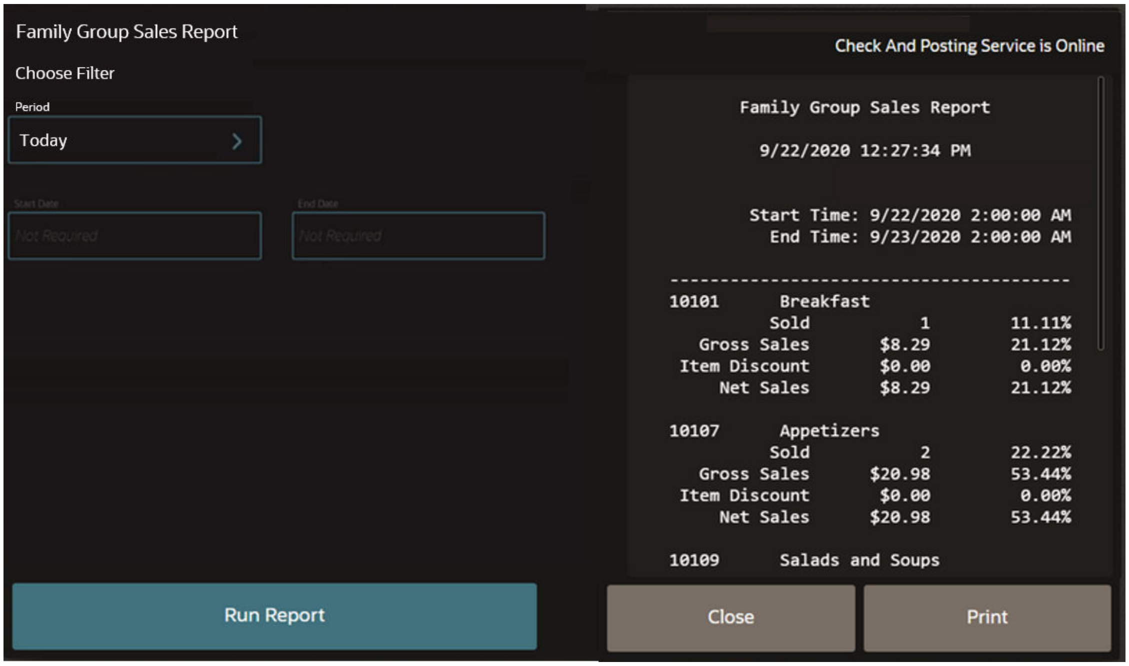
Family Group Sales Report

The Family Group Sales Report prints a detailed summary of Family Group Gross Sales, Item Discounts (including Subtotal Discounts that are configured to act as Item Discounts), and Net Sales consolidated by Family Group (in the Menu Item Maintenance module, each menu item must be assigned one Major Group and one Family Group).

The usefulness of this report depends on consistency and logic in configuring the Menu Item module and in defining Major and Family Groups. Family Groups are generally thought of as more specific categories than Major Groups and often as subsets of a Major Group. For example, the Family Groups, APPETIZERS and SALADS, are subsets of the Major Group, FOOD. Likewise, Family Groups, DRAFT BEER and BOTTLE BEER, are both subsets of the Major Group, BEER.

The Family Group Sales Report provides summary information in a fixed format. This report provides four basic totals (Sales Count, Gross Sales, Item Discount, and Sales Total) for each Family Group. The end of the report provides a grand total section for all Family Groups.

Figure 9-13 Family Group Sales Report



Major Group Sales Report

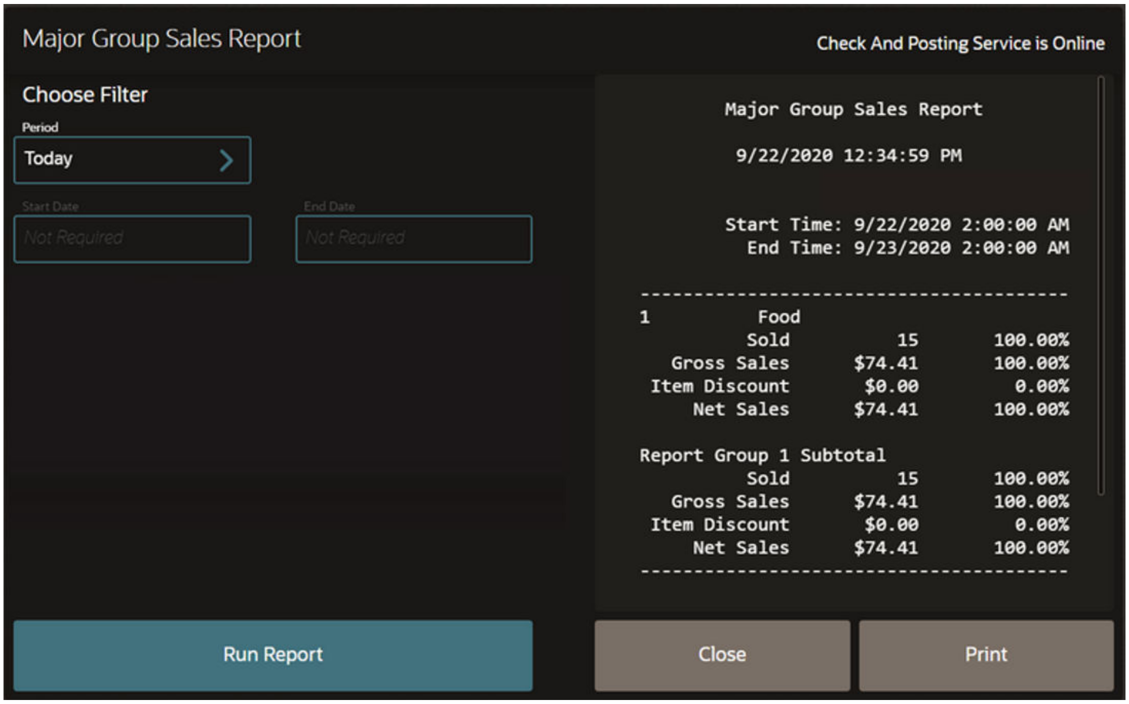
The Major Group Sales Report prints a detailed summary of Major Group Gross Sales, Item Discounts (including Subtotal Discounts that are configured to act as Item Discounts), and Net Sales consolidated by Major Group. (In the Menu Item Maintenance module, each menu item must be assigned one Major Group and one Family Group.) The usefulness of this report depends on consistency and logic in configuring the Menu Item module and in defining Major and Family Groups. Major Groups are generally thought of as more general categories than Family Groups. For example, the Major Group, FOOD, includes the Family Groups APPETIZERS and SALADS, which are both subsets of the Major Group, FOOD.

The Major Group Sales Report provides summary information in a fixed format. This report provides four basic totals for each Major Group:

- Sales Count (Sold)
- Gross Sales
- Item Discount
- Net Sales

The end of the report provides a grand total section for all Major Groups.

Figure 9-14 Major Group Sales Report



Menu Item Sales Summary Report

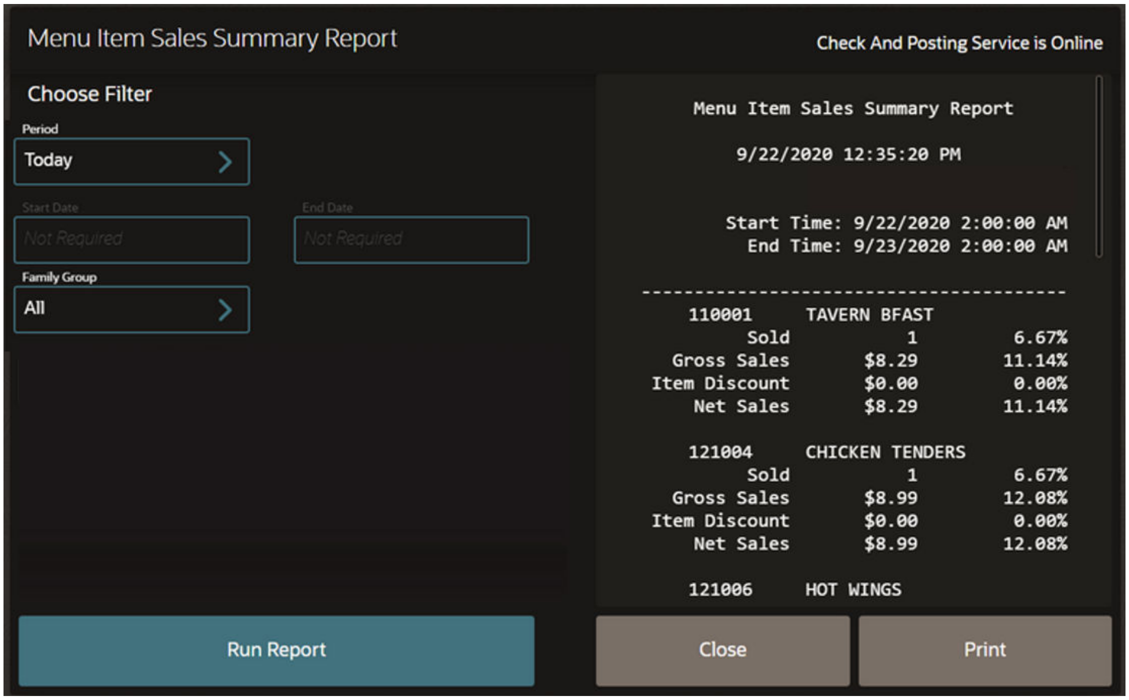
The Menu Item Sales Summary Report provides sales for each menu item. The report may also show each menu item total for the revenue center.

This report provides Sales Count (Sold), Gross Sales, Item Discounts, and Net Sales for each menu item definition/price. The end of the report provides a summary section for all menu items. Menu items can be shown in detail and summary format.

Detail vs. Summary Formats

The detail format generates a line entry for each menu item definition or price. Keep in mind that each menu item can have more than one definition, and each definition may have more than one price. For example, Sm Juice, Med Juice, and Lrg Juice may be separate definitions of Juice. You could also have a different price for each size juice. As you might imagine, the detail format can produce a very long report. If the summary format is used, menu item definition totals are combined into a single record.

Figure 9-15 Menu Item Sales Summary Report



Menu Item Sales Detail Report

The Menu Item Sales Detail Report provides sales for each menu item. The report may also show each menu item total for the revenue center.

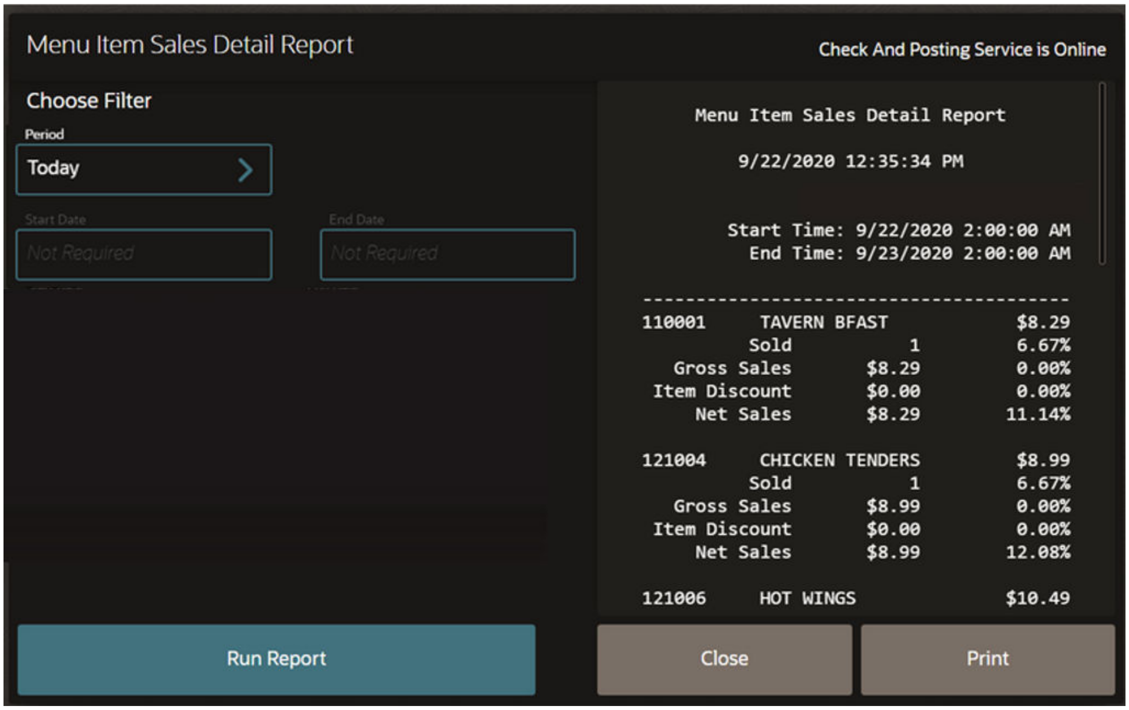
Menu item definition totals are combined into a single record.

This report provides Sales Count (Sold), Item Discounts, and Net Sales for each menu item definition/price. The end of the report provides a summary section for all menu items. Menu items can be shown in detail and summary format.

Detail vs. Summary Formats

The detail format generates a line entry for each menu item definition or price. Keep in mind that each menu item can have more than one definition, and each definition may have more than one price. For example, Sm Juice, Med Juice, and Lrg Juice may be separate definitions of Juice. You could also have a different price for each size juice. As you might imagine, the detail format can produce a very long report. If the summary format is used, menu item definition totals are combined into a single record.

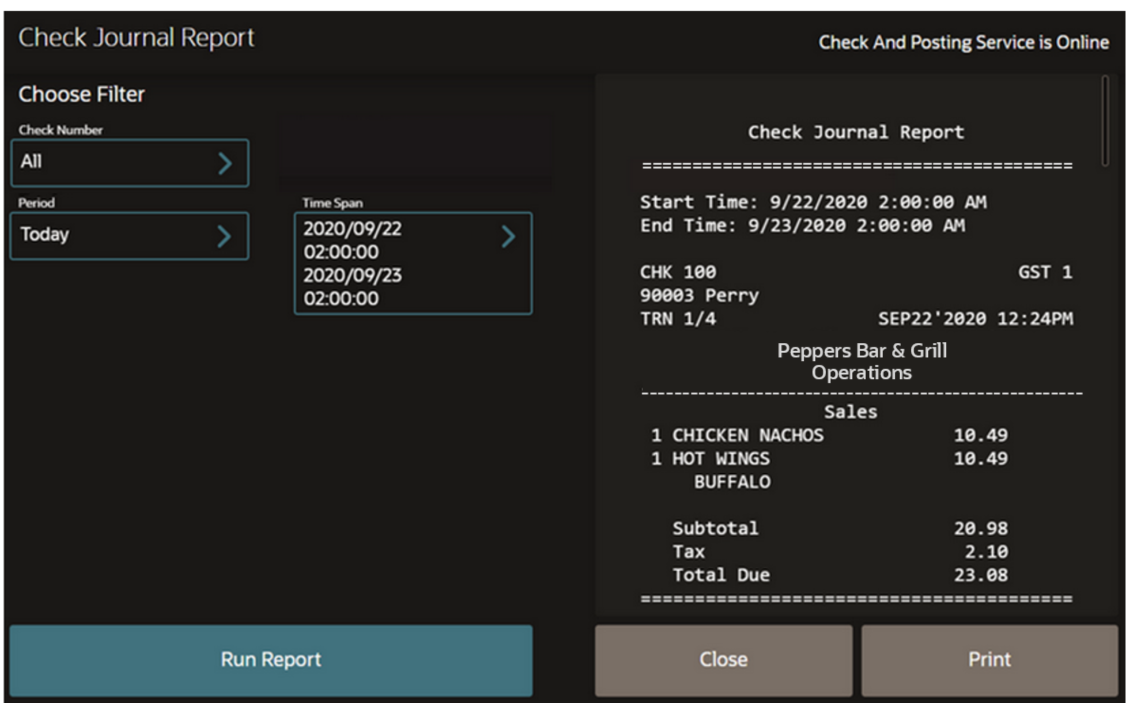
Figure 9-16 Menu Item Sales Detail Report



Check Journal Report

The Check Journal Report provides a journal of all sales transactions on a check. The report can be taken for a selected Check Number, Period, and Time Span.

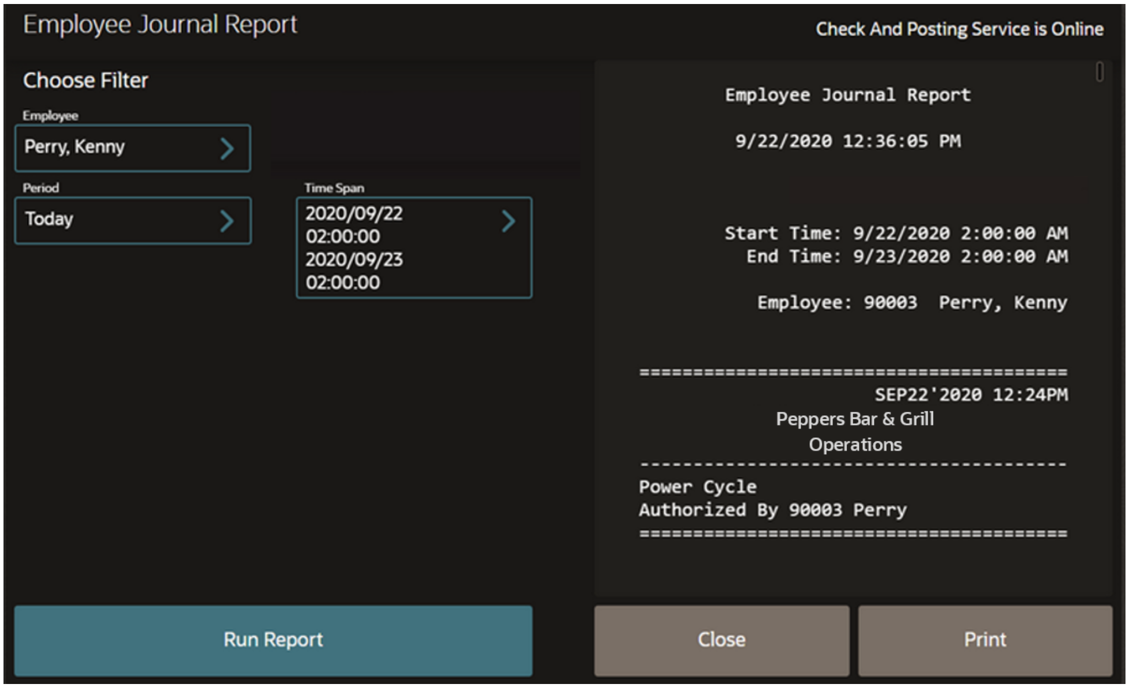
Figure 9-17 Check Journal Report



Employee Journal Report

The Employee Journal Report provides a journal of all sales transactions by a specific employee shown in a check detail area. The report can be taken for a selected Employee, Period, and Time Span.

Figure 9-18 Employee Journal Report



Held Item Summary Report

The Held Item Summary Report shows menu items which are still held at a property or for an employee.

Each line entry includes the menu item name and type, quantity of each item, and total number of held items. If there are no entries for an employee, nothing prints for that employee.

Figure 9-19   Held Item Summary Report

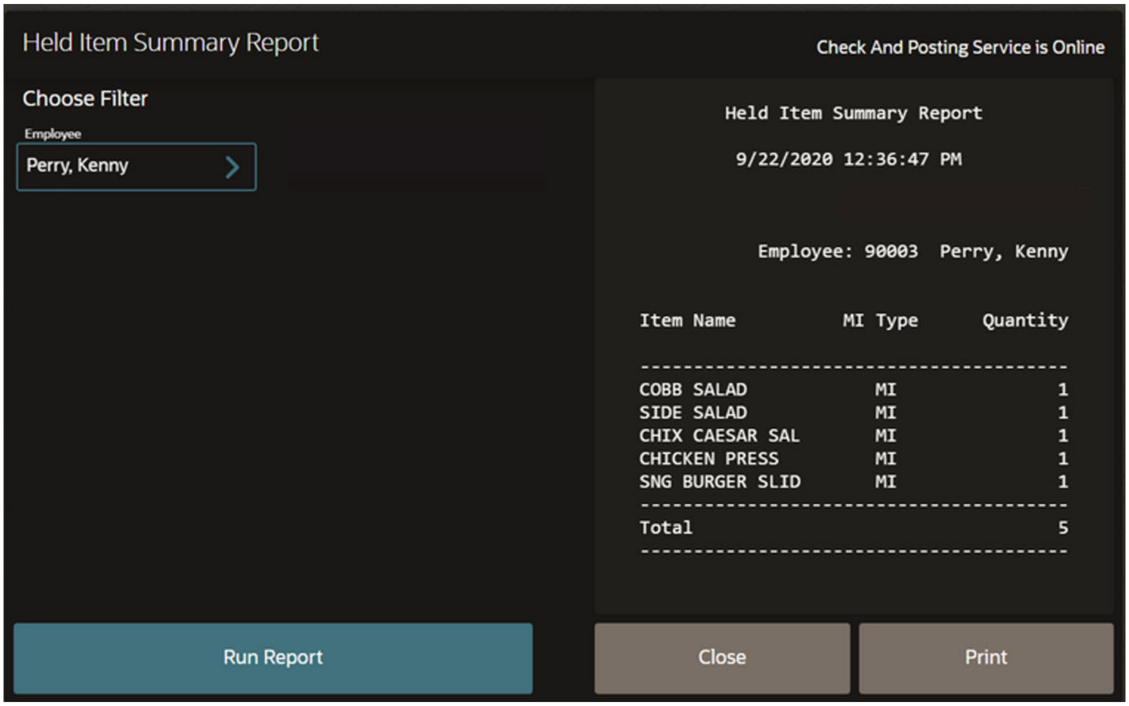


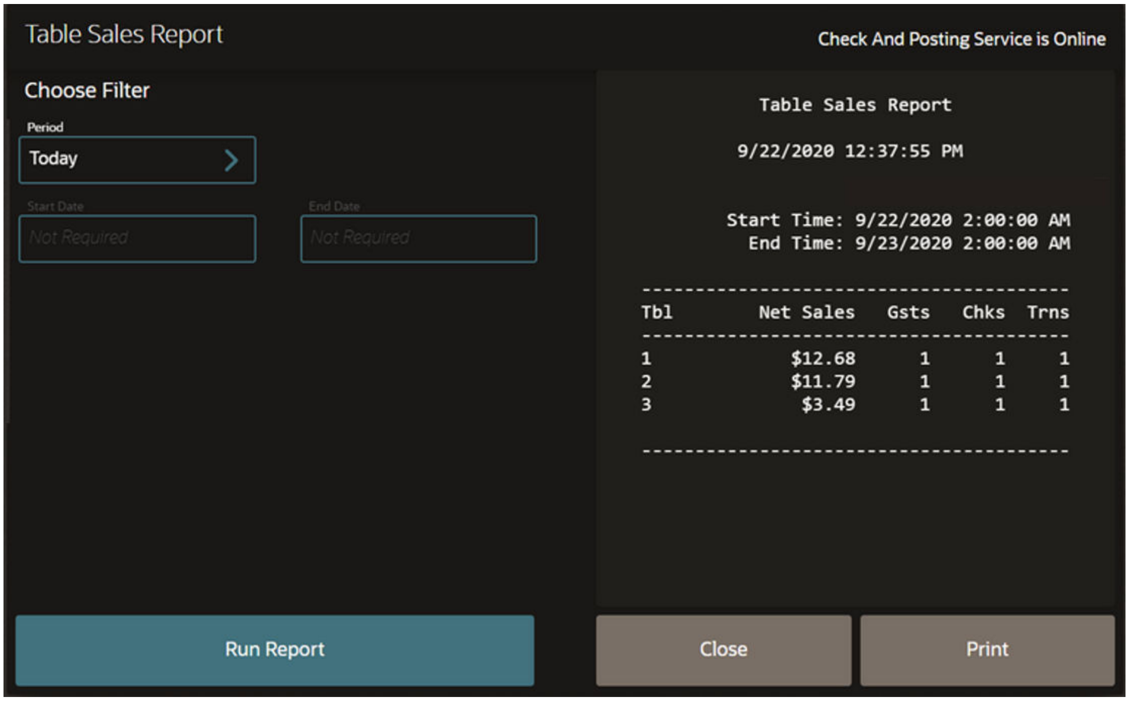
Table Sales Report

The Table Sales Report provides profile totals for each table in the revenue center. These are used to help managers analyze each table's sales activity. For example, this report helps determine which tables are most popular and produce the most sales, or which tables are slow to turn over.

The Table Sales Report provides four basic totals for each table:

- Net Sales
- Guest Count (Gsts)
- Check Count (Chks)
- Number of Turns (Trns)

Figure 9-20 Table Sales Report

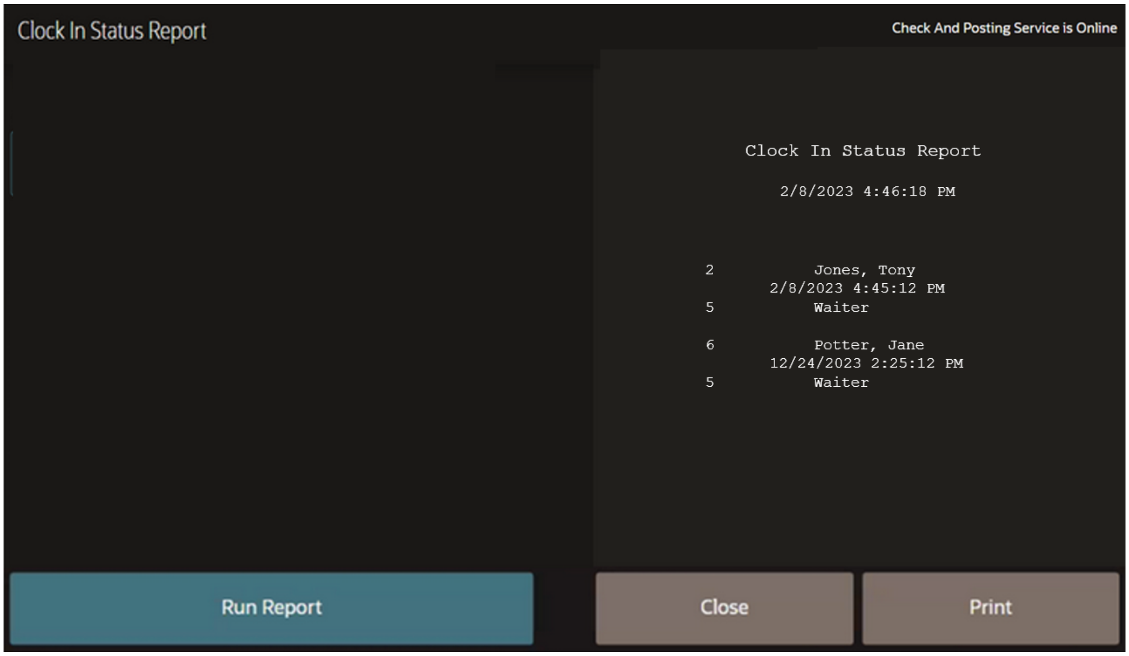


Clock In Status Report

The Clock In Status Report provides a list of employees who are currently clocked in to the system or on a break. For example, at the beginning of a shift, you can determine if anyone is late. Or, before running labor reports, you may need to make sure everyone is clocked out.

The report is taken for the entire system.

Figure 9-21 Clock In Status Report

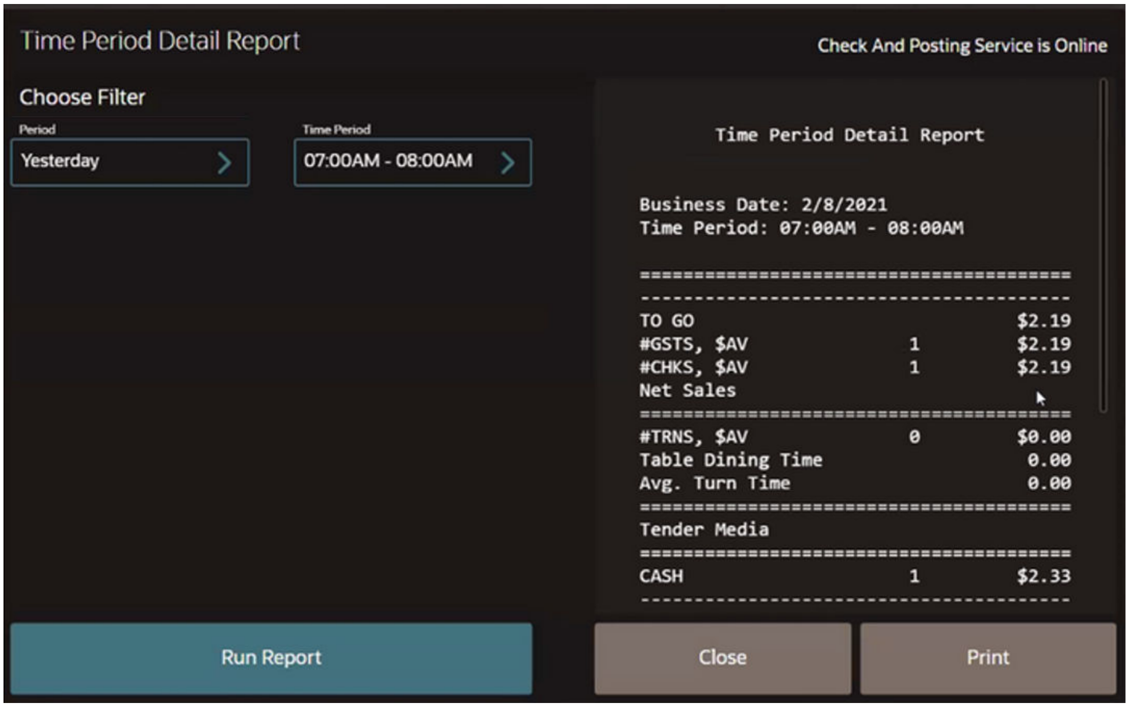


Time Period Detail Report

The Time Period Detail Report provides a detailed summary of sales activity and labor cost totals for a selected hourly time period. The report provides sales and labor profile information, which can help management determine peak periods for labor scheduling.

The totals in this report reflect each time period's financial information.

Figure 9-22 Time Period Detail Report



Time Period Summary Report

The Time Period Summary Report provides a summary of certain sales activity for each time period.

The totals in this report reflect each time period's financial information.

This report covers all time periods for today or yesterday.

Figure 9-23   Time Period Summary Report