

Oracle® Symphony Essentials

Configuration Guide



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Preface

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

Purpose

This Configuration Guide explains the setup of Symphony Essentials using the Enterprise Management Console (EMC) and Symphony Home.

Audience

This document is intended for system administrators of Symphony 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.
October 2022	Updated Enable Fiscal Reports.
November 2022	Updated Preface and Add a Workstation.

Date	Description of Change
January 2023	Created new chapter called Paid In and Paid Out Operations, and moved the following topics out of the Payments chapter and into this new chapter: • Create Tender/Media Records • Create Pickup Reasons • Create Loan Reasons Added Enable a Third Party Mobile Device Management (MDM) to Distribute Symphony POS Client Software to the Hardware chapter.
March 2023	Updated publication for Release 19.5.
April 2023	Added New Locations chapter.
June 2023	Re-organized and updated chapters 1 through 11.
January 2024	Updated publication for Release 19.6.
May 2024	Added the following topics to the Personnel chapter: • Labor Management • People Management • Add a Person • Grant Access to Point of Sale Operations Updated Personnel and Create Employee Roles and Grant Privileges.
September 2024	Updated publication for Release 19.7.
February 2025	Updated publication for Release 19.8.

1

System Overview

Simphony Essentials supports the Point-of-Sale (POS) client devices listed in the following table. The Microsoft Windows operating system is not supported on a POS client device for Simphony Essentials.

Table 1-1 Supported Workstations

Property Client Device	Operating System
Oracle Linux MICROS Compact Workstation 310	Oracle Linux for MICROS
Oracle Linux MICROS Workstation 6 Series	Oracle Linux for MICROS
Oracle Linux MICROS Workstation 8	Oracle Linux for MICROS

Table 1-2 Supported Peripherals

Peripheral Device	Operating System
Adyen Castles S1F2 (SATURN1000) payment device	Android Version 10.0
Android Tablets/Phones	Android Versions 10.0, 11.0, and 12.0
Lenovo K10 Tablet	Android Versions 10.0, 11.0, and 12.0
Oracle MICROS HH500	Android Versions 10.0, 11.0, and 12.0

Table 1-3 Kitchen Display Hardware

POS KDS Hardware	Operating System
Oracle Linux MICROS Kitchen Display Controller 210	Oracle Linux for MICROS
Oracle Linux MICROS Express Station 4 Series	Oracle Linux for MICROS
Oracle Linux MICROS Workstation 625E	Oracle Linux for MICROS

2

Initial Setup Using Enterprise Management Console (EMC)

The Enterprise Management Console (EMC) is the primary configuration application in Symphony Essentials.

Download and Install the Enterprise Management Console (EMC)

1. Sign in to the SymphonyApp website at [https://\[ServerName\]/SymphonyApp](https://[ServerName]/SymphonyApp). You will need your **Username**, **Company**, and **Password**. If this is your first time signing in to SymphonyApp, you will be prompted to change your password.

Figure 2-1 SymphonyApp Sign In Page



Oracle MICROS Symphony

User Name

Company

Password

[Can't Sign In?](#)

Login

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See [Enterprise Management Console \(EMC\) Authentication](#) for more information about passwords.

2. After signing in, a red message prompts you to set up security questions if they have not already been set. Click **User Profile**, and then complete the security questions.

Figure 2-2 User Profile Link

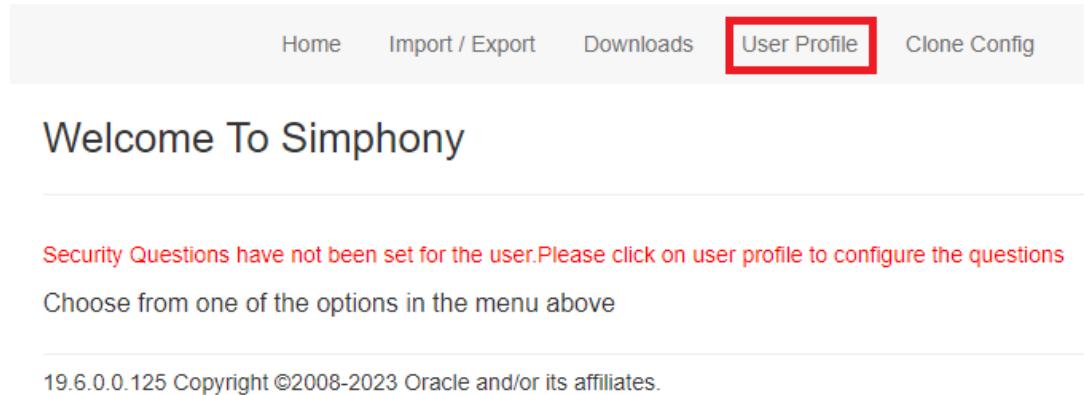


Figure 2-3 Security Questions

User Profile

User Configuration	
User Name	masala
Email	
Company Code	mas
Change Password	
* Current Password	
* New Password	
* Confirm Password	
Change Password	
Security Questions	
* Question	In which city did you meet your spouse? ▾
* Answer	
* Question	What is the name of your high school? ▾
* Answer	
* Question	What is your mother's maiden name? ▾
* Answer	
Save Security Questions	

3. Click the **Downloads** link, and then select **Enterprise Management Console (EMC)**.

Figure 2-4 Downloads Link

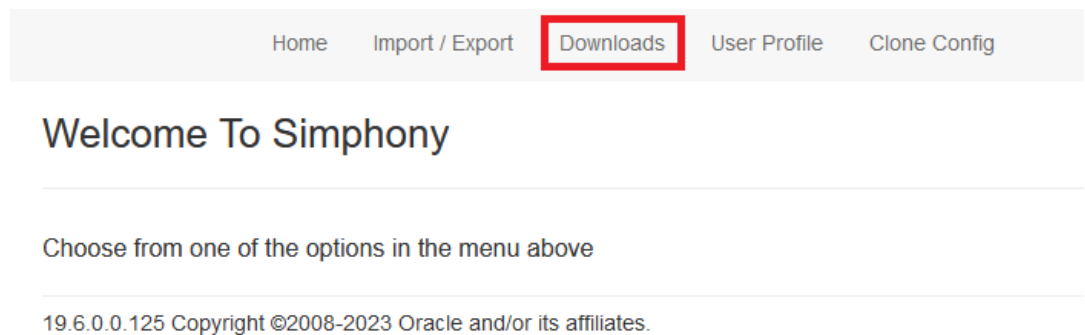
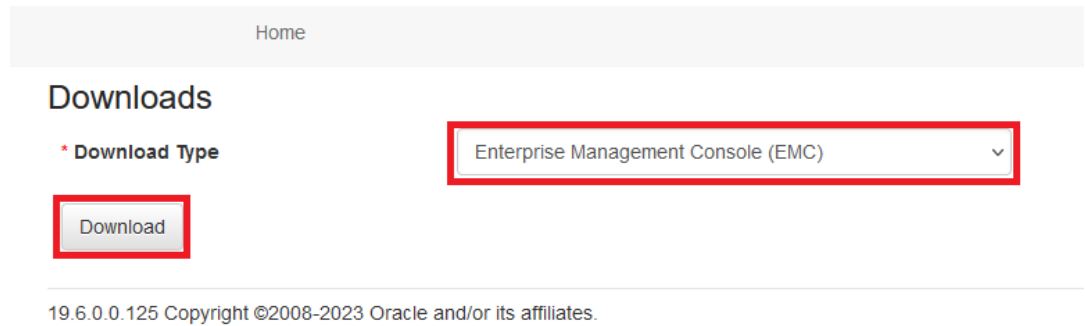
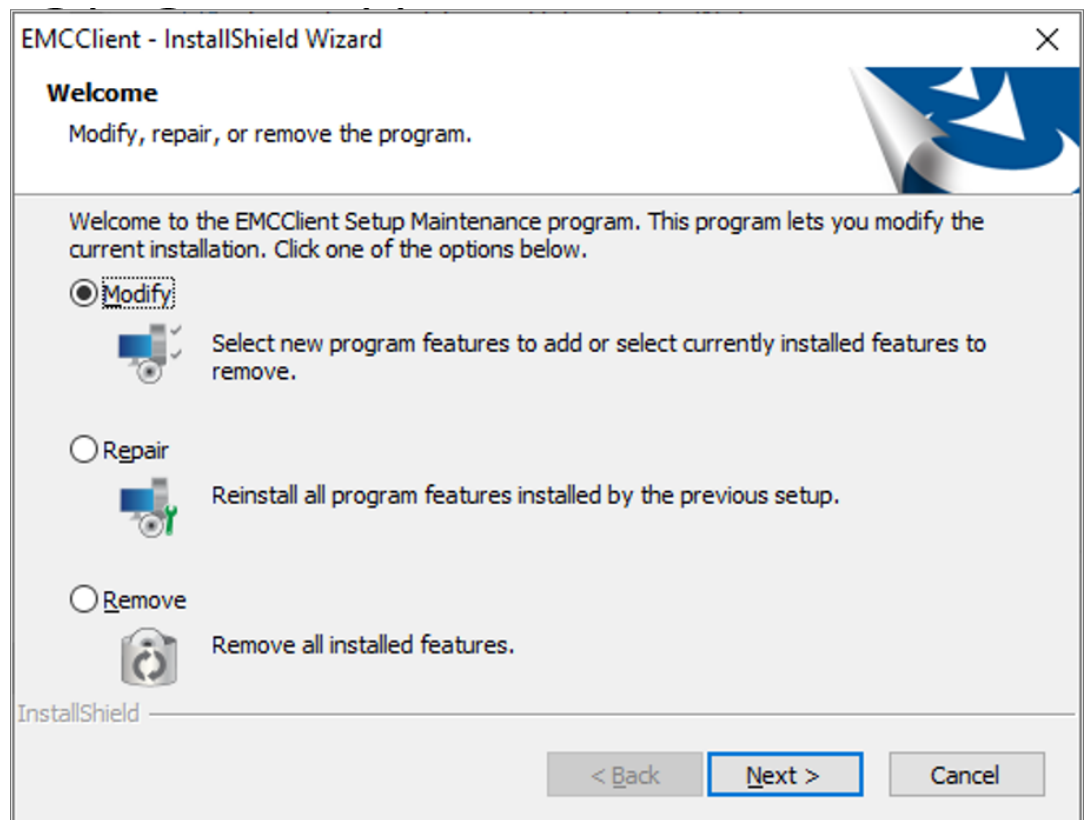


Figure 2-5 EMC Download Selection



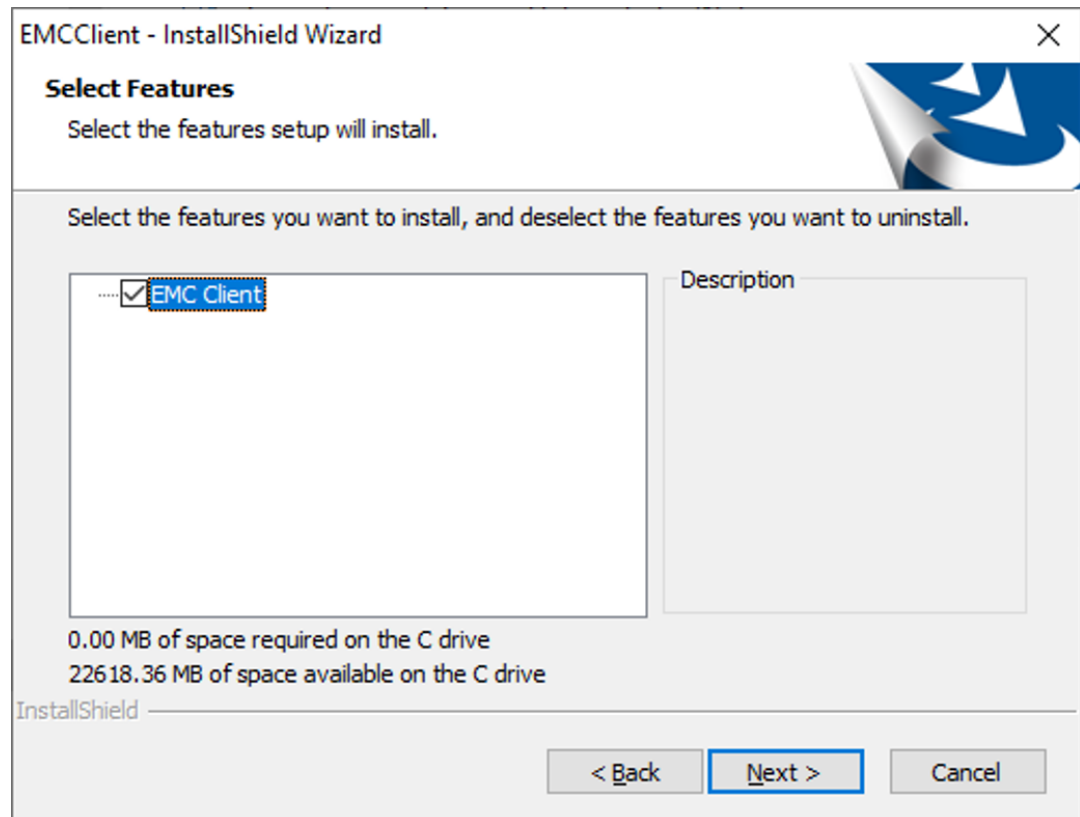
4. Click **Download** to start the EMC client setup package download process.
It may take a moment for the download process to commence. This process downloads a file called EMCSetup.exe.
5. After the download process is complete, run **EMCSetup.exe** to install the EMC client.
EMCSetup.exe contains all files required by EMC to function.
6. Select **Yes** for the question: Do you want this app to make changes to your device?
7. Leave the default option (**Modify**) checked, and then click **Next**.

Figure 2-6 InstallShield Wizard Welcome Dialog



8. Click **Next** on the Select Features dialog, leaving **EMC Client** checked.

Figure 2-7



Files and libraries will be installed. The default installation path for the EMC client is C:\Program Files\Oracle Hospitality.

9. Click **Finish** at the Maintenance Complete prompt.
10. The process will create an EMC desktop icon. Double-click the icon on the desktop to open the EMC sign in page.

Enterprise Management Console (EMC) Passwords

Each user has a unique username and must enter it along with their valid password to access the Enterprise Management Console (EMC). Passwords must adhere to the system's complexity requirements, as follows:

- The password must be a minimum of 8 characters and a maximum of 20 characters.
- The password must contain letters, numbers, and special characters like: ! " # \$ % & ' () * + , - . / : ; < = > ? @ [\] ^ _ ` { | } ~
- The user must not choose a password equal to the last 4 passwords used.

Sign in to Enterprise Management Console (EMC)

1. To sign in to EMC, enter your **User Name**, **Company**, and **Password**, and then click **Sign In**.

Figure 2-8 EMC Sign In

The screenshot shows the 'EMC Sign In' window. At the top, it says 'Oracle MICROS Symphony Enterprise Management Console'. Below this is a 'Server' dropdown menu. Underneath are three input fields: 'User Name', 'Company', and 'Password'. At the bottom left is a blue 'Sign In' button, and to its right is a link that says 'Can't Sign In?'. The Oracle logo is at the bottom left of the window.

2. If a newer version exists, EMC automatically downloads the latest files, and then updates itself. A progress bar indicates the duration of the login and update operation. You will be prompted to log in again after completion of the updates as shown in the following figure.

Figure 2-9 EMC Sign In After Updates

This screenshot is similar to Figure 2-8, but it includes a red message at the top: 'EMC has been updated to the latest version [19.6.0.0.125]. Login is required.' The rest of the interface, including the 'Server' dropdown, 'User Name', 'Company', and 'Password' fields, the 'Sign In' button, the 'Can't Sign In?' link, and the Oracle logo, remains the same.

3. To sign out of EMC, select **File**, and then click **Exit**.

EMC Basics

This section describes the basic functions in EMC.

EMC Configuration Hierarchy

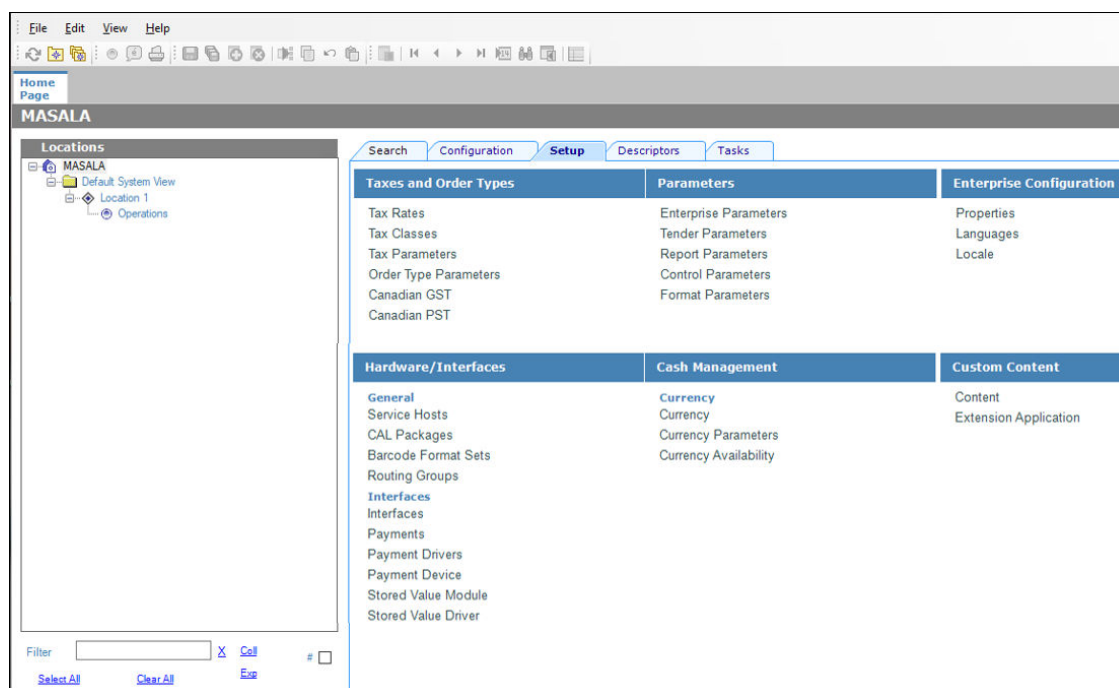
The Symphony Essentials EMC has three areas that allow you to choose where to define certain definitions and records in the EMC's hierarchy tree. In EMC, modules are configured (in order from highest to lowest) on the enterprise, property, or revenue center levels.

An employee's assigned role determines whether users have full or partial access to specific modules on certain levels.

EMC Home Page

After you sign in, EMC defaults to the Home Page. The Home Page shows a navigation tree in the Locations pane based on the EMC levels. Modules appear to the right of the Locations pane and filters based on the location you select from the Locations navigation tree.

Figure 2-10 EMC Home Page



You can use the filters beneath the Locations pane to easily search for properties and revenue centers within an enterprise.

Figure 2-11 EMC Home Page Filters



- **Filter:** Enter the name of a property or revenue center to filter the navigation tree.
- **Coll:** Click to collapse the navigation tree. If the navigation tree is collapsed when filtering, the search returns the top most level. For example, when you search for a revenue center, the navigation tree shows the property to which it belongs.
- **Exp:** Click to expand the navigation tree.
- **#:** Select to show the object number in front of properties and revenue centers in the navigation tree.

EMC remembers each users state at the time of exit. Therefore, the next time you log in, the EMC Home Page defaults to the location that was last viewed by you when EMC was closed.

Table View and Form View

Table view and form view are two views used to show information within modules.

Most modules open to table view, which is a grid view showing all records sorted by object number. Typically, the first two columns are the object number and name of the record. Table view is generally used when making bulk changes. When a record is changed, table view highlights the record in yellow.

Form view shows the same content that is available in table view, but for a single record. Depending on the data, sometimes form view shows more information than table view. For example, the Employee Roles module, which contains only object number and name in table view, contains several configurable tabs in form view. Form view includes a navigation bar that shows the object number and name of each record available, making record-to-record navigation easier. To navigate to a specific record, simply select the record within the navigation bar and the corresponding form view tabs populate with the selected record's information.

Three methods are available for switching between table view and form view:

- Click the **Toggle Table/Form View** icon on the EMC toolbar.
- While in table view, double-click the Object Number column to open form view.
- While in form view, double-click the object number/name in the navigation bar to open table view.

Module Record Filters

By default, most modules in EMC show all of the available records when opened. You can remove unwanted records from view using the filters available in table view. The filters appear above the table and is set to Show All Records.

Figure 2-12 EMC Filter Section in Table View



The screenshot displays the filter section of the EMC interface. It includes a 'Filter' header, a 'Show Records Where' dropdown menu currently set to 'Show All Records', a text input field with the placeholder 'contains the text', and a 'Filter Now' button. To the right of these elements are two links: 'Clear Filters' and 'Clear and Run'.

When records are filtered,

- Form view shows only the records that appear in table view. While in form view, the navigation buttons (next, previous, first, and last) change to only the records that appear in table view.
- The Option Bit Comparison Dialog shows only the records that appear in table view.

The Menu Item Maintenance module provides additional filters for streamlining the records. See [Searching and Filtering Menu Items](#) for more information.

Sorting Records

In EMC, you can sort records presented in tables by one of the columns. By default, records are sorted by object number. To sort by another column, click the column header.

EMC Toolbar

EMC uses common controls that are familiar to most users. For example, the top of the screen includes a menu bar with the standard File, Edit, and View options. Additionally, a number of navigational icons are available on the toolbar.

The following table describes the icons on the EMC toolbar. You can also access the functions performed by these icons within the menu bar.

Table 2-1 EMC Toolbar Icons

Toolbar Icon	Name	Function	Available in Table View?	Available in Form View?
	Refresh	Performs a refresh of the data in the current module.	Yes	Yes
	Close	Closes the currently active module.	Yes	Yes
	Close All	Closes all open modules.	Yes	Yes
	Location Selector	Opens the current module in another property or revenue center. This icon is enabled only if you open a module from the property or revenue center level.	Yes	Yes
	Language Translation	Opens the EMC Record Translation dialog. This icon is enabled only when the current GUI control is a translatable text field.	Yes	Yes
	Print	Opens a dialog that allows you to print records from table view.	Yes	No
	Save	Saves changes to records in the currently active module. This icon is enabled only when changes have are made to the current module. When you insert a new record to a module, the application automatically saves that record. To invoke this icon, you must make initial entries or modify an existing record entry.	Yes	Yes
	Save All	Saves changes to records in all open modules. This icon is enabled only when any open module has its records change.	Yes	Yes

Table 2-1 (Cont.) EMC Toolbar Icons

Toolbar Icon	Name	Function	Available in Table View?	Available in Form View?
	Insert	Adds a new record to the module. This icon is enabled only when the current module supports the Insert functionality and only when the logged-in user has Employee Role permissions to add new records to the module.	Yes	Yes
	Delete	Deletes records. This icon is enabled only when the current module supports the Delete functionality, and only when the logged-in user has Employee Role permissions to delete records from the module.	Yes	Yes
	Distribute	Distributes records. This icon is enabled only when the EMC user is associated with an Enterprise Role with the option Distribute enabled, and only when the current module supports distribution.	Yes	Yes
	Copy Record(s)	Copies records while in table view.	Yes	No
	Undo/Redo	Performs the undo/reload function. You cannot undo the addition or deletion of a record. EMC uses a record-level undo, where all changes to a single record are undone. You cannot undo a previous change because the flow and layout of EMC make this an impractical option. The standard Ctrl+Z functionality exists to undo changes to a text field. In the Employee Maintenance and Menu Item Maintenance modules, undo is available through the right-click menu only.	Yes	Yes
	Paste Record(s)	Pastes records while in table view.	Yes	No
	Toggle Table/Form View	Switches the current module between table view and form view.	Yes	Yes
	First Record	Navigates to the first record in the module.	No	Yes
	Previous Record	Navigates to the previous visible record in the module.	No	Yes
	Next Record	Navigate to the next record.	No	Yes
	Last Record	Navigates to the last record in the module.	No	Yes
	Go To	Opens a dialog that allows you to enter an object number and navigate to the specified record.	Yes	Yes

Table 2-1 (Cont.) EMC Toolbar Icons

Toolbar Icon	Name	Function	Available in Table View?	Available in Form View?
	Find	Opens a dialog that allow you to find a record based on text comparison in any column.	Yes	No
	Go To Previous	In some modules, go to links are provided to quickly open other modules.	N/A	N/A
	Navigation Bar	Switches the visibility of the navigation bar in form view.	No	Yes

Change Location Information

One location, called Location 1, is already created in the Symphony Essentials organization.

To change information, such as name and address, for Location 1:

1. Select the Enterprise level, click **Setup**, and then click **Properties**.
2. Double-click the Location 1 property.
3. Change the information as needed.
4. Click **Save**.

Change Revenue Center Information

One revenue center, called Operations, is already created in the Symphony Essentials organization. Only one revenue center per location is supported.

To change information, such as address, for Operations:

1. Select the property, click **Setup**, and then click **RVC Configuration**.
2. Double-click the Operations revenue center.
3. Change the information as needed.
4. Click **Save**.

Add Order Type, Order Channels, and Menu Levels to Revenue Center

A default order type and default menu levels must be configured in the Operations revenue center. There are two order types already created in Symphony Essentials: Dine In and Take Out.

An order channel can be assigned to a revenue center, but an overall default is used if the order channel is not configured for the revenue center. [Managing Order Types and Channels](#) contains more information.

Menu levels allow different prices for one menu item and determine which sales items are available in a transaction. Defaults have been set up for Symphony Essentials called Main and Sub. [Introduction to Menu Levels](#) contains more information.

To add order types, order channels, and menu levels:

1. Select the **Operations** revenue center, click **Setup**, and then click **RVC Parameters**.
2. Double-click the **Operations** revenue center.
3. On the **General** tab, select a **Default Order Type**, **Default Order Channel**, **Default Main Level**, and **Default Sub Level**.

Figure 2-13 Select Default Order Type, Order Channel, Main and Sub Levels

The screenshot shows the 'RVC Parameters 1 - Operations' window with the 'General' tab selected. The 'Miscellaneous' section contains four dropdown menus, each with a red rectangle around it:

- Default Order Type: 1 - Dine In
- Default Order Channel: 2 - Delivery Company
- Default Main Level: 1 - Main
- Default Sub Level: 1 - Sub

4. Click **Save**.

Add a Workstation

Simphony Essentials supports up to five POS workstation client devices per location/property. Symphony Essentials is supported on POS workstation client devices running Linux and Android operating systems. The Microsoft Windows operating system is not supported on a POS client device for Symphony Essentials.

1. Select the property, click **Setup**, and then click **Workstations**.
2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name**, and then click **OK**.
4. Double-click the new workstation record.
5. On the **General** tab, enter information in the following fields:

Table 2-2 General Workstation Settings

Field	Description
Type	Select the type of workstation from the drop-down list: • 2 - Workstation Client: Workstations and Android devices Select this option for the Oracle MICROS Workstation 6 Series, the Oracle MICROS Workstation 310, and Android devices. • 3 - POSAPI Client: Symphony Transaction Services • 7 - Castle S1F2: Adyen Castles S1F2 Android payment devices
Language	Select the default language of the workstation. This is the language that appears on the workstation's Sign On screen. If an employee has a different default language set, the employee sees their default language after signing in to the workstation.
Log Verbosity	Select the logging verbosity for the workstation. Select 0 (zero) for minimal logging. Higher log verbosity provides more information in the log file, which may be helpful in troubleshooting issues.
Workstation Class	Select the service type: • 1 - Table Service Restaurant: Workstations and larger Android landscape tablet devices • 2 - Quick Service Restaurant: Workstations and larger Android landscape tablet devices • 3 - Bar: Workstations and larger Android landscape tablet devices • 4 - Mobile Table Service Restaurant: Adyen Castles S1F2 Android payment devices and smaller Android portrait devices (such as mobile phones) • 5 - Mobile Quick Service Restaurant: Adyen Castles S1F2 Android payment devices and smaller Android portrait devices (such as mobile phones) If a workstation is incorrectly configured (for example, Workstation Class 1 - Table Service Restaurant is selected for a mobile phone device), the page <i>Configuration Error Incorrect Workstation Class configured</i> appears before the sign in page on the POS client device. This error also appears on workstations and tablets if an incorrect Workstation Class is selected. Workstations and tablets use the non-mobile Workstation Classes. To resolve this error, correct the Workstation Class, and then click Update Database And Redraw Page on the POS Client device. Alternatively, close the application on the device and change the Workstation Class at a later time.
Enable Symphony Transaction Services	These options become active after you select 3 - POSAPI Client from the Type field. Select the appropriate option to enable Symphony Transaction Services.
Database Update Frequency	Enter the number of seconds for the workstation to receive changes. The value in this field overrides the Property Parameter's Database Update Frequency setting.

Table 2-2 (Cont.) General Workstation Settings

Field	Description
Check Inactivity Timeout	Enter the number of seconds before the workstation shows the message (Do you need more time?), prompting the workstation operator to cancel the transaction. When you enter 0 (zero), the message does not appear.
Check Inactivity Dialog Timeout	Enter the number of seconds that the workstation shows the Inactivity dialog before automatically cancelling the transaction. This field is inactive when you set the Check Inactivity Timeout value to 0 (zero).
Report Timeout	Enter the number of seconds the workstation waits for a response from the Reporting and Analytics server before showing a communication failure notice.
Offline Threshold	Enter a number between 0 and 99 to represent the signal strength percentage at which devices go offline. Devices will go offline when the signal strength is at or below this percentage value. For example, if the Offline Threshold is set to 90 (90%), and the device's current signal is 89%, the device will go offline. When the signal is detected above 90%, the device reconnects online.
Reconnect Threshold	Enter a number between 0 and 99 to represent the signal strength percentage at which devices recover online after being in an offline state. Devices will go online when the signal strength is at or above this percentage value. For example, if the Reconnect Threshold is set to 80, and the device's signal strength is 85%, the device will go online.
Service Host ID	This field become active after you select 3 - POSAPI Client from the Type field. Select the service host on which the POS API client runs.
Address / Host Name	Enter the IP address or host name of the service host where the workstation application runs.
Subnet Mask	Enter the subnet mask of the service host where the workstation application runs.
Default Gateway	Enter the default gateway of the service host where the workstation application runs.
Is Windows Service	Select this option to allow the service host to start as a Windows service. The service host service starts on Microsoft Windows startup with other Microsoft Windows services. The workstation starts only when the workstation operator signs on to the operating system. If you select this option, you need to change the ports of the services being run (for example, Check and Posting Service (CAPS) and Kitchen Display System (KDS) Controller) in addition to the workstation. Use the EMC modules to change the ports. If a non-POS workstation is required to run on the service host, it must run on a different port than the workstation port. You can also set the service host to run as a Microsoft Windows service from the Service Host module (rather than from the Workstations module). If you set this option in the Service Host module, you do not need to change the ports of the services being run as the device is not intended to run the workstation.

Table 2-2 (Cont.) General Workstation Settings

Field	Description
Resolution Cols	Enter the number of Resolution Columns for the workstation's display. The default value is 0 (zero).
Resolution Rows	Enter the number of Resolution Rows for the workstation's display. The default value is 0 (zero).
Location From Top	Enter the number of pixels from the top where the workstation window is placed on the display screen.
Location From Left	Enter the number of pixels from the left where the workstation window is placed on the display screen.

6. Click the **Printers** tab.
7. Click the **Select** link next to each printer type that you need to configure, select the printer, and then click **OK**.
8. Click **Save**.

Configure Workstation Database Passwords

To maintain workstation database access control, you must assign unique usernames and complex passwords in the Symphony EMC.

Symphony allows administrators to configure strong passwords for workstation local databases at either the Enterprise or property level before installation.

At the Enterprise Level

1. Select the Enterprise, click **Setup**, click **Enterprise Parameters**, and then click the **Security** tab.
2. In the **Enterprise Security** section, enable the **Use Same Credentials for all Properties** checkbox, and then select any arbitrary property from the drop-down list.
3. In the **User Admin Credentials** section, enter a username and a desired password that complies with your password complexity policy.
4. In the **User Database Credentials** section, enter a username and a desired password that complies with your password complexity policy.
5. Save the changes.

Figure 2-14 Enterprise Level Configuration

The screenshot displays the 'Enterprise Parameters' window with the 'Enterprise' tab selected. The 'Security' sub-tab is active, showing the following configuration options:

- Enterprise Security:**
 - ☐ Enable SIM File Access Service
 - ☐ Autosequence Legacy Mode
 - ☒ Use Same Credentials for all Properties (Dropdown: 2 - QA2_Property)
- User Security Credentials:**
 - Install Security User: [Redacted]
 - Current Password Compliance Status: Compliance Not Met
 - Enter New Password: [Empty]
 - Confirm New Password: [Empty]
- User Admin Credentials:**
 - Admin User: SA
 - Current Password Compliance Status: Compliance Met
 - Enter New Password: [Green bar]
 - Confirm New Password: xxxxxxxxxxxx
- User Database Credentials:**
 - Database User: dbuser
 - Current Password Compliance Status: Compliance Met
 - Enter New Password: [Green bar]
 - Confirm New Password: xxxxxxxxxxxx

At the Property Level

1. Select the property, click **Setup**, click **Property Parameters**, and then click the **Security** tab.
2. In the **User Admin Credentials** section, enter a username and a desired password that complies with your password complexity policy.
3. In the **User Database Credentials** section, enter a username and a desired password that complies with your password complexity policy.
4. Save the changes.

Figure 2-15 Property Level Configuration

The screenshot shows the 'Property Parameters 10 - QA1_Property' window with the 'Security' tab selected. It contains three sections for configuring user credentials:

- User Security Credentials:**
 - Install Security User:
 - Current Password Compliance Status:
 - Enter New Password:
 - Confirm New Password:
- User Admin Credentials:**
 - Admin User:
 - Current Password Compliance Status:
 - Enter New Password:
 - Confirm New Password:
- User Database Credentials:**
 - Database User:
 - Current Password Compliance Status:
 - Enter New Password:
 - Confirm New Password:

Currency

You can configure the types of currencies in circulation for exchange at workstations (for example US Dollars, Canadian Dollars, Euros, Pounds Sterling, Pesos, or Yen).

Configure Currency

1. Select the Enterprise or property, click **Setup**, and then click **Currency**.
2. Insert a record, enter the name (for example, US Dollars), and then click **OK**.
3. Double-click the record to open it.
4. Enter the **Abbreviation** for the currency.

Oracle Food and Beverage recommends using Currency ISO standard 4217 in the Currency module's Abbreviation field. For example:

- USD for the US Dollar
- CAD for the Canadian Dollar
- EUR for the Euro
- GBP for Pound Sterling
- MXN for the Mexican Peso
- JPY for the Japanese Yen

5. Enter the **Symbol** for the currency record (for example, \$).
6. Select the **Number of Digits** from the drop-down list.
This is the number of digits after the decimal point that the currency allows.
7. Select **1 - On = Print Symbol After Total; Off = Print Symbol Before Total** to print the currency's symbol after the amount due on guest checks and customer receipts. Deselect this option to print the currency's symbol before the amount due.
8. Select **5 - Use Thousands Separator Character** to use the thousands separator (comma as in the example 1,000) when numbers are printed.
9. Click **Save**.
10. Repeat Steps 2 through 9 for each currency payment allowed.

Configure Base Currency and Alternate Currency

1. Select the Enterprise or property, click **Setup**, and then click **Currency Parameters**.
2. Click the **Configuration** tab.
3. Select the **Base Currency** from the drop-down list. This is the primary currency for the location.
Oracle recommends setting the base currency once during initial configuration of a property, prior to opening guest checks. When you change the base currency after opening checks, the EMC prompts you for verification twice.
4. (Optional) Select the **Alternate Currency** from the drop-down list.
This is the other currency used at the location. For example, a restaurant located near Niagara Falls might set US Dollars as the base currency and accept Canadian Dollars as the alternate currency.
5. To use rounding, select **4 - Round Currency**. Selecting this option activates the subsequent options. Select the appropriate options to round the amount due:
 - **5 - ON = Round to Nearest 0; OFF = Round to Nearest 5**: Select this option to round currency amounts to the nearest 0 (for example, 163.336 rounds to 163.340). Deselect this option to round currency amounts to the nearest 5 (for example, 163.336 rounds to 163.335).
 - **6 - ON = Round to Second-Least Significant Digit; OFF = Round to Least Significant Digit**: Select this option to round currency amounts based on the second least significant digit (for example, in 100.45, the second least significant digit is 4). Deselect this option to round currency amounts based on the least significant digit (for example, in 100.45, the least significant digit is 5).
6. Click **Save**.
7. Select the Enterprise or property, click **Setup**, and then click **Currency Availability**.
8. If you selected the Enterprise level, for each record, select the non-base currency (foreign or alternate currency) for conversion in the **Currency** field.
9. Select the appropriate alternate currency options:
 - **2 - Issue Change In Other Currency**: Select this option to issue change from a currency conversion in the currency. Deselect this option to issue change only in the base currency.
 - **3 - Prompt For Issuing Change**: Select this option to ask the workstation operator with a **Yes/No** prompt whether change is required in the alternate currency. Deselect this option to issue change only in the base currency without prompting.

- Select options **4**, **5**, and **6** as appropriate for the alternate currency. These options are described in Step 4.

10. Click **Save**.

3

Initial Setup Using Symphony Home

Symphony Home is the configuration application used to set up employee information for Symphony Essentials.

Sign in to Symphony Home

To access Symphony Home, use the URL that was provided by Oracle.

To sign in to Symphony Home, enter your **Email** or **User Name**, **Enterprise Name**, and **Password**. Then click **Sign In**.

If you have forgotten the password, click **Can't Sign In** to initiate an email with a time expiration link that allows you to set a new password.

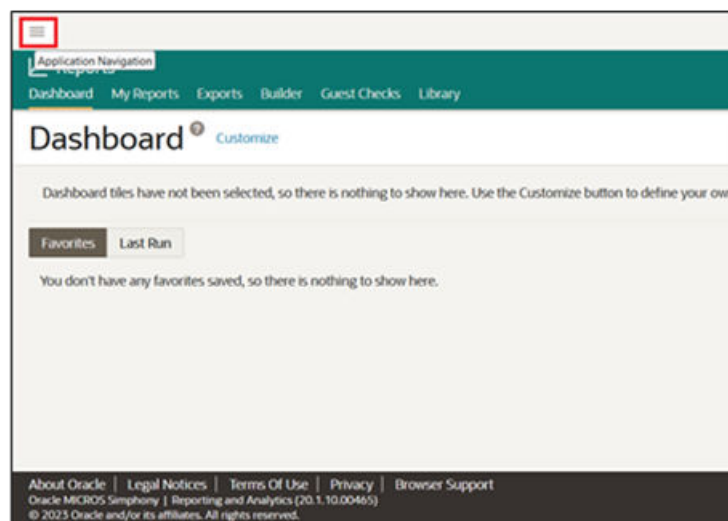
To sign out of Symphony Home, click **Logout**.

Enable Labor Management

You need to enable Labor Management for the location.

1. Sign in to Symphony Home with the credentials supplied by Oracle.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page to view the side panel menu.

Figure 3-1 Dashboard



3. Click **Configuration**, click **Portal Admin**, click **Organizational Structure**, and then click **Locations**.

4. Select the location.
5. Click **Edit**.
6. Select **Enable Enterprise Labor**.

Figure 3-2 Enable Enterprise Labor

Organizational Structure - Locations Portal Administration for

Save **Cancel**

Name:

Location Reference:

Source Name and Version:

Active: ☒

Labor Program:

Language:

Number Workstations:

Weather Country:

Zip Code:

Currency:

Cuisine:

Service Style:

Time Zone:

Site ID:

Address details entered via Symphony Enterprise Management Console.

Address 1:

Address 2:

Address 3:

City:

State/Region:

ZIP/Postal Code:

Country:

Latitude:

Longitude:

Phone Number:

Fax:

Cost Tier:

Financial Calendar:

Comp Store: ☐

Open Date:

Tax Type Override:

☒ Do not override organization tax setting

☐ Net Sales for this location does not include tax

☐ Net Sales for this location includes tax

☒ Do not override organization setting

☐ Disable iCare OLTP for this location

configuration Mode: ☐

Enable Enterprise Labor: ☒

Use Standalone Terminal: ☐

Enable Inventory: ☐

Location Tax Settings:

☒ Add-on Tax

☐ Inclusive Tax

7. Click **Save**.

Configure Organization Wide Unique Magnetic Cards

1. Sign in to Symphony Home with your credentials.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page to view the side panel menu.
3. Click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Organization Configuration**.
4. Select **Enforce unique POS Password**.
5. Select **Enforce unique MagCard Number**.

Figure 3-3 Check Boxes for Magnetic Cards

Save | Cancel | Help ?

Human Resource Organization Configuration
MASALA

PC Application Password Exclusion Prefix

Enforce unique POS Password ☒
Enforce unique MagCard Number ☒
Remove MagCard Number on Termination ☐
Allow PC Application Password To Be Alpha/Numeric ☒
Auto Generate POS Password ☐
Validate Payroll ID Before Uploading Employee ☐
Allow User Defined Payroll ID ☐
Use External Payroll ID As Obj Num ☐
Hire Date Maximum Days In Past
Hire Date Maximum Days In Future
Enforce Federal Contractor Veteran Rules ☐
SSN Validation
Enable Multi-User Locking in Basic Scheduler ☐
Enable Non-labor HR Template ☐

SSN Uniqueness Setting
☒ Enforce SSN Uniqueness by Organization
☐ Enforce SSN Uniqueness by Org Level

6. Click **Save**.

Assign Templates

Human Resources templates are used to tailor the information shown when setting up employees as not all fields are required. Default templates have been created which need to be assigned to your location.

1. Sign in to Symphony Home with your credentials.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page to view the side panel menu.
3. Click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Template Assignment**.
4. For all roles, assign the **Simphony Default Home Location** template to the following:
 - Home Store Template
 - Home Store Edit Template
5. For all roles, assign the **Simphony Default Away Location** template to the following:
 - Away Store Template
 - Away Store Edit Template

Figure 3-4 Assign HR Templates to Roles Page

Assign HR Templates to Roles				
Role	Home Store Template	Away Store Template	Home Store Edit Template	Away Store Edit Template
IT Manager	Simphony Default Home Location ▼	Simphony Default Away Location ▼	Simphony Default Home Location ▼	Simphony Default Away Location ▼
Manager	Simphony Default Home Location ▼	Simphony Default Away Location ▼	Simphony Default Home Location ▼	Simphony Default Away Location ▼
Owner	Simphony Default Home Location ▼	Simphony Default Away Location ▼	Simphony Default Home Location ▼	Simphony Default Away Location ▼

- Click **Save**.

Add Job Definition

Job definitions group employees into Salaried and Hourly Paid. One job definition, called Default, is already created in the Simphony Essentials organization for Salaried employees.

To add a job definition for Hourly Paid staff:

- Sign in to Simphony Home with your credentials.
- From the **Dashboard**, click the application navigation icon () at the top left of the page to view the side panel menu.
- Click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Job Definitions**.
- Click **Add**.
 - Set the following in the **General** tab:
 - Job Name:** Enter `Hourly`.
 - Labor Category:** Select the default labor category.
 - Revenue Center:** Select the `Operations` revenue center.
 - Job Category:** Select the default job category.
 - Employee Roles:** Select a role.
 - Clock In Privilege:** Select 1.
 - Set the following in the **Type** tab:
 - Job Type:** Select `Hourly`.
 - Effective From:** Select the date. (Tomorrow's date is the earliest possible.)
 - Default Pay Rate:** Enter the default hourly pay rate.
- Click **Save**.

Assign Pay Period Calendar to Location

- Sign in to Simphony Home with your credentials.
- From the **Dashboard**, click the application navigation icon () at the top left of the page to view the side panel menu.

3. Click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Location Configuration**.
4. Select **Corporate** from the tree (top node).
5. Enable **Pay Period Calendar**.
 - a. Select the default calendar from the drop-down list.
 - b. In the **Effective From** field, select the starting effective date. (Tomorrow's date is the earliest possible.)
6. Click **Save**.
7. Click **OK**.

4

New Locations

A location is a place of business—usually a restaurant or food outlet. A location can support up to five point-of-sale (POS) workstation client devices. Each location has separate sales figures, tax information, and other configuration specific to the location. When Symphony Essentials is installed, one location is created by default. If additional locations are required, you can create them manually.

Add New Location

To add a new location in Symphony Essentials:

1. Sign in to EMC.
2. Select the Enterprise, click **Setup**, and then click **Properties**.
3. Click the **Insert** icon () on the toolbar.
4. In the Add Property dialog, enter or select the appropriate values as described in the following table, and then click **OK**:

Table 4-1 Add Property Fields

Field	Description
Property Number	Enter a unique location number.
Property Name	Enter the location name.
Symphony Reporting Location	Leave the defaults as is.
Enable Enterprise Labor Management	Select this option to enable Labor Management for the location.
Source Property	Leave this option disabled to use enterprise information for the location.
Time Zone	Select the time zone for the location.

Figure 4-1 Add Property Dialog

Add Property

Property Number: 5 Property Name: Indian Spices
☒ Add Location To Symphony Reporting

Symphony Reporting Location

Location Name: Indian Spices
 Location Reference: Indi
 Location Time Zone:
 Parent Org Level:
 Reporting Hierarchy:

Symphony Labor Logon: Indi
 Symphony Labor Password:
☐ Enable Inventory ☒ Enable Enterprise Labor Management

Source Property ☐ Copy from source property

HANGOUT2
 Default System View
 BP
 CAB
 Caroline1
 Location 1
 New

Filter: X Coll # ☐
 Select All Clear All Exp

Time Zone
 35 - (UTC-05:00) Eastern Time (US & Canada)

Modules To Copy

Copy	Table
☒	Property Parameters
☐	Effectivity Groups
☐	Report Groups
☐	Major Groups
☐	Family Groups
☐	Menu Item Groups
☐	Menu Item Classes
☐	Print Classes
☐	Condiment Sets
☐	Menu Item Masters
☐	Menu Item Definitions
☐	Menu Item Prices
☐	Barcodes

[Select All Modules](#) [Clear All Modules](#)

☐ Create Clone
☐ Create RVCs
☒ Overwrite records if they exist
☒ Create records if they do not exist
☐ Copy IP Addresses
☐ Distribute inherited records
☐ If destination record is inherited, create override
☐ Distribute Data Extensions if they exist
☐ Create Masters for Definitions

OK Cancel

5. Click **OK**, close the **Properties** tab, and then re-open it.
6. Double-click the new location record.
7. Enter a **Phone Number** for the location.

Figure 4-2 Edit Property

Content Enterprise Data Extensions Enterprise **Properties Enterprise**

General

Current Record

Number [Audit This Record](#)

Name

Details

Property ID

Consumer Facing Name

Phone Number

Address 1

Address 2

Address 3

City

Country

State/Region

ZIP/Postal Code

Latitude Longitude

Comment

Oracle MICROS Reporting and Analytics
If the Report Location is changed or Reference Code is updated, the user should update the authorizations for the third party identities in the Symphony Home Portal.
In a live location, if a user maps (chooses) the current property to another Report Location or updates the "Reference Code" of the existi

Report Location [Edit](#)

Time Zone

Locale

☒ Enterprise Labor Management Enabled

8. Enter the **Address** of the location.
9. Select the **Country** from the drop-down list.
10. Select the state or region from the **State/Region** drop-down list.
11. Enter the **ZIP** or **Postal Code** for the location.
12. Leave the other defaults, and click **Save**.
13. Add workstations for the location. See [Add a Workstation](#) for more information.

Add Order Type, Order Channels, and Menu Levels to Revenue Center

A default order type and default menu levels must be configured in the Operations revenue center. There are two order types already created in Symphony Essentials: Dine In and Take Out.

An order channel can be assigned to a revenue center, but an overall default is used if the order channel is not configured for the revenue center. [Managing Order Types and Channels](#) contains more information.

Menu levels allow different prices for one menu item and determine which sales items are available in a transaction. Defaults have been set up for Symphony Essentials called Main and Sub. [Introduction to Menu Levels](#) contains more information.

To add order types, order channels, and menu levels:

1. Select the **Operations** revenue center, click **Setup**, and then click **RVC Parameters**.
2. Double-click the **Operations** revenue center.
3. On the **General** tab, select a **Default Order Type**, **Default Order Channel**, **Default Main Level**, and **Default Sub Level**.

Figure 4-3 Select Default Order Type, Order Channel, Main and Sub Levels

4. Click **Save**.

Add a Workstation

Simphony Essentials supports up to five POS workstation client devices per location/property. Simphony Essentials is supported on POS workstation client devices running Linux and Android operating systems. The Microsoft Windows operating system is not supported on a POS client device for Simphony Essentials.

1. Select the property, click **Setup**, and then click **Workstations**.
2. Click the **Insert** icon (📁+) on the toolbar.
3. In the Insert Record dialog, enter the **Record Name**, and then click **OK**.
4. Double-click the new workstation record.
5. On the **General** tab, enter information in the following fields:

Table 4-2 General Workstation Settings

Field	Description
Type	Select the type of workstation from the drop-down list: • 2 - Workstation Client: Workstations and Android devices Select this option for the Oracle MICROS Workstation 6 Series, the Oracle MICROS Workstation 310, and Android devices. • 3 - POSAPI Client: Symphony Transaction Services • 7 - Castle S1F2: Adyen Castles S1F2 Android payment devices
Language	Select the default language of the workstation. This is the language that appears on the workstation's Sign On screen. If an employee has a different default language set, the employee sees their default language after signing in to the workstation.
Log Verbosity	Select the logging verbosity for the workstation. Select 0 (zero) for minimal logging. Higher log verbosity provides more information in the log file, which may be helpful in troubleshooting issues.
Workstation Class	Select the service type: • 1 - Table Service Restaurant: Workstations and larger Android landscape tablet devices • 2 - Quick Service Restaurant: Workstations and larger Android landscape tablet devices • 3 - Bar: Workstations and larger Android landscape tablet devices • 4 - Mobile Table Service Restaurant: Adyen Castles S1F2 Android payment devices and smaller Android portrait devices (such as mobile phones) • 5 - Mobile Quick Service Restaurant: Adyen Castles S1F2 Android payment devices and smaller Android portrait devices (such as mobile phones) If a workstation is incorrectly configured (for example, Workstation Class 1 - Table Service Restaurant is selected for a mobile phone device), the page <i>Configuration Error Incorrect Workstation Class configured</i> appears before the sign in page on the POS client device. This error also appears on workstations and tablets if an incorrect Workstation Class is selected. Workstations and tablets use the non-mobile Workstation Classes. To resolve this error, correct the Workstation Class, and then click Update Database And Redraw Page on the POS Client device. Alternatively, close the application on the device and change the Workstation Class at a later time.
Enable Symphony Transaction Services	These options become active after you select 3 - POSAPI Client from the Type field. Select the appropriate option to enable Symphony Transaction Services.
Database Update Frequency	Enter the number of seconds for the workstation to receive changes. The value in this field overrides the Property Parameter's Database Update Frequency setting.

Table 4-2 (Cont.) General Workstation Settings

Field	Description
Check Inactivity Timeout	Enter the number of seconds before the workstation shows the message (Do you need more time?), prompting the workstation operator to cancel the transaction. When you enter 0 (zero), the message does not appear.
Check Inactivity Dialog Timeout	Enter the number of seconds that the workstation shows the Inactivity dialog before automatically cancelling the transaction. This field is inactive when you set the Check Inactivity Timeout value to 0 (zero).
Report Timeout	Enter the number of seconds the workstation waits for a response from the Reporting and Analytics server before showing a communication failure notice.
Offline Threshold	Enter a number between 0 and 99 to represent the signal strength percentage at which devices go offline. Devices will go offline when the signal strength is at or below this percentage value. For example, if the Offline Threshold is set to 90 (90%), and the device's current signal is 89%, the device will go offline. When the signal is detected above 90%, the device reconnects online.
Reconnect Threshold	Enter a number between 0 and 99 to represent the signal strength percentage at which devices recover online after being in an offline state. Devices will go online when the signal strength is at or above this percentage value. For example, if the Reconnect Threshold is set to 80, and the device's signal strength is 85%, the device will go online.
Service Host ID	This field become active after you select 3 - POSAPI Client from the Type field. Select the service host on which the POS API client runs.
Address / Host Name	Enter the IP address or host name of the service host where the workstation application runs.
Subnet Mask	Enter the subnet mask of the service host where the workstation application runs.
Default Gateway	Enter the default gateway of the service host where the workstation application runs.
Is Windows Service	Select this option to allow the service host to start as a Windows service. The service host service starts on Microsoft Windows startup with other Microsoft Windows services. The workstation starts only when the workstation operator signs on to the operating system. If you select this option, you need to change the ports of the services being run (for example, Check and Posting Service (CAPS) and Kitchen Display System (KDS) Controller) in addition to the workstation. Use the EMC modules to change the ports. If a non-POS workstation is required to run on the service host, it must run on a different port than the workstation port. You can also set the service host to run as a Microsoft Windows service from the Service Host module (rather than from the Workstations module). If you set this option in the Service Host module, you do not need to change the ports of the services being run as the device is not intended to run the workstation.

Table 4-2 (Cont.) General Workstation Settings

Field	Description
Resolution Cols	Enter the number of Resolution Columns for the workstation's display. The default value is 0 (zero).
Resolution Rows	Enter the number of Resolution Rows for the workstation's display. The default value is 0 (zero).
Location From Top	Enter the number of pixels from the top where the workstation window is placed on the display screen.
Location From Left	Enter the number of pixels from the left where the workstation window is placed on the display screen.

- Click the **Printers** tab.
- Click the **Select** link next to each printer type that you need to configure, select the printer, and then click **OK**.
- Click **Save**.

Configure Check and Posting (CAPS) Workstation

Every location must have a check and posting (CAPS) workstation; otherwise information will not post to the Enterprise.

- Sign in to EMC.
- Click the Home page tab, and then highlight the new location name in the hierarchy on the left.
- Click **Setup**, and then click **Property Parameters**.
- Click the **Workstations** tab.
- In the Service Hosts section, click the ellipsis (...) point button for the Check and Posting row, and then select a workstation (not a mobile device) that will be used to post information in real-time from the POS to the Enterprise.

Figure 4-4 CAPS Workstation Selection

The screenshot shows the 'Workstations' tab in the EMC interface. The 'Workstation Options' section includes fields for 'Database Update Frequency' (1800), 'Lines Per Workstation Report Page' (0), 'Default Transaction Help Screen' (0 - None), and 'On Demand Replay Frequency Check' (0). The 'Service Hosts' section contains a table with the following data:

Service ID	Type	Service Host	Port	URL
962	SIM File Access Service	...		
963	Check and Posting	621 - Workstation 2	8080	EGateway/EGateway.asmx
964	Check and Posting Backup	663 - Workstation 3	8080	EGateway/EGateway.asmx

The 'Service Host' column for rows 963 and 964 is highlighted with a red box. Below the table, there is a dropdown menu for 'SIM File Access Service for this Property' set to '0 - None' and a checkbox for 'Disabled'.

6. Click the ellipsis (...) point button for the Check and Posting Backup row, and then select a workstation (not a mobile device) that will be used as a backup in case the Check and Posting workstation is not working.

If you do not have another workstation to use as a backup at this location, leave this field blank.
7. Click the **Options** tab.
8. Select the following time and date format options if required:
 - **2 - Use DDMMYY date format**
 - **3 - Use 24 Hour Clock**
9. Leave the other defaults, and click **Save**.

Configure Begin Future Order

You can configure checks to be sent to the kitchen at a specific date and time for Table Service Restaurant operations. These are called Future Orders (sometimes called Autofire checks).

By default, the future orders feature is not active for Symphony Essentials. When you enable future orders, the following changes occur in POS Operations:

- The **Begin Future Order** button appears on the POS Functions page.
- The Pickup Check dialog shows the **Future Checks** button.
- The **Future Open Check Report** button appears on the POS Reports page.

To enable Begin Future Order:

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Autofire** tab, and then configure the fields as described in the following table:

Figure 4-5 Autofire Tab

The screenshot shows the 'Autofire' tab of the 'RVC Parameters' configuration window. The 'Autofire Options' section contains the following fields and controls:

- Autofire Employee:** A text box containing '2 - James, Peter' with a 'Select' button to its right.
- Autofire Workstation:** A text box containing '1 - WS1' with a 'Select' button to its right.
- Default Autofire Tender/Media:** A text box containing '300 - Service Total' with a 'Select' button to its right.
- Backup Autofire Delay (Mins):** A text box containing the value '1'.
- Maximum Days:** A text box containing the value '366'.
- Checkboxes:** A list of two items, each with a checked checkbox:
 - ☒ 2 - Print Guest Check at Time of Autofire
 - ☒ 3 - Enable Autofire in this Revenue Center

The interface includes standard navigation tabs at the top: General, Search, Options, Posting, Taxes, and Autofire (which is currently selected). The Autofire tab is highlighted in blue.

Table 4-3 Automatic Check Firing Fields

Fields and Options	Description
(Optional) Autofire Employee	To allow a specific employee to become the owner of all checks, including those placed using Transaction Services after the orders fire, select a workstation operator, and then click OK. - If you select an Autofire Employee, all sales totals post to the designated workstation operator and the checks appear under the Autofire Employee in the Open Check Report. - If you do not select an Autofire Employee, the check operator remains the owner of the check after the order fires.
Autofire Workstation	Select the workstation from which the orders fire and print. The application uses this value to determine the order output devices and workstation printers to use when an order fires.
Default Autofire Tender/Media	Select a service total that workstation operators can use with Future Orders. This service total must be the same as the Default Service Total Tender/Media set in the Tender Parameters module, Symphony Essentials tab. Create Payment Buttons contains more information.
Backup Autofire Delay (Mins)	Enter the amount of time (in minutes) that the Future Orders workstation must try to fire the orders. After the Backup Autofire Delay time elapses, if the Future Orders workstation is unsuccessful at firing the order, the workstation at which the check was originally created tries to fire the order. If both workstations fail, a memo chit prints and a workstation operator must manually fire the order.
(Optional) Maximum Days	Enter the maximum number of days for which workstation operators can schedule orders to fire automatically.
(Optional) 2 - Print Guest Check at Time of Autofire	Select this option if you want a guest check to print when an order automatically fires to order devices. If you select this option, guest checks print at the guest check printer assigned to the autofire workstation.
3 - Enable Autofire in this Revenue Center	Select this option to allow the revenue center to create orders that fire automatically.

- Click **Save**.
- Select the Enterprise level, click **Configuration**, and then click **Roles**.
- Double-click the role type for the employee who needs privileges to assign future checks.

6. Click the **Operations** tab, and then select the appropriate options.
7. Click the **Guest Checks** subtab, and then select the following privileges. The following table describes the privileges corresponding to automatic check firing.

Table 4-4 Employee Guest Check Privileges for Automatic Check Firing

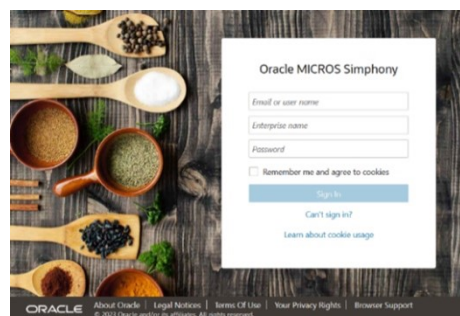
Privilege	Description
183 - Begin Autofire Check using [Begin Autofire Check] Key	Select this option to allow employees in this role to create checks with orders that automatically fire at a preset time using the Begin Autofire Check function key.
184 - Authorize/Perform Pickup of Autofire Check Belonging to Another Operator	Select this option to allow employees in this role to pick up and edit checks with orders that fire at a preset time from other employees.
185 - Authorize/Perform Edit of Autofire Date/Time	Select this option to allow employees in this role to modify the date and time that orders are set to automatically fire.

8. To allow employees in this role to generate the Autofire Open Check Report from the workstation, click the **Ad Hoc Reports** subtab, and then select **31030 - Run Autofire Open Check Report**.
9. Click **Save**.
10. Select the Enterprise, property, or revenue center, click **Descriptors**, and then click **Autofire Check Offline Header**.
11. From the **Text** column, enter the header lines to print on memo chits when future orders fail to fire automatically.
12. To add a logo to the header, select **Use Logo**, click the ellipsis point (...) button from the Logo column, select the logo from the list, and then click **OK**.
13. Click **Save**.

Assign New Location in Symphony Home

1. Sign in to Symphony Home with the system administration credentials that you have been provided with.

Figure 4-6 Symphony Home Sign In Page



2. From the **Dashboard**, click the application navigation icon (



) at the top left of the page to view the side panel menu.

3. Select **Configuration**, select **Warehouse Admin**, select **Reporting Hierarchies**, and then select **Relationships**.
4. Highlight the organization name, and then click **Select**.
5. Click **Assign Location**.
6. In the **Location Name** drop-down list, select the new location.
7. In the **Parent Level Name** drop-down list, select **Region**.
8. Click **Assign Location** to return to the main page.
9. Click **Back** twice.

Add Employees for New Location

1. Sign in to Symphony Home with the system administration credentials that you have been provided with.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page to view the side panel menu.
3. Follow the steps in [Personnel](#) for People Management or Labor Management.

Configure Location Gift Card Login and Password

Complete these steps if gift cards are used at the location.

1. Select the new location in the property level hierarchy, click **Setup**, and then click **Stored Value Driver**.
2. Right-click to the left of the object number of the iCare SVC record, select **Override Record**, and then select **Use Existing Record**.

If there is no record for iCare SVC, you need to set up gift cards. See [Gift Card Setup for Organizations Pre 19.5 Release](#) for more information.

3. Select iCare SVC, and then click **Yes**.
4. Double-click the iCare SVC record to open it.
5. Click the **Configuration** tab.
6. Scroll to the end of the page, and then enter the iCare **Login** and **Password** for the location.

These fields are specific to the property, not the Enterprise.

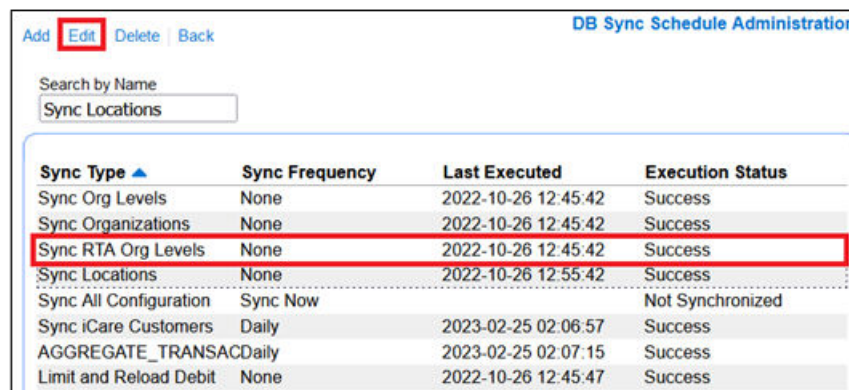
7. Click **Save**.
8. Select the Enterprise, click **Setup**, and then click **Interfaces**.
9. Double-click the **Stored Value** record to open it.
10. Click the **Properties** tab.
11. Select the new location.
12. Click **Save**.

Sync Gift Card Information for New Location

Complete these steps if gift cards are to be used at the location on the same day they have been set up.

1. Sign in to Symphony Home with the system administration credentials that you have been provided with.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page to view the side panel menu.
3. Select **Gift and Loyalty**, select **G&L Gift, Payment, and Loyalty Configuration**, and then select **Initial iCare GPL Setup and Configuration**.
4. Select **DB Sync Schedule**.
5. Select **Sync RTA Org Levels**, and then click **Edit**.

Figure 4-7 Sync RTA Org Levels



Sync Type ▲	Sync Frequency	Last Executed	Execution Status
Sync Org Levels	None	2022-10-26 12:45:42	Success
Sync Organizations	None	2022-10-26 12:45:42	Success
Sync RTA Org Levels	None	2022-10-26 12:45:42	Success
Sync Locations	None	2022-10-26 12:55:42	Success
Sync All Configuration	Sync Now		Not Synchronized
Sync iCare Customers	Daily	2023-02-25 02:06:57	Success
AGGREGATE_TRANSAC	Daily	2023-02-25 02:07:15	Success
Limit and Reload Debit	None	2022-10-26 12:45:47	Success

6. Select **Sync Now**.

Figure 4-8 Sync Now

The screenshot shows the 'DB Sync Schedule Administration' form. At the top, there are buttons for 'Save', 'Cancel', and 'Help'. The 'Save' button is highlighted with a red box. The form contains the following fields and values:

- Sync Type:** Sync RTA Org Levels (dropdown menu)
- Server Name:** wfivm09839 (text input)
- Sync Now:** ☒ (checkbox, highlighted with a red box)
- Sync Time:** 04:00AM (dropdown menu)
- Sync Time Zone:** (UTC-05:00) New York (dropdown menu)
- Sync Frequency:** Daily (dropdown menu)
- Days of Week:** Sun, Mon, Tue, Wed, Thu, Fri, Sat (all checked with checkboxes). A 'Clear Days' button is also present.
- Other Options:** (empty text input)
- Last Executed:** 2022-10-26 12:45:42
- Execution Time (ms):** 0
- Execution Status:** Success

7. Click **Save**.
8. Sign out and then sign in.
9. Click the application navigation icon () at the top left of the page.
10. Select **Gift and Loyalty**, select **G&L Gift, Payment, and Loyalty Configuration**, and then select **Initial iCare GPL Setup and Configuration**.
11. Select **DB Sync Schedule**.
12. Ensure that the Sync RTA Org Levels job ran by looking at the last executed date and time.
13. Select **Sync RTA Org Levels**, and then click **Edit**.
14. Deselect **Sync Now**, select 04:00AM in the **Sync Time** drop-down list, select the **Sync Time Zone**, and then select **Daily** from the **Sync Frequency** drop-down list.

5

Personnel

This chapter describes how to add employees in Symphony Home. This is done through Labor Management until your system is upgraded to People Management. Use People Management if there is no **Employee** option in the EMC under the Personnel section.

- Labor Management:
 - Add an employee
 - Assign user names and passwords to EMC users
- People Management:
 - Add a person
 - Specify employment details
- Grant Access to Point of Sale Operations
- Create Employee Roles and Grant Privileges

Labor Management

Oracle MICROS Labor Management lets you manage employees for Symphony Essentials. It can be used to add and edit employees until your system is upgraded to People Management.

Add Employee

Employees need to be set up in Symphony Home, but you can view information and change roles in the EMC.

To create Point of Sale and EMC employees:

1. Sign in to Symphony Home with your credentials.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page to view the side panel menu.
3. Click **Labor Management**, click **Human Resources**, and then click **Employee**.
4. Click **Add**.
5. Select a Home store (if not already selected).
6. On the **General** tab, enter basic employee information, such as Name, Date of Birth, and Language. Complete the form as follows:

Table 5-1 Employee Information

Field	Description
First Name	Enter the employee's first name.
Last Name	Enter the employee's last name.

Table 5-1 (Cont.) Employee Information

Field	Description
Date of Birth	Enter the employee's date of birth.
Language	Enter the employee's primary language.
Employee Role	Select the employee's role at the location. • 2000 - Waiter • 2500 - Bartender • 2500 - Supervisor • 4000 - Manager • 1 - Super Super If the employee is an EMC user, select Manager or Super Super. Managers can view EMC information. Super users can add and edit EMC information, such as menu items. You can set the employee role when creating the employee, but you cannot make changes through Labor Management.
Employee Level	Enter the employee's level for EMC users only. Employee Level is used to control the access of other employee records when a user is logged into the EMC. Level 0 is highest and 9 is the lowest. An employee assigned Level 4 cannot see records for employees with Levels 0-3.

Figure 5-1 General Tab

Home Store Location 1

General Status Location Configuration

First Name Last Name Check Name
Jack Phillips Jack

Personal Info

Date of Birth 12/10/1980

Language UK English

Employee Role Bartender

Employee Level Please Select

Exclude from EU Directives ☐

Age Certificate Information

Certificate Number

Age

Certificate Expiration Date

Work Permit Information

Work Permit Number

Work Permit Expiration Date

- On the **Status** tab, enter the employee's hiring information.
 - Hire Date:** Select today's date.
 - Hire Status:** Select **Hired**.

Figure 5-2 Status Tab

Save | Apply | Cancel | Help ?

Home Store Location 1

General | **Status** | Location Configuration

Hire Date: 31/05/2023 | Rehire Date: | Temporary: ☐ | Part Time: ☐ | Hire Status: ☒ Hired, ☐ Terminated, ☐ Leave Of Absence

Documents

Add Document | Edit Document | Delete Document

Document Name	Expiration Date	Comments
---------------	-----------------	----------

8. On the **Location Configuration** tab, enter pay rate, job rate, and point-of-sale (POS) configuration information. Complete the form as follows:

Table 5-2 Location Configuration

Field	Description
Is Salaried	Leave unchecked for an Hourly paid employee. Enable this field for a salaried employee and complete the following: In the Effective From field, select today's date. In the Monthly Rate field, enter the monthly salary amount. The Annual Rate field is automatically calculated.
Job Rates tab	In the Location Name field, select your restaurant. In the Job Code Name field, select the relevant job code. In the Effective From field, select tomorrow's date. In the Override Pay Rate field, enter an hourly pay rate for hourly paid employees. Click Update List.

Figure 5-3 Location Configuration Tab

The screenshot shows the 'Location Configuration' tab. It includes a 'Filter by Location' dropdown set to 'Location 1'. Below this, there are fields for 'Home Store' (checked), 'Is Salaried' (checked), 'Effective From' (31/05/2023), 'Average Hourly Rate' (13.85), 'Average Daily Rate' (92.31), 'Average Weekly Rate' (553.85), 'Average 4 Weeks Rate' (2215.38), 'Monthly Rate' (2400.00), and 'Annual Rate' (28800.00). Below these are tabs for 'Job Rates' and 'POS Configuration'. The 'POS Configuration' tab is active, showing an 'Add Job Rate' button, 'Allow Sub Minimum Wage: false', and 'OT Exempt: false'. A table with columns 'Location Name', 'Job Code Name', 'Pay Rate', 'Effective From', and 'Effective To' is visible. Below the table are fields for 'Location Name' (Location 1), 'Job Code Name' (Default (S)), 'Effective From' (31/05/2023), 'Effective To', 'Skill Level', 'Primary Job' (unchecked), and 'Exclude From Staff Requirements'.

9. For POS users (not EMC users), click the **POS Configuration** tab.

For EMC users, a user name and password must be configured in the EMC after the user is created in Symphony Home. See [Assign User Names and Passwords to EMC Users](#) for more information.

Figure 5-4 POS Configuration Tab

The screenshot shows the 'POS Configuration' tab. It includes a 'Show All' button and a table with columns: 'Location Name', 'POS Password', 'PC Application Password', 'Employee Class', 'Back Office Class', 'Employee Privilege', 'Cashier', and 'Cash'. Below the table are fields for 'Location Name' (Location 1), 'POS Password', 'Confirm POS Password', 'PC Application Password', 'Confirm PC Application Password', 'Employee Class' (Employee), 'Back Office Class' (Please Select), 'Employee Privilege' (Please Select), 'Cashier' (Please Select), 'User ID', 'Cash Drawer Id' (None), 'LDS ID', 'User Account Disabled' (unchecked), 'Generate Password' button, 'HTML', and 'Magnetic Card Number' (****).

- a. Select your restaurant from the list.
- b. In the **Employee Class** field, select `Employee`.
- c. In the **Magnetic Card Number** field, enter the code to access the Symphony Essentials POS. It can be a magnetic card number or a manual code.
- d. Click **Update List**.
10. Click **Save**.
11. Click **OK**.

Assign User Names and Passwords to EMC Users

To enable users set up in Symphony Home to access the EMC:

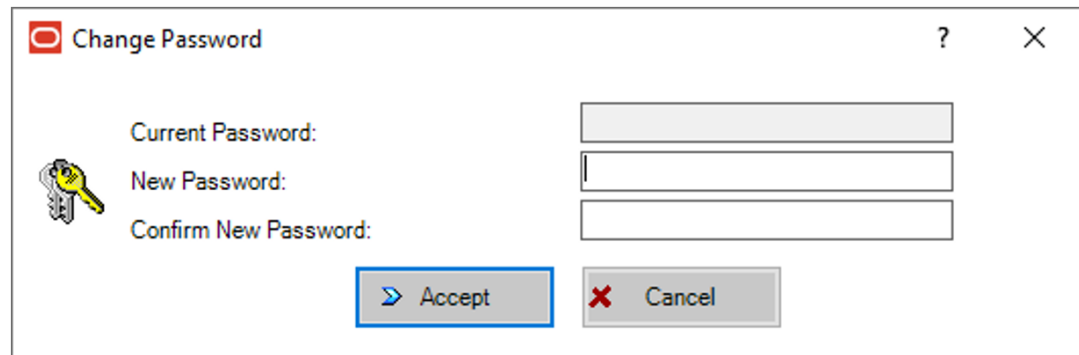
1. Sign in to EMC by entering your **User Name**, **Company**, and **Password**, and then click **Sign In**.
2. Select the Enterprise hierarchy level in the left section of the page.
3. Click the **Configuration** tab.
4. Click **Employee Maintenance** under the Personnel section.
5. Select your property, and then click **Search** to display existing users who are set up in Symphony Home for the property.
6. Double-click the user that you want to set up to use the EMC.
7. On the **General** tab in the EMC Login section, enter the **User Name** the user will use to sign in to the EMC, and then click **Save**.

Figure 5-5 Set EMC Login User Name

The screenshot displays the Oracle Labor Management Employee Maintenance interface. The top navigation bar includes 'Home Page', 'Order Type Parameters Enterprise', and 'Employee Maintenance Enterprise'. The main header shows 'Search/Table View' and 'Employee: 2 - Marr, Jonny'. Below this, the 'Employee Record' section contains fields for Employee # (2), Last Name (Marr), First Name (Jonny), Check Name (Jonny), and Email. To the right, a list shows 'Employee Record', 'Property Summary', and '100 - CL Restaurant'. The 'General' tab is selected, showing 'General Settings' with fields for Language (1 - English), Payroll ID (4), ID (4455), Alternate ID (0), PIN, Level (1), Group (0), Is Deleted, and Data Privacy Consent Granted. There are buttons for 'Fingerprint Enrollment' and 'Delete Enrollment'. On the right, the 'EMC Login' section is highlighted with a red box, containing a 'User Name' field with 'Jonny', 'Password' and 'Reset Security Questions' buttons, and a 'Locale' dropdown set to '0 - None'.

8. Click **Password**, and enter the password twice. Click **Accept** and then click **OK**.

Figure 5-6 Change Password Dialog

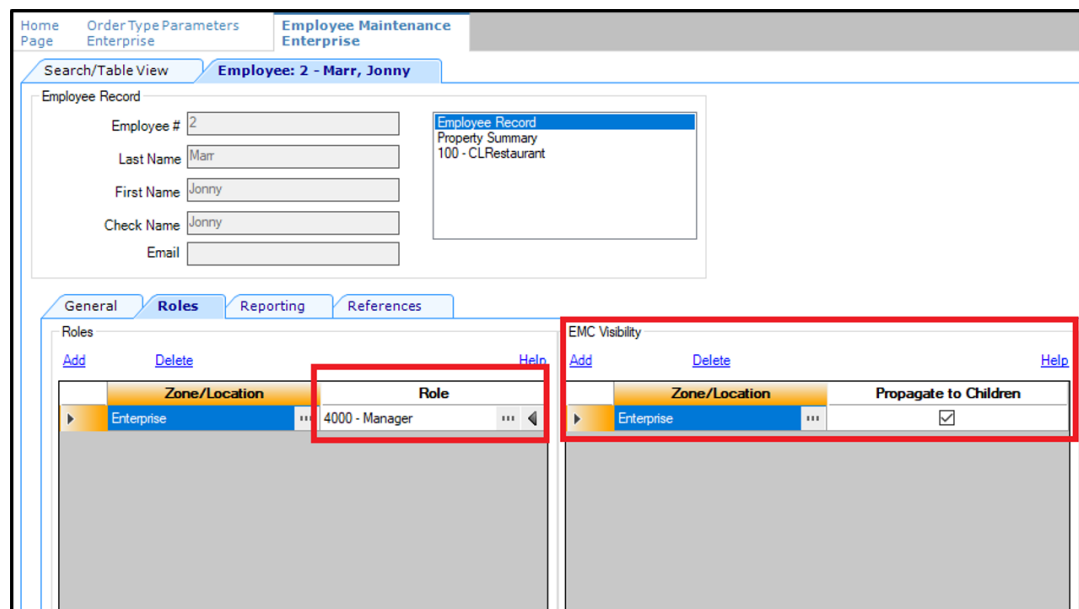


The dialog box is titled "Change Password" and contains three input fields for "Current Password:", "New Password:", and "Confirm New Password:". There is a key icon next to the "New Password:" label. At the bottom, there are two buttons: "Accept" (with a right arrow icon) and "Cancel" (with a red X icon).

See [Enterprise Management Console \(EMC\) Passwords](#) for more information on passwords.

9. Click the **Roles** tab, and select the **Manager** role if it is not already selected.

Figure 5-7 Set Employee Role



The screenshot shows the "Employee Maintenance" page for "Employee: 2 - Marr, Jonny". The "Roles" tab is selected. In the "Roles" section, a table shows the role "4000 - Manager" selected for the "Enterprise" zone. In the "EMC Visibility" section, a table shows the "Enterprise" zone selected with the "Propagate to Children" checkbox checked. Red boxes highlight the role selection and the EMC Visibility settings.

10. In the EMC Visibility section, add a record and select **Enterprise** to see all the properties.
11. Click **Save**.

People Management

Oracle MICROS People Management lets you manage employees and their roles after upgrading from Labor Management. After the upgrade to People Management, the **Employee** option is no longer available in the EMC under the Personnel section.

For more information about People Management, see the *Oracle MICROS Reporting and Analytics User Guide* at <https://docs.oracle.com/en/industries/food-beverage/back-office/20.1/rause/index.html>.

Add a Person

To create POS and EMC employees:

1. Sign in to Symphony Home with your credentials.
2. Click the application navigation icon

at the top left of the page to view the side panel menu.
3. Click **People**, and then click **Add Person**.
4. Specify basic information to uniquely identify the person in the system, such as name, user name, and email address.

Fields with an asterisk are required.

Figure 5-8 New Person Page

5. Select the **Enterprise Role** and **Enterprise Level** from the drop-down lists.
 - **Enterprise Role:** If the employee is an EMC user, select **System Administrator** and enter an email address. If the employee is a POS user, select **Only POS access**.
 - **Enterprise Level:** If the employee is an EMC user, select **Corporate**. If the employee is a POS user, select their location or revenue center.
6. Click **Save and Continue**. If **System Administrator** was selected in Step 5, the user will have access to Symphony Home and an email will be sent to the email address with instructions on how to set a password.
7. On the **Employment** tab, click **Add Employment Information**.
8. On the **General** tab, select the **Home Store** if not already selected.
9. Enter the employee's **Date of Birth** and **Language**. You can enter other information, but it is not required.

Figure 5-9 Employee Date of Birth and Language

The following tabs are used for Payroll and are not required for Symphony Essentials:

- **Contact Information:** Enter contact details, such as the employee address.
 - **I9 Information:** Enter employment eligibility verification information, such as the passport number.
 - **Exemptions:** Enter tax exemption information.
 - **Payroll Information:** Enter direct deposit information.
10. On the **Status** tab, enter the employee's hiring information.
- **Hire Date:** Select when the employee is starting work.
 - **Hire Status:** Select **Hired**.

Figure 5-10 Hiring Information

11. On the **Location Configuration** tab, set the following options:
- a. Disable **Is Salaried** for an hourly paid employee.
 - b. Enable **Is Salaried** for a salaried employee, and then complete the following:

- **Effective From:** Select today's date.
- **Monthly Rate:** Enter the monthly salary amount.
- The **Annual Rate** field is automatically calculated.

Figure 5-11 Location Configuration Information

The screenshot shows the 'Employment' section with the 'Location Configuration' tab selected. The 'Filter by Location' dropdown is set to 'Location 1'. The 'Home Store' is checked with a checkmark. The 'Is Salaried' checkbox is checked. The 'Effective From' date is 03/03/2024. The 'Average Hourly Rate' is 12.50, 'Average Daily Rate' is 83.33, and 'Average Weekly Rate' is 500.00. The 'Average 4 Weeks Rate' is 2000.00. The 'Monthly Rate' is 2166.67, and the 'Annual Rate' is 26000.00.

12. On the **Job Rates** tab, set the following information, and then click **Update List**.

- **Location Name:** Select your restaurant.
- **Job Code Name:** Select the relevant job code.
- **Effective From:** Select tomorrow's date.
- **Override Pay Rate:** Enter an hourly pay rate for hourly paid employees.

Figure 5-12 Job Rates Information

The screenshot shows the 'Job Rates' section with the 'POS Configuration' tab selected. The 'Add Job Rate' button is visible. The 'Allow Sub Minimum Wage' checkbox is unchecked. The 'OT Exempt' checkbox is unchecked. The table below shows the job rate configuration:

Location Name	Job Code Name	Pay Rate	Effective From	Effective To	Primary Job
Location 1	Hourly (H)	12.00	14/03/2024		

Below the table, the 'Update List' button is visible. The 'Location Name' dropdown is set to 'Location 1'. The 'Job Code Name' dropdown is set to 'Hourly (H)'. The 'Skill Level' dropdown is set to 'Please Select'. The 'Effective From' date is 14/03/2024. The 'Effective To' date is empty. The 'Primary Job' checkbox is unchecked. The 'Default Pay Rate Applies' checkbox is unchecked. The 'Override Pay Rate' is 12.00. The 'Minimum Regular Rate' is empty. The 'Maximum Regular Rate' is empty. The 'Default Pay Rate' is 15.00. The 'Overtime Level 1' through 'Overtime Level 4' are all set to 'Not Avail'.

13. On the **POS Configuration** tab, set the following information for POS users only (not EMC users), and then click **Update List**.

- Select your restaurant in the location list.
- **Employee Class:** Select **Employee**.
- **Magnetic Card Number:** Enter the code to access the Symphony Essentials POS. This can be a magnetic card number or a manual code.

Figure 5-13 POS Configuration Information

Job Rates POS Configuration

Show All

Location Name	POS Password	PC Application Password	Employee Class	Back Office Class	Employee Privilege	Cashier	Cash Drawer Id
Location 1			Employee				None

Update List Cancel

Location Name: Location 1

POS Password:

Confirm POS Password:

PC Application Password:

Confirm PC Application Password:

Employee Class: Employee

Back Office Class: Please Select

Cashier: Please Select

Cash Drawer Id: None

LDS ID:

User ID:

Generate Password:

User Account Disabled: ☐

In Training: ☐

User Alpha 6:

User Alpha 7:

User Alpha 8:

User Numeric 6:

User Numeric 7:

User Numeric 8:

14. Click **Save**, and then click **OK**.

Grant Access to Point of Sale Operations

1. In Reporting and Analytics, click the application navigation icon , and then click **People**.
2. Click the name of the person you want to edit.
3. Click the **Point of Sale** tab.

Figure 5-14 Point of Sale Settings

Employment Application Settings Point of Sale

Settings Roles Visibility

General

POS object number: 15

POS language: English

Employee level:

Employee group:

POS Client

PIN:

Enterprise Management Console

Locale: None

Set EMC Password:

4. Click the **Settings** page and then complete the following fields:
 - a. Select the **POS language**.
 - b. Select the **Employee level**.

The employee level is a layer of security that gives an employee access to some employee records but not others. This field allows a one-digit entry, where 0 gives the most access and 9 gives the least access. For example, an employee with level 2 access can see all employees with levels 3 through 9 but can't see employees with

levels 0 through 2 (including themselves). Level 0 should be reserved for System Administrators while a level like 8 or 9 to be used for cashiers or servers.

c. Enter the **Employee group**.

The employee group is another level of security that controls employee access to other employee records. This field is more restrictive than the **Employee level** field, which is more commonly used. The **Employee group** field allows a three-digit entry. If you set the employee group number to 0, the employee can view all other employee records. Any other number restricts the employee to view only employees with that same number as their employee group. For example, an employee with a group number of 17 can only view other employees from group number 17.

d. Enter the **POS Client PIN**.

e. For EMC users, click **Set EMC Password**, enter and confirm the new password, and then click **Submit**.

Figure 5-15 Set EMC Password

Set EMC Password for [redacted]

The person will be asked to reset the password the first time they login.

New password Required

Confirm new password Required

Cancel Submit

5. Click the **Roles** page and then complete the following fields:

a. Click **Assign Roles**.

b. Select the EMC role or roles for the user, and then click **Assign**.

Click **Expand Entities** to view all locations and revenue centers or click **Zone** to view roles by regional zone.

See [Create Employee Roles and Grant Privileges](#) for more information about EMC roles.

Figure 5-16 Manage Roles

The screenshot shows the 'Manage Roles' interface. At the top, there are tabs for 'Enterprise' and 'Zone'. Below the tabs is a button labeled 'Expand Entities'. The main part of the interface is a table with the following structure:

Entities	Roles				
	Super Super	Manager	Supervisor	Bar Tender	Waiter
Enterprise (Micros)	☐	☐	☐	☐	☐
All Locations	☐	☐	☐	☐	☐
All Revenue Centers	☐	☐	☐	☐	☒

- Click the **Visibility** page, and then click **Assign Visibility**.

If the person you are setting up has EMC access, you can configure what they can see at specific enterprise levels.

- Select the locations and revenue centers that the user can access, and then click **Assign**.

You can view options by **Enterprise**, **Location**, or **Zones**.

Figure 5-17 Manage Visibility

The screenshot shows the 'Manage Visibility' interface. At the top, there are tabs for 'Enterprise', 'Locations', and 'Zones'. The 'Locations' tab is selected. Below the tabs, there is a search bar labeled 'Search by location name'. Below the search bar, there is a summary bar showing '1 of 1 selected' and a 'Sort by' dropdown. Below the summary bar, there is a list of locations with checkboxes. The first location, 'Location 1', is selected. To the right of the locations list, there is a section for 'Revenue Centers' with a list of centers. The first center, 'Operations', is selected.

- Click **Update**.

Create Employee Roles and Grant Privileges

A role is a group of privilege options defining what an employee can do. Employee roles determine the EMC modules a user can access, and they also determine what types of operations a POS user can perform (for example, privilege to perform voids or open the cash drawer).

The following employee roles are already created in the Symphony Essentials organization:

- Waiter
- Bartender

- Supervisor
- Manager
- Super Super (This is the Administrator role for the EMC and cannot be changed.)

Each role has already been assigned privileges, such as being able to perform returns or voids at the POS level, although you can change these.

Supervisors and Managers have been given privileges to perform most POS actions, such as running reports and authorizing the use of functions such as voids. Waiters and Bartenders have fewer POS privileges.

Manager and Super Super roles are used to access the EMC, and only Super Supers can edit the EMC records.

You can create additional employee roles and change existing roles and privileges as needed.

To add a role:

1. Add a role:
 - a. Select the Enterprise level, click **Configuration**, and then click **Roles**.
 - b. Click the **Insert** icon () on the toolbar.
 - c. Enter the **Record Name** for the type of role (for example, Head Waiter), and then click **OK**.
2. Assign privileges to POS roles:
 - a. Double-click the POS role (for example, Waiter, Bartender, Supervisor, or Manager), and then click the **Operations** tab.
 - b. Click the sub tabs to see which privileges have been enabled for the role. Check or uncheck the privileges as required.

For example,

- To allow employees in the role to copy and edit a menu item, select **30026 - Copy Edit Menu Item**.
- To allow employees in the role to access register fingerprint, select **30071 - Register Fingerprint**.
- To allow employees in the role to edit the guest check header and trailer, select **308 - Authorize/Perform Edit Receipt Header Trailer**.

Figure 5-18 Assign Privileges to POS Roles

The screenshot displays the Oracle POS system interface for assigning privileges to a role. The 'Operations' tab is selected, showing a 'Current Record' for a role named 'Waiter' with ID '2000'. Below this, there are several sections for selecting privileges:

- Check Editing Options:**
 - ☒ 81 - Authorize/Perform Edit of a Guest Check ID In an Open Check
 - ☒ 185 - Authorize/Perform Edit of Autofire Date/Time
 - ☐ 200 - Edit Check by Prompt
- Add / Transfer / Pickup Options:**
 - ☒ 3 - Create New Checks using [Begin Check] Key
 - ☐ 45 - Authorize Transfer of Checks in the Same Revenue Center
 - ☒ 46 - Authorize Transfer of Checks Between Revenue Centers
 - ☐ 47 - Authorize Adding of Checks in the Same Revenue Center
 - ☒ 48 - Authorize Adding of Checks Between Revenue Centers
 - ☐ 67 - Authorize/Perform Adjust Closed Check
 - ☐ 68 - Authorize/Perform Reopen Closed Check
 - ☐ 129 - Authorize/Perform Creation and Pickup of Unassigned Checks
 - ☐ 133 - Auth/Perform Adjust Closed Check from Previous Business Days
 - ☒ 183 - Begin Autofire Check using [Begin Autofire Check] Key
 - ☐ 199 - Begin Check by Prompt
- Guest Check Control Options:**
 - ☐ 4 - Authorize/Perform Pickup of a Check that is "Open on System"
 - ☐ 8 - Authorize/Use the [Split Check] Key
 - ☐ 18 - Authorize/Perform Pickup of a Check Belonging to Another Operator
 - ☐ 30 - Authorize/Perform Open of Checks for Multiple Groups at a Table
 - ☐ 63 - Authorize/Use the [Block Transfer] and [Auto Block Transfer] Keys
 - ☐ 93 - Authorize/Perform Pickup of a Check that is "Owned by Offline UWS"
 - ☐ 102 - Enable Limited Split Check
 - ☐ 181 - Authorize/Perform Find Check
 - ☐ 184 - Authorize/Perform Pickup of Autofire Check Belonging to Another Operator

3. Assign privileges to EMC roles:
 - a. Double-click the EMC role (for example, Manager), and then click the **EMC Modules** tab.
 - b. Check the modules for which employees with this role can View, Edit, Add, or Delete information.

Figure 5-19 Assign Privileges to EMC Roles

General **EMC Modules** Actions Operations Visibility View Fields

Current Record
 Number [Audit This Record](#)
 Name

Right-click row or column header for bulk operations.

	File	View	Edit	Add	Delete
▶	Global Access				
	All Modules	☒	☐	☐	☐
	All Property/Zone Modules	☐	☐	☐	☐
	Menu Items				
	Major Groups	☐	☐	☐	☐
	Family Groups	☐	☐	☐	☐
	Menu Item Groups	☐	☐	☐	☐
	Menu Item Classes	☐	☐	☐	☐
	Menu Item Masters	☐	☐	☐	☐
	Menu Item Definitions	☐	☐	☐	☐
	Menu Item Prices	☐	☐	☐	☐
	Menu Item Master Restrictions	☐	☐		
	Barcodes	☐	☐	☐	☐
	Condiment Sets	☐	☐	☐	☐
	Print Classes	☐	☐	☐	☐
	Allergen Classes	☐	☐	☐	☐
	Nutrient Sets	☐	☐	☐	☐
	Personnel				
	Employees (Enterprise)	☐	☐	☐	☐
	Property Employee Records	☐	☐	☐	☐
	Operators	☐	☐	☐	☐

- Click **Save**.

Time and Attendance

Hourly paid employees can clock in and out of Symphony Essentials POS to log their shift start and end times. Chits can be configured to print showing the hours worked in the shift. A clock-in cycle for a workstation operator includes one clock in and the subsequent clock out. A cycle is the equivalent of a work shift and includes the day, date, and time of the entry and the Job Code under which the employee clocks in. Clock-in cycles are sequentially numbered from the start of the current payroll period to the current date on employee time cards and labor detail reports.

Employee Clock-In and Clock-Out Cycles

You can configure a clock-in button
(



) to be shown or hidden on the POS client Sign In page, which enables employees to log the time that their shift starts and ends. The button is visible by default.

1. Select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.
2. Click the **Miscellaneous** tab.
3. To hide the Clock In/Clock Out icon on the workstation, select **90 - Hide Clock In / Out Button on Sign In Screen**. Deselect this option to show the Clock In/Clock Out icon on the workstation.
4. Click **Save**.

The following page appears on the POS after clicking the clock-in button.

Figure 5-20 Click In and Clock Out Page

A screenshot of the 'Clock In/Out' screen. The title 'Clock In/Out' is at the top. Below it, the instruction 'Enter your employee ID number to clock in or out' is displayed. A close button (X) is in the top right corner. The main area contains a numeric keypad with buttons for digits 1 through 9, 0, and a backspace button (X with a left arrow). At the bottom, there are two large buttons: 'Cancel' on the left and 'OK' on the right.

Configure Employee Time Card Printing

You can print time card chits for an employee with the total hours worked per shift. The total labor hours worked are labeled Labor Shift Hours on the printout.

The following figure shows an example of the printed time card chit with the Labor Shift Hours indicated in red.

Figure 5-21 Time Card Chit

Clock In Chit	
26 Price, Williams	
Wed 07/06/2023	11:00

Clock In:	2 Hourly
Operations	

Clock Out Chit	

26 Price, Williams	
Wed 07/06/2023	16:00

Clock Out:	2 Hourly
Current Hours	5.00
Labor Shift Hours	5.00

To configure printing for time card chits:

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. Click the **Timekeeping** tab.
3. Select **Print Accumulated Labor Shift Total in Clock In/Out Chits**.
4. Click **Save**.
5. Select the property, click **Setup**, and then click **Workstations**.
6. Click the **Printers** tab.
7. Select the **Printer** and the **Destination Printer Groups** for the following print jobs:
 - **Empl Time Chit Printer**
 - **Empl Time Card Printer**
8. Click **Save**.

When enabled, the system prints single labor shift total hours worked by employees on final clock-out chits for the shift.

6

Payments

Patrons pay guest checks with various types of payments or tenders, ranging from paper to plastic to digital.

Create Default Tender/Media Records

Several default Tender/Media records are already created in the Symphony Essentials organization.

You need to change or set up default payment (for example, cash and credit card) and service total tenders for use on the workstation.

The payment type Tender/Media records that you set up here can be linked to buttons on the Payments page of the workstation. See [Create Payment Buttons](#) for instructions to create the payment tender buttons.

1. Select the Enterprise, click **Configuration**, and then click **Tender/Media**.

2. To add a payment tender, click the **Insert** icon



) on the toolbar, enter the record name, and then click **OK**.

3. Double-click the tender record to open it.
4. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.
5. Select the **Print Class** to associate with the tender.
[Introduction to Print Class Output](#) contains more information.
6. Click the **Options** tab, and then click the **Printing Options** subtab.
7. Select **8 - Print Customer Receipt** and **21 - Print Summary Totals**.
8. To allow reprinting of order chits, select **73 - Reprint Orders**.

When this option is selected, order chits are generated with the word REPRINT in the header.

9. Click the **Ops Behavior** subtab, and then select the appropriate options as described in the following table:

Table 6-1 Amount Options For Payment Tenders

Option	Description
2 - Amount Required	Select this option to require an amount when using the cash tender. If the workstation operator presses the cash tender button at the workstation without entering an amount, the workstation prompts to enter the tender amount. If you deselect option 2 and select option 3, the tender is used for 0.00, unless the workstation operator enters an amount before pressing the tender key.
3 - Assume Paid in Full	Select this option to record the exact amount due as the entry. You must also deselect option 2. If you deselect both options 2 and 3, the system records 0.00 as the entry.
37 - Partial Tender Not Allowed	Select this option to prevent the cash tender from being used to partially tender a transaction.
53 - Round Tender to Next Highest Whole Number	Select this option to round the cash tender up to the next highest whole number dollar amount.
56 - Round Change Due	Select this option to accept payments for the exact amount and to round change due. Selecting option 56 overrides option 87.
87 - Round Payments and Change	Select this option to round change due resulting from an overtender.
88 - Round Payments and Change To the Nearest 0	Select this option to round the payment total or change due to the nearest 0 or 10. You must also select option 87. If you select option 88, the least significant decimal digit is rounded to 0 or 10. Deselect option 88 to round the least significant decimal digit to 0 or 5. Tender/Media Amount Options 53 and 88 are mutually exclusive; you cannot select both.
96 - Round To Second Least Significant Digit	Select this option to round the payment total or change due to the nearest .50 or 1.00. You must also select option 87. If you select option 88, the payment total and change due are rounded to the nearest 0. With option 96 enabled, it is rounded to the nearest .00. If you deselect option 88, the payment total and change due are rounded to the nearest 0 or 5. With option 96 enabled, it is rounded to the nearest .00 or .50.
97 - Round Change Due Down	Select this option to round change due down when the unrounded change is exactly half of the rounding number. For example if the payment given is .25 greater than the amount due, and rounding is to the nearest .50, the change due will be 0 instead of .50. Select option 97 to round the change due down. Deselect option 97 to round the change due up.

10. Click **Save**.

Create Payment Buttons

You need to configure the payment buttons that will appear on the workstation. You can also configure the **Send** and **Print** buttons, and the bar **Begin Check** button.

1. Select the Enterprise, click **Setup**, and then click **Tender Parameters**.

Payments use tender records set up in the Tender/Media module (for example, cash) and you can modify them in the Tender Parameters module using arguments to enable different payment functionality (for example, Exact Cash or Round Up).

2. Click the **Symphony Essentials** tab.
3. Select the **Default Service Total Tender/Media** that is used with the **Send** function on the workstation.
4. Select the **Default Print Tender/Media** that is used with the **Print** function on the workstation.
5. Select the **Default Credit Card Auth Payment** that is used for the **Begin Check** function in the bar workflow.

This can only be done after adding a Credit Card Auth Payment record in the Payment Configuration section (step 6).

To authorize a credit card and prompt for a check name in bar transactions, select **8 - Credit Auth Prompt & Guest ID**.

Figure 6-1 Example of Default Tender/Media Functions

EMC Tender Parameters Essentials

Home | Tender Parameters | Payments | Tender/Media
Page | Enterprise | Enterprise

General | Configuration | **Symphony Essentials**

Tender Settings

- Default Service Total Tender/Media: **100 - Service Total**
- Default Print Tender/Media: **100 - Report Order**
- Default Credit Card Auth Payment: **8 - Credit Auth Prompt & Guest ID**

Payment Configuration

#	Tender/Media	Arguments	Name	Quick Tender	Sort Priority
1	100 - Cash	Cash Cash *	Exact Cash	☒	1
2	100 - Cash	Cash Cash \$ 20	20	☒	2
3	100 - Cash	Cash Cash \$ 10	10	☒	3
4	100 - Cash	Cash Cash \$ 5	5	☒	4
5	100 - Cash	Cash Cash #	Round Up	☒	5
6	0 - None	Credit Card Loadable CreditAuthOnly	Credit Pay in Full	☐	6
7	0 - None	Credit Card Loadable CreditAuthOnly ?	Credit Over Under Pay	☐	7
8	0 - None	Credit Card Loadable CreditAuthOnly GuestCheckID ?	Credit Auth Prompt & Guest ID	☐	8

The Default Service Total Tender/Media is used to service total a check when the Send button is selected in the TSR and Bar workflows.

The Default Print Tender/Media is used when the Print button is selected for TSR workflows.

The Default Credit Card Auth Payment is called when the Begin Check button is selected from the Bar Home Page. It enables a credit card to be authorized before selling items.

6. To add a payment that will appear in the Payment page on the workstation:
 - a. Click **Add**.
 - b. In the **Tender/Media** column, click the ellipsis button, select the type of tender (for example, Cash), and then click **OK**.

- c. In the **Arguments** column, click the ellipsis button, select the **Payment Type** (for example, Cash:Cash). Select the appropriate function key from the **Functions** drop-down list, and then click **OK**.

To authorize a credit card and prompt for a check name in bar transactions, select **CreditDebit Loadable CreditAuthOnly GuestCheckId ?** in the **Arguments Payment Type** field.

- d. In the **Name** column, enter the name of the payment button that appears on the workstation.
- e. Select **Quick Tender** if this payment is a button on the QSR and Bar Transaction pages, in addition to the Payments page.

You can select a maximum of five payments as quick tenders. The following quick tender cash payments are already configured:

- **Exact Cash**
- Payment with **20** note
- Payment with **10** note
- Payment with **5** note
- **Round Up**

Figure 6-2 Example of Payment Button Name and Quick Tender Configuration

EMC Tender Parameters Essentials

Home Page Tender Parameters Enterprise

General Configuration **Simphony Essentials**

Tender Settings

Default Service Total Tender/Media 300 - Service Total

Default Print Tender/Media 400 - Repeat Order

Default Credit Card Auth Payment 0 - Credit Auth Prompt & Guest ID

Payment Configuration

#	Tender/Media	Arguments	Name	Quick Tender	Sort Priority
1	100 - Cash	Cash:Cash ?	Exact Cash	☒	1
2	100 - Cash	Cash:Cash \$ 20	20	☒	2
3	100 - Cash	Cash:Cash \$ 10	10	☒	3
4	100 - Cash	Cash:Cash \$ 5	5	☒	4
5	100 - Cash	Cash:Cash #	Round Up	☒	5
6	0 - None	CreditDebit Loadable CreditAuthOnlyPay	Credit Pay in Full	☐	6
7	0 - None	CreditDebit Loadable CreditAuthOnlyPay ?	Credit Over/Under Pay	☐	7
8	0 - None	CreditDebit Loadable CreditAuthOnly GuestCheckId ?	Credit Auth Prompt & Guest ID	☐	8

If **Quick Tender** is selected the payment buttons appear on the Transaction page

All Payments appear on the Payments Page for TSR, QSR and Bar

Payments

Exact Cash	20	10	5	Round Up
Credit Pay in Full	Credit Over / Under Pay	Credit Auth Prompt & Guest ID	Credit Card Finalize	
Equal Payment				

Credit Card Finalize and Equal Payment buttons are automatically configured to appear

- f. Enter the **Sort Priority**. Payment 1 appears first in the Transactions page for QSR and Bar. Payment 1 appears first in the Other Payments page for all service types.
- g. Repeat Steps 6a through 6f to add records for credit cards and other payments required for the restaurant.

The following figure shows the Tender Parameters module Simphony Essentials tab with three sample credit card payments included in the Arguments column. Note that the Tender/Media records show **0 - None**; this means that these tender records default to the value set in the **Configuration** tab, **Payment Card Tender** field.

Figure 6-3 Example Credit Card Tender/Media and Arguments

The screenshot shows the 'Tender Parameters Enterprise' window with the 'Simphony Essentials' tab selected. Under 'Tender Settings', there are three dropdown menus: 'Default Service Total Tender/Media' set to '300 - Service Total', 'Default Print Tender/Media' set to '400 - Reprint Order', and 'Default Credit Card Auth Payment' set to '8 - Credit Auth Prompt & Guest ID'. Below this is the 'Payment Configuration' section with 'Add' and 'Delete' buttons. A table lists 8 payment configurations with columns for #, Tender/Media, Arguments, Name, Quick Tender, and Sort Priority.

#	Tender/Media	Arguments	Name	Quick Tender	Sort Priority
1	150 - Cash	Cash/Cash *	Exact Cash	☒	1
2	150 - Cash	Cash/Cash \$ 20	20	☒	2
3	150 - Cash	Cash/Cash \$ 10	10	☒	3
4	150 - Cash	Cash/Cash \$ 5	5	☒	4
5	150 - Cash	Cash/Cash #	Round Up	☒	5
6	0 - None	CreditDebit Loadable CreditAuthAndPay	Credit Pay in Full	☐	6
7	0 - None	CreditDebit Loadable CreditAuthAndPay ?	Credit Over/Under Pay	☐	7
8	0 - None	CreditDebit Loadable CreditAuthOnly GuestCheckId ?	Credit Auth Prompt & Guest ID	☐	8

Record 6 shows a credit card button configured to pay off a check in full without numerical entry.

To display a number pad in the credit card workflow to be used for under and over payments, enter ? in the **Argument** field. Records 7 and 8 in the previous figure and the following figure show examples of this configuration. Record 7 is a credit card payment with an argument to show the number pad. Record 8 is a payment with multiple arguments: one to show the number pad, and one to add the guest name to the check. It allows a credit card to be authorized before adding items to the check (CreditAuthOnly has been entered in the **Argument**), so it can be used as the **Default Credit Card Auth Payment** (in the Tender Settings section).

Figure 6-4 Credit Card Allow Under/Over Payments Number Pad

The screenshot shows a 'Payment Configuration' dialog box. It has four fields: 'Payment Type' set to 'CreditDebit Loadable', 'Functions' set to 'CreditAuthAndPay', 'Argument' set to '?', and 'Command Text' set to 'CreditDebit Loadable CreditAuthAndPay'. There are 'OK' and 'Cancel' buttons at the bottom.

- Click **Save**.

Consumer Payments

Simphony Essentials lets you accept payments from guests. Guests can pay their checks with a credit card through the handheld terminal that the server uses to take orders.

Configure Guest Pay

Guest Pay is a means for guests to pay their checks with a credit card through the handheld terminal that the server uses to take orders. To set up Guest Pay, you need to configure

options in the Tender Parameters module, enable a credit card payment for Guest Pay, and configure a service charge tender for posting tips.

Next, you can configure suggested tip percentages to be used in the Guest Pay POS to prompt guests to leave a tip. You can set three suggested tip percentages in EMC for each order type (Dine In and Take Out). A tip percentage is applied to the check by default. Tip% 1 is applied if more than 0; otherwise Tip% 2 is applied. If both Tip% 1 and Tip% 2 are 0, then Tip% 3 is applied. If all Tip% values are 0 (zero), no tip is applied to the check. The default tip is highlighted in blue in the POS. Tip% values appear in ascending order starting with the lowest entered percentage value. Tips that are 0% are not shown.

The following figure shows an example of tips configured in the EMC, and the corresponding appearance in the POS on an Android mobile payment device.

Figure 6-5 Suggested Tip Percentages

The figure consists of two parts. On the left is a screenshot of the 'Order Type Parameters' table in the EMC system. On the right is a screenshot of a POS interface showing a check total and suggested tip percentages.

Order Type Parameters Table:

#	Order Type Name	Zone/Location	Inheritance Type	Options	Tax Mask	Active	Order Device Mask	KDS Highlight Scheme	Service Level Time	Tip% 1	Tip% 2	Tip% 3
1	Dine In	Enterprise	Defined Here	8000	800000000000	☒	0 - None	0	0	20	18	25
2	Take Out	Enterprise	Defined Here	0000	000000000000	☒	0 - None	0	10	0	0	0
3		Enterprise	Defined Here	0000	000000000000	☒	0 - None	0	18	20	25	25
4		Enterprise	Defined Here	0000	000000000000	☒	0 - None	0	18	20	25	25
5		Enterprise	Defined Here	0000	000000000000	☐	0 - None	0	18	20	25	25

POS Interface Screenshot:

Check 50
Would you like to leave a tip?
\$24.58
20.48 + 4.10 tip

18% 3.69
20% 4.90
25% 6.12

Enter Custom Tip
No Tip
Pay Now \$24.58

Two active order types are already configured in Symphony Essentials: Dine In and Take Out. You can change these descriptions and configure a default order type in the RVC Parameters module. Default suggested tip percentages of 18, 20, and 25 are already set up for each order type parameter. To modify these order types, see [Configure Order Type](#) for more information.

1. Set the Tender Parameters options and enable a credit card payment:
 - a. Select the Enterprise, click **Setup**, and then click **Tender Parameters**.
 - b. Click the **Guest Pay** tab.
 - c. To ensure that guests cannot exit Guest Pay and start using the POS system, deselect (uncheck) **1 - Exit Guest Pay Without ID Prompt**.
When exiting from Guest Pay, a dialog prompts for an employee ID, ensuring that only restaurant servers can use the POS system.
 - d. To hide the email receipt option, select (check) **2 - Disable Email Receipt**.
If you select option **2**, guests will not be able to email their receipt.
Email receipts must be set up in the Property Parameters module. See [Configure Email Receipts](#) for more information.
 - e. In the Payments section, click the ellipsis point (...) button in the **Type** column, select **Credit Card**, and then click **OK**.
 - f. Click the ellipsis point (...) button in the **Command** column, select the following values, and then click **OK**.
 - **Payment Type:** Select **CreditDebit:Loadable**.

- **Functions:** Select **CreditAuthAndPay**.

The following figure shows an example of the Guest Pay credit card configuration in the EMC Tender Parameters module.

Figure 6-6 Guest Pay Configuration

Enabled	Type	Command
☒	Credit Card	CreditDebit:Loadable CreditAuthAndPay
☐	None	
☐	None	
☐	None	
☐	None	

- g. Click **Save**.
2. Configure a service charge for tips to appear on the Employee Tip Report:
 - a. Select the Enterprise, click **Configuration**, and then click **Tender/Media**.
 - b. Double-click the SPI Tender/Media record that is being used for Guest Pay.
 - c. Click the **Options** tab, and then click the **Charge Tip Options** subtab.
 - d. Select a **Service Charge** from the drop-down list for Guest Pay tips.
 - e. Select **9 - Charged Tip Required**.
 - f. Click **Save**.

If there is no service charge set up, the following error appears when Guest Pay is selected in POS Operations: Please add a charge tip to your credit card tenders to use Guest Pay.

3. To suppress a prompt for tips each time the Tender/Media record is used outside Guest Pay:
 - a. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
 - b. Click the **Options** tab.
 - c. Select **46 - Do Not Prompt For Tips (Suppress "Charge Tip Amount is 0.00")**.
 - d. Click **Save**.
4. To configure suggested tip percentages:
 - a. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Order Type Parameters**.
 - b. For each **Order Type Name**, enter a numerical percent value in the following fields:
 - **Tip% 1**
 - **Tip% 2**
 - **Tip% 3**
 - c. Ensure that each order type has **Active** enabled.
 - d. Click **Save**.

5. To hide the Custom Tip and No Tip buttons:
 - a. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Order Type Parameters**.
 - b. For each Order Type Name, select the following options to hide the buttons in Guest Pay. If both options are selected and no tips are configured, the Tip page does not appear in Guest Pay.
 - **13 - Hide Custom Tip Button**
 - **14 - Hide No Tip Button**
 - c. Ensure that each order type has **Active** enabled.
 - d. Click **Save**.

Configure Symphony Payment Interface (SPI) Payment Driver

The Symphony Payment Interface (SPI) simplifies credit card payment configuration by enabling Symphony Essentials to communicate with payment service providers (PSPs) that provide credit card processing using a single payment driver.

The SPI Payment Driver is already created with as much information as possible. Consultants configuring Symphony Essentials need to enter the variable information, such as IP addresses for the SPI Payment Driver record.

To change the Payment Driver record:

1. Select the Enterprise, click **Setup**, and then click **Payment Drivers**.
2. Double-click the **SPI** record.
3. Click the **Configuration** subtab.
4. Enter the Machine IP Address in the **Primary Host** field, as shown in the following field.

Figure 6-7 Payment Drivers Module Fields

The screenshot displays the 'Configuration' subtab of the SPI record. The 'Primary Host' field is highlighted with a red box and contains the value '1991'. Other fields include 'Currency Code' (840), 'Merchant Number' (459863375), 'Host Timeout' (180), 'Include Namespace with XML Message' (False), 'Pass Phrase' (HTTP(S)), 'Validate XML Message Against Schema' (True), and 'Security Settings' (Use HTTP Only). The 'Display Name' field is also visible at the bottom.

5. Click **Save**.

Configure Credit Card Authorization to Print Merchant Vouchers and Customer Receipts

You can configure the printing of credit card vouchers when workstation operators press the **Credit Card Authorization** function key on the workstation. Complete the steps below to allow the following items to print:

- Merchant voucher (for cardholder signature)
- Customer receipt

Confirm the cardholder signature verification with your Payment Service Processor (PSP) before configuring Quick Service Limits. Cardholder signature verification prompts are forced by the PSP, and may appear for every transaction, even if the property is configured to not print merchant vouchers below a certain amount. This could leave a property in a situation where no signature is present, but the workstation operator is prompted to verify it.

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Click the **Options** tab
3. Click the **Printing Options** subtab, and then select the following options:
 - **8 - Print Customer Receipt**
 - **54 - Print 2 Guest Checks/Receipts**
4. Click **Save**.
5. Repeat Steps 1 through 4 for each credit card tender record.
6. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
7. Click the **CA/EDC** tab (Credit Card Authorization/Electronic Draft Capture), and then select **7 - Print Two Credit Card Vouchers**.
8. Click **Save**.

Configure Credit Card Voucher Headers and Trailers

Credit card headers and trailers are leading and trailing lines that print on credit card vouchers. You can also set a header or trailer line to print logos rather than text. See [Introduction to Logo Printing](#) for more information.

1. Select the Enterprise or revenue center, click **Descriptors**, and then click one of the following modules, depending on whether you want to configure voucher headers or trailers:
 - **Credit Card Headers**
 - **Credit Card Trailers**
2. Enter the text to appear on the header or trailer in the rows under the Text column.
3. If you want to insert a logo for the header or trailer, select a check box under the **Use Logo** column and then select a logo using the ellipsis point (...) symbol in the **Logo** column.
4. Click **Save**.

Configure Email Receipts

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. On the **General** tab, click the **Primary SMTP Server** subtab.
3. Enter information in the fields as described in the following table:

Table 6-2 Email Receipt Fields

Field	Description
Server	Enter the email server or service to use. Click Select to choose from the SMTP Server list of commonly used mail servers (for example, Outlook, Gmail, or Yahoo).
Port	Enter the port number for the SMTP email server. A default port of 587 works for most SMTP servers.
SSL	Select this option to require secure Internet communication.
User Name	Enter the user name of the email address that will send receipts.
Password, Confirm Password	Enter the password associated with the email user name.
Source Email	Enter the full email address to appear as the sender in the emailed receipt. Depending on the SMTP server, this may not create a copy of emails sent.
Name	Enter the business name or sender name to appear along with the email in the sender field. Depending on the SMTP server, this value may or may not appear in the sent email (for example, Username = jsmith Name = John could appear as: John<jsmith@yourcompany.com>).
BCC List	Enter the email addresses to receive a blind carbon copy of the email receipt that is sent to the guest. Oracle recommends that you list the source email in the BCC field so you can resend copies of email receipts later if necessary.

4. Click the **Send Test Email** button to send a test email receipt message to the source email address. A confirmation appears after the email is successfully sent.
5. Click the **Backup SMTP Server** subtab.
6. Configure the Backup SMTP Server with the same settings as the Primary SMTP Server or an alternate server from which to send emails in the event the primary server becomes unavailable.
7. Click the **Text Formatting** subtab, and then enter information in the following fields:
 - **Email Subject:** Enter text in rich text format to appear as the subject line of email receipts.

- **Email Body:** Enter text in rich text format to appear as the body of email receipts. You must include @@Check in the body in order to send a copy of the receipt.
8. Click the **HTML Formatting** subtab, and then enter information in the following fields:
 - **Email Subject:** Enter text in HTML format as the subject line of email receipts.
 - **Email Body:** Enter text in HTML format as the body of email receipts. You must include @@Check in the body in order to send a copy of the receipt.
 9. Select the **Send Html Email** check box to dim the Text Formatting tab and send only the HTML format. Deselect this option to dim the HTML Formatting tab and send only the text formatted email.
 10. Click **Save**.

7

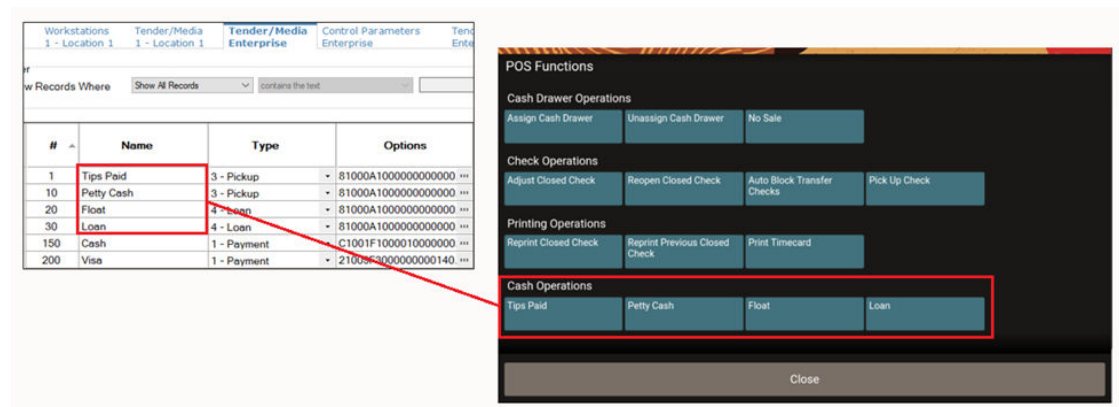
Paid In and Paid Out Operations

Paid in transactions or “loans” are used when money is added to the cash drawer, such as from floats and loans.

Paid out transactions or “pickups” are used when money is removed from the cash drawer, such as tips paid to employees in cash or payments to vendors for products.

Buttons for paid in and paid out operations appear in the POS in a section called Cash Operations on the POS Functions page. The buttons are created automatically for EMC Tender/Media records set up with a **Key Type** of **3 - Pickup** or **4 - Loan**. The button names are the same as the Tender/Media record names entered in the EMC, as illustrated in the following figure. If there are no Pickup and Loan type tenders, the Cash Operations section does not appear.

Figure 7-1 EMC Pickup and Loan Tender Records Corresponding to Pickup and Loan Buttons in POS Operations



These transactions appear on the Employee Financial Report and the Property Financial Report in the configured Report Group section.

Create Tender/Media Records for Paid In/Paid Out Operations

You can configure buttons for paid in and paid out transactions in the EMC.

1. Select the Enterprise, click **Configuration**, and then click **Tender/Media**.
2. Click the **Insert** icon

) on the toolbar, enter the record name (for example, Petty Cash), and then click **OK**.
3. Double-click the tender record to open it.
4. On the **General** tab, select either **3 - Pickup** (this is used for Petty Cash) or **4 - Loan** from the **Key Type** drop-down list, depending on the tender record you created.

Figure 7-2 Tender/Media General Settings for Paid In and Paid Out Operations

The screenshot shows the 'General' tab of the Tender/Media General Settings. The 'Current Record' section has 'Number' set to 4 and 'Name' set to Petty Cash. The 'Consumer Facing Content' section has an empty 'Consumer Display Name' field. The 'General Settings' section includes several dropdown menus: 'Privilege Group' is 0, 'Key Type' is 3 - Pickup, 'NLU' is 2 - Service Total, 'SLU' is 4 - Loan, 'Report Group' is 0 - None, 'SRM Payment Type' is 0 - None, 'Print Class' is 0 - None, and 'Below Threshold Print Class' is 0 - Use Tender Print C.

5. Click the **Options** tab, and then click the **General** subtab.
6. To print a validation chit when the workstation operator presses a pickup button, select **6 - Validation Required**.
7. Select the appropriate options as described in the following table:

Table 7-1 Options For Pickup and Loan Tender Key Types

Option	Description
1 - Open Cash Drawer	Select this option to have the cash drawer open automatically when a workstation operator presses a pickup button.
2 - Cash Tips Paid	Select this option to establish a pickup key that is used to record cash tips paid to a server from the cash drawer. The workstation operator needs to enter the employee number for the employee being paid tips.

Table 7-1 (Cont.) Options For Pickup and Loan Tender Key Types

Option	Description
5 - Reference Entry Required	Select this option to require the workstation operator to enter an alphanumeric reference entry when using the pickup or loan operation.
82 - Prompt for Reason	Select this option to have the POS client prompt the workstation operator to enter a reason for the pickup or loan operation. See Create Pickup Reasons and Create Loan Reasons for more information about configuring the reasons.

8. Click **Save**.
9. Restart the workstation to have the buttons appear in POS Operations.

Create Paid Out Reasons

You can optionally configure reasons to appear when entering paid out (pickup) transactions on the workstation.

1. Select the Enterprise, zone, property, or revenue center, click **Descriptors**, and then click **Pickup Reasons**.
2. Place your mouse cursor in a **Text** column row, and then enter a reason for a pickup transaction.
3. Click **Save**.
4. To edit a reason, highlight the reason record, change the reason name, and then click **Save**.
5. To remove a reason, delete the text in the **Text** column row. The reason will no longer appear in POS Operations.

Create Paid In Reasons

You can optionally configure reasons to appear when entering paid in (loan) transactions on the workstation.

1. Select the Enterprise, zone, property, or revenue center, click **Descriptors**, and then click **Loan Reasons**.
2. Place your mouse cursor in a **Text** column row, and then enter a reason for a loan transaction.
3. Click **Save**.
4. To edit a reason, highlight the reason record, change the reason name, and then click **Save**.
5. To remove a reason, delete the text in the **Text** column row. The reason will no longer appear in POS Operations.

8

Taxes

A tax is a sum of money imposed by a government, levied upon prepared food and beverages sold in a restaurant. The following table explains the Symphony Essentials methods of taxation:

Table 8-1 Tax Methods

Tax Method	Description
Value Added Tax (VAT)	A VAT is a form of sales tax used in some countries. VAT is an inclusive tax, which means the tax is included in the menu item price. The global tax type can be set as European or United States. A VAT is calculated differently, depending on the global setting. In Europe, only inclusive type tax is calculated. In the United States, inclusive type tax and add-on type tax can be used at the same time. VAT inclusive taxes are broken out from sales totals on financial related reports (for example, Property Financial Report), with the inclusive tax reflected in the Tax Collected totals field. If your property uses VAT, the following Reporting and Analytics templates can be applied for the Open/Closed Check reports: • EAME_MMRevCtrOpenChecks_VAT • EAME_MMRevCtrClosedChecks_VAT
U.S. Inclusive Tax	U.S. inclusive tax uses the item price and a percent value to calculate the tax amount. The tax is then included in the price of each menu item not added to the bill. For example, if the tax rate is 5% and the item price is \$5.00, the inclusive tax method calculates by the formula: $\\$5.00 / (1 + 5\%) = \\4.76. The total cost for the customer remains \$5.00, but the net sales price is \$4.76 and the tax is \$0.24. If U.S. inclusive tax is used, only one inclusive tax rate can be applied to a menu item. U.S. inclusive taxes do not appear on the Open Check Report in Reporting and Analytics, and do not print on Open/Closed Check reports. Additionally, inclusive taxes are broken out from net sales totals on financial related reports (for example, Property Financial Report), with the inclusive tax reflected in the Tax Collected totals field.
Add-on Tax	Add-on tax uses the item price to calculate tax, which is then added to the bill. For example, if the tax rate is 5% and the item is \$5.00, the application calculates 5% of \$5.00, posting \$0.25 tax to the check and making the total due of \$5.25.
Breakpoint or Threshold Tax	Breakpoints establish the points at which an increase of one cent in sales increases tax by one cent. For example, a breakpoint tax might be one percent for sales from zero to twenty cents and then two percent from twenty-one to forty cents. Twenty cents would be the breakpoint for this tax.

Introduction to Tax Rates and Tax Classes

Simphony Essentials uses tax rates and tax classes to assign taxes to menu items, discounts, and service charges.

A tax rate is the percentage at which taxes are paid to a government. In some jurisdictions, multiple tax rates apply. Usually these tax rates must be calculated separately for accounting purposes (allowing each jurisdictional government to collect the appropriate tax amount).

A tax class is a collection of tax rates. Tax classes determine the tax rates that apply to menu items and service charges, and which tax rates can be reduced by discounts. Consider the following example: 2% City Tax Rate + 4% State Tax Rate = 6% Sales Tax (tax class which contains two tax rates). In this example, both the city and state tax rates are active for the Sales tax class. The total sales tax is 6%. By grouping multiple tax rates into a single tax class, you can view a record named Sales Tax.

You can associate a tax class with the following types of records:

- **Menu Item Class:** All menu item definitions in the menu item class are taxed using the tax class.
- **Discount:** When you assign a tax class to a discount, the taxes linked to the tax class are recalculated when the discount is applied using the reduced taxable sales value.
- **Service Charge:** Some types of service charges are taxed, such as banquet and room service transactions.

For server convenience, bars often use inclusive taxes.

You can set order types to have the appropriate tax rates in the revenue center. The following table shows an example configuration using Order Types:

Table 8-2 Example of Inclusive Tax with Multiple Revenue Centers

Revenue Center	Order Type Tax Configuration
Bar	• Inclusive tax rate enabled • Add-on tax rate disabled
Dining Room	• Inclusive tax rate disabled • Add-on tax rate enabled

Configure Tax Rates and Tax Classes

1. Select the Enterprise or property, click **Setup**, and then click **Tax Rates**.
2. Locate the appropriate tax rate. There are 64 active tax rates.
3. Select the tax rate type from the **Type** drop-down list. The following table describes the tax types:

Table 8-3 Tax Types

Type	Description
0 - Disabled Tax Rate	Select this option if the tax rate is not used.
1 - Add On, Breakpoint	Select this option to calculate the add-on tax using the Breakpoint method.

Table 8-3 (Cont.) Tax Types

Type	Description
2 - Add On, Percentage	Select this option to calculate the add-on tax using the tax percentage rate.
3 - Included, Percentage	Select this option to calculate the inclusive tax using the tax percentage rate to determine what portion of the sales price is the tax. The inclusive tax applies differently depending on the global VAT (European or United States). Because the tax is included in the price, the tax is backed out of gross sales on reports.
4 - Surcharge	Select this option to calculate surcharges for items.

4. Click **Save**.
5. Select the Enterprise or property, click **Setup**, and then click **Tax Classes**.
6. Insert a tax class record with the appropriate name (for example, Soda Tax, Alcohol Tax, or Surcharge).
7. From the **Taxes Enabled** field, select the applicable tax rates, and then click **OK**. The tax rates you select are active for the tax class.
8. Click **Save**.

Configure Tax Parameters

[Tax Parameters Options](#) contains a list of all tax parameter options.

1. Select the property or revenue center, click the **Setup** tab, and then click **Tax Parameters**.
2. Click the **International Options** tab, enable the appropriate options, and then click **Save**.
3. Click the **Options** tab, enable the appropriate options, and then click **Save**.
4. To set printing lines for the appropriate tax rates, select the **VAT Options**, and then click **Save**.

Tax Parameters Options

The Tax Parameters module lets you configure options related to taxes. You can configure the Tax Parameters module at the property, zone, or revenue center levels. [Configure Tax Parameters](#) contains more information.

The following tables list all tax parameter options.

Table 8-4 Tax Parameters International Options

International Options	Description
1 - ON = Apply Tax as Add-On; OFF = Apply Tax as VAT	Select this option to treat taxes as add-on. Deselect this option to treat taxes as a value added tax (VAT). If you enable VAT, all tax rates in use must be type Included, Percentage .

Table 8-4 (Cont.) Tax Parameters International Options

International Options	Description
3 - Print Tax Itemizers	Select this option to print tax itemizers on guest checks and receipts. An itemizer is considered a bucket that holds the sale amount of all items taxed at a specific rate. At the end of a transaction, the tax is applied to the subtotal of all items in the bucket. Menu Item Classes are linked to Tax Classes, which in turn, are linked to Tax Rates 1-64. When you link to a tax rate, you are creating an itemizer bucket for that item. You must enable this option for Philippine tax.
4 - Enable Canadian GST	Select this option to enable Canadian Goods and Services Tax (GST).
5 - Enable Japanese Tax	Select this option to enable Japanese tax options.
6 - Enable Thailand Tax Printing	Select this option to enable Thai tax options. Starting with Symphony Essentials release 19.2.1, this option is not in use.
9 - Japanese Tax Rounding: On = Truncate digits after decimal; Off = Round digits after decimal	Select this option to indicate rounding and digit appearance.
10 - Print Japanese Amount Due	Select this option to print the amount of Japanese tax due, even if summary totals are suppressed for the tender media.
12 - Thai Tax Trailer Uses WS Number Instead of RVC Number	Select this option to print the last two digits of the workstation number on the Tax Invoice and Account Record Lines. Deselect to print the last two digits of the revenue center number.
13 - Truncate Inclusive Taxes	This option applies to all inclusive tax calculations. It determines whether the inclusive tax amount that is calculated is rounded or truncated. For example, if a currency has two decimal places and the tax calculated is 12.005, the rounded tax is 12.01, but the truncated tax is 12.00.
14 - Print Item Inclusive Tax Total	If the check contains items with inclusive taxes, this option enables the total inclusive tax to print on the guest check. The line prints according to Tax Parameters option 4 - Print Inclusive Tax Totals when 0.00. The inclusive tax amount is the sum of the inclusive taxes for each item on the check. You must also select Tender/Media Printing Options 21 - Print Summary Totals and 24 - Print Inclusive Tax or VAT Lines on Check or Receipt for the inclusive tax totals to print.

Table 8-4 (Cont.) Tax Parameters International Options

International Options	Description
15 - Print Check Inclusive Tax Total	If the check contains items with inclusive taxes, this option enables the total inclusive tax to print on the guest check. The line prints according to Tax Parameters option 4 - Print Inclusive Tax Totals when 0.00 . The inclusive tax amount is calculated on the total sales for each tax rate. You must also select Tender/Media Printing Options 21 - Print Summary Totals and 24 - Print Inclusive Tax or VAT Lines on Check or Receipt for the inclusive tax totals to print.
16 - Print Tax Rate per item	Select to print the applied tax rates associated with the menu item class on guest checks, customer receipts, and the journal. For example, the line item for a Grilled Cheese Sandwich on the printed check appears as follows: 1 Grilled Cheese 5.99 T2 T4 The guest check and customer receipt indicate the tax rate applied to each item. The T2 and T4 shown after the item's price indicate that tax rates 2 and 4 were applied to a Grilled Cheese.
17 - Enable Tax Labels	Select to consolidate tax reporting information based on the defined Tax Labels configured under Tax Rates. Enabling tax labels permits: • Up to two tax labels and associating each of them with a specific tax rate • Associating multiple tax rates with the same tax labels • Associating a blank tax label with tax exempt items (considered non-value-added tax (VAT))

Table 8-5 Tax Parameters Options

Options	Description
1 - Do Not Include Tax in Totals on Tip Reports	Select this option to prevent a transaction's calculated tax amount from posting to the gross receipts and charged receipts totals on tip reports.
2 - Require a Reference Entry with Tax Exemptions	Select this option to require workstation operators to enter a reference entry when using an exempt tax function key.
3 - Print Inclusive Tax Lines Before Summary Totals	Select this option to print inclusive tax total before summary totals on guest checks and customer receipts.
4 - Print Inclusive Tax Totals when 0.00	Select this option to print inclusive totals on guest checks and customer receipts even if the calculated tax due is 0.00.

Table 8-5 (Cont.) Tax Parameters Options

Options	Description
5 - Print Consolidated VAT Line on Checks and Customer Receipts	Select this option to print a consolidated VAT line. If you use this option in conjunction with individual VAT line printing, the consolidated line prints last.
6 - Print VAT Net Totals on Guest Checks and Customer Receipts	Select this option to print a VAT Net Totals line on guest checks and customer receipts.
7 - Print Tax Exempt Voucher	Select this option to print a voucher when any tax is exempted. The voucher prints when a tax exempt function key or a tender exempts tax. The voucher prints at the validation printer designated for the workstation. Deselect this option to suppress printing of a tax exempt voucher.
8 - Post Taxable Sales When the Tax Rate is Zero	Select this option to have taxable sales post to the TAX_DAILY_TOTAL table in Reporting and Analytics when the tax rate is set to 0.00%. The taxable amounts can be used for reporting even though there are no applied taxes. Deselect this option so that taxable sales do NOT post to Reporting and Analytics when the tax rate is set to 0.00%.

9

Order Channels and Types

Order channels and order types enable the system to determine how a transaction entered the business and where the consumer received the goods.

A transaction's order channel indicates where the order was placed:

- Online (website) order
- Mobile app order
- Drive thru
- Dining room
- Front counter
- Delivery app
- Phone in

A transaction's order type determine where it was picked up or consumed:

- Dining room
- Bar
- Counter
- Drive thru
- Delivery app
- Curbside

When used together, it is possible to differentiate between order flows, such as:

- Mobile app orders that were picked up in the drive thru
- Mobile app orders that were picked up curbside
- Mobile app orders that were picked up at the bar
- Drive thru orders that were picked up in the drive thru

In addition to identifying a transaction's origin and destination, these features can be used to configure the way in which the system processes the transaction—routing orders through the kitchen, formatting receipts and kitchen chits, and setting tax rates.

Order Channels

An order channel is where an order is placed. For example, guests can place an order at a kiosk, a drive thru window, inside a restaurant, or via a delivery aggregator. These examples can be set up as order channels and assigned to checks in the POS.

By assigning an order channel to a check, the restaurant can track where orders are coming from and make decisions about how to drive existing sales and generate new sales.

If order channels are not set up, a channel called **Default** is assigned to checks.

You can manually assign channels to revenue centers, workstations, and order types. This is the order of precedence:

1. Revenue center order channels override the **Default** channel.
2. Workstation order channels override the revenue center.
3. Order type order channels override the workstation.
4. Manually entered order channels override the order type.

Configure Order Channel

You can configure order channels using the following two EMC modules:

1. Order Channels

Can only be configured at the Enterprise level of the system and are available to be used in all revenue centers.

2. Order Channel Parameters

Can be configured at the Enterprise, zone, or property levels of the system, so that you can define standard configurations and override them where necessary.

One order channel, labeled **Default**, is already created. The default order channel is assigned to checks automatically if no other channels are set up. You can rename the default channel. You can also override the default order channel at the revenue center, workstation, order type, and by manually changing the order channel.

1. Configure the order channel:

- a. Select the Enterprise, click **Descriptors**, and then click **Order Channel**.
- b. Insert an order channel record and open it. (The **Record Name** maximum is 32 characters.)

Figure 9-1 Examples of Order Channel Names

Order Channel Enterprise		
Records Where Show All Records cont		
#	Name	Active
1	Default	☒
2	Kiosk	☒
3	Delivery Company	☒
4	In House quick serve restaurant	☒
5	Phone In Pick Up	☒
6	On Line Direct	☒
7	Ziosk	☒
8	Drive-Thru	☒
9	Room Service	☒
10	Riverside Restaurant	☒
11	Door Deliveries	☒
12	Order and Eat	☒

- c. If there are order channels that are not being used in the Enterprise, deselect **Active** for each unused order channel.
- d. Click **Save**.
- e. Repeat Steps 1-a though 1-d to add order channels as needed.
2. Configure the order channel parameters for each order channel:
 - a. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Order Channel Parameters**.
 - b. Select an order channel record.
 - c. Set the order channel parameters as described in the following table:

Table 9-1 Order Channel Parameter Options and Fields

Option/Field	Description
1 - Print on Customer Receipt and Guest Check	Select this option to print the order channel name on customer receipts and guest checks.
2 - Print on Order Printer	Select this option to print the order channel name on order printers.

Table 9-1 (Cont.) Order Channel Parameter Options and Fields

Option/Field	Description
3 - Enable Routing Order by Order Channel	Select this option to control order routing by the order channel. The workstation order devices must be set for all possibilities and use this as an override to disable order devices. Order channel routing takes precedence over order type routing if both are set. If 3 - Enable Routing Order by Order Channel is selected, click the ellipsis point (...) button in the Order Device Mask column, select the order devices for the order channel, and then click OK. KDS order devices are not supported.
Service Level Time	Set the Service Level Time (in minutes) for each active order channel. If defined, the service level time establishes a lead time that is required before an order can be ready for pickup. For guests ordering online, the earliest pickup time they can choose is based on the current time plus the service level time. If a check has an order channel and an order type, both with service level times, the order channel takes precedence. Note that the service level time is not the same as the KDS Prep Time (configured in the Menu Item Maintenance module).
Active	If there are order types that are not being used at this hierarchy level, deselect Active for each unused order type.

- d. Click **Save**.
- e. Repeat Steps 2-a through 2-d for each order channel.
3. To override the default order channel for a revenue center:
 - a. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
 - b. Select the **Default Order Channel** from the drop-down list.

This is the order channel that is active when a workstation operator begins a check at this revenue center unless it is overridden at the workstation, by order type, or manually changed.
 - c. Click **Save**.
4. To override the default revenue center order channel for a workstation:
 - a. Select the property, click **Setup**, and then click **Workstations**.
 - b. Double-click the workstation.
 - c. Click the **Transactions** tab.
 - d. Select the **Default Order Channel** from the drop-down list.

This is the order channel that is active when a workstation operator begins a check on this workstation unless it is manually changed.
 - e. Click **Save**.
5. To override the default workstation order channel for an order type:

- a. Select the appropriate hierarchy level, click **Setup**, and then click **Order Type Parameters**.
- b. Scroll to the Default Order Channel column.
- c. Select the **Default Order Channel** from the drop-down list.

This is the order channel that is active when starting a check with this order type. The order channel set against the order type overrides all default order channels, and can only be overridden by a manually entered order channel.

- d. Click **Save**.

Display Order Channel on POS

If configured, the order channel displays:

- As text in the guest check header for TSR and bar workstations and tablets
 - As a selection box on the Transaction page for QSR workstations and tablets
 - As buttons on the Check/Transaction Functions pages for TSR and bar workstations and tablets
 - As a selection box on the Check Attributes page for mobile phones and handheld devices
 - In the check header on the POS Journal Reports
1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Format Parameters**.
 2. To display the Order Channel Name in the POS check detail and in the check header on POS Journal reports, select **65 - Display Order Channel on POS Workstation/Device**.
 3. Click **Save**.

Configure Order Channels for POS Reports

You can configure an order channel to appear on Property and Employee Financial Reports.

1. Select the Enterprise or property, click **Setup**, and then click **Report Parameters**.
2. Click the **Options** tab.
3. To enable printing the order channel section on financial reports, select **12 - Print Order Channel Breakdown on Financial Reports**.
To exclude the order channel section on financial reports, deselect option **12**.
4. Click **Save**.

Order Types

An order type is a sales category based on where the order is consumed, such as Dine In or Take Out. You can set up to 32 order types for the enterprise. Order types control active tax rates for a transaction, allocating a tax based on where the order is consumed. For example, often Take Out orders are taxed differently than Dine In orders.

You can specify the order type for a transaction, which is the order type of the current round. If the workstation operator changes the transaction order type, the order type of all menu items in the current round changes to the selected order type, while the order type of the check remains unaffected.

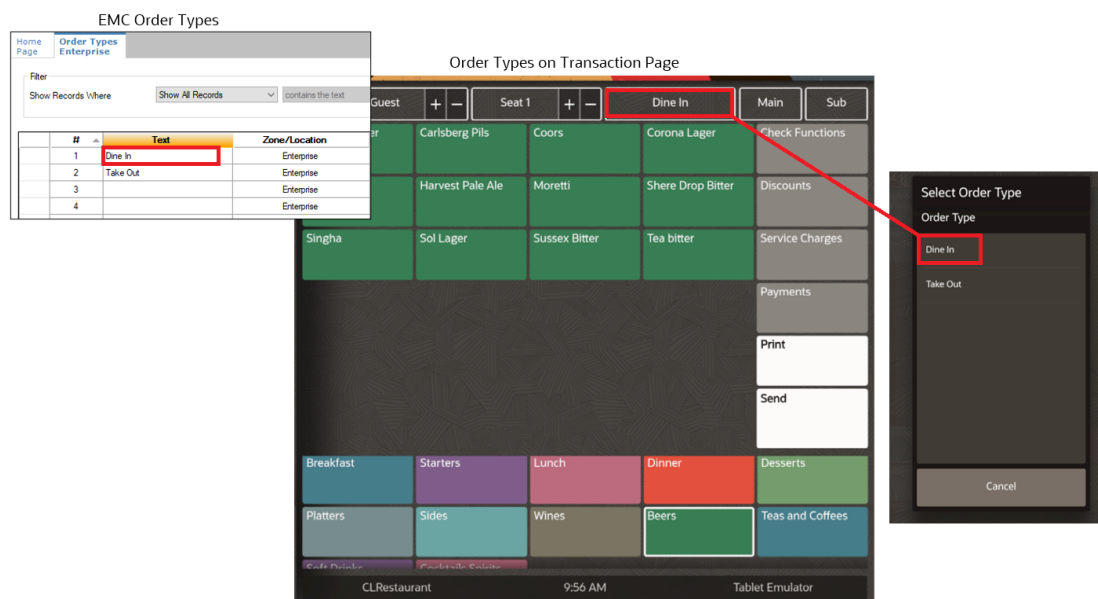
Configure Order Type

You can configure order types using the following two EMC modules:

1. Order Types
2. Order Type Parameters

Two records are already created for Symphony Essentials: Dine In and Take Out.

Figure 9-2 Example of Order Types



1. Configure the order type:
 - a. Select the Enterprise, click **Descriptors**, and then click **Order Types**.
 - b. In the **Text** field, enter an order type name (for example, Drive Thru).
 - c. Click **Save**.
 - d. Repeat Steps 1-a though 1-c to add other order types as needed.
2. Configure the order type parameters for each order type:
 - a. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Order Type Parameters**.
 - b. Set the order type parameters as described in the following table:

Table 9-2 Order Type Parameters Options and Fields

Option/Field	Description
1 - Print on Customer Receipt and Guest Check	Select this option to print the order type name on customer receipts and guest checks.
2 - Print on Order Printer	Select this option to print the order type name on order printers.

Table 9-2 (Cont.) Order Type Parameters Options and Fields

Option/Field	Description
4 - Do Not Post Transactions to Tip Report Totals	Select this option to exclude sales for the order type from Tip Report Totals.
6 - Transaction Cancel Default	Select this option when starting orders without an order type. When a workstation operator begins a transaction and cancels it before selecting an order type, the POS client requires the workstation operator to associate the check with an order type for posting purposes. The POS client finds the first order type that has this option selected and uses it. Deselect this option to have the POS client use the first order type record in the list to associate with the check.
8 - Enable Routing Order by Order Type	Select this option to control order routing by the order type. The workstation order devices must be set for all possibilities and use this as an override to disable order devices. Order channel routing takes precedence over order type routing if both are set.
11 - Forgive Inclusive Tax	Select this option to forgive the Inclusive Tax for eligible Menu Items (Australian GST only).
13 - Hide Custom Tip Button	Select this option to instruct the payment device to hide the Custom Tip button (Guest Pay only).
14 - Hide No Tip Button	Select this option to instruct the payment device to hide the No Tip button (Guest Pay only).
Tax Mask	Click the ellipsis point (...) button in the Tax Mask column, select the tax rates for the order type, and then click OK. If you are creating an order type for a delivery service provider, do not select tax rates in the Tax Mask column.
Active	Select Active for each order type that you want to activate.
Service Level Time	Set the Service Level Time (in minutes) for each active order type. If defined, the service level time establishes a lead time that is required before an order can be ready for pickup. For guests ordering online, the earliest pickup time they can choose is based on the current time plus the service level time. If a check has an order channel and an order type, both with service level times, the order channel takes precedence.
Order Channel	Select the Order Channel from the drop-down list that will be assigned when starting a check with this order type. The order channel set against the order type overrides all default order channels and can only be overridden by a manually entered order channel.

Table 9-2 (Cont.) Order Type Parameters Options and Fields

Option/Field	Description
Order Device Mask	If option 8 - Enable Routing Order by Order Type is selected, click the ellipsis point (...) button in the Order Device Mask column, select the order devices for the order type, and then click OK . Order Device Mask settings for the order channel take precedence over order type settings if both are set.
KDS Highlight Scheme	Select the KDS Highlight Scheme color to display menu items on the KDS.
Suggested Tip Percentages	To configure suggested tip percentages (Tip% 1, Tip% 2, Tip% 3), see Configure Guest Pay for more information.

- c. Click **Save**.
 - d. Repeat Steps 2-a through 2-c for each order type.
 3. (Optional) To set the default order type for a revenue center:
 - a. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
 - b. Select the **Default Order Type** from the drop-down list. This is the order type that is active when a workstation operator begins a check.
 - c. Click **Save**.
 4. (Optional) To override the default order type for a workstation:
 - a. Select the property, click **Setup**, and then click **Workstations**.
 - b. Double-click the workstation.
 - c. Click the **Transactions** tab.
 - d. Select the **Default Order Type** from the drop-down list.
 - e. Click **Save**.

10

Discounts

You can activate a discount using the methods described in the following table:

Table 10-1 Discount Methods

Discount Method	Description
Manual	A workstation operator manually applies a discount to a check by pressing a discount key. This is a traditional discount method.
Automatic	Simphony Essentials applies an automatic discount when a transaction meets certain criteria. As a workstation operator adds menu items to the guest check, the system detects items that trigger a discount, and then applies the discount to the check.
Coupon	A coupon is an automatic discount with one difference: the workstation operator must first apply the discount (coupon) to the guest check.

Configure Discounts

1. Select the Enterprise, click **Configuration**, and then click **Discounts**.
2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name**, and then click **OK**.
4. Double-click the new discount record.
5. On the **General** tab, enter the customer-facing service charge name that will appear in Symphony Transaction Services Gen 2 in the **Consumer Display Name** field.
6. Select the type of discount from the **Activation Type** drop-down list:
 - **0 - Manual (Manually entered and applied)**
 - **1 - Automatic (Automatically applied, operator cannot enter)**
 - **2 - Coupon (Automatically applied, operator must enter)**
7. (Optional) Enter the minimum menu item subtotal required on a check to apply the discount in the **Min Amount** field.
8. To configure a manual discount, enter the following information. Otherwise, skip this step.
 - a. To use a percent discount, enter the percentage in the **Percent** field.
 - b. If configuring an open-priced discount (this prompts for the amount or percentage on the POS), select option **1 - ON = Open; OFF = Preset** and then enter the maximum amount allowed for the discount in the **Max Amount** field.
 - c. If configuring a preset amount discount, select option **2 - ON = Amount; OFF = Percentage** and then enter the amount of the discount in the **Amount** field.
9. To make the discount available to the workstation operator, select **Enabled**.

You can turn off temporary discounts by deselecting **Enabled**.

10. Select the **Tax Class** to use for the discount.
11. Select a **Privilege Group** to restrict the discount to only employees who are linked to the same privilege group. Set the **Privilege Group** to **0** to allow all employees to use the discount.
12. Select the method to determine how condiment menu items are discounted from the **Condiment Discountability** drop-down list.

Condiments typically provide details to the cook preparing the menu item, such as a rare steak and peppercorn sauce. The steak is the parent; the meat temperature and sauce are the condiments.

If you select **0 - Use MI Class Option**, the discounts only apply to parent items unless you enable the Menu Item Class option **55 - Discounts Apply to Priced Condiments**.

13. Select the **Report Group** to associate with the discount.

Report groups are subcategories that allow reports to show similar discounts grouped together. You can set report groups from the Report Groups module, in the Reporting section of the Property tab.

14. Select the **Print Class** to associate with the discount.

[Introduction to Print Class Output](#) contains more information.

15. Select the appropriate options for the discount. The following table describes the options and indicates the Activation Types (Manual, Automatic, Coupon) that are available for each option.

Table 10-2 Discount Options

Option	Description	Manual	Automatic	Coupon
1 - ON = Open; OFF = Preset	Select this option to make the discount open. The workstation prompts the workstation operator to enter the amount or percentage. Deselect this option to use a preset amount or preset percentage for the discount.	Yes	No	Yes
2 - ON = Amount; OFF = Percentage	Select this option to make the discount an amount. Deselect this option to make the discount a percentage.	Yes	No	No

Table 10-2 (Cont.) Discount Options

Option	Description	Manual	Automatic	Coupon
3 - This is an Item Discount	Select this option to calculate the discount based on the price of the last menu item entered. Deselect this option to calculate the discount based on the discountable transaction subtotal. For automatic discounts, this option controls the discount sorting and consolidation on a check. When set, each item in the Menu Item Award Group shows the discounted amount on customer receipts and on the workstation. When deselected, all items in the Menu Item Award Group show a combined discounted amount as one entry.	Yes	Yes	Yes
4 - Employee Meal	Select this option to set the discount as an Employee Discount. The workstation prompts the workstation operator to enter the employee number or ID of the employee receiving the discount.	Yes	No	Yes
5 - Reference Entry Required	Select this option to require the workstation operator to enter a name or number when using the discount.	Yes	No	Yes
6 - Validation Required	Select this option to print a validation chit when the discount is applied.	Yes	No	Yes
7 - Limit Discount to Value in Amount Field	Select this option to limit the amount of a discount. Enter an amount in the Max Amount field, which represents the highest discount possible when setting this option.	Yes	No	Yes
8 - If No Amount is Entered, Use the Full Discountable Amount	Select this option to control the open amount discount calculation if the workstation operator does not enter an amount before pressing the Discount button. In short, this option allows you to set a discount as: • A 100% discount (if the workstation operator does not enter an amount before selecting the Discount button) • An open amount discount (if the workstation operator enters an amount before selecting the Discount button) You must select option 2 - ON = Amount; OFF = Percentage to activate this option.	Yes	No	No

Table 10-2 (Cont.) Discount Options

Option	Description	Manual	Automatic	Coupon
9 - Simple Item Exclusivity	Select this option to apply the discount to only one menu item. This setting imposes a limit of one discount per item and prevents individual items from receiving a discount more than once. Deselect this option to have the Exclusivity tab settings determine how the discount interacts with other discounts.	Yes	Yes	Yes
10 - Tender Required (Only for Subtotal Discounts)	Select this option to require workstation operators to tender the transaction after applying a subtotal discount. You must also deselect option 3 - This is an Item Discount .	Yes	No	No
11 - Affects Auto Service Charge (Only Subtotal Discounts)	Select this option to apply the discount to Menu Item Itemizers that allow Auto Service Charges. This results in an adjusted Auto Service Charge value based on the Itemizers discounted. Deselect to keep the Auto Service Charge unchanged.	Yes	No	No
14 - Do Not Allow Subtotal Discount While Seat Filter is Active	Select this option to disallow subtotal discounts while seat filtering is active. Deselect for item discounts or when not using seat handling.	Yes	No	No
23 - Simple Transaction Exclusivity	Select this option to have the discount apply to a single transaction. This setting prevents the transaction from receiving a discount more than once.	Yes	Yes	Yes
29 - Menu item to use check open time	Select this option to have a menu item use the check's open time (instead of using the current time) to determine effectivity of the discount.	Yes	Yes	Yes
30 - Selected menu item to include parent menu item in discount	Select this option to include a parent menu item in the discount when the workstation operator selects a child menu item for the discount.	Yes	Yes	Yes
31 - Net Automatic Service Charge Itemizer	Select this option to post the net value of the menu item to the Automatic Service Charge Itemizer, reducing the Automatic Service Charge after the discount is applied. This option is available when you set option 3 - This is an Item Discount and option 12 - Add to Automatic Service Charge Itemizer from the Menu Item Classes module.	No	Yes	Yes

Table 10-2 (Cont.) Discount Options

Option	Description	Manual	Automatic	Coupon
32 - Limit Discount value to value of Discountable Item	Select this option to limit the discountable amount to the item or award when the Amount Off exceeds the item or award. For example, if the Amount Off is \$5.00 and the item or award is \$4.00, the discount is limited to \$4.00.	Yes	Yes	No

16. Click the **Menu Levels** tab.
17. In the **Menu Level Configuration** section, select the **Active On Main Levels** and **Active On Sub Levels** on which the discount is active.
18. In the Main Level Popup and Sub Level Popup sections, select **Transaction Default** to return the transaction to the default Main Level or Sub Level after the discount is pressed, select **0 - Stay Down** to keep the current transaction levels, or select one of the levels 1-8 to become active. Deselect **Transaction Default** to make the other levels active for selection.
19. Click the **Effectivity** tab, and then select the dates, days, and times for the discount to be in effect.
20. Click the **Effectivity Groups** tab.

Effectivity groups allow you to configure and package promotions so that the menu items and their discounts are only available for a fixed period of time. If effectivity groups do not exist, you must create one or more in the Effectivity Groups module. [Configure Effectivity Groups](#) contains more information.
21. Click the **Add Effectivity Record** link.
22. Click the **Select** link adjacent to **Effectivity Group**, select the effectivity group, and then click **OK** twice. The new effectivity record shows the discount name, Effectivity Status (for example, Active or Future), Date Start, and Date End.
23. Click **Save**.
24. To set an automatic discount to apply to the revenue center:
 - a. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
 - b. Click the **Options** tab.
 - c. Select **48 - Enable Automatic Discounts by Default**.

Examples of the types of discounts that are available with this option include:
 - All appetizers are 25% off
 - All domestic beers are \$3.00 during Happy Hour
 - Buy an appetizer, get another one for 50% off
 - Buy an entrée, get \$2.00 off a dessert
 - d. Click **Save**.

Effectivity Groups

You can configure periods of time when discounts and menu item prices can be used. These are known as effectivity groups. For example, you can make menu item prices or discounts available for New Year's Day only.

Configure Effectivity Groups

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Effectivity Groups**.
2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name**, and then click **OK**.
4. Double-click the new effectivity group record.
5. Click the **Add** link, and then select the **Start Time** and the **End Time** from the calendar.
6. Select **Time Is Local** if the start and end times represent the local time of the location/property.
7. Click **Save**.
8. After creating the Effectivity Group, you need to associate the Effectivity Group with one of the following types of records to make it active:
 - Tender/Media
 - Menu Item Price (in the Menu Item Maintenance module)
 - Discount
 - Service Charge
 - Tax Rate

You can make the association in the record type. For example, to associate a discount record with the Effectivity Group, open the **Discounts** module, and then select the Effectivity Group in the **Effectivity Group** column.

12

Service Charges

A service charge is the amount added to a sales transaction for a service rendered and is posted to one of the following parties:

- The person or people providing the service (for example, a server or bartender, or a team of servers)
- The House or the establishment providing the service

You can configure the following types of service charges:

- Service charges that report as Tips on employee tip reports
- Service charges that report as Service Charges on employee tip reports
- Service charges that are paid to the House
- Non-revenue service charges

Configure Service Charges

1. Select the Enterprise, click **Configuration**, and then click **Service Charges**.
2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name**, and then click **OK**.
4. Double-click the new service charge record.
5. On the **General** tab, enter information in the fields as described in the following table:

Table 12-1 General Tab Fields

Field	Description
Consumer Display Name	Enter the customer-facing service charge name that will appear in Symphony Transaction Services Gen 2.
Percent	Enter the service charge percentage.
Amount	Enter the service charge amount. This field becomes active only when you select option 2 - ON = Amount ; OFF = Percentage .
Pickup Tender/Media	To associate a tender to the service charge for charged tips and cash back, select the Tender/Media from the drop-down list.
HALO	Enter the High Amount Lock Out (HALO) value for the service charge. This setting limits the amount workstation operators can enter for the service charge. To exceed this limit, the workstation operator must have the 158 - Authorize/Perform Over HALO Amounts on [Service Charge] Keys option set for the employee role. When you set the value to 0 , there is no HALO for the service charge. This field does not apply to automatic service charges.

Table 12-1 (Cont.) General Tab Fields

Field	Description
Print Class	Select the Print Class for the service charge. Introduction to Print Class Output contains more information.
Tax Class	To apply a tax class to the service charge, select a Tax Class from the drop-down list.
Privilege Group	Select a Privilege Group to restrict use of this service charge to employees who are associated with the same privilege group. You can set the field to 0 to allow all employees to use the service charge.
Percent to Tips Paid	Enter the percentage of a charged tip that posts to the Tips Paid Tender/Media.
Report Group	Select the report group to which this service charge record belongs. Report groups are subcategories that allow reports to show similar service charges grouped and subtotaled together. You can configure report groups from the Report Groups module, in the Reporting section of the Property tab.

6. Select the Service Charge options as described in the following table:

Table 12-2 Service Charge Options

Option	Description
1 - ON = Open; OFF = Preset	Select this option to make the service charge an open service charge, prompting the workstation operator for the amount or percentage. Deselect this option to use a preset amount or preset percentage for the service charge.
2 - ON = Amount; OFF = Percentage	Select this option to make the service charge an amount service charge. Deselect this option to make the service charge a percentage service charge.
3 - Post to Charged Tips Total on Tip Reports	Select this option to post the service charge to the Direct Charged Tips total. This option records charged tips that employees receive directly from customers. If you select this option, workstation operators who use it must also enter a charge payment using a tender with Tender/Media option Post to Charged Receipts on Tip Reports set. Select either 3 - Post to Charged Tips Total on Tip Reports or 11 - Do Not Post to Gross Receipts , but not both. Select either 3 - Post to Charged Tips Total on Tip Reports or 4 - Post to Service Charges Total on Tip Reports , but not both.

Table 12-2 (Cont.) Service Charge Options

Option	Description
4 - Post to Service Charges Total on Tip Reports	Select this option to post the service charge to the Service Charges total, but not the Total Tips or the Gross F&B Receipts total. Deselect this option to post the service charge to the Gross Food and Beverage Receipts, but not to the Service Charges total. The Service Charges total on tip reports meets the reporting requirements of United States IRS Form 8027, which states that this total should equal all tips that are paid to the employee as wages, and are less than 10% of the transaction total. Select either 3 - Post to Charged Tips Total on Tip Reports or 4 - Post to Service Charges Total on Tip Reports, but not both.
5 - Reference Entry Required	Select this option to require the workstation operator to enter an alphanumeric reference entry when using the service charge.
6 - Validation Required	Select this option to print a validation chit when the workstation operator uses the service charge.
7 - Non-Revenue Service Charge (No Post to Sales)	Leave this option deselected. This option is used to create a service charge for gift card/certificate sales, which are not supported with Symphony Essentials.
9 - Reset Itemizer(s)	Select this option to reset service charge itemizers. When set, service charges can only apply once to menu items that post to the same service charge itemizers. Deselecting this option allows multiple service charges to apply to the same service charge itemizers.
10 - Service Charge Adds to Guest Count	Select this option to increment the transaction's guest count by one every time the service charge applies to the transaction. This option is often used for non-revenue service charges that apply as cover charges. Selecting the RVC Parameter option 8 - Use Number of Seats for Guest Count overrides the setting of this option. When the workstation operator presses the Number of Guests key during a transaction, the guest count no longer increments when the service charge applies to the transaction. The workstation operator must maintain the guest count manually from that point.
11 - Do Not Post to Gross Receipts	Select this option to prevent checks with this service charge from posting to gross F&B receipts on tip reports. This is intended for service charges that meet the United States Internal Revenue Service's definition of non-allocable receipts (as defined in the IRS Instructions for Form 8027). Deselecting this option allows the service charge to post to gross F&B receipts on the tip reports. Select either 3 - Post to Charged Tips Total on Tip Reports or 11 - Do Not Post to Gross Receipts, but not both.
12 - Item is Shareable	Select this option to share the item between two or more seats or two or more checks when using TouchEdit or TouchSplit.

Table 12-2 (Cont.) Service Charge Options

Option	Description
13 - Cash Tips	Select this option to add the Direct Cash Tips total on the tip reports. Selecting option 3 - Post to Charged Tips Total on Tip Reports or 4 - Post to Service Charges Total on Tip Reports overrides this option. This option is used in a cashier environment where the guest leaves the table and pays the check directly with a cashier. When paying the bill, the guest indicates to the cashier to give the change to the server. After receiving payment, the cashier can post a value to a Cash Tip Service Charge. This Cash Tip Service Charge posts to the employee's Direct Cash Tips total on the Employee Tip Report.
14 - Service Charge Used For Stored Value Transactions	Select this option if the service charge is used for stored value transactions.
17 - Use Floor Amount (Automatic Service Charges Only)	Select this option to require a minimum value for the automatic service charge. Then enter the minimum floor amount in the Amount field, which is only active for percentage service charges when you select option 17 . This option only applies to the service charge in revenue centers where it is used as an automatic service charge.
18 - Gift Certificate Sold	Select this option to create a service charge that can be paid without posting to sales totals. (A tracking group total can track the amount if necessary.) This option is similar to 7 - Non-Revenue Service Charge , except that menu items can be present on the check in addition to the service charge. When you select this option, you must configure the service charge as an amount. If a tender requires a cashier link, posting a non-revenue service charge also requires a cashier link. Selecting this option dims option 7 .
30 - Prorate Service Charges to Menu Items	Select this option to prorate the service charge based on the value of the menu items. This overrides the requirement for the minimum guest count for a memo check, if the minimum guest count requirement is met for the entire check.

7. Click the **Menu Levels** tab.
8. In the **Menu Level Configuration** section, select the **Active On Main Levels** and **Active On Sub Levels** on which the service charge is active.
9. In the Main Level Popup and Sub Level Popup sections, select **Transaction Default** to return the transaction to the default Main Level or Sub Level after the service charge is pressed, select **0 - Stay Down** to keep the current transaction levels, or select one of the levels 1-8 to become active. Deselect **Transaction Default** to make the other levels active for selection.
10. Click the **Effectivity Groups** tab.

Effectivity groups allow you to configure and package promotions so that the service charges are only available for a fixed period of time. If effectivity groups do not exist, you must create one or more in the Effectivity Groups module. [Configure Effectivity Groups](#) contains more information.
11. Click the **Add Effectivity Record** link.

12. Click the **Select** link adjacent to **Effectivity Group**, select the effectivity group, and then click **OK** twice. The new effectivity record shows the discount name, Effectivity Status (for example, Active or Future), Date Start, and Date End.
13. Click **Save**.
14. To set an automatic service charge for the revenue center:
 - a. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
 - b. On the **General** tab in the **# Of Guests Before Auto Service Charge** field, enter the number of guests required to trigger the automatic service charge for a transaction.

If set to a value greater than 0, the automatic service charge is applied to the check after the number of guests equals or exceeds the value entered in this field. You must also select option **10 - Auto Service Charge Defaults to Off** (step 15d below).
 - c. Click the **Options** tab.
 - d. Deselect **10 - Auto Service Charge Defaults to Off** to apply the automatic service charge set in the Tender Parameters module for each transaction.

If **# Of Guests Before Auto Service Charge** (step 15b above) is set to a value greater than 0 (zero), selecting this option makes the Auto Service Charge default to off. When a transaction has the number of guests specified in the **# Of Guests Before Auto Service Charge** field, the Auto Service Charge becomes active. If **# Of Guests Before Auto Service Charge** is set to 0 (zero), the workstation operator can apply the service charge.
 - e. Click the **Posting** tab.
 - f. To round the service charge, select the appropriate rounding option:
 - **13 - Round Service Charge % Entries:** Select to round percentage service charge amounts according to the Round Service Charge % to 0, 10 and Round Service Charge % based on 10s digit option settings. Deselect to round the amounts to the nearest least significant digit.
 - **14 - Round Service Charge % to 0, 10:** Select to round percentage service charge amounts to the nearest 0 or 10 increment. Deselect to round the percentage amounts to the nearest 0, 5, or 10 increment. You must also select option **13**.
 - **15 - Round Service Charge % Based on 10s Digit:** Select to round percentage service charged amounts based on the second least significant digit. Deselect to round the percentage amounts based on the least significant digit. You must also select option **13**. This option is also affected by option **14**.
 - g. Click **Save**.

13

Menu Items

Introduction to Menu Items

A menu item is the foundation of transactions. Anything ordered is a menu item. In restaurants, food and drinks are menu items. In retail stores, shirts and hats are also considered menu items. Therefore, any item being sold is a menu item.

Menu item configuration consists of a group of components that are assembled to make the menu item function as needed. The following table shows the menu item components grouped into two categories of tasks: reporting and behavior.

Table 13-1 Menu Item Components

Reporting Tasks	Behavior Tasks
Major Group	Menu Item Definition
Family Group	Menu Item Class
Master Record	Price Record

A single menu item can be broken down into six parts that create the whole.

Major Group

A major group is a product category and is the broadest reporting category. Common examples of major groups are food, non-alcoholic beverages, liquor, beer, wine, and retail merchandise. They are used to group items for revenue reporting, such as how much food was sold today or this month.

Family Group

Family groups are smaller groups within the major group to which they belong. Typically, a family group is a subset, or product sub-category, of a specific major group. Common examples of family groups are appetizers, salads, entrées, desserts, vodka, gin, and t-shirts. A family group is more specific in reporting tasks as it helps detail quantities such as burgers sold or bottles of X brand of beer ordered.

The following figure illustrates an example of major groups and family groups.



Master Record

Master records offer the sharpest level of reporting detail as they are the actual menu items themselves. Examples of master records are Cheeseburger, Oracle Suds IPA, and specific pieces of merchandise purchased by customers (hats or shirts). Master records are also the bridge to the behavioral side of the menu item: menu item definition, menu item class, and price record.

Menu Item Definition

Each master record can have up to 64 possible definitions. The definitions begin to diversify a menu item, defining when the item is available by enabling the different menu levels, as well as where the item is available. The definitions bridge to the reporting side of the menu item and also link to the menu item class and to the menu item price.

Menu Item Class

The menu item class is the element of the menu item that defines whether the item requires, or is required by, another item. For example, if the menu item being configured is a cheeseburger, it will likely be configured with a menu item class that requires the guest to select a meat temperature after selecting the burger. When the cheeseburger is ordered, the workstation operator will be prompted to select the meat temperature menu items that were configured to appear on the workstation at that time. In this example, the meat class can be used as the class for any menu item that only requires a meat temperature. If an item requires a meat temp and a cheese choice, that item needs a new class that requires two condiments instead of only one. On the other hand, if the item being configured is a meat temperature such as rare, the item might be given a class that presents itself on the workstation as an option when a burger is ordered. All items that are meat temperatures receive the same class, meaning they all behave the same way and appear for selection when the burger is ordered.

Each menu item class is constructed to fit a business need, and each menu item definition requires and is limited to a single menu item class, without which it does not appear on the workstation.

Price Record

A menu item price is the amount charged for the sale of a menu item. In Symphony Essentials, menu item prices are configured per menu item definition. Typically a definition has one price, but a definition can be configured with multiple prices (for example, small/medium/large soda), or with no price (common for condiments). Each menu item definition can have up to eight price records. This allows flexibility in configuring a menu item, like ketchup, to be free in one instance when it comes with a meal, and priced in another instance when it is ordered as extra on the side. A beer can cost \$3.50 during the day but only \$1.50 during happy hour.

- Price Record #1: \$3.50
- Price Record #2: \$1.50

Prices are mandatory for reporting sold and prep counts, even if the price record is \$0.00. If an item does not have a price record, it does not appear on reports and does not deduct from inventory counts. Prep or descriptive menu items, such as “Do Not Make”, “Sunny Side Up”, and “Rare” typically do not receive price records.

Configure Major Group

A major group is a grouping of related menu items for reporting sales summaries. A major group is the highest level of the reporting structure for categorizing menu items. Major groups are considered the more general category of sales, while family groups are more specific.

A major group is usually a general category of similar menu items. Typical major groups are Food, Non-Alcoholic Beverages, Liquor, Beer, Wine, and Retail Merchandise.

You can use major groups when running the Major Group Sales Report on the workstation. Each major group also has a report group number associated with it. The report group numbers are used to view subtotals of major groups on reports. By using report groups, users can see sale subtotals.

1. Select the Enterprise, click **Configuration**, and then click **Major Groups**.
2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name** for the major group (for example, Food), and then click **OK**.
4. Enter a number other than 0 (zero) in the **Report Group** field.

For example, you can enter 1 for the Food major group and enter 2 for the Non-Alcoholic Beverages major group. When you enter 0 (zero), the menu item does not appear on reports.

5. Click **Save**.

Configure Family Group

A family group is a grouping of related menu items for reporting sales summaries. Each menu item is linked to a family and a major group. Family groups are often subsets of major groups. For example, menu items linked to family groups Appetizers, Soups, Salads, Entrées, and Desserts might also be linked to a major group called Food.

The following is a typical example of how family groups are configured:

Food

- Appetizers
- Soups
- Salads
- Entrées
- Desserts

Non-Alcoholic Beverages

- Sodas
- Juices
- Smoothies
- Other

You can use family groups when running the Family Group Sales Report on the workstation, or to sort items within other reports. Each family group also has a report group number associated with it. The report group numbers are used to view subtotals of family groups on reports.

1. Select the Enterprise, click **Configuration**, and then click **Family Groups**.

2. Click the **Insert** icon () on the toolbar.

3. In the Insert Record dialog, enter the **Record Name** for the family group (for example, Appetizers), and then click **OK**.

4. Enter a number other than 0 (zero) in the **Report Group** field.

Report Groups let you see family group food sales subtotals together in whichever way the enterprise needs. For example, appetizers, soups, and salads may be Report Group Subtotal 1; domestic and imported beers may be Report Group Subtotal 2.

5. (Optional) Select the **Parent Major Group** to which the new family group belongs.

By associating the family group and major group here, the application limits the family group assignment for a menu item to those family groups linked to the item's major group.

6. Click **Save**.

Configure SLU Group

A screen look up (SLU) is a button that gives workstation operators access to a list of items, except the workstation shows each item in the list as a separate touchscreen button. When a workstation operator presses a menu item SLU (for example, sandwiches), the workstation shows all menu items belonging to that SLU. You can assign each menu item master record to a maximum of 8 different SLUs.

The SLU names appear in various colors on workstation, automatically allocated by the application.

1. Select the Enterprise, property, or revenue center, click **Descriptors**, and then click **Menu Item SLU Names**.
2. Enter names for menu item screen look ups in the **Text** column.

There is no sort priority; the SLU names appear on the workstation screen in number order. Set up the SLU group names with plenty of space between the numbers to provide flexibility when adding more.

Figure 13-1 Example of Menu Item SLU Names

The left screenshot, titled "EMC SLU Names", shows a table with the following data:

#	First	Zone/Location	Inheritance Type
100	Breakfast Buffet	Enterprise	Defined Here
150	Breakfast a la carte	Enterprise	Defined Here
200	Breakfast Sides	Enterprise	Defined Here
250	Breakfast Eggs	Enterprise	Defined Here
300	Breakfast Beverage	Enterprise	Defined Here
350	Statens	Enterprise	Defined Here
400	Soups	Enterprise	Defined Here
450	Salads	Enterprise	Defined Here
500	Meat Meat/Seafood	Enterprise	Defined Here
550	Meat Pasta/Veggie	Enterprise	Defined Here
600	Meat Sides	Enterprise	Defined Here
650	Sandwiches	Enterprise	Defined Here

The right screenshot, titled "Transaction Page", shows a grid of menu items. A red box highlights a specific item in the grid, which corresponds to the "Sandwiches" item in the table on the left.

3. Click **Save**.
4. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Maintenance**.
5. Search for the menu item.
[Searching and Filtering Menu Items](#) contains more information.
6. To assign a SLU group to the menu item, click the ellipsis point (...) button adjacent to the menu item First Name, select the **SLU**, and then click **OK**.
7. Click **Save**.

Configure Condiment Group

Condiment groups directly impact menu item classes, and consequently the menu items associated with them.

Condiments are menu items used to indicate preparation and other instructions for a menu item. They are sometimes referred to as modifiers. Examples include salad dressings (a group of condiments) such as Blue Cheese, Ranch, and Italian; meat temperatures (a preparation instruction) such as Rare, Medium, and Well Done; and other instructions such as Sauce on Side or No Sauce.

The individual condiments (Rare, Medium, and Well Done) are assigned to the condiment group of meat temperatures, and the condiment group is then associated with menu items through the menu item class.

1. Select the Enterprise, property, or revenue center, click **Descriptors**, and then click **Condiment Group Names**.
2. Enter condiment group names (for example, Meat Temp or Cheese Choice) in the **Text** field.

As a best practice, the condiment groups list should show all modifiers grouped by type. Do not mix groups (for example, do not mix meat temperature and cheese choices) together. Each collection of modifiers is usually its own group.

To accommodate changes in future menu offerings that may introduce new condiment groups, you may want to leave open record rows between the condiment groups by setting them up in non-contiguous order. This allows you to set up a new condiment group that will be prompted for in the appropriate order if multiple condiment groups are required for a

menu item. The order in which a condiment group appears here dictates the order in which they appear on the workstation. If required, record 1 appears first, followed by 2, and so on.

Enter the names of the modifier groups in a way that is easy to understand for workstation operators and other employees.

3. Click **Save**.
4. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Classes**.
5. Double-click the menu item class.
6. Click the **Condiment Groups** tab. The list of condiment groups (entered in step 2) appears.
 - See also [Configure Regular Menu Item Class - Requiring Condiments](#) for more information about making the condiment groups required or allowed for the menu items to which the class is assigned.
 - See also [Configure Condiment Menu Item Class](#) for more information about making the condiment groups a member of menu items to which their class is assigned.

Introduction to Menu Item Classes

A menu item class defines the operating characteristics of the menu items assigned to it. Menu item classes help determine many aspects of an item's behavior, including:

- Order device or printer destinations
- Condiment requirements
- Taxes, discounts, and service charges that can apply
- Privilege options (which employees can order the menu item)

When setting a menu, locations separate menu items into groups dependent on behavior. Menu item classes give those menu items the behavior. For example, if a certain group of items require the workstation operator to select a meat temperature, all of those items could be associated with the same class. Examples of the items could be a hamburger, a tuna steak, and a prime rib. While hamburger, tuna steak, and prime rib are all different items, they are prepared at the same preparation station in the kitchen, and all require a meat temperature specification. Because of these similarities, they may be assigned to the same menu item class.

If a group of items needs the workstation operator to select two modifiers, such as a meat temperature and a cheese selection, they would receive a different class. Menu item classes are based on what the items need, not what the item is.

The Menu Item Maintenance module is used to configure the two types of menu items (Regular and Condiment), and each requires a menu item class. By default, every menu item class is a Regular menu item class. A Regular class is used for menu items that appear on a menu as any item that is ordered on its own by a guest. These could include a sandwich or steak, a soda or a cup of coffee. In other words, a regular item is any item that is not a condiment. A condiment is a menu item that modifies the regular menu item. An example is the cheese selection for a sandwich. The sandwich is the regular menu item and the cheese choice is the condiment. There are often multiple options when selecting condiments like cheese. To make things easier, Symphony Essentials collects condiments together and places them into a Condiment Group. In the cheese selection example, each type of cheese can each be its own condiment menu item (Cheddar, Pepperjack, Provolone, and so on), and grouped together because they share the same identifying quality: they are all selections of cheese.

Together they can form a Condiment Group called “Cheese Choice”, and can all receive the same menu item class. The class tells the menu items they are A) Condiments and B) part of the same Condiment Group.

Among regular menu items, some require a selection of condiments to accompany them. These items are given Required Classes. Using the meat temperature example, the hamburger, tuna steak, and prime rib all receive Required Classes. This particular class tells the application that in order to register as a complete item, each item needs a selection of a meat temperature.

Regular Classes associated with menu items require no additional modifiers. These are called by different names based on the person setting up your Enterprise, but you can think of them as “Food No Prep” classes. For example, a hummus plate appetizer does not usually require modifiers or prep, but it is still a regular item (not a condiment). The item can be ordered on its own and does not modify another menu item.

Configure Menu Item Class

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Classes**.
2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name** for the menu item class, and then click **OK**.
4. Double-click the new menu item class record.
5. On the **General** tab, configure the appropriate settings:

Table 13-2 General Menu Item Class Fields

Field	Description
Tax Class	Select the tax class to apply to the menu item class. To leave the tax class blank, select 0 - None .
Main Level Popup	Select the Main Level of the transaction that becomes active after ordering a menu item from the menu item class.
Sub Level Popup	Select the Sub Level of the transaction that becomes active after ordering a menu item from the menu item class.
Privilege Group	Select a Privilege Group number to restrict the use of menu items in the menu item class to employees who are linked to the same Privilege Group. To enable all employees to order items in the menu item class, select 0 (zero).
Sales Itemizer	Select the Sales Itemizer that is associated with this Menu Item Class. The Sales Itemizer is often used for interface (Property Management System) purposes, or to replace the Subtotal on printed guest checks and customer receipts. You can either see the Subtotal, or Food, Liquor, Beer, and Wine.

Table 13-2 (Cont.) General Menu Item Class Fields

Field	Description
Discount Itemizer	Select the discount itemizer to determine which discounts can apply to specific menu items.
Srv Chrg Itemizer	Select the Service Charge Itemizer that is associated with this Menu item Class. The Service Charge Itemizer is used to determine which Service Charges can be applied to specific menu items. Note that the automatic service charge is unaffected by this setting; only Menu Item Class Option 12 - Add to Automatic Service Charge Itemizer affects the Automatic Service Charge posting.
HALO	Enter the High Amount Lock Out (HALO) value for menu items in this Menu Item Class. This field represents the total dollar amount of the items that are being ordered, and it is often used for Open Priced menu items. For example, if this field is set to 50, the operator is prompted to confirm items in this class if they exceed 50.00. Note that the entered value must contain all zeroes except for the first digit. Valid values are: 2, 20, 200, 2000. Invalid values are 45, 450, 405. HALO is also often used for preset priced menu items to safeguard against erroneous entry. For example, the price of Coffee is \$1.00. A workstation operator could post 1 Coffee, 5 Coffees or 10 Coffees if someone is getting coffee for their entire office. It is unlikely that someone would order 100 Coffees (\$100). It is likely that someone ordering 10 Coffees inadvertently presses an extra 0 when entering the quantity.
Condiment Order Type	This setting describes how the condiment is added to a check when it is ordered. • 0 - Add: Select to create a new item on the check even if it already exists for that parent. • 1 - Increment: Select to add the item if it does not exist for the parent or increments an existing one. • 2 - Replace in Condiment Group: Select to remove any items that exist in the item's member condiment group before adding it (this simulates a radio button effect). • 3 - Replace in Master Group: Select to remove any items that exist in the item's master group before adding it. • 4 - Toggle: Select to switch the item on and off.

Table 13-2 (Cont.) General Menu Item Class Fields

Field	Description
Pricing Calculation	Select the calculation method to use for pricing menu items in the class. • 0 - Based on entered count: Select to base the price on the amount entered. • 1 - Based on sales count when sales rounded up: Select to base the price on the rounded up count.
Count Display	Select the manner in which the amount appears for a decimal item on the workstation and printers. • 0 - Show entered amount • 1 - Show sales count amount with entered count as reference The count for an item can be entered as a decimal. There are two counts kept for an item; the entered amount, and the sales count. The sales count is always the entered amount if the entered amount is a whole number. If the entered amount is not a whole number then the sales count is the entered amount, only rounded up. For example, if a user enters 1.5, then the entered amount is 1.5 and the sales count is 2. This field determines whether the entered amount or the sales count appears on workstations and printers.
Count Entry	Select the manner in which workstation operators can enter the sales count of an item in the class.
Print Group	Enter the Print Group (1-99). The sorting mechanism uses this value for receipt printing, check detail, and order output devices. When the items are set to use groups for sorting, the items appear from lowest group number to highest.

Table 13-2 (Cont.) General Menu Item Class Fields

Field	Description
Print Class	Select the print class for the menu item class. Menu items print based on the print class. There are four basic print class output destinations: • Receipts: Printed at the workstation at the end of a fast transaction. Typically used in a QSR environment where ordering menu items and tendering the check is performed in the same service round. • Guest checks: Printed at the workstation. Typically used in a TSR environment. Checks usually include a table number or guest name and are service totalled several times before final tender. • Order devices: Remote kitchen or bar printers, or KDS devices. These devices deliver the order to the production area from the workstation. • Journal: Not a physical device, but an electronic file journal that provides audit capabilities in the application. The Print Class can link to a menu item class, or directly to a menu item definition. When linked to the definition, the Print Class overrides the standard print class linked here to the menu item class. If the Condiment Prefix Type is set to anything except 0 - Not a Prefix, prefix condiments follow the same print class setting chosen for the condiment with which they are associated.
KDS Highlight Scheme	Select the KDS Highlight Scheme color to display menu items on the KDS.
Condiment Prefix Type	Select the prefix type associated with the condiment type.
Condiment Handling with Parent Item Switching	Select from the following condiment behaviors to use for default and other condiments, when the parent item is switched in Conversational Ordering. All options are applicable when using Condiment Prefixes. • 0 - Condiments Remain Unchanged: Condiment modifications will be unchanged. • 1 - Reset Default Condiments Only: Only reset default condiments for a menu item. • 2 - Reset All Condiments: Reset all condiment types.
Service Charge Group	Select the Service Charge Group to apply to this Menu Item Class. Select 0 - None for no service charge.

Table 13-2 (Cont.) General Menu Item Class Fields

Field	Description
Pre-Production Chit Print Class	Select a Print Class to print pre-production chits to remote printers for the menu items assigned to this Menu Item Class. Remote pre-production chit printers are assigned in the Print Classes module.
Allergen Class	Select the Allergen Class for this menu item class.

6. Click the **Options** tab, and then select the appropriate options.

Table 13-3 Menu Item Class Options

Option	Description
1 - ON = Open-Priced Menu Items; OFF = Preset Menu Items	Select this option to require workstation operators to enter a price when adding a menu item in the class. Deselect this option if you are using preset prices.
2 - ON = Condiment Menu Items; OFF = Regular Menu Items	Select this option to make this class a Condiment class, meaning that any menu item linked to this class also becomes a condiment.
3 - Negative Priced Menu Items	Select this option to have menu items in this class post a negative price. This option causes a minus sign (-) to appear before the price.
4 - Increment Seat Number With Sale of these Menu Items	Select this option to increase the seat number each time a workstation operator adds a menu item in the class. This feature is not available when seat filtering is active.
5 - Reference Entry Required	Select this option to require workstation operators to enter a reference entry when adding menu items in the class. The text that is entered outputs to order devices, checks, receipts, and journals.
6 - Validation Required	Select this option to print a validation chit at the validation printer designated in the Workstation module.
7 - Item Discounts May Be Applied to these Menu Items	Select this option to allow menu items in the class to be discounted with an item discount (manual discount only).
8 - Allow Menu Items in this Class to be Non-Priced	Select this option to allow menu items in the class to be non-priced. By default, menu items without a price record do not appear on a workstation page. Any item that does not need a price record, such as some condiments, needs to have this option enabled to appear on a workstation. When selected, associated menu items can have a price record, but it is also acceptable if they do not have a price record.
9 - Condiment Changes Print Group of Parent Menu Item	Select to force a parent menu item that is modified by a condiment to use the Print Group assigned to the condiment.

Table 13-3 (Cont.) Menu Item Class Options

Option	Description
10 - ON = Use Sub Level Pricing; OFF = Use Main Level Pricing	Select this option to apply Sub Level pricing to menu items assigned to the menu item class.
11 - Add to Guest Count	Select this option to increase the guest count each time a workstation operator adds menu items that are assigned to the class. When this option is selected and the Guest Count field is set to 0, Symphony increments the guest count in the transaction by one. If a workstation operator uses the Number of Guests function key during a transaction, the guest count no longer increments when menu items in the class are added to the check.
12 - Add to Automatic Service Charge Itemizer	Select this option to add sales of the menu items in this class to the Automatic Service Charge itemizer. Automatic service charges apply to all menu items associated with Menu Item Classes where this option is enabled.
13 - Print Price on Order Chit	Select this option to print the menu item price on order devices. This option is typically used with open-priced menu items. Order Devices option Wrap Condiments overrides this option.
14 - Do Not Put in Transaction Detail	Select this option to prevent zero-priced or non-priced menu items in the class from printing, appearing, or posting.
15 - Weighed Items	Select this option if all menu items in this class are sold by weight.
17 - Print Name 1 and Name 2 on Checks	Select this option to print the First Name and the Second Name (from the Menu Item's Definition record) of all menu items associated with the class on guest checks. For example, with wine menu items, the First Name shows the name of the wine, while the Second Name shows the Bin Number and the type of wine.
21 - Require Number of Condiments to Match Number of Parent Items	Select this option to require the number of required condiments to match the number of parent menu items ordered.
22 - On = Use Own Output Link; Off = Use Parent's (Condiments Only)	Select this option to have condiments in this class print to their own order devices. Deselect to have condiments print to the same order devices as the parent menu item, provided that the menu item class has the same order devices configured.
23 - Add Condiment Price to the Parent Item's Price on Check Only	Select this option to add condiment prices to the parent menu item's price on guest checks.
24 - LDS Items (International LDS Only)	Select this option if all menu items in this class can be ordered using an International Liquor Dispensing System (ILDS). Deselect if using a North American Dispensing System (NALDS).

Table 13-3 (Cont.) Menu Item Class Options

Option	Description
26 - Keep Main Level With Repeat Rounds	Select this option to enforce items in this class to use the same main menu level that was in effect during the most recent service round when ordered using the Repeat Round key. Deselect to use current menu levels.
27 - Keep Sub Level with Repeat Round	Select this option to enforce items in this class to use the same sub menu level that was in effect during the most recent service round when ordered using the Repeat Round key. Deselect to use current menu levels.
28 - Print Main Level Prefix and Suffix	Select this option to have the main level prefix or suffix appear on the check detail area and to print on order output devices, guest checks, and customer receipts.
29 - Print Sub Level Prefix and Suffix	Select this option to have the sub level prefix or suffix appear on the check detail area and to print on order output devices, guest checks, and customer receipts.
30 - Sort Condiments by Print Group	Select this option to sort condiment display and printing tasks according to their Print Group assignment.
31 - Prompt for Seat Number with Each Menu Item	Select to prompt Enter Seat Number after adding each parent item with this menu item class. Deselect to suppress the seat number prompt. You can disable seat numbers for a revenue center and use a condiment group set with menu items named Seat 1, Seat 2, and so on.
34 - Item is Beverage	Select if all items in this Menu Item Class are beverages. Use this option with Beverage Control to track beverage usage.
35 - Fixed Price Meal	Select this option to indicate all menu items in the class are the priced (parent) portion of a fixed price meal.
38 - Item is Shareable	Select this option to allow menu items in the class to be shared between two or more seats, or two or more checks.
39 - Retail Item	Select this option to designate all menu items in this class as retail items. Retail items do not post to Gross Food and Beverage receipts.

Table 13-3 (Cont.) Menu Item Class Options

Option	Description
41 - Consolidate Menu Items with Condiments on Order Output	Select this option to consolidate parent menu items on Order Device Output, and then to print each condiment with its seat number to which the condiment applies. (The Order Device option, Print Seat Numbers with Individual Items must be enabled). For example, if this option is enabled, and an operator orders Chicken Wings with condiments 'Extra' and 'Sauce' on Seat 1, and Chicken Wings with condiments 'Without' and 'Bleu Cheese' on Seat 2, then the Order Device Output shows the following: Seat 1,2: Chicken Wings S1 Extra S1 Sauce S2 Without S2 Bleu Cheese
42 - Consolidate parents with matching condiments on Order Output	Select to consolidate parent menu items with identical (matching) condiments.
49 - Participates in Menu Item Master Switching	Select to switch a parent menu item based a menu level change. All items switching based on menu levels must belong to the same Master Group, and each item's menu item class has this option set. The menu item must be set as a Condiment Prefix.
51 - Item must be complete before beginning another item	Select this option to prevent workstation operators from adding a second menu item before completing the first item. This option is not used with required condiments.
52 - Prompt to begin another item if this item is incomplete	Select this option to prompt to move to the next item before completing a menu item order.
53 - Remove Item on Subsequent Press if Ordering Type is Exclusive	Select this option to remove a condiment item and revert the parent menu item to the default state. The menu item must be set as a Condiment Prefix.
55 - Discounts Apply to Priced Condiments (parent items only)	Select this option to apply discounts to parent items in this class and all priced condiments associated with the items. Deselect to apply discounts only to parent items. The menu item must be a Condiment Prefix.
57 - Parent items appear on condiment order devices (for condiments only)	Select this option to send the parent item to the order devices set for this class. Deselect to send parent menu items based on the menu item class settings only. The menu item must be set as a Condiment Prefix.
58 - Condiment order device programming overrides that of parent	Select this option to allow the order devices set for this condiment's class to override the order devices defined for the parent items. The menu item must not be a Condiment Prefix.

Table 13-3 (Cont.) Menu Item Class Options

Option	Description
59 - Allow Item Incomplete Based On Role	Select this option to allow the employee to add the parent menu item without the required condiments. You must also select Allow Incomplete Item in the Roles module for the employee.
63 - Autofill	Select this option to adjust the quantity to satisfy the required condiments when adding the condiment with a required condiment group that has Min/Max set, and more than one condiment is still needed.
65 - Support Enhanced Prefix Mode (Parent Only)	Select this option to enable enhanced prefix support for non-condiment menu items in this class. Enhanced prefix support uses condiment prefix items to describe condiments, such as Extra or No.
69 - Prompt to lookup menu item definition based on current menu levels (Repeat Rounds)	Select this option to prompt the workstation operator to look up a menu item definition based on the current menu levels when a repeatable menu item is unavailable. You must also select options 26 - Keep Main Level With Repeat Rounds and 27 - Keep Sub Level With Repeat Rounds .
74 - Prevent Menu Items from Being Held	Select this option to prevent menu items belonging to this menu item class from being held.
76 - Post Sales Count To KDS Reports	Select this option to add the menu item count to the Menu Item Count totals on KDS reports.
77 - Only allow condiments with an active price record	Select this option to have condiment items with an active effectivity price record appear in SLUs. When the effectivity record is expired or has a future date, the condiments are not available in SLUs. You must also disable option 8 - Allow Menu Items in this Class to be Non-Priced .
78 - Forgive Inclusive Tax	Select this option to forgive the inclusive tax for the Menu Item Class.
79 - Do not print unpriced condiments on Guest Checks	Select this option to prevent unpriced condiments from printing on guest checks and customer receipts. Option 79 applies to the menu item condiments. For example, if there is no charge for lettuce on a sandwich, you can configure this condiment to not print. If there is a charge for avocado on a sandwich, you can configure this condiment to print. You must also select 65 - Support Enhanced Prefix Mode (Parent Only) for the main menu item (such as a hamburger or chicken sandwich) that can be modified with condiments.

Table 13-3 (Cont.) Menu Item Class Options

Option	Description
81 - Use like item order routing	Select this option for menu items in this class to use the tender/media like item order routing print class if the order contains only items with this option set.
82 - Contains alcohol	Select this option for menu items in this class to be marked as containing alcohol.

7. Click the **Condiment Groups** tab.

There are three sections:

- Required
: Does the menu item require a condiment?
 - Allowed
: Does the menu item allow condiments?
 - Member
: Is the menu item a member of a group of condiments?
- a. For Regular classes, select the **Required Condiment Groups**. These require a selection to be considered a complete menu item.
- b. To allow a condiment as an option for guests, select the **Allowed Condiment Groups**. If extra condiments are an option, make sure the Condiment Group is allowed.
- c. Select the **Member Condiment Groups** for the class.
- For example, if the condiment class is Meat Temp, select Meat Temp from the Member Condiment Groups list. The condiment menu items can be:
- Rare
 - Medium Rare
 - Medium
 - Medium Well
 - Well Done

8. Click **Save**.

Configure Regular Menu Item Class - Requiring Condiments

The following instructions help you configure a menu item class for menu items requiring a condiment. Certain menu items require a selection of one or more condiment menu items. For example, a cheeseburger may require the selection of both a meat temperature and a type of cheese. The menu item class for the cheeseburger must be configured to require the members of the two Condiment Groups to appear on the workstation for selection when the cheeseburger button is pressed.

It is helpful to use a naming convention that allows users to distinguish between types of menu item classes and to identify their purpose: what Condiment Groups they Require, Allow, or are a Member of; what order devices they output to, and so on. You could use a shorthand letter at the beginning of the Regular and Required and Condiment or Member classes:

- An upper case "R" for the classes requiring a condiment

- A lower case “m” for classes that are members of Condiment Groups
1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Classes**.

2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name** for the regular menu item class requiring condiments, and then click **OK**.

An example is R-Meat Temp/Cheese Choice.

4. Double-click the new menu item class record.
5. On the **General** tab, configure the following settings:

Table 13-4 General Menu Item Class Fields

Field	Description
Tax Class	Select the tax class to apply to all menu items that receive this class. To leave the tax class blank, select 0 - None .
Print Class	Select the print class to apply to all menu items that receive this class.

6. Click the **Options** tab, and then select the appropriate options. See [Configure Menu Item Class](#) for a description of each option.
7. Click the **Condiment Groups** tab.
 - a. In the **Required Condiment Groups** column, select the condiment groups that are required for the menu items to which this class is assigned.

Using the R-Meat Temp/Cheese Choice menu item class example, the Meat Temp and Cheese Choice Condiment Groups are enabled.
 - b. In the **Allowed Condiment Groups** column, select the condiment groups that are allowed for menu items to which this class is assigned.

If these allowed condiment groups are disabled, the only condiments permitted with menu items associated with this class are those being required.
8. Click the **Forced Condiments** tab.

You can edit the minimum and maximum number of condiment choices the workstation operator can select. If a group (for example, Cheese Choice) is set to 0 (zero), the operator is not required to make a selection. If set to 1, that is the minimum number of condiments from that group that are required for selection.

 - a. In the **Minimum** column for a group, enter 1.
 - b. In the **Maximum** column for a group, enter the largest number of condiments allowed for selection.
9. Click **Save**.

Configure Condiment Menu Item Class

The following instructions help you configure a condiment menu item class. Condiment classes define the Condiment Group membership of menu items to which their class is assigned. When a menu item requiring a condiment is selected in a transaction, the menu items belonging to that Condiment Group appear.

It is helpful to use a naming convention that allows users to distinguish between types of menu item classes and to identify their purpose: what Condiment Groups they Require, Allow, or are a Member of; what order devices they output to, and so on. You could use a shorthand letter at the beginning of the Regular and Required and Condiment or Member classes:

- An upper case “R” for the classes requiring a condiment (priced menu items)
 - A lower case “m” for classes that are members of Condiment Groups
1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Classes**.

2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name** for the condiment menu item class, and then click **OK**.

An example is `m-meat temp`.

4. Double-click the new menu item class record.
5. On the **General** tab, click the **Print Class** drop-down list and select the print class to apply to all menu items that receive this class.
6. Click the **Options** tab, and select the following options:
 - **2 - ON = Condiment Menu Items; OFF = Regular Menu Items**
 - **8 - Allow Menu Items in this Class to be Non-Priced**

See [Configure Menu Item Class](#) for a description of all other options.

7. Click the **Condiment Groups** tab.
 - In the **Member Condiment Groups** column, select the condiment groups to assign for this condiment menu item class and its menu items.
8. Click **Save**.

Configure Regular Menu Item Class - No Condiments Required

The following instructions help you configure a menu item class for menu items that do not require condiments. Many items that appear on a menu do not require modifiers, such as appetizers and beer. These types of menu items need a special menu item class to tell the items that they need no additional modifications to be marked as complete.

Often these classes are named “Food No Prep” or “Bar No Prep”, indicating that no further preparation is needed.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Classes**.

2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name** for the regular menu item class without condiments, and then click **OK**.

An example is `Food No Prep`.

4. Double-click the new menu item class record.
5. On the **General** tab, configure the following settings:

Table 13-5 General Menu Item Class Fields

Field	Description
Tax Class	Select the tax class to apply to all menu items that receive this class. To leave the tax class blank, select 0 - None .
Print Class	Select the print class to apply to all menu items that receive this class.

- Click the **Options** tab, and select the appropriate options.

See [Configure Menu Item Class](#) for a description of all options.

- Click the **Condiment Groups** tab.

For a No Prep class, the menu items require no modifiers and are also not members of a Condiment Group, so you do not need to select **Required Condiment Groups** nor **Member Condiment Groups**.

- In the **Allowed Condiment Groups** column, select the condiment groups that are allowed for menu items to which this class is assigned.

When a menu item comes with a condiment, it needs to either require that condiment (enabled in the **Required** column), or to have it allowed (enabled in the **Allowed** column).

- Click **Save**.

Introduction to Menu Levels

Menu levels are a customized way to indicate when menu items are available to workstation operators. Menu levels determine which items within a transaction (menu items, discounts, service charges, or tenders) can be accessed on a workstation at all times throughout the day. There are two types of menu levels: main levels and sub levels. On the workstation, a main level and a sub level are active at all times during any transaction. To make an item accessible, it must be available on the current main and sub levels. Main and sub levels have two functions:

- They determine what items a workstation operator can and cannot access during a transaction.
- They can impact items, such as different prices, to be active at specific times (for example, a Happy Hour price versus a regular menu item price).

Menu levels are often used to determine serving periods. Basic examples of menu levels are Breakfast, Lunch, Dinner, and Happy Hour. If a location starts serving eggs at 6:00 a.m., but stops at 11:00 a.m., as the kitchen changes to serving sandwiches the manager can use menu levels to remove all egg items from the workstation screen. These items remain in the database, but are not available to workstation operators at certain times.

Menu levels are also used to control sizing, meaning certain menu items only exist on a large level, while others only exist on small or medium levels. Using menu levels for sizing allows workstation operators to determine whether a cup or bowl of soup is ordered. You can apply the concept of small and large to many items, such as a half sandwich or full sandwich, a glass of wine or a carafe, a mug of beer or a pitcher, and an appetizer portion versus an entrée portion. Workstation operators generally have manual control over the menu level that determines item sizing.

Menu levels are used to change pricing, such as Happy Hour level becoming effective at 4:00 p.m. on weekdays, where all beers have a reduced cost price record that is effective only when that menu level is active. You can configure the application to manage these levels automatically.

Two menu levels need to be active in order for menu items to appear on the workstation:

- Main level
- Sub level

The two levels work together to control the active items so that different combinations of levels mean that different items can be active. For example, if main level 1 is called Regular and sub level 1 is called Breakfast, only menu items and price records configured to be active on both Regular and Breakfast levels are available when those two levels are active. If Regular is active all day, but at 11:00 a.m., Breakfast switches to Lunch, active items only on Regular and Breakfast are no longer available, while items on Regular and Lunch can be sold. The item's definition can have other levels active as well.

Menu levels are not an all-or-nothing feature; you can configure them as required. After you configure menu levels, they can be activated in multiple places using a hierarchy of overriding modules. If menu level defaults are specified in multiple modules, they are applied in the order listed.

Menu Level Hierarchy

The following menu level hierarchy determines which setting controls the default transaction menu levels:

Table 13-6 Menu Level Hierarchy

Hierarchy Number	Enterprise Management Console (EMC) Configuration	Description
1	Auto Menu Levels module	The Auto Menu Levels table is the most flexible of all menu level settings. It allows for more complex menu manipulation. For example, if a location has levels like Breakfast, Lunch, Dinner, Happy Hour, and Brunch, all with different menu items or price records, the Auto Menu Levels table controls them. Using the Auto Menu Levels table, menu levels are configured to change at specified times. There are 8 different Auto Menu Levels, all of which can be enabled on different days and times. If the time of day falls during an active auto menu level, the main or sub level that is specified for that auto menu level is the active level. See Activate Auto Menu Levels for more information.

Table 13-6 (Cont.) Menu Level Hierarchy

Hierarchy Number	Enterprise Management Console (EMC) Configuration	Description
2	Transaction Menu and Sub Level Defaults	The Default Main Level and the Default Sub Level (configured in the RVC Parameters module) become the default for the revenue center as a whole. If this setting is used, whenever a workstation operator signs in to the revenue center, these two menu levels will be active until they are changed manually. See Activate Default Menu and Sub Levels for a Revenue Center for more information.
3	Main 1 and sub 1 are always defaults Default if no levels are configured for use	If none of the other menu levels are configured, the workstation defaults to main level 1 and sub level 1 as the active levels for the transaction. This is configured in the Menu Level Sets module. See Activate Main and Sub Level Defaults for more information.

Activate Auto Menu Levels

Auto Menu Levels are sets of configuration that change the main and/or sub menu levels at specific times of day. Each location can have 8 levels.

Each Start time must match the End time of the previous row, without gaps. The times must cover a total 24-hour period. You must configure the times using a 24-hour clock.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Auto Menu Levels**.
2. In the **Start** column, enter the time at which the menu level becomes active.
For example, if Eggs become active at 6:00 a.m., enter 06:00.
3. In the **End** column, enter the time at which the menu level becomes inactive.
For example, if Eggs become inactive at 11:00 a.m., enter 11:00.
4. Select the **Main Level**, and then select the **Sub Level**.
5. Click the ellipsis point (...) button from the **Options** column.
6. Select **1 - This Entry is Active**, select one or more of the following options that correspond with the days that the menu level becomes active, and then click **OK**.
 - **2 - Active On Sunday**
 - **3 - Active On Monday**
 - **4 - Active On Tuesday**
 - **5 - Active On Wednesday**
 - **6 - Active On Thursday**

- **7 - Active On Friday**
- **8 - Active On Saturday**

Each menu level time range must be marked active on the specific days it will need to work. The Entry Active option is a quick way to turn off a specific menu level.

7. Repeat steps 2 through 6 for the remaining 7 levels.
8. Click **Save**.

Activate Main and Sub Level Defaults

The Menu Level Sets module contains the lowest menu level hierarchy. In Symphony Essentials, there are two default Menu Level Sets already set up at the Enterprise level called 'Main' and 'Sub' with menu level entries of the same name. You can change these names and add other records. They will appear in the workstation TSR and Bar workflows as shown below:

Figure 13-2 Example of Menu Level Sets Names

EMC Menu Level Configuration

Home Page | Menu Level Sets | Enterprise

Filter: Show Records Where: Show All Records | contains the text | Filter Now

#	Name	Zone/Location	Inheritance Type	Type	Options
1	Main	Enterprise	Defined Here	1 - Main	00
2	Sub	Enterprise	Defined Here	2 - Sub	00

Menu Level Entries

This Menu Level Set record is for the 8 Sub Levels. The Add/Delete links for individual entries are available in the Sub Menu.

#	Name	Prefix	Suffix	Options
1	Early Bird Prices		0	...
2	Lunch		0	...
3	Spit low		0	...
4	Spit high		0	...
5	Happy Hour		0	...

Default records called "Main" and "Sub" will already exist for Essentials. These can be changed in EMC as shown above for the Sub Menu Level

TSR Transaction Page showing Menu Levels

Seat 1 | Dine In | Main | **Early Bird Prices**

Sub Menu: Please Select Sub Menu

Early Bird Prices | Lunch | Spit low | Spit high | Happy Hour

Cancel

Breakfast Buffets | Breakfast a la carte | Breakfast Sides | Breakfast Eggs | Breakfast Beverage | Starters

Soups | Salads | Main Meat/Seafood | Main Pasta/Veggie | Main Sides | Sandwiches

Sub Total: 0.00 | Total Due: 0.00 | Le Meriden | 19:29 | POSREADY7

1. Select the Enterprise, click **Configuration**, and then click **Menu Level Sets**.

The **Type** column specifies whether the Menu Level Set refers to the Main Levels, the Sub Levels, or to the levels defined within the record. You can create an entry for the entire Main Level Set and Sub Level Set in this module; this allows you to configure the Options for Main and Sub levels.

2. Double-click the row for the level you are setting:

Two Menu Level Sets come with the application: Main and Sub.

- a. To define main menu levels, highlight the **Main** row in the left pane.
- b. To define sub menu levels, highlight the **Sub** row in the left pane.
- c. To define menu levels for a custom level set, insert a new record, enter a custom level set name, click **OK**, and then highlight the new custom level in the left pane.

3. In the Menu Level Entries section, define the menu levels by entering the numbered level field values.

You can use menu levels to specify menu item sizes, such as Small, Medium, and Large; and serving periods, such as Breakfast, Lunch, Dinner, and Happy Hour.

- a. Enter text into the **Name** field for reference purposes, regardless of whether it is being used to identify specific uses like sizing or serving periods.
- b. (Optional) Enter the **Prefix** or **Suffix** for each menu level. This information appears on the check detail area and prints on guest checks and customer receipts.
- a. To define a menu level as the default level for the menu level set, in the Options column, click the ellipsis point (...) button adjacent to the default menu level, select **1 - Default**, and then click **OK**.
- b. To define a menu level as an anonymous level for the menu level set, in the Options column, click the ellipsis point (...) button adjacent to the anonymous menu level, select **2 - Anonymous**, and then click **OK**.

The default and anonymous menu levels are generic, and are typically used with \$0.00 priced menu item definitions that have names such as [SIZE] Hot Drink or [TEMP] Drink.

4. Click **Save**.

Activate Default Menu and Sub Levels for a Revenue Center

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. On the **General** tab, select the **Default Main Level**, and the **Default Sub Level**.
3. Click the **Options** tab, and then set the main and sub menu levels as follows:
 - To set the workstation to remain at the current main menu level after completing a transaction, select **23 - Retain Current Main Level after a Transaction**.
 - To set the workstation to remain at the current sub menu level after completing a transaction, select **24 - Retain Current Sub Level after a Transaction**.
4. Click **Save**.

Configure Active Menu Levels for Menu Item Definitions and Prices

In order for a menu item definition to use sub level pricing (for example, Happy Hour), its menu item class must have the Active On Level enabled.

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Maintenance**.
2. Search for and then double-click a menu item master record.
See [Searching and Filtering Menu Items](#) for more information.
3. If the menu item has multiple definitions, select a definition, and then click the **General** tab.
4. In the Menu Level Availability section, select the active main and sub levels for the item.
5. To set the menu item definition as active on all menu levels, click **All**.
6. To set the menu item definition as active on a custom menu level:
 - a. Click **Menu Levels Tab**, select a **Menu Level Set**, and then select the menu levels.
 - b. To set the definition as active on all custom levels, select **Active on All Levels**.

7. If the menu item has multiple price records click **Prices**, and then select the **Active Menu Level** for each price definition.

When menu items are assigned to a class which uses sub level pricing (Menu Item Class option **10 - ON = Use Sub Level Pricing; OFF = Use Main Level Pricing** is set), the application lists sub levels.

8. Click **Save**.

Introduction to Menu Item Definitions

Menu item definitions are a required part of a menu item. Without them, the menu item does not appear on workstation screens. Definitions are the behavioral hub of a menu item.

Definitions use menu level links to determine when a menu item is accessible to workstation operators. By activating specific menu levels, the menu item is available to workstation operators when the level is active.

Menu item definitions also tie price records and menu item classes to the menu item.

The following table shows an example of three different iterations of mac and cheese, all behaving differently, all costing different prices, but all are reporting as mac and cheese. This is possible because each menu item master record can have up to 64 individual menu item definitions. These definitions are all available and configured in the Menu Item Maintenance module, on the Definition tab.

Table 13-7 Defining Definitions

Definition and Availability (Using Menu Levels)	Menu Item Class	Price
Mac and Cheese – Lunch	R – M&C Topping	\$8.00
Mac and Cheese – Dinner	R – M&C Topping	\$10.99
Basic Mac and Cheese – Lunch and Dinner Side	R – No Prep	\$3.99

If a menu item definition is not enabled on both the main or the sub level when those levels are active, the item does not appear on the workstation screens. As each menu item can have up to 64 definitions, making sure the correct levels are enabled in each definition is critical.

There are multiple ways to configure menu items, depending on how the enterprise needs the menu item to behave and to report:

- Single menu item master with multiple definitions
- Multiple menu item masters, each with their own definition
- Single menu item master with definitions only available on sizing levels

An example of each method is described in the following paragraphs.

Single menu item master with multiple definitions

The menu item definition name appears on the workstation screen, not its master record. For example, a restaurant serves the menu item Tomato Soup. When a guest orders soup, they choose either a cup or a bowl size. Both the menu item definitions `Tomato Soup-Cup` and `Tomato Soup-Bowl` appear on the workstation screen as two separate items, each with a different price record. The menu item `Tomato Soup` appears on reports as the master record name.

Multiple menu item masters, each with their own definition

If the restaurant wants the cup and bowl to report separately, they may configure a separate menu item master record for each—`Tomato Soup-Cup` and `Tomato Soup-Bowl`—with a single definition and price for each master record.

Single menu item master with definitions only available on sizing levels

A single master record can also have multiple definitions. For example, a restaurant uses menu levels for sizing. Instead of Breakfast, Lunch, and Dinner menu levels, they have menu levels for Small, Medium, and Large. One definition is only available on the Small level, another is only available on Medium, and so on.

The menu item class specifies whether the item is a regular menu item (such as a burger or salad), or a condiment item (such as meat temperature or ketchup). This is how you can get a master record, like bowl of soup, to behave both as an entrée on its own and as a side dish. Each has its own menu item class associated with its own definition.

As for price records, each item definition can have up to eight price records, each controlled by either the main or sub menu level. For example, a beer bottle can have two prices: one regular price and one happy hour price. When the menu level changes from regular to happy hour, the price record that is active on that level also changes.

However, a location may not want two definitions (regular and happy hour), but instead may create a single definition with two prices. A price record is either active on the main or sub level, but not on both levels. By default, price records operate on the main level. If needed, you can open the Menu Item Classes module, click the Options tab, and change the price record to operate on the sub level for the item's definition by selecting **10 - ON = Use Sub Level Pricing**; **OFF = Use Main Level Pricing**.

Configure a Menu Item From Scratch

You can create a menu item from scratch for an item that is unique. If you have a new location and there are no template records to use, at first you can add only a menu item master record, and then add menu item definition and price records later.

Adding items from scratch is not the most efficient method to create new menu items. The easiest and fastest way is to find a similar item and use it as a template for the new menu item. The new item inherits the characteristics of the template. See [Configure a Menu Item Using a Template](#) for more information about this method.

1. Select the Enterprise level, click **Configuration**, and then click **Menu Item Maintenance**.
2. Click the **Search** button in the lower left area.
3. If there is a list of existing menu items, click the record row where you want to add the menu item.

Determine the organization method used in your system when configuring menu items as it is helpful to try to use the same method. It is best to add the menu item in an area with other similar items. For example, you can list all Specials together, all Sandwiches together, and all Salads together.

4. Click the **Insert** icon () on the toolbar.
5. Complete the following fields for the menu item master record in the Add Menu Items dialog:
 - a. In the **Select a task to perform** drop-down list, select **Add Master Records without a Template**.

The application defaults to inserting the new menu item record into the next available slot after the currently selected record. Verify the record number you are adding.

- To insert the menu item in the next available position, select **Next Available Position**.
- To define the record number or range for the new menu item record or records, select **Record Number Or Range**, and then enter the record numbers or ranges.
- To insert the menu item at the next available record number after the currently selected record, select **After currently selected record**. For example, if you have record #50 selected and records 51 through 53 also exist, the new menu item is created in record #54.

b. Enter the **Name** of the new menu item.

c. Verify the **Major Group**, **Family Group**, and **Report Group** (number between 1 and 99) for the menu item. Change these fields if needed.

Menu Item Reports sort and list subtotals by **Report Group**. When the **Report Group** number is 0 (zero), the menu item does not show on Menu Item Reports.

d. Click **OK**. The new menu item master record appears in the list. Continue with the next steps to configure the definition, class, price, and menu levels.

6. Double-click the new master record row to open it.

7. Click the **Insert** icon () on the toolbar.

8. Complete the following fields for the menu item definitions and price records in the Add Menu Items dialog:

a. In the **Select a task to perform** drop-down list, select **Add Definition Records to this Master**.

The **Master** field shows the menu item master record to receive the new definition records.

b. In the **Definitions to Add** list, select the definitions to create for the master.

Each master record is allowed up to 64 definitions, each with its own menu item class, menu level, and up to eight price records. Each definition in the list needs to be assigned to a menu item class and a price record (optional).

c. (Optional) To add up to eight price records when creating a definition, select **Insert Price Records**.

d. If you are not using a definition template, select the **Number of Price Records** to create for the definition, and then enter the default **Price** for the new price records.

If the **Price** field is empty, the application assigns a default price of \$0.00, which you can change later.

If using a definition template, the application copies the price records from the template record.

e. Click **OK**, and then click **Yes** to confirm. The definition appears on the Definition List subtab.

9. Click the **General** subtab.

10. To switch between multiple definitions without leaving the current view, select the **Def Sequence #** from the drop-down list.

11. To change the menu item class, click the **Select** link adjacent to **Menu Item Class**, select the appropriate menu item class, and then click **OK**.

12. To change the print class, click the **Select** link adjacent to **Print Class Override**, select the appropriate print class, and then click **OK**.

Menu items print based on the **Print Class**. Sometimes a single definition needs to print somewhere different than all other items in its menu item class. You can create a new **Print Class** and attach it directly to the menu item definition here in the **Print Class** override.

13. In the Menu Level Availability section, select the **Main Level Link** and **Sub Level Link**. Click the **All** link to select all menu levels for main or sub.

These menu levels specify when a menu item definition is available on a workstation. Often restaurants make a definition available at all times, but adjust the price records to become active based on the current menu level (for example, Happy Hour pricing versus pricing during Lunch or Dinner).

14. To view the definition and price record, click the **Prices** subtab.
15. Click **Save**.

Configure a Menu Item Using a Template

You can configure a menu item using an existing menu item as a template. This is the easiest and fastest method to create a new menu item. The new item copies the characteristics of the template.

1. Select the Enterprise level, click **Configuration**, and then click **Menu Item Maintenance**.
2. Click the **Search** button in the lower left area.
3. In the list of existing menu items, find the item most closely related to the item you want to create.

To locate the right item to use, pay attention to Major Groups, Family Groups, Menu Item Definitions, Menu Levels, and Menu Item Classes. These characteristics will copy to the new item. After creating the new item from a template, you can make adjustments.

4. Click the record row where you want to add the menu item.

If you select a record before clicking the **Insert** icon in the next step, that record appears by default in the **Template Record** field. If you do not select a record, you can select the **Template Record** from the Add Menu Items dialog later.

5. Click the **Insert** icon () on the toolbar.
6. Complete the following fields for the menu item master record in the Add Menu Items dialog:
 - a. In the **Select a task to perform** drop-down list, select **Add Master Record from Template**.
 - b. (Optional) To select a different template item, click the **Select** link adjacent to **Master to Copy**.
 - c. Enter the **Name** of the new menu item.
 - d. Verify the **Record Number** assigned to the new menu item and change it if needed.

By default, the **Record Number** assumes the next available record after the template menu item. You can override this number by specifying a different **Record Number**.

- e. Click **OK**. The new menu item master record appears in the list.
- f. To add another record number immediately, click **Yes**. Otherwise, click **No**.

7. On the Master Records tab in the lower area of the screen, verify that the new menu item record appears with the correct record number.
8. On the Definition Records tab in the lower area of the screen, verify that the new menu item definition appears. You can scroll to the right to see more parts of the menu item definition, and change any attribute of the new menu item, Menu Item Class, Major Group, or Family Group as needed.
9. On the Price Records tab in the lower area of the screen, verify that the new menu item price record or records appears. If the template item had two price records, the new item has the same information. You can change the price record as needed.

Add Dietary Labels to Menu Item Masters

You can add special dietary labels (for example, Gluten Free, Vegetarian, Vegan, and Heart Healthy) to menu items masters.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the employee record, and then click the **EMC Modules** tab.
3. In the bulk operations list, scroll to the **Dietary Labels** row, and ensure the necessary operations are selected.
4. Click **Save**.
5. Select the Enterprise level, click **Descriptors**, and then click **Dietary Labels**.
6. Add dietary label records as needed. If you delete a dietary labels record, this will in turn delete all dietary labels associated with a menu item.

The **Use Template** function is not supported in the Dietary Labels module.

7. Click **Save**.
8. Select the Enterprise level, click **Configuration**, and then click **Menu Item Maintenance**.
9. Search for and then double-click the menu item master record, and then click the **Dietary Labels** tab.
10. In the **Dietary Labels** section, click **Add**, and then click
11. Select the desired dietary label for the menu item, and then click **OK**.
12. Repeat Steps 10 and 11 to add more dietary labels.
13. Click **Save**.

Configure Menu Tag Groups and Tags

A menu is a collection of menu items. Use a menu tag to associate a Symphony Essentials menu item with an online ordering menu. Each online ordering provider must have a unique menu tag in Symphony Essentials. Only the menu items with these tags are visible in the online ordering application.

Symphony retains all tag activity (including add, edit, and delete) for use in auditing.

1. To add a tag group:
 - a. Select the Enterprise level, click **Descriptors**, and then click **Tag Groups**.
 - b. Click the **Insert** icon () on the toolbar.
 - c. Add a new tag group record with the appropriate name, and then click **OK**.

- d. Click **Save**.
2. To add a tag:
 - a. Select the Enterprise level, click **Descriptors**, and then click **Tags**.
 - b. Click the **Insert** icon () on the toolbar.
 - c. Add a new tag record with the appropriate name (for example, Online Only), and then click **OK**.
You cannot duplicate tag names.
 - d. Select the **Tag Group**.
 - e. Click **Save**.
3. To edit a tag:
 - a. Select the Enterprise level, click **Descriptors**, and then click **Tags**.
 - b. Change the tag name in the **Name** column.
 - c. Click **Save**.
4. To delete a tag:

If you delete a tag that is associated with a menu item definition, the association is also deleted.

 - a. Select the Enterprise level, click **Descriptors**, and then click **Tags**.
 - b. Highlight the tag record, click the delete icon () on the toolbar, and then click **Yes**.
 - c. Click **Save**.
5. To associate a tag with a menu item definition, see [Associate a Menu Item Definition with a Tag](#) for detailed instructions.

Associate a Menu Item Definition with a Tag

Menu tags need to be added in the Tags module before associating them with a menu item definition. [Configure Menu Tag Groups and Tags](#) contains more information about adding tags.

You can use tags to filter and group menu item definitions. A menu item definition record can be associated with more than one tag. The menu item master record must have at least one menu item definition to enable the Tags tab in the Menu Item Maintenance module.

1. Select the Enterprise level, click **Configuration**, and then click **Menu Item Maintenance**.
2. Double-click the menu item master record corresponding to the definition to open it.
3. Click the **Tags** tab.
4. Click the **Add** link.
By default, the first tag from the Tags module appears.
5. To change the tag, click the ellipsis (...), select the new tag from the list, and then click **OK**.
6. To change the tag name, click inside the **Tags** column and edit the text.
7. If the menu item master record has more than one menu item definition, click the **Next Def Seq** link, and then click the **Add** link again for another tag.

8. Click **Save**.

Allergen, Nutrition and Consumer Advisory Information

Administrators can configure allergen, consumer advisory, and nutrition related menu item content in the EMC. This information can be used in Oracle API interfaces to meet legal requirements where necessary. The allergen, nutrition, and consumer advisory details are supported in the Symphony Essentials Transaction Services (STS) Gen 2 configuration service responses, such as self-service kiosks or Enterprise online ordering.

The allergen, nutrition, and consumer advisory content is configured for individual menu item definitions. Each menu item definition can have multiple allergens and multiple nutrition entries configured. One consumer advisory description is allowed per menu item definition.

The allergen, nutrition, and consumer advisory content is translatable. You can also change the nutritional content unit of measure for each language translation.

Symphony Essentials does not support the % of Daily Value or Serving Size.

Allergen

Symphony Essentials contains a fixed list of allergens (for example, eggs, fish, peanuts, and milk) in the Allergens module at the Enterprise level. Administrators can create an allergen class using the Allergen Classes module, and then associate allergens to an allergen class. Then the allergen class can link to a menu item class. You can override the allergen class at the menu item definition level.

Nutrition

Administrators can configure nutritional values (for example, calories, total fat, saturated fat, and sodium) for each menu item definition. The nutrition information is typically found on a packaged goods label.

The Nutrition Names module provides a pre-defined list of nutrients available at the Enterprise level. This is a reference list used for entering nutritional details and cannot be modified.

You can use the Nutrient Sets module, available at the Enterprise level, to create a set of nutritional details that can be associated with a menu item definition. For example, you can add nutritional content for a Chicken entrée to a Chicken nutrient set, with details of calories, dietary fiber, carbohydrates, total fat and protein, and link this nutrient set to the menu item definition for the Chicken entrée.

The Menu Item Definition module has a Nutrition tab that is used to add nutritional details based on the defined nutrient sets. You can use the Nutrition tab to link Nutrient Sets to the menu item definition.

Consumer Advisory

Typically, the consumer advisory description contains food safety warnings specific to allergens. An example of a consumer advisory description is: Consuming raw or under-cooked meats, poultry, seafood, shellfish, or eggs may increase your risk of foodborne illness. The **Consumer Advisory Description** field is available in the Menu Item Definition module.

Configure Allergens

You can add an allergen (for example, Shrimp), and associate it with an allergen class (for example, Seafood).

1. To add an allergen:

- a. Select the Enterprise level, click **Descriptors**, and then click **Allergen Names**.
The Allergen Names module has several preset allergen names and codes. The existing allergen names and codes cannot be edited or deleted; however, the text can be translated.
 - b. Click the **Insert** icon () on the toolbar.
 - c. Enter the allergen in the **Record Name(s)** field, and then click **OK**.
The system does not allow duplicate allergen names.
 - d. Click **Save**.
2. To add an allergen class:
 - a. Select the Enterprise level, click **Configuration**, and then click **Allergen Classes**.
 - b. Enter the allergen class in the **Record Name(s)** field, and then click **OK**.
You can configure the Allergen Classes module from either table or form view. In table view, if more than one allergen is selected, allergens are listed and comma separated.
 - c. Based on the allergen class' name, select the allergen you want to include in the class.
You can select more than one allergen. Switch to form view by using the toggle icon on the toolbar
, or double-click the record.
 - d. Repeat steps 2a through 2c to add more allergen classes if needed.
 - e. Click **Save**.
 3. To link the allergen class to a menu item class:
 - a. Select the Enterprise level, click **Configuration**, and then click **Menu Item Classes**.
 - b. On the **General** tab, select the allergen class in the **Allergen Class** field.
 - c. Click **Save**.
 4. To override the allergen class at the menu item definition level:
 - a. Select the Enterprise level, click **Configuration**, and then click **Menu Item Maintenance**.
 - b. Search **Menu Item Definition** records for items you wish to assign an allergen class.
[Search and Filter Menu Items](#) contains more information about searching.
 - c. On the record's **General** tab, select the allergen class from the drop-down list that you want to assign to the menu item class from the **Allergen Class Override** field, and then click **OK**.
 - d. Click **Save**.

Configure Nutrition and Consumer Advisory Information

1. To translate nutrition names for menu items:
 - Select the Enterprise level, click **Descriptors**, and then click **Nutrition Names**.
The EMC shows preset nutrient records. You cannot add nutrient records. The existing nutrient names cannot be edited or deleted, but you can translate the nutrient names in the **Text** column.

2. To add nutrient sets:
 - a. Select the Enterprise level, click **Configuration**, and then click **Nutrient Sets**.
 - b. Click the **Insert** icon () on the toolbar.
 - c. Enter the nutrient set name in the **Name** field.
 - d. Switch to form view by clicking the toggle icon on the toolbar , or double-click the record. In the **Nutrients** section, click **Add** to insert and configure nutritional information.
 - e. In the **Nutrient** column, click the ellipsis (...), select the nutrient type from the drop-down list, and then click **OK**. Repeat this step for each nutrient you add to the record.
 - f. In the **Unit of Measure** column, select the appropriate measurable for each nutrient. The available units are:
 - Calories
 - Kilojoules
 - Grams
 - Milligrams
 - g. In the **Quantity** column, enter the numerical value associated with each unit of measure type.
 - h. Click **Save**.
3. To link the nutrient set to the menu item definition and add consumer advisory text:
 - a. Select the Enterprise level, click **Configuration**, and then click **Menu Item Maintenance**.
 - b. Search **Menu Item Definition** records for items you wish to assign nutrition sets. [Search and Filter Menu Items](#) contains more information about searching.
 - c. (Optional) Open a menu item definition record and enter text in the **Consumer Advisory Description** text box (for example, May contain nuts).
 - d. Open a menu item definition record, and then click the **Nutrition** tab.
 - e. In the **Nutrients** section, click the **Add** link.
 - f. In the **Nutrient Set** column, click the ellipsis (...), select the nutrient set from the drop-down list, and then click **OK**.
You can add more than one nutrient set to a menu item definition record.
 - g. Repeat steps 3a through 3f for each menu item definition record for which you want to add nutrient sets.
Adding nutrient set to menu item definition records cannot be performed from table view. You need to manually add each nutrient set to each individual menu item definition record.
 - h. Click **Save**.

Search and Filter Menu Items

The Menu Item Maintenance module allows you to search for menu items. Typically several hundred menu item records are likely to exist. Searching and filtering allows you to work with only the desired menu item records. By default, no items appear in table view.

1. Select the Enterprise level, click **Configuration**, and then click **Menu Item Maintenance**.
2. To view all records, click **Search** without entering search criteria.

Depending on the number of menu items, this step may take several minutes.

3. To view specific menu item records, enter information in the relevant search fields, and then click **Search**:
 - **Record Type**: Select the type of record to find (**Menu Item Master**, **Menu Item Definition**, or **Menu Item Price**). When both a **Menu Item Master** and a revenue center are selected, the application returns only master records with definitions in the selected revenue center.
 - **Name Search**: Enter the menu item name (partial or full) to search. Only records containing the text in the name field for the specified language are returned. Menu Item Definition and Price searches look for the text in either the Name 1 or Name 2 fields. Entering Shrimp Cocktail returns the specific record; a family group search on Appetizers returns results more quickly.
 - **Major Group**: Enter a major group number or a range of major group numbers to include in the search.
 - **Family Group**: Enter a family group number or a range of family group numbers to include in the search.
 - **Object Number or Range**: Enter an object number or range of object numbers to include in the search.
 - **Show Master w/Defs Only**: Select to show only menu item master records that contain one or more definitions for this property. Deselect to show all menu item master records for this level or higher.
 - **Map Menu Item Overrides**: Select to show the Menu Item Override indicator, which allows you to see other locations in the Enterprise where the item is configured. Deselect to exclude the Menu Item Override indicator. As the system needs to check the entire enterprise for the menu item, the search results will take longer to generate. Therefore, set this option only when there is a specific need to see this information.
 - **Class**: Enter a menu item class or range of menu item classes to include in the search when querying menu item definitions or menu item prices.
 - **Sales Itemizer**: Enter a sales itemizer or range of sales itemizers to include in the search when querying menu item definitions or menu item prices.

Guest Checks

A guest check contains a record of all sales on the check, from the guest's initial menu item order to final payment.

Configure Check Name Prompt for Bar Transactions

You can enable workstation operators to enter a check name when selecting the **Begin Check** button in the bar workflow. This increases speed of service by allowing busy bartenders using tabs to name checks more quickly when starting a transaction.

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Control Parameters**.
2. Click the **Options** tab, and then select **72 - Prompt for Check Name in Essentials Bar Workflow**.

When option **72** is enabled, the **Begin Check** button on the workstation prompts for a check name if no pre-authorization credit card payment is defined, or if the pre-authorization did not return a name.

3. Click **Save**.

Allow Employees to Add or Transfer Checks

Transferring checks is a procedure that changes ownership of a guest check. Symphony Essentials enables privileged workstation operators to transfer checks from another server to themselves by employee number or by employee ID number. The Transfer Checks function only transfers the ownership of the guest check; it does not transfer the check's sales totals for reporting purposes.

Add Check means to combine two checks together while in a transaction.

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the role type record (for example, administrator, manager or server).
3. Click the **Operations** tab, and then click the **Guest Checks** subtab.
4. Select the appropriate permission options for the user role:
 - **45 - Authorize Transfer of Checks in the Same Revenue Center:** Select to allow employees with this role to transfer checks from another operator within the same revenue center, and to authorize others to do so.
 - **47 - Authorize Adding of Checks in the Same Revenue Center:** Select to allow employees with this role to add checks (to be in a check, and add another check to it) within a revenue center, and to authorize others to do so.
5. Click **Save**.

Configure Begin Future Order

You can configure checks to be sent to the kitchen at a specific date and time for Table Service Restaurant operations. These are called Future Orders (sometimes called Autofire checks).

By default, the future orders feature is not active for Symphony Essentials. When you enable future orders, the following changes occur in POS Operations:

- The **Begin Future Order** button appears on the POS Functions page.
- The Pickup Check dialog shows the **Future Checks** button.
- The **Future Open Check Report** button appears on the POS Reports page.

To enable Begin Future Order:

1. Select the revenue center, click **Setup**, and then click **RVC Parameters**.
2. Click the **Autofire** tab, and then configure the fields as described in the following table:

Figure 14-1 Autofire Tab

The screenshot shows the 'Autofire' tab in a software interface. It contains several input fields and checkboxes. The 'Autofire Options' section includes: 'Autofire Employee' with a dropdown showing '2 - James, Peter' and a 'Select' link; 'Autofire Workstation' with a dropdown showing '1 - WS1' and a 'Select' link; 'Default Autofire Tender/Media' with a dropdown showing '300 - Service Total' and a 'Select' link; 'Backup Autofire Delay (Mins)' with a text input '1'; and 'Maximum Days' with a text input '366'. Below these are two checkboxes, both checked: '2 - Print Guest Check at Time of Autofire' and '3 - Enable Autofire in this Revenue Center'.

Table 14-1 Automatic Check Firing Fields

Fields and Options	Description
(Optional) Autofire Employee	To allow a specific employee to become the owner of all checks, including those placed using Transaction Services after the orders fire, select a workstation operator, and then click OK. • If you select an Autofire Employee, all sales totals post to the designated workstation operator and the checks appear under the Autofire Employee in the Open Check Report. • If you do not select an Autofire Employee, the check operator remains the owner of the check after the order fires.

Table 14-1 (Cont.) Automatic Check Firing Fields

Fields and Options	Description
Autofire Workstation	Select the workstation from which the orders fire and print. The application uses this value to determine the order output devices and workstation printers to use when an order fires.
Default Autofire Tender/Media	Select a service total that workstation operators can use with Future Orders. This service total must be the same as the Default Service Total Tender/Media set in the Tender Parameters module, Symphony Essentials tab. Create Payment Buttons contains more information.
Backup Autofire Delay (Mins)	Enter the amount of time (in minutes) that the Future Orders workstation must try to fire the orders. After the Backup Autofire Delay time elapses, if the Future Orders workstation is unsuccessful at firing the order, the workstation at which the check was originally created tries to fire the order. If both workstations fail, a memo chit prints and a workstation operator must manually fire the order.
(Optional) Maximum Days	Enter the maximum number of days for which workstation operators can schedule orders to fire automatically.
(Optional) 2 - Print Guest Check at Time of Autofire	Select this option if you want a guest check to print when an order automatically fires to order devices. If you select this option, guest checks print at the guest check printer assigned to the autofire workstation.
3 - Enable Autofire in this Revenue Center	Select this option to allow the revenue center to create orders that fire automatically.

3. Click **Save**.
4. Select the Enterprise level, click **Configuration**, and then click **Roles**.
5. Double-click the role type for the employee who needs privileges to assign future checks.
6. Click the **Operations** tab, and then select the appropriate options.
7. Click the **Guest Checks** subtab, and then select the following privileges. The following table describes the privileges corresponding to automatic check firing.

Table 14-2 Employee Guest Check Privileges for Automatic Check Firing

Privilege	Description
183 - Begin Autofire Check using [Begin Autofire Check] Key	Select this option to allow employees in this role to create checks with orders that automatically fire at a preset time using the Begin Autofire Check function key.

Table 14-2 (Cont.) Employee Guest Check Privileges for Automatic Check Firing

Privilege	Description
184 - Authorize/Perform Pickup of Autofire Check Belonging to Another Operator	Select this option to allow employees in this role to pick up and edit checks with orders that fire at a preset time from other employees.
185 - Authorize/Perform Edit of Autofire Date/Time	Select this option to allow employees in this role to modify the date and time that orders are set to automatically fire.

8. To allow employees in this role to generate the Autofire Open Check Report from the workstation, click the **Ad Hoc Reports** subtab, and then select **31030 - Run Autofire Open Check Report**.
9. Click **Save**.
10. Select the Enterprise, property, or revenue center, click **Descriptors**, and then click **Autofire Check Offline Header**.
11. From the **Text** column, enter the header lines to print on memo chits when future orders fail to fire automatically.
12. To add a logo to the header, select **Use Logo**, click the ellipsis point (...) button from the Logo column, select the logo from the list, and then click **OK**.
13. Click **Save**.

Introduction to Logo Printing

You can print the logo of your Enterprise, property, or revenue center on guest checks, customer receipts, and credit card vouchers. Symphony Essentials only supports monochrome bitmap image files. Use Microsoft Paint to convert an image to a monochrome bitmap. Adhere to the following rules governing the size of your logo:

- The image area must not exceed 98,304 pixels. (Keep in mind that a logo that is 512 x 384 pixels exceeds 98,304 pixels.)
- The image width must not exceed 512 pixels.
- The image height must not exceed 384 pixels.
- The bitmap file must not exceed 8 kilobytes in size.

Symphony Essentials does not support logo printing on printers with multi-language cards.

Complete the following tasks to set up logo printing:

- Upload a logo to Symphony Essentials.
- Assign a logo to guest checks, customer receipts, and credit card vouchers.
- Set the printer to print the logo.

Configure Logo Printing

You need to upload the logo to Symphony Essentials, and then you can assign the logo to guest checks and receipts.

1. Select the Enterprise level, click **Configuration**, and then click **Print Logos**.
2. Insert a new record, and then double-click it to open.

3. Click **Load Image**.
4. Select the image, and then click **Open** to upload it. After the logo uploads, an image preview appears.
5. Alternately, you can copy the image to your clipboard, and then click **Paste Image** to upload it.
6. Click **Save**.
7. To print the logo on guest check headers, trailers, or customer receipts, see [Configure Guest Check Headers and Trailers, and Customer Receipt Headers](#) for information.

Configure Guest Check Headers and Trailers, and Customer Receipt Headers

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. At hotels, guest check trailers are often configured to show room charge information for the customer to complete. You can also set a header or trailer line to print logos rather than text.

Headers print automatically on guest checks. You must set trailers to print per tender/media record.

This is a separate configuration from [Configure Headers and Trailers for Printed POS Reports](#)

1. Select the Enterprise, property, or revenue center, click **Descriptors**, and then click either **Guest Check Headers** or **Guest Check Trailers**.
2. For each row, enter information in the following fields:
 - **Text**: Enter the text to appear on the header or trailer.
 - (Optional) **Use Logo**: Select this option to print a logo rather than text on the guest check header or trailer. If you select **Use Logo** for an existing check header record that has content in the **Text** column, that text no longer appears on printed guest checks and customer receipts.
 - (Optional) **Logo**: If you selected **Use Logo**, click the ellipsis point (...) button in the **Logo** column, select the image you uploaded, and then click **OK**.
3. Click **Save**.
4. To assign text or a logo to customer receipts and guest check trailers, repeat these steps, selecting the **Guest Check Trailers** and **Customer Receipt Headers** modules in Step 1.
 You must also select **28 - Print Guest Check Trailer on Fast Transaction Customer Receipt** for tender records from the Tender/Media Printing options. If you do not set this option, trailers do not print on customer receipts when the tender is used to close a fast transaction.
5. To configure trailers to print for each tender media record, select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
6. Double-click the tender record.
7. Click the **Options** tab, and then click the **Printing Options** subtab.
8. Set the appropriate options as described in the following table:

Table 14-3 Trailer Printing Options for a Tender Record

Option	Description
20 - Print Sales Itemizers	Select this option to print the sales itemizer lines on guest checks, customer receipts, and memo checks when workstation operators use the tender record. Deselect this option to suppress printing of the sales itemizers.
21 - Print Summary Totals	Select this option to print the summary totals (subtotal, tax, amount due, and change due) on guest checks, customer receipts, and memo checks when workstation operators press the key. Deselect this option to suppress printing of the summary totals.
22 - Print Check Trailer	Select this option to print the guest check trailer lines at the end of the guest check.
28 - Print Guest Check Trailer on Fast Transaction Customer Receipt	Select this option to print the guest check trailer on the customer receipt when workstation operators use the tender to close a fast transaction. Deselect this option to prevent the trailer from printing on customer receipts.

9. Click **Save**.

Configure Headers and Trailers for Printed POS Reports

You can configure the printing of report headers and trailers for POS reports containing site specific information. Audit procedures in certain countries require them to generate POS reports containing such information. Printing information—such as the site's business address or logo—on report headers (or trailers) helps to identify the source (or location name) of the data to which the report pertains.

This is a separate configuration from [Configure Guest Check Headers and Trailers, and Customer Receipt Headers](#).

1. Select the Enterprise, property, or revenue center, click **Descriptors**, and then click either **Report Headers** or **Report Trailers**.

Note:

You can configure different report headers and trailers based on the scope your reports are generated from, such as the Enterprise, property, or revenue center level. For example, a property level report might contain different report headers/trailers than a revenue center level report. If desired, configure the report headers/trailers for each level.

2. From top to bottom, in ascending order, enter the information in the **Text** column as you want the header to print on the report.

The Report Headers and Report Trailers modules each contain 12 lines which can be configured. You cannot insert new lines.

3. To print your company's logo, select the **Use Logo** check box on any line.
4. From the **Logo** column, click the ellipsis button (...), and then select the logo.

This configuration supports logo printing using the same image rules as existing header and trailer lines. See [Introduction to Logo Printing](#) for more information.

5. To create a blank space or a blank line between other header/trailer lines, define such lines on a lower line number. These blank spaces and lines print only when the populated lines are defined on a higher line number.

You can only print a blank line between two other lines, not at the end. For example, if you define text on lines 1, 2, 3, and 5, there will be a blank line between 3 and 5. If you define text on lines 1, 2, 3, 4, and leave line 5 blank, then line 5 will not count as a blank line on the report.

6. Repeat Steps 1 through 5 to configure the Report Trailers module. The report trailer appears near the end of the printed report.
7. Click **Save**.

Gift Cards

Simphony Essentials release 19.5 added support for Oracle MICROS Gift and Loyalty's gift card functionality.

When the functionality is enabled, the POS client displays buttons for the following gift card operations:

- **Balance Inquiry**
- **Balance Transfer**
- **Cash Out**
- **Issue**
- **Redeem**
- **Reload**
- **Activate**

There are two paths available for configuring Oracle MICROS gift cards on the POS. To determine which path to follow, before setting up data, sign in to the EMC. Select the Enterprise level, click **Setup**, and then click **Stored Value Module**.

- If there is a Stored Value record called iCare SVC, select this link: [Gift Card Setup for New Organizations](#).
- If there are no records or you are not sure which path to follow, select this link: [Gift Card Setup for Organizations Pre 19.5 Release](#).

After configuring the POS clients, follow this process to configure your gift card program: [Configure Gift Card Program](#).

Gift Card Setup for New Organizations

Complete the following to configure Oracle MICROS gift cards for your Simphony Essentials system.

Configure Gift Card Privileges

Privileges must be configured by role to enable users to access gift card functions.

1. Select the Enterprise, click **Configuration**, and then click **Roles**.
2. To enable users with this role to access gift card functions on the POS, click the **Operations** tab, and then click the **Stored Value Cards** subtab.
3. Select the appropriate options. The following table summarizes the privileges associated with gift card functionality.

Table 15-1 Gift Card Privileges

Section	Option Number	Privilege Name	Select This Option to Allow Employees to...
Issue Functions	104	Authorize/Perform Issue Stored Value Function	Issue a gift card
Issue Functions	105	Authorize/Perform Void Issue Stored Value Entry	Void an issued gift card
Issue Functions	106	Authorize/Perform Issue Stored Value Batch Function	Issue a batch of gift cards
Issue Functions	107	Authorize/Perform Void Issue Stored Value Batch Entry	Void a batch of gift cards
Issue Functions	108	Authorize/Perform Activate Stored Value Function	Activate a gift card
Issue Functions	109	Authorize/Perform Void Activate Stored Value Entry	Void the activation of a gift card
Issue Functions	110	Authorize/Perform Activate Stored Value Batch Function	Activate a batch of gift cards
Issue Functions	111	Authorize/Perform Void Activate Stored Value Batch Entry	Void the activation of a batch of gift cards
Reload and Redeem Functions	112	Authorize/Perform Reload Stored Value Function	Reload (add credit) a dollar amount to an existing gift card
Reload and Redeem Functions	113	Authorize/Perform Void Reload Stored Value Entry	Void a reload transaction
Reload and Redeem Functions	114	Authorize/Perform Redeem Authorization Stored Value Function	Perform a redemption authorization
Reload and Redeem Functions	115	Authorize/Perform Void Redeem Authorization Stored Value Entry	Void a redemption authorization
Reload and Redeem Functions	116	Authorize/Perform Redeem Stored Value Function	Perform a redemption transaction (use gift card to pay some or all of a check)
Reload and Redeem Functions	117	Authorize/Perform Void Redeem Stored Value Entry	Void a redemption transaction
Reload and Redeem Functions	118	Authorize/Perform Manual Redemption Stored Value Function	Perform a manual redemption
Reload and Redeem Functions	119	Authorize/Perform Void Manual Redemption Stored Value Entry	Void a manual redemption transaction

Table 15-1 (Cont.) Gift Card Privileges

Section	Option Number	Privilege Name	Select This Option to Allow Employees to...
Other Stored Value Card Options	103	Authorize/Perform Manual Entry of Stored Value Card Number	Manually enter the gift card account number
Other Stored Value Card Options	124	Authorize/Perform Stored Value Cash Out Function	Debit some or all of the remaining balance on a gift card
Other Stored Value Card Options	179	Authorize/Perform Void Stored Value Cash Out Function	Void a cash out transaction
Other Stored Value Card Options	125	Authorize/Perform Stored Value Balance Inquiry Function	Check a gift card balance
Other Stored Value Card Options	126	Authorize/Perform Stored Value Balance Transfer Function	Transfer the balance from one gift card to another

4. Click **Save**.

Configure Stored Value Driver

1. Select the Enterprise, click **Setup**, and then click **Stored Value Driver**.
2. Double-click the iCare SVC record to open it.
3. Click the **Configuration** tab.
4. Scroll to the end of the page, and enter the path to Gift and Loyalty in the **Web Address** field (including location, port number and service path).
Use the following format: `https://[GiftLoyaltyLocation]:[GiftLoyaltyPortNumber]/ws/services/StoredValueService`. This web address is case-sensitive and cannot contain spaces.
5. Click **Save** and close the Stored Value Driver module.
6. Select the property, click **Setup**, and then click **Stored Value Driver**.
7. Right-click to the left of the object number of the iCare SVC record, select **Override Record** and then select **Use Existing Record**.
8. Select iCare SVC, and then click **Yes**.
9. Double-click the record to open it.
10. Click the **Configuration** tab.
11. Scroll to the end of the page, and then enter the **Login** and **Password**.
These fields are specific to the property, not the Enterprise.
12. Click **Save** and close the Stored Value Driver module.

Configure Stored Value Module

1. Select the Enterprise, click **Setup**, and then click **Stored Value Module**.
2. Double-click the iCare SVC record to open it.

3. Click the **Configuration** tab.
4. Enter the **Currency ISO Code** (three alpha characters) that represents the currency being used (for example, USD). See www.currency-iso.org/en/home/tables/table-a1.html for a list of Currency ISO 4217 codes.
5. Enter the **Language ISO Code** (two alpha characters) that represents the language being used (for example, EN). See www.loc.gov/standards/iso639-2/php/code_list.php for a list of Language ISO 639–1 codes.
6. Click **Save**.

Enable the Gift Card Interface

1. Select the Enterprise, click **Setup**, and then click **Interfaces**
2. Insert a record for *Stored Value* as the **System Name**.
3. Double-click the new interface record to open it.
4. On the **General** tab, select **5 - Stored Value** in the **Interface Type** drop-down list.
5. Click the **Options** tab, and then select **12 - Gift and Loyalty SVC Interface**.
6. Click the **Properties** tab, and then select the gift card locations.
7. Click **Save**.

Gift Card Setup for Organizations Pre 19.5 Release

Complete the following to configure Oracle MICROS gift cards for your Symphony Essentials system. If information in a step is already set up, continue to the next step.

Configure Gift Card Privileges

Privileges must be configured by role to enable users to access gift card functions.

1. Select the Enterprise, click **Configuration**, and then click **Roles**.
2. To enable users with this role to access gift card functions on the POS, click the **Operations** tab, and then click the **Stored Value Cards** subtab.
3. Select the appropriate options. The following table summarizes the privileges associated with gift card functionality.

Table 15-2 Gift Card Privileges

Section	Option Number	Privilege Name	Select This Option to Allow Employees to...
Issue Functions	104	Authorize/Perform Issue Stored Value Function	Issue a gift card
Issue Functions	105	Authorize/Perform Void Issue Stored Value Entry	Void an issued gift card
Issue Functions	106	Authorize/Perform Issue Stored Value Batch Function	Issue a batch of gift cards
Issue Functions	107	Authorize/Perform Void Issue Stored Value Batch Entry	Void a batch of gift cards

Table 15-2 (Cont.) Gift Card Privileges

Section	Option Number	Privilege Name	Select This Option to Allow Employees to...
Issue Functions	108	Authorize/Perform Activate Stored Value Function	Activate a gift card
Issue Functions	109	Authorize/Perform Void Activate Stored Value Entry	Void the activation of a gift card
Issue Functions	110	Authorize/Perform Activate Stored Value Batch Function	Activate a batch of gift cards
Issue Functions	111	Authorize/Perform Void Activate Stored Value Batch Entry	Void the activation of a batch of gift cards
Reload and Redeem Functions	112	Authorize/Perform Reload Stored Value Function	Reload (add credit) a dollar amount to an existing gift card
Reload and Redeem Functions	113	Authorize/Perform Void Reload Stored Value Entry	Void a reload transaction
Reload and Redeem Functions	114	Authorize/Perform Redeem Authorization Stored Value Function	Perform a redemption authorization
Reload and Redeem Functions	115	Authorize/Perform Void Redeem Authorization Stored Value Entry	Void a redemption authorization
Reload and Redeem Functions	116	Authorize/Perform Redeem Stored Value Function	Perform a redemption transaction (use gift card to pay some or all of a check)
Reload and Redeem Functions	117	Authorize/Perform Void Redeem Stored Value Entry	Void a redemption transaction
Reload and Redeem Functions	118	Authorize/Perform Manual Redemption Stored Value Function	Perform a manual redemption
Reload and Redeem Functions	119	Authorize/Perform Void Manual Redemption Stored Value Entry	Void a manual redemption transaction
Other Stored Value Card Options	103	Authorize/Perform Manual Entry of Stored Value Card Number	Manually enter the gift card account number
Other Stored Value Card Options	124	Authorize/Perform Stored Value Cash Out Function	Debit some or all of the remaining balance on a gift card
Other Stored Value Card Options	179	Authorize/Perform Void Stored Value Cash Out Function	Void a cash out transaction
Other Stored Value Card Options	125	Authorize/Perform Stored Value Balance Inquiry Function	Check a gift card balance

Table 15-2 (Cont.) Gift Card Privileges

Section	Option Number	Privilege Name	Select This Option to Allow Employees to...
Other Stored Value Card Options	126	Authorize/Perform Stored Value Balance Transfer Function	Transfer the balance from one gift card to another

4. Click **Save**.

Set Offline and Printing Options for Gift Cards

1. Select the Enterprise, click **Configuration**, and then click **Stored Value**.
2. Insert a record named `Stored Value`, and then click **OK**.
3. Double-click the record to open it.
4. Select the following options:
 - **1 - Support Offline Transactions**
 - **2 - Always Print Stored Value Results** (print a chit after the operation)
5. Click **Save**.

Import and Configure Stored Value Driver

1. Select the Enterprise, click **Setup**, and then click **Stored Value Driver**.
2. Insert a record named `iCare SVC`, and then click **OK**.
3. Double-click the record to open it.
4. On the **General** tab, click the **Import from a file** link.
5. Browse to [Drive Letter]:\Program Files\Oracle Hospitality\EMCCClient, select **StoredValueCommandModule.dll**, and then click **Open**.
6. Click the **Configuration** tab.
7. In the Assembly/Class section, enter `OHGL` in each of the following fields:
 - **Module ID**
 - **Display Name**
 - **Description**
8. In the iCare Driver Properties section, select `True` in the **Ignore Server Certificate** field.
9. In the **Web Address** field, enter the path to Gift and Loyalty, including location, port number and service path.

Use the following format: `https://[GiftLoyaltyLocation]:[GiftLoyaltyPortNumber]/ws/services/StoredValueService`. This web address is case-sensitive and cannot contain spaces.
10. Click **Save** and close the Stored Value Driver module.
11. Select the property, click **Setup**, and then click **Stored Value Driver**.
12. Right-click to the left of the object number of the `iCare SVC` record, select **Override Record**, and then select **Use Existing Record**.

13. Select `iCare SVC`, and then click **Yes**.
14. Double-click the record to open it.
15. Click the **Configuration** tab.
16. Scroll to the end of the page, and then enter the **Login** and **Password**.
These fields are specific to the property, not the Enterprise.
17. Click **Save** and close the Stored Value Driver module.

Import and Configure Stored Value Module

1. Select the Enterprise, click **Setup**, and then click **Stored Value Module**.
2. Insert a record, enter `iCare SVC` as the name, and then click **OK**.
3. Double-click the `iCare SVC` record to open it.
4. On the **General** tab, click the **Import from a file** link.
5. Browse to [Drive Letter]:\Program Files\Oracle Hospitality\EMCCClient, select **StoredValueCommandModule.dll**, and then click **Open**.
6. Click the **Configuration** tab.
7. In the Assembly/Class section, enter `OHGL` in each of the following fields:
 - **Module ID**
 - **Display Name**
 - **Description**
8. Enter the **Currency ISO Code** (three alpha characters) that represents the currency being used (for example, USD). See www.currency-iso.org/en/home/tables/table-a1.html for a list of Currency ISO 4217 codes.
9. Enter the **Language ISO Code** (two alpha characters) that represents the language being used (for example, EN). See www.loc.gov/standards/iso639-2/php/code_list.php for a list of Language ISO 639–1 codes.
10. Click **Save**.

Create Gift Card Service Charges

Create the following three service charge records to be used for gift card transactions:

- Gift Card Issue
 - Gift Card Reload
 - Gift Card Activate
1. Select the Enterprise, property, or zone, click **Configuration**, and then click **Service Charges**.
 2. Insert a service charge record named `Gift Card Issue` (use number 100 if not already used), and then double-click it to open.
 3. On the **General** tab, select the following Service Charge options:
 - **1 - On = Open; Off = Preset**
 - **2 - On = Amount; Off = Percentage**
 - **14 - Service Charge Used For Stored Value Transactions**

- **18 - Gift Certificate Sold**
Ensure that all other options are disabled.
- 4. Click **Save**.
- 5. Repeat steps 2 through 4 to create *Gift Card Reload* (number 200 if not already used) and *Gift Card Activate* (number 300 if not already used) service charge records.
- 6. Write down the record numbers (shown in the # column) for each of the three service charges. These numbers are used when configuring the gift card program, which occurs in an upcoming step.

Create Gift Card Tenders

Create the following two Tender/Media records to be used for gift card transactions:

- Gift Card Redeem
- Gift Card Cash Out

The following table provides a summary of information to be entered in the steps that follow.

Table 15-3 Summary of Gift Card Tender Information

Tab	Field or Option	Gift Card Redeem	Gift Card Cash Out
General	Name	Gift Card Redeem	Gift Card Cash Out
General	Record Number	500 *	600 *
General	Key Type	1 - Payment	3 - Pickup
Options, Printing Options	8 - Print Customer Receipt	Enable	
	21 - Print Summary Totals	Enable	
	3 - Assume Paid in Full	Enable	
	66 - Tender Media Used for Stored Value Transactions	Enable	Enable
	68 - Mask Account Number	Enable	

* Use this number if it is not being used; otherwise use another number.

1. Select the Enterprise or property, click **Configuration**, and then click **Tender/Media**.
2. Insert a record, name it *Gift Card Redeem* (use number 500 if not already used), and then click **OK**.
3. Double-click the record to open it.
4. On the **General** tab, select **1 - Payment** from the **Key Type** drop-down list.
5. Click the **Options** tab, and then click the **Printing Options** subtab.
6. Select **8 - Print Customer Receipt** and **21 - Print Summary Totals**.
Ensure that all other options are disabled.
7. Click the **Ops Behavior** subtab, and then select the following options:
 - **3 - Assume Paid in Full**

- **68 - Mask Account Number**
- **66 - Tender Media Used For Stored Value Transactions**

Ensure that all other options are disabled.

8. Click **Save**.
9. Insert a record, name it `Gift Card Cash Out` (use number 600 if not already used), and then click **OK**.
10. Double-click the record to open it.
11. On the **General** tab, select **3 - Pickup** from the **Key Type** drop-down list.
12. Click the **Options** tab, click the **General** subtab, and then select **66 - Tender Media Used For Stored Value Transactions**.
Ensure that all other options are disabled.
13. Click **Save**.
14. Write down the record numbers (shown in the # column) for each of these two tenders. These numbers are used when configuring the gift card program, which occurs in an upcoming step.

Enable the Gift Card Interface

1. Select the Enterprise, click **Setup**, and then click **Interfaces**
2. Insert a record for `Stored Value` as the **System Name**.
3. Double-click the new interface record to open it.
4. On the **General** tab, select **5 - Stored Value** in the **Interface Type** drop-down list.
5. Click the **Options** tab, and then select **12 - Gift and Loyalty SVC Interface**.
6. Click the **Properties** tab, and then select the gift card locations.
7. Click **Save**.

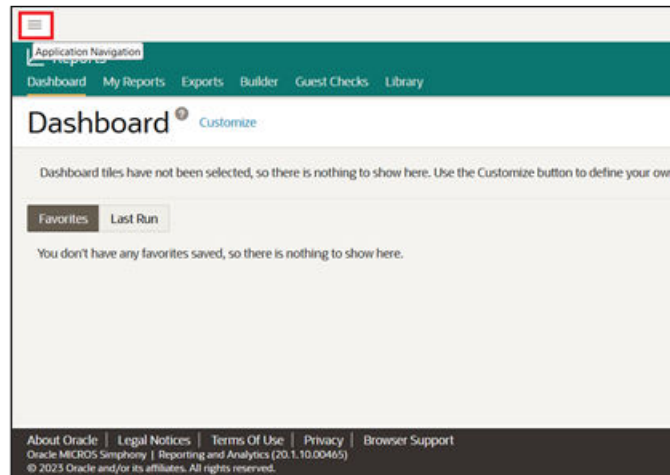
Configure Gift Card Program

After configuring the POS clients, follow this process to configure a basic gift card program.

Configure Role

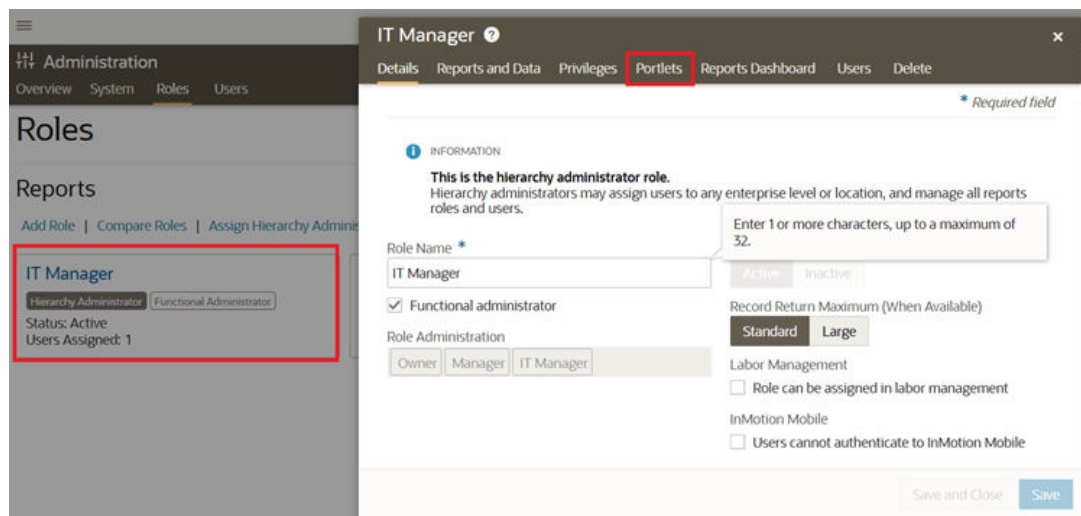
1. Sign in to Symphony Home with your credentials. This user must have hierarchy administration privileges.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page to view the side panel menu.

Figure 15-1 Dashboard



3. Select **Administration**, and then click **Roles**.
4. Select your role, and then click **Portlets**.

Figure 15-2 Role and Portlets Selection



5. Select **Assign Portlet**, and then select the following Gift and Loyalty portlets:
 - **G&L Account Administration (Portlet)**
 - **G&L Gift, Payment, and Loyalty Configuration (Portlet)**

Figure 15-3 Gift and Loyalty Portlets Assigned

6. Select all the privileges for both portlets, and then click the blue **Assign Portlet** button to assign the options.

Figure 15-4 Select Portlet Privileges

Figure 15-5 Assign Portlet

7. Sign out and sign in again. From the **Dashboard**, click the application navigation icon (), select **Gift and Loyalty**, and the new Gift and Loyalty options appear in the side panel.

Configure Organization

1. Select **G&L Gift, Payment, and Loyalty Configuration**, select **Initial iCare GPL Setup and Configuration**, and then select **Organization Configuration**.
2. On the **Main** tab, ensure that **iCare** is selected in the **Interface Type** drop-down list.

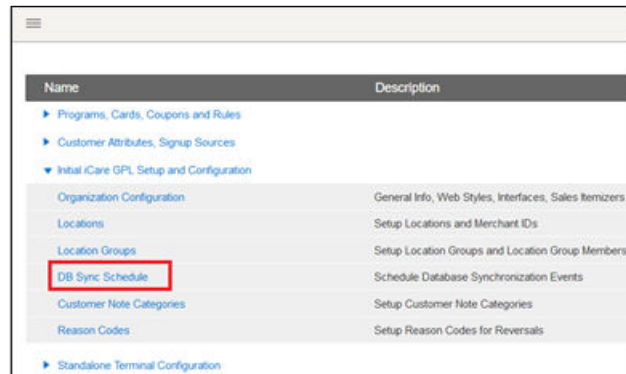
Figure 15-6 Organization Main Page for Interface Type Selection

3. Click **Save**.

Configure DB Sync Schedule

1. Select **G&L Gift, Payment, and Loyalty Configuration**, and then select **Initial iCare GPL Setup and Configuration**.
2. Select **DB Sync Schedule** to schedule the database synchronization jobs to transfer information from the Enterprise Back Office database to the Gift and Loyalty database.

Figure 15-7 DB Sync Schedule Link



3. Add the sync records described in the following table if they do not exist, or change them if they exist. You also need to enter the **Server Name** for your server and the sync frequency information for each sync type record.

Table 15-4 DB Sync Types and Frequencies

Sync Type	Sync Frequency
Sync All Configuration	Sync now.
Sync Org Levels	Sync daily at 4:00 a.m.
Sync Revenue Centers	Sync daily at 4:00 a.m.
Sync RTA Org Levels	Sync daily at 4:00 a.m. Run manually (Sync Now) after adding a new location if that location needs to process Gift Cards in the same business day.
Sync iCare Transactions	Run once daily after Point-of-Sale End of Day operations.
Sync iCare Customers	Run once daily after Point-of-Sale End of Day operations.
AGGREGATE_TRANSAC	Run once daily after Point-of-Sale End of Day operations.
Sync Locations	Sync daily at 4:00 a.m.

Figure 15-8 Add Sync Types and Frequencies

4. Click **Save**.

Create Gift Card Program

To create a basic gift card program:

1. Sign in to Symphony Home with your credentials.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page, select **Gift and Loyalty**, select **G&L Gift, Payment, and Loyalty Configuration**, select **Programs, Cards, Coupons and Rules**, and then select **Programs**.
3. Click **Add**.
4. On the **General** tab, select **Gift or Debit Card** from the **Program Type** drop-down list.
5. Enter an identifying **Program Name** and **Public Name**, and optionally enter a **Description** for comments or notes regarding the program.
6. Enter an identifying code up to 10 alphanumeric characters in **Program Code**. This code is not made public.
7. Select the default currency type used by the program from the **Currency Type** drop-down list.
8. Leave the **Default Coupon Code** blank.
9. Select **Same type, amount, and check** from the **Credit Reversal** and **Debit Reversal** drop-down lists.
10. For programs with a limited duration, select the date range that the gift/debit program is active using the **Effective From** and **Effective To** date selection fields. Leave the fields blank if the program has an indefinite duration.
11. Leave the other defaults.

Figure 15-9 General Gift or Debit Card Program Defaults

Save | Cancel | Loyalty Tiers | Help

General | Loyalty Programs | Gift or Debit/Credit/Award Programs

Program Type:	Gift or Debit Card	Program Name:	Pizza Gift Card Program
Public Name:	Pizza Gift Card Program	Program Code:	GIFT
Currency Type:	United States of America, Dollars	Default Coupon Code:	
Description:			
Credit Reversal:	Same type, amount and check	Debit Reversal:	Same type, amount and check
Allow Foreign Currency:	☐		
Prompt For Program At POS:	☐	Prompt For PIN on mycard.net:	☐
Prompt For PIN with Swipe At POS:	☐	Prompt For PIN With Manual Entry At POS:	☐
Allow Multiple Programs/Card Rule:	☐		
PIN Type:	None	Override Style Directory:	
Effective From:		Web Password Type:	None
Effective To:		Effective To:	
Other Options:			

12. Click the **Gift or Debit/Credit/Award Programs** tab.
13. To allow customers to cash out a gift card:
 - a. Select **Allow Cash Out**.
 - b. Enter a **Cash Out Limit** to set an upper limit to the amount that can be cashed out.

Figure 15-10 Gift or Debit/Credit/Award Programs

General | Loyalty Programs | **Gift or Debit/Credit/Award Programs**

Allow Cash Out:	☒	Cash Out Limit:	100.00
Reserve for Auth:	☒	Allow Reload:	☒
Allow Partial Redeem:	☒	Use with SV Bonus Only:	☐
Do Not Allow Issue/Reload and Redemption on Same Check:	☒	Maximum Account Balance:	750.00
Default Credit Limit:		Credit Denial Text:	
Max Redeem Amount/Day:		Max Redeem Amount/Day Part:	
Max Redeem Amount/Visit:		Transaction Limit:	750.00
Dormant Charge Start:	1 Month	Dormant Charge:	
Dormant Charge Frequency:	Every Month	Require Customer On Redeem:	☐
Period Carry Over Amount:		Period Reload Amount:	
Adjustment Rule:	Disable	Balance Warning Threshold:	
Adj Min Trans Value Before Discount:		Adj No Discount After Trans Value:	
Adj Debit Desc:		Adj Credit Desc:	
Valid Until Type:	Always Valid	Valid Until Period Type:	Days
Valid Until Number Periods:		Valid Until Date:	
Enable Spend Or Lose:	☐	Spend Or Lose Description:	
Spend Or Lose Allowance:		Spend Or Lose Start:	Sunday
Spend Or Lose Schedule:	Daily		

14. Select the following check boxes:

- **Reserve for Auth**
 - **Allow Reload**
15. Select **Allow Partial Redeem** to allow the Point-of-Sale to redeem the total value of the card when it is used for a check with a higher value.

For example, when applying a gift card with \$5 remaining to a \$10 check, if this option is enabled, the system applies the \$5 from the card to the check. If this option is not enabled, the system shows an insufficient balance error, and the balance must be manually redeemed.
 16. Select **Do Not Allow Issue/Reload and Redemption on Same Check** to prevent issuing, reloading, and redemption actions to be performed on the same check.
 17. Enter a **Maximum Account Balance** to set an upper limit on the amount that can be stored on a card at any time.
 18. Enter a **Transaction Limit** to set an upper limit to the amount that can be issued or reloaded to a card in a single transaction. Oracle Hospitality recommends entering a value to prevent input errors.
 19. If required, enter a **Max Redeem Amount/Day**, **Max Redeem Amount/Day Part**, or **Max Redeem Amount/Visit** to set an upper limit to the reward amount that can be redeemed by day, day part, or visit.
 20. Leave the other defaults, and click **Save**.

Create Gift Card Rules

Programs require at least one card rule, which defines the type of cards that work for the program. Gift cards for Symphony Essentials have a single iCard rule.

1. From the **Dashboard**, click the application navigation icon () at the top left of the page, select **Gift and Loyalty**, select **G&L Gift, Payment, and Loyalty Configuration**, select **Programs, Cards, Coupons and Rules**, and then select **Card Rules**.
2. Click **Add**.
3. Enter an identifying name in the **Rule Name** field.
4. Select **Is this an iCard?**.

Figure 15-11 Create Card Rules Page

Save | Create | Cancel | Help

Rule Name:

Is this an iCard?: ☒

iCard Program Number:

Check Digit Type:

Foreign Card Preamble:

Foreign Card Length:

Foreign Card Denomination:

Starting Account Number:

Ending Account Number:

Effective From:  Effective To: 

5. Leave the other fields, which are required for foreign cards.
6. Click **Create**. Gift and Loyalty generates the iCard Program Number.

Assign Rules to Programs

After creating a gift card rule, you can assign it to a program and to locations.

1. Sign in to Symphony Home with your credentials.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page, select **Gift and Loyalty**, select **G&L Gift, Payment, and Loyalty Configuration**, select **Programs, Cards, Coupons and Rules**, and then select **Programs**.
3. Select the card program, and then click **Edit Card Rules**.
4. Select the rule, and then click **Edit**.
5. Select the location or select **All Locations** if the gift card is to be used everywhere.

Figure 15-12 Edit Card Rules Page

[Save](#) | [Cancel](#) | [Help](#)

Program: Gift Card Program 9063

Card Rule: Gift Card Rule 9063

Auto Create Acc Number: ☐

Org Level:
☐ No Locations
☐ All Locations
☐ Corporate
☒ Location 1
☐ Region

- Click **Save**.

Create Gift Card Numbers

After creating a card program and card rule, generate card numbers for a specific program and rule. Gift and Loyalty uses card numbers as the account numbers.

- Sign in to Symphony Home with your credentials.
- From the **Dashboard**, click the application navigation icon () at the top left of the page, select **Gift and Loyalty**, select **G&L Account Administration**, and then select **Create Card Numbers**.
- Select the **Program** to create card numbers for.

Figure 15-13 Create Card Numbers Page

[Create](#) | [Cancel](#)

Program: Gift Card Program 9063 ▼

Card Rule: Gift Card Rule 9063

Preset Denomination: 50 .00

First Account Number: 09063050 0001075

Number of Accounts: 100

NOTE: Verify previously created account numbers before creating additional numbers— Duplicate numbers should not be reprinted. Duplicate numbers include any number that has previously been printed, encoded or issued in iCare.

- Enter the amount that can be issued to the card in **Preset Denomination**.
- If the field is not automatically populated, enter the first number to assign in **First Account Number**.

6. Enter the number of account numbers that you want to generate in **Number of Accounts**.
7. Click **Create**. The numbers will appear in a window and can be copied into a notepad if required.

You can print cards with these numbers, and then issue customer accounts using these numbers. This process does not forego the need to issue the cards before they are active, and you must avoid duplicate cards.

Review Existing Card Numbers

1. Sign in to Symphony Home with your credentials.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page, select **Gift and Loyalty**, select **G&L Account Administration**, and then select **View Created Card Numbers**.
3. Select the line with the set of numbers for your program, and then click **View**. A list of the card numbers appears.
4. Scroll to the end of the list of numbers and make note of the last card number. You must enter a higher number when creating your next batch of cards.

Manage Existing Accounts

If required, you can enter a name and phone number against an account number so that the gift card balance is accessible by name or phone from the POS. You can also see the status of your accounts here.

1. From the **Dashboard**, click the application navigation icon () at the top left of the page, select **Gift and Loyalty**, select **G&L Account Administration**, and then select **Manage Existing Accounts**.
2. Select **Find Account Number**.
3. To list the status of your accounts, enter the start of the account number in the search field, and then click **Find**.

Figure 15-14 Enter Account Number

Manage | [Cancel](#)

☐ Enter Account Number

☒ Find Account Number

Account Number ▾

Starts With ▾

090

AND ▾

Add

Page 1 of 1

Account Number	Name	Status	Home Phone
0906301000001005	Billy Wright	Active New Issue	000777000
0906301000000219	dave jupp	Active New Issue	
0906301000000106	Jill Pasley	Active	07818882881
0906310000010621		Awaiting Activation	
0906310000010643		Awaiting Activation	
0906310000010596		Active New Issue	
0906310000010712		Active New Issue	
0906301000000015		Active New Issue	
0906310000010632		Awaiting Activation	
0906310000010609		Active New Issue	
0906310000010585		Active	
0906310000010574		Transferred	
0906310000010610		Newly Activated	

- To assign a name and phone number, select the account number line, and then click **Manage**.

Figure 15-15 Select Account Number Line

[Edit Account Information](#) | [Return](#)

[Reissue New Customer Kit](#) |
 [Replace Card](#) |
 [Reset PIN](#) |
 [Reset Web Password](#) |
 [Set Test Account](#) |
 [Unlock Account](#) |
 [Update Email Status](#)

Account Number: 0906310000010712

Customer: Paul Evans

07885112977

Registration Date: 01/03/2023

Email Status: No Email Address

Program Name	Balance	Lifetime Balance	Program Level	Status	Validity	Number of transactions in the last 90 days
Gift Card Program 9063	USD100.00	USD100.00	-	Active New Issue	01/03/2023 -	1

- Select **Edit Account Information**.
- Enter **First Name**, **Last Name**, and **Phone Number**.

Figure 15-16 Edit Account Name and Phone Number

Save | Cancel iCare Account Ac

0906310000010712

First Name	Paul	Address Line 1	
Last Name	Evans	Address Line 2	
Home Phone	07885112977	City	
Work Phone		State/Province	
Mobile Phone		County/Region	
Email Address		ZIP/Postal Code	
Birth Date		Country	
PIN			

7. Click **Save**.

Configure Point-of-Sale Touchscreen Keys

Gift and Loyalty Point-of-Sale (POS) keys need to be activated, and some need to be associated with the tender types and service charge records in the Symphony EMC.

1. Sign in to Symphony Home with your credentials.
2. From the **Dashboard**, click the application navigation icon () at the top left of the page, select **Gift and Loyalty**, select **G&L Gift, Payment, and Loyalty Configuration**, select **Programs, Cards, Coupons and Rules**, and then select **POS Configuration**.
3. To activate a function, select the function, click **Edit**, and then select **Active**.
The following functions need to be active for gift cards if they are being used:
 - Balance Inquiry
 - Balance Transfer
 - Cash Out
 - Activate
 - Issue
 - Redeem
 - Redeem Auth
 - Reload
4. To allow a function to be used when the system network is offline, select the function, click **Edit**, and then select **Allow Offline**.
5. Click **Save**.
6. To associate the **Activate** POS key to the Symphony EMC Gift Card Activate service charge record:
 - a. Select the **Activate** line, select **Edit POS Key**, and then edit the record.
 - b. Select **Service Charge** in the **POS Key Type** drop-down list.

Figure 15-17 Edit POS Key for Activate Service Charge

Save Cancel Help

POS Request Code: Activate

Use Type: Use Always

POS Key Type: Service Charge

Description: Activate

POS Key Number: 300

Default Amount:

Card Rule: All Card Rules

Program: All Programs

Org Level: All Org Levels

Location Group: All Locations

Print Reference Entry:

Effective From:

Effective To:

Min Chk Subtotal to Allow Trans:

Coupon Type: All Coupon Types

Loyalty Rule: All Loyalty Rules

Revenue Center: All Revenue Centers

Do Not Use If a Discount Already on Transaction:

Reconcile with POS:

- c. Enter a **Description**.
 - d. Enter the **POS Key Number**. This must be the same as the Gift Card Activate service charge record number in the Symphony EMC. (For new Symphony Essentials 19.5 organizations, the number is 300.)
 - e. Click **Save**.
7. To associate the **Issue** POS key to the Symphony EMC Gift Card Issue service charge record:
 - a. Select the **Issue** line, select **Edit POS Key**, and then edit the record.
 - b. Select **Service Charge** in the **POS Key Type** drop-down list.
 - c. Enter a **Description**.
 - d. Enter the **POS Key Number**. This must be the same as the Gift Card Issue service charge record number in the Symphony EMC. (For new Symphony Essentials 19.5 organizations, the number is 100.)
 - e. Click **Save**.
 8. To associate the **Reload** POS key to the Symphony EMC Gift Card Reload service charge record:
 - a. Select the **Reload** line, select **Edit POS Key**, and then edit the record.
 - b. Select **Service Charge** in the **POS Key Type** drop-down list.
 - c. Enter a **Description**.
 - d. Enter the **POS Key Number**. This must be the same as the Gift Card Reload service charge record number in the Symphony EMC. (For new Symphony Essentials 19.5 organizations, the number is 200.)
 - e. Click **Save**.
 9. To associate the **Cash Out** POS key to the Symphony EMC Cash Out Gift Card tender record:

- a. Select the **Cash Out** line, select **Edit POS Key**, and then edit the record.
- b. Select **Tender** in the **POS Key Type** drop-down list.

Figure 15-18 Edit POS Key for Cash Out Tender

POS Request Code: Cash Out

Use Type: Use Always

POS Key Type: Tender

Default Amount:

Card Rule: All Card Rules

Program: All Programs

☒ Org Level: All Org Levels

☐ Location Group: All Locations

Display Group Members Edit Location Groups

Print Reference Entry:

Effective From:

Effective To:

Description: Cash Out

POS Key Number: 600

Min Chk Subtotal to Allow Trans:

Coupon Type: All Coupon Types

Loyalty Rule: All Loyalty Rules

Revenue Center: All Revenue Centers

Do Not Use if a Discount Already on Transaction: ☐

Reconcile with POS: ☒

- c. Enter a **Description**.
 - d. Enter the **POS Key Number**. This must be the same as the Cash Out Gift Card tender record number in the Symphony EMC. (For new Symphony Essentials 19.5 organizations, the number is 600.)
 - e. Click **Save**.
10. To associate the **Redemption** POS key to the Symphony EMC Redeem Gift Card tender record:
- a. Select the **Redemption** line, select **Edit POS Key**, and then edit the record.
 - b. Select **Tender** in the **POS Key Type** drop-down list.
 - c. Enter a **Description**.
 - d. Enter the **POS Key Number**. This must be the same as the Redeem Gift Card tender record number in the Symphony EMC. (For new Symphony Essentials 19.5 organizations, the number is 500.)
 - e. Click **Save**.

16

Dining Room Table Numbers

Configure Dining Table Numbers

Table numbers are required for TSR operations. You need to configure the table numbers in the restaurant so that servers can start a check using one of these table numbers. The table number appears on the workstation home page beside the open check.

1. Select the revenue center, click **Setup**, and then click **Tables**.
2. Click the **Insert** icon () on the toolbar.
3. On the Insert Record dialog, leave the default values and click **OK**. A record is created for Table 1.

To create a specific table number or numbers, enter a value in the **Record number or range** field.

4. Repeat steps 2 and 3 to create the required number of tables.
5. (Optional) Change the **Name** field to describe the table (for example, 1 or One).

The table name appears on the workstation and represents the local facing name or number used to differentiate the table from others. Values in the Name field can be:

- All numeric
- All alpha
- Alpha and then numeric

6. Click **Save**.

Hardware

Add a Workstation

Simphony Essentials supports up to five POS workstation client devices per location/property. Simphony Essentials is supported on POS workstation client devices running Linux and Android operating systems. The Microsoft Windows operating system is not supported on a POS client device for Simphony Essentials.

1. Select the property, click **Setup**, and then click **Workstations**.
2. Click the **Insert** icon () on the toolbar.
3. In the Insert Record dialog, enter the **Record Name**, and then click **OK**.
4. Double-click the new workstation record.
5. On the **General** tab, enter information in the following fields:

Table 17-1 General Workstation Settings

Field	Description
Type	Select the type of workstation from the drop-down list: • 2 - Workstation Client: Workstations and Android devices • Select this option for the Oracle MICROS Workstation 6 Series, the Oracle MICROS Workstation 310, and Android devices. • 3 - POSAPI Client: Simphony Transaction Services • 7 - Castle S1F2: Adyen Castles S1F2 Android payment devices
Language	Select the default language of the workstation. This is the language that appears on the workstation's Sign On screen. If an employee has a different default language set, the employee sees their default language after signing in to the workstation.
Log Verbosity	Select the logging verbosity for the workstation. Select 0 (zero) for minimal logging. Higher log verbosity provides more information in the log file, which may be helpful in troubleshooting issues.

Table 17-1 (Cont.) General Workstation Settings

Field	Description
Workstation Class	Select the service type: • 1 - Table Service Restaurant: Workstations and larger Android landscape tablet devices • 2 - Quick Service Restaurant: Workstations and larger Android landscape tablet devices • 3 - Bar: Workstations and larger Android landscape tablet devices • 4 - Mobile Table Service Restaurant: Adyen Castles S1F2 Android payment devices and smaller Android portrait devices (such as mobile phones) • 5 - Mobile Quick Service Restaurant: Adyen Castles S1F2 Android payment devices and smaller Android portrait devices (such as mobile phones) If a workstation is incorrectly configured (for example, Workstation Class 1 - Table Service Restaurant is selected for a mobile phone device), the page <i>Configuration Error Incorrect Workstation Class configured</i> appears before the sign in page on the POS client device. This error also appears on workstations and tablets if an incorrect Workstation Class is selected. Workstations and tablets use the non-mobile Workstation Classes. To resolve this error, correct the Workstation Class, and then click Update Database And Redraw Page on the POS Client device. Alternatively, close the application on the device and change the Workstation Class at a later time.
Enable Symphony Transaction Services	These options become active after you select 3 - POSAPI Client from the Type field. Select the appropriate option to enable Symphony Transaction Services.
Database Update Frequency	Enter the number of seconds for the workstation to receive changes. The value in this field overrides the Property Parameter's Database Update Frequency setting.
Check Inactivity Timeout	Enter the number of seconds before the workstation shows the message (Do you need more time?), prompting the workstation operator to cancel the transaction. When you enter 0 (zero), the message does not appear.
Check Inactivity Dialog Timeout	Enter the number of seconds that the workstation shows the Inactivity dialog before automatically cancelling the transaction. This field is inactive when you set the Check Inactivity Timeout value to 0 (zero).
Report Timeout	Enter the number of seconds the workstation waits for a response from the Reporting and Analytics server before showing a communication failure notice.
Offline Threshold	Enter a number between 0 and 99 to represent the signal strength percentage at which devices go offline. Devices will go offline when the signal strength is at or below this percentage value. For example, if the Offline Threshold is set to 90 (90%), and the device's current signal is 89%, the device will go offline. When the signal is detected above 90%, the device reconnects online.

Table 17-1 (Cont.) General Workstation Settings

Field	Description
Reconnect Threshold	Enter a number between 0 and 99 to represent the signal strength percentage at which devices recover online after being in an offline state. Devices will go online when the signal strength is at or above this percentage value. For example, if the Reconnect Threshold is set to 80, and the device's signal strength is 85%, the device will go online.
Service Host ID	This field become active after you select 3 - POSAPI Client from the Type field. Select the service host on which the POS API client runs.
Address / Host Name	Enter the IP address or host name of the service host where the workstation application runs.
Subnet Mask	Enter the subnet mask of the service host where the workstation application runs.
Default Gateway	Enter the default gateway of the service host where the workstation application runs.
Is Windows Service	Select this option to allow the service host to start as a Windows service. The service host service starts on Microsoft Windows startup with other Microsoft Windows services. The workstation starts only when the workstation operator signs on to the operating system. If you select this option, you need to change the ports of the services being run (for example, Check and Posting Service (CAPS) and Kitchen Display System (KDS) Controller) in addition to the workstation. Use the EMC modules to change the ports. If a non-POS workstation is required to run on the service host, it must run on a different port than the workstation port. You can also set the service host to run as a Microsoft Windows service from the Service Host module (rather than from the Workstations module). If you set this option in the Service Host module, you do not need to change the ports of the services being run as the device is not intended to run the workstation.
Resolution Cols	Enter the number of Resolution Columns for the workstation's display. The default value is 0 (zero).
Resolution Rows	Enter the number of Resolution Rows for the workstation's display. The default value is 0 (zero).
Location From Top	Enter the number of pixels from the top where the workstation window is placed on the display screen.
Location From Left	Enter the number of pixels from the left where the workstation window is placed on the display screen.

6. Click the **Printers** tab.
7. Click the **Select** link next to each printer type that you need to configure, select the printer, and then click **OK**.
8. Click **Save**.

Enable a Third Party Mobile Device Management (MDM) to Distribute Symphony POS Client Software

You can use a third party Payment Service Provider (PSP) and its proprietary external Mobile Device Management (MDM) platform to distribute Symphony Essentials software to Android devices. The Third Party Managed Device option is only available for use with the following types of POS workstations:

- 1 - Mobile
 - 2 - Workstation Client
 - 6 - Tablet Client
1. Select the property, click **Setup**, and then click **Workstations**.
 2. Select an Android workstation record that has **Type 1 - Mobile**, **2 - Workstation Client**, or **6 - Tablet Client**.
 3. Click the **Options** tab, and then click the **Hardware/Cash Drawer** subtab.
 4. Select **68 - Third Party Managed Device**.

Enabling this option allows a third party PSP to ensure the device's CAPS and Service Host versions are compatible and in sync. When the option is enabled, if the device's CAPS version does not match the Service Host version, the customer is prompted to upgrade (or downgrade) the Symphony Essentials application version on the device.
 5. Click **Save**.

Introduction to Print Class Output

You can use a Print Class to configure the output for Discounts, Service Charges, and Tender Media. This enables multiple records with a single Print Class, meaning you can define the output settings once rather than separately for each record.

A Print Class is automatically created for every Discount, Service Charge, and Tender Media record. The **Print Class** field automatically defaults to the Print Class created for these records on the General tab in the Discounts, Service Charges, and Tender/Media modules.

There are four basic print class output destinations:

1. Receipts

Receipts print at the workstation at the end of a fast transaction. They are typically used in a quick service restaurant (QSR) environment where ordering menu items and tendering the check is performed in the same service round.
2. Guest Checks

Guest checks print at the workstation. They are typically used in a table service restaurant (TSR) environment. Checks usually include a table number or guest name and are service totalled several times before final tender.
3. Order Devices

Order devices are remote kitchen or bar printers, or KDS devices. These devices deliver the order to the production area from the workstation.
4. Journal

The journal is not a physical device, but an electronic file journal that provides audit capabilities in the application.

Configure Printer

Printers and order devices are critical types of hardware that allow communication between various areas of a restaurant, such as the kitchen and dining room or bar.

1. Select the property, click **Setup**, and then click **Printers**.
2. Insert a printer record, name the printer, and then click **OK**.
3. Double-click the printer record to open it.
4. Select the **Workstation** from the drop-down list.
5. Select the **Printer Type** from the drop-down list.

Select **Epson Bluetooth Printer** for all Bluetooth printers.

6. If the roll printer is a thermal printer, select **Thermal printer** in the **Printer Options** section.
7. Enter the number of lines to advance the guest check or customer receipt after printing the trailer text in the **Trailing Line Feeds** field.

The value in this field defaults to the recommended trailing line feeds for the printer communication type, as listed in the following table. You can change the default value.

Table 17-2 Trailing Line Feeds per Printer Communication Type

Printer Communication Type	Trailing Number of Lines
Bluetooth	1
Ethernet	1
Integrated Device Network (IDN)	1
Serial	6
OPOS	6

8. (Optional) To set the printer to print logos, select **Enable Logo Printing**. Symphony Essentials does not support logo printing on printers with multi-language cards.

When configuring Epson TM-P60 and TM-T88 Ethernet Thermal printers, configure the logo to print in the center of the guest check or customer receipt by selecting the paper size of the printer from the **Center Logo Using** drop-down list.

- Epson TM-P60 Ethernet Thermal printers: Set the paper size to **2 1/4" (58mm) Paper**.
- Epson TM-T88 Ethernet Thermal printers: Set the paper size to **3 1/8" (80mm) Paper**.

[Introduction to Logo Printing](#) contains more information about setting up logos to print on guest checks and customer receipts.

9. To allow the printer to be selectable by workstation operators (typically used with mobile POS client devices), select **Destination Printer**.

Bluetooth printers are not selectable.

10. Configure the appropriate values for the printer type. Specific fields become active based on the printer type you selected.

The following table lists the printer types and indicates information for each applicable field. Enter or select information for the fields based on the printer you are configuring. Fields denoted as Not applicable are not needed for the printer type.

Table 17-3 Printer Configuration by Printer Type

Field	Roll Printer	Slip Printer	IP Printer	Bluetooth Printer
COM Port	Select the communications port for the printer.	Select the communications port for the printer.	Not applicable	Not applicable
Baud Rate	Select the baud rate for the printer.	Select the baud rate for the printer.	Not applicable	Not applicable
Parity	Select the parity for the printer.	Select the parity for the printer.	Not applicable	Not applicable
Data Bits	Select the data bits for the printer.	Select the data bits for the printer.	Not applicable	Not applicable
Stop Bits	Select the stop bits for the printer.	Select the stop bits for the printer.	Not applicable	Not applicable
PIN	Not applicable	Not applicable	Not applicable	Set the four-digit passkey that must be entered into the device before printing.
ID	Not applicable	Not applicable	Not applicable	(Optional) Enter the Bluetooth ID of the printer. You can leave this field blank to allow configuration from a mobile device when using different printers per event.
Number of Columns	Not applicable	Not applicable	Not applicable	This setting determines the report width so that guest checks and reports print with center alignment. By default, the width is set to 32 columns. Select 40 for Bixolon SPP-R300, SPP-R310, and R310iK Bluetooth printers.

Table 17-3 (Cont.) Printer Configuration by Printer Type

Field	Roll Printer	Slip Printer	IP Printer	Bluetooth Printer
Address	Not applicable	Not applicable	Enter the IP address or hostname of the printer. If you are using the printer for banquet checks, enter the hostname.	Not applicable
Port	Not applicable	Not applicable	Enter the port number for the IP printer.	Not applicable

11. Click **Save**.
12. Select the property, click **Setup**, and then click **Workstations**.
13. Double-click the workstation to open it.
14. Click the **Printers** tab.
15. Click the **Select** link to set the appropriate **Printer** for each type of print job. Click the **Set for All Destination Printers** link to set the same printer for each type of print job.

The printer defined here (primary or backup) always appears in the Destination Printers list on the POS workstation, even if you do not add it to the **Destination Printer Group**. [Create, Edit, and Remove Printer Groups](#) contains more information.

Assign the same printer model and format for the backup printer to ensure that checks format properly on other printers.

16. Click the **Select** link and assign each printer type to a **Destination Printer Group**. Click the **Set for All Destination Printers** link to set the same printer type for all destination printer groups.

Selecting a **Destination Printer Group** overrides the printer selected for the printer type.

Printers with the option **Selectable as Destination Printer** set belong to a default **Destination Printer Group** called **All Destination Printers**.

If you define a **Destination Printer Group** for the Backup Printer, the workstation operator is prompted at the time of printing for both the primary printer (if it has a group defined) and the Backup Printer.

17. Click **Save**.
18. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Format Parameters**.
19. Click the **Configuration** tab, and then enter the appropriate information in the following fields:

Table 17-4 Print Output Configuration

Field	Description
Lines on First Page	Enter the maximum number of lines to print on the first page of the guest check before prompting for a new check to begin a new order receipt.

Table 17-4 (Cont.) Print Output Configuration

Field	Description
Lines on Other Pages	Enter the maximum number of lines to print on successive pages of the guest check before prompting for a new check to begin a new order receipt.
Line Feeds Before First Page	Enter the number of lines to advance before printing the guest check header. You can add extra space for the check so it appears properly in custom check presentation binders.
Line Feeds Before Other Pages	Enter the number of lines to advance before printing begins on the next successive page. The line feeds set here are included in the number configured for the Lines on Other Pages field. For example, if you set this field to 5 and set Lines on Other Pages to 30, the pages have 25 lines of text.
Minimum Lines Per Roll Check/Receipt	Enter the minimum number of lines to print on guest checks and customer receipts. Blank lines are added after printing to achieve the minimum. Use this field if you want guest checks and customer receipts that are printed on a roll printer to have a minimum length in order to fit into guest check covers.
Number of Guest Check Information Lines	Enter the number of detail lines (0 through 30) that can be entered in a System Interface Module (SIM) dialog box.
Print Tax Invoice after Sales Threshold	Enter the sales threshold needed to pass for a tax invoice to be printed for a customer.
Print Customer Information after Sales Threshold	Enter the sales threshold needed to pass for customer information to be printed for a customer.
Customer/Trade Identity Label	Enter the label information to be presented on the top of a bill after a maximum sales threshold is met. This label is either a customer's name (written in the field as Customer Name) or a Trade Identity Label. In the case of Australia Goods & Services Tax requirements, the trade identity label for Australia is ABN . This information must be present on a bill after the maximum threshold is met. The information is never stored, and the label can be changed.

20. Click the **Options** tab.

21. Select the appropriate printing options:

- **57 - Do Not Print Change/Payment Due in Double Wide:** Select this option if you do not want double-wide formatting on the Change Due line of a receipt or the Total Due line of a check.
- **58 - Do Not Consolidate Current Round Items in Printed Guest Check:** Select this option if you do not want to combine identical items which are ordered in multiples in the current round when printing a receipt.

- **61 - Show Asterisk (*) indicator for Menu Item where Inclusive Tax was forgiven on screen:** Select this option if you want to display an asterisk on the receipt to indicate that the inclusive tax was forgiven for a menu item.

22. Click **Save**.

Create, Edit, and Remove Printer Groups

If the location is large and has many printers disbursed over a wide area, you may find it useful to configure a limited list of printers that are selectable by workstation operators. The workstation operator can select a printer that is nearby from the list on the workstation (a mobile tablet device), and optionally set this printer as the default printer for future print jobs. When a workstation operator selects a default destination printer, the selection automatically resets at Start of Day.

A default printer group named **All Destination Printers** exists in the Printer Groups module. You cannot change this default printer group. If you do not create printer groups, all printers with the option **Destination Printer** (set in the Printers module) belong to the **All Destination Printers** printer group. The **All Destination Printers** default printer group is useful for locations that need only one group of destination printers.

1. Select the property, click **Setup**, and then click **Printer Groups**.
2. Insert a printer group record, name the printer group, and then click **OK**.
3. Double-click the printer group record to open it.
4. To add a printer to the printer group, click the **Add** link, click the ellipsis button, and then select the printer.

You can add any printer to any printer group, regardless of the **Destination Printer** option setting. You can add one printer to multiple printer groups.

5. Repeat Steps 1 through 4 for to create more printer groups and to add printers to the groups.
6. To delete a printer from a printer group, select the printer, and then click the **Delete** link.
7. Click **Save**.
8. To edit a printer group, highlight the record, change the values, and then click **Save**.
9. To remove a printer group, highlight the record, and then click **Delete** on the toolbar.

Configure Printer Order Device

You can configure order chits to send to a printer at the kitchen when checks are service totalled on a workstation.

1. Select the revenue center, click **Setup**, and then click **Order Devices**.
2. Insert an order device record for the printer (for example, Kitchen Hot Printer), and then double-click the record to open it.
3. On the **General** tab, select **1 - Remote** from the **Device Type** drop-down list, select **0 - Printer** from the **Primary Device Type** drop-down list, and then select the appropriate printer record from the **Device** drop-down list.
4. If you have a backup printer, select the **Backup Device** from the drop-down list.
5. From the **Order Device Redirect** drop-down list, select the printer order device that you created in Step 2.

6. From the **Menu Item Printing** drop-down list, select the items to route to this KDS:
 - **0 - All Items:** Select to route all menu items.
 - **1 - Only Items with Condiments:** Select to route only menu items with condiments.
 - **2 - Only Items without Condiments:** Select to route only menu items without condiments.
7. From the **Condiment Sort Type** drop-down list, select how to sort the condiments on the order chits. Condiment sorting only works if you have set Menu Item Classes option **30 - Sort Condiments by Print Group** for the parent menu items.
 - **No condiment sorting:** Select to list condiments in the order in which they are entered on the check by the workstation operator. Allowed condiments sort in the order assigned in Condiment Sets, if configured.
 - **Sort allowed condiments:** Select to sort only allowed condiments based on the print group. The sort order configured for allowed condiments in Condiment Sets is discarded. If required condiments are ordered in between allowed condiments, the required condiments remain in the same position in which order they were ordered.
 - **Sort all condiments:** Select to sort all condiments based on the print group, regardless of condiment type.
8. Configure the following Print Settings:

Table 17-5 Order Devices Printer Settings

Field	Description
Max # Lines per Chit	Enter the maximum number of lines (0 to 99) to print on each page of an order chit. Oracle MICROS roll printers print 6 lines per inch.
Sort/Consolidation Method	Select the parent menu item sort and consolidation method for this order device.
Language	Select the primary language for the order device. This field only shows the languages that are assigned to the property in the Property Parameters module.
Language 2	To print the output in a second language, select the secondary language.
Language 3	To print the output in a third language, select the third language.
Line Feeds Before Order	Enter the number of lines to advance before printing the order on order chits.
Line Feeds After Order	Enter the number of lines to advance after printing the order on order chits.

9. Click the **Options** tab, and then select the appropriate printer options as described in the following table:

Table 17-6 Order Devices Printer Options

Option	Description
1 - On = Print Trans Emp Name and #; Off = Print Chk Emp Name and #	Select this option to print the employee name and number of the transaction operator on the order chit. Deselect to print the employee name and number of the check operator.
3 - Print Dopplebon	Select this option to print a separate order chit for each menu item in the current service round (dopplebon style). Deselect to print one order chit for all menu items in the current service round (the default printing style).
4 - Print Dopplebon Summary	Select this option to print an order summary chit before printing an order's dopplebon order chits. Deselect to suppress dopplebon summary chit printing
6 - Print Seat Numbers with Individual Items	Select this option to print seat numbers with each individual menu item. If the order device is set to consolidate (Sort/Consolidate Method on the General tab), the seats print as a Seat Header above the detail item.
7 - Print Revenue Center Name on Orders	Select this option to print the revenue center name with each order sent to this order device. The name prints in double-wide characters. Deselect to suppress printing the revenue center name.
9 - On = Print void marker before Void; Off = Print Void in Red	Select this option to print a VV VOID VV line, in red or inverse, in front of voided menu items. Deselect to print voided items in red, without the VV Void VV line.
10 - Print Condiments in Red (Overrides Print Class Settings)	Select this option to print condiments in red ink or in inverse. Deselect to print condiments in red/inverse or in black, depending on the Print Class Red/Black option setting.
11 - Print Both Menu Item Names	Select this option to print both names entered for a Menu Item Definition on the order chit. Deselect to print only one name. When this option is deselected, the name that prints is determined by the Menu Item Definition's Menu Item Class option Print Name 2 on Order Output Instead of Name 1 .
13 - Print Guest Check Info Lines Before Header on Order Device	Select this option to print guest check information lines before the order device header.
14 - Print Guest Check Info Lines After Header on Order Device	Select this option to print guest check information lines after the order device header.
15 - Print Guest Check Info Lines After Trailer on Order Device	Select this option to print guest check information lines after the order device trailer.

Table 17-6 (Cont.) Order Devices Printer Options

Option	Description
16 - Print Secondary Items	See Configure Secondary Printing for more information.
21 - Exclude Voids	Select this option if you do not want voids of previous round items to be sent to the kitchen.
22 - Intersperse Different Languages	If you are printing in more than one language, select this option to print the menu item in each language before printing any condiments. For example, the output will be menu item name in language 1, menu item name in language 2, 1st condiment in language 1, 1st condiment in language 2.
24 - Print Dining Course Header	Select this option to print a dining course header and to group the menu items by dining course.
25 - Format Prefix On Separate Line	Select this option to print the prefix on a separate line above the condiment. Deselect to print the prefix on the same line as the condiment that it modifies.
26 - Print Single Wide	Select this option to print orders in single-width characters. This supports longer menu item names, but has the drawback of not being as readable from a distance.

10. Click **Save**.
11. Select the property, click **Setup**, and then click **Workstations**.
12. Double-click the workstation record for which to assign the printer order device, and then click the **Order Devices** tab.
13. Select the printer order device from the Order Device Output list, and then click **Save**.

Configure Secondary Printing

Secondary printing enables workstation operators to print menu items to additional printers as secondary items. A secondary item is one that is part of the same order, but prepared at another Prep Station. This allows the prep cook to know what other items accompany the dish. For example, a house salad is a primary item on the cold line, but a secondary item on the hot line. When secondary printing is enabled, the cook reading the chit from the hot printer sees the items necessary for preparation at the hot line and also any items being prepared by other cooks that were added to the check at the same time. This feature allows the kitchen to synchronize orders for delivery. For example, pizza and chicken wings are set to print to the hot printer, and house salad is set to print to the cold printer. If the cook who prepares the salad does not know that the chicken wings and pizza go with the salad order, the cook might prepare the salad immediately. This can cause the salad to get warm or wilt, possibly having to be remade.

Secondary items print in a smaller font at the bottom of the order chit.

1. Select the revenue center, click **Setup**, and then click **Order Devices**.
2. Double-click a printer order device record, and then click the **Options** tab.

3. Select the appropriate options that apply to secondary printing, and then click **Save**:

Table 17-7 Secondary Printing Options

Option	Description
16 - Print Secondary Items	Select this option to allow this order device to print items sent from other printers as secondary items.
17 - Broadcast Secondary Print Jobs to All Printers	Select this option to send all items programmed to print at this order device to other printers to print as secondary items. Items print only at other printers that have 16 - Print Secondary Items enabled.
18 - Print Secondary Printer Header	Select this option to print the name of the printer from which the secondary items are being broadcasted.
19 - Print Secondary Items in Red	Select this option to print secondary items in red.
20 - Suppress Blank Lines Between Secondary Items	Select this option to remove extra line spacing between secondary items on order chits.

Configure Cash Drawer

1. Select the property, click **Setup**, and then click **Workstations**.
2. Double-click the workstation to be used with the cash drawer.
3. Click the **Transactions** tab.
4. Select the number of **Cash Drawers** (0, 1, or 2) that are physically installed at the workstation.
5. In the **Cash Drawer Beep Timeout** field, enter the number of seconds the cash drawer can be open before the workstation begins beeping. If you set this value to 0 (zero), beeping does not occur.
6. In the **Cash Drawer Notify Timeout** field, enter the number of seconds the cash drawer can be open before the workstation posts a message to the journal log file. If you set this value to 0 (zero), the message does not post to the journal log.
7. Click the **Options** tab, and then click the **Hardware/Cash Drawer** subtab.
8. Select the appropriate cash drawer options.

Table 17-8 Cash Drawer Options for Workstation

Option	Description
3 - Require Cash Drawer to be Closed Before New Transaction	Select this option to require the workstation operator to close the cash drawer before beginning a new transaction. Deselect this option to allow transactions to begin while a cash drawer is open.

Table 17-8 (Cont.) Cash Drawer Options for Workstation

Option	Description
4 - Assign Cash Drawer By User Workstation	Select this option to allow workstation operators to assign themselves to the cash drawer using the function key Assign Cash Drawer . Only the workstation operator assigned to the drawer can open it.
7 - Use Other Cash Drawer for Other Currency	Select this option if two cash drawers are in use for the workstation and one is dedicated to foreign currency.

9. Click **Save**.
10. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Control Parameters**.
11. Click the **Options** tab.
12. Select the appropriate cash drawer options.

Table 17-9 Cash Drawer Options for Control Parameters

Option	Description
23 - Open Drawer Only if Balance Due is 0.00	Select this option to prevent a tender/media key from opening the cash drawer unless the balance due is \$0.00. Deselect this option to allow a tender/media key to open the cash drawer even if there is a balance due on the transaction. If the transaction's subtotal is \$0.00 and you set 36 - Do Not Open Cash Drawer if Subtotal is 0.00 , the setting of option 23 is irrelevant.
33 - Employee ID Required With [No Sale] Key	Select this option to prompt for the signed-on workstation operator's employee ID after pressing the No Sale key. Deselect this option to allow workstation operators to use the No Sale key any time a privileged employee is signed on. This feature is used by staydown operators (such as bartenders or sales clerks) who typically walk away from the workstation, and by prompting for employee ID, mischievous persons cannot open the drawer.
36 - Do Not Open Drawer if Subtotal is 0.00	Select this option to prevent the cash drawer from opening for transactions in which the subtotal is \$0.00. Deselect this option to allow the cash drawer to open whenever a workstation operator uses a tender/media key that is configured to open the drawer.

Table 17-9 (Cont.) Cash Drawer Options for Control Parameters

Option	Description
42 - Always Open Cash Drawer if Change Due	Select this option to allow the cash drawer to open when there are no tenders on the check that should usually open the drawer. The transaction must have change due, and the current tender must not be configured to open the drawer. This option is typically used for Tender/Media records such as gift certificates, where change is issued only if the gift certificate exceeds the value of the transaction (thus, the drawer should be opened to issue change), but the drawer remains closed when the gift certificate does not exceed the transaction's total.
65 - Allow open of Cash Drawer on Service Charge	Select this option to allow the cash drawer to open for transactions where the service charge has a value greater than \$0.00, but the subtotal is \$0.00. If you selected 36 - Do Not Open if Subtotal is \$0.00, you must also select this option to allow the cash drawer to open for service charge only guest checks.

13. Click **Save**.
14. Select the Enterprise, click **Configuration**, and then click **Roles**.
15. Double-click the role to open it.
16. Select the role type, click the **Operations** tab, and then click the **Miscellaneous** subtab.
17. Select the appropriate options for cash drawer privileges.

Table 17-10 Cash Drawer Privilege Options

Option	Description
17 - Authorize/Perform unassignment of cash drawer from others	Select this option to allow employees in the employee class to use the Unassign Cash Drawer function key to unassign cash drawers from other workstation operators. Do not select this option for every employee; set it only for management employee classes. Setting this option allows workstation operators in the employee class to use the function key Assign Cash Drawer.
34 - Authorize Open Cash Drawer Using the [No Sale] Key	Select this option to allow employees associated with the role to open the cash drawer outside of a transaction using the No Sale key, and to authorize non-privileged employees to do so.
88 - Authorize Cash Drawer Reconnection	Select this option to allow employees associated with the role to authorize a cash drawer cable reconnection on a workstation.

18. Click **Save**.

Configure Magnetic Stripe Reader

Workstation operators scan magnetic stripe cards using a magnetic stripe reader (MSR) attached to a workstation. Magnetic cards are commonly used as:

- Credit cards
 - Gift cards
 - Employee identification cards
1. Select the property, click **Setup**, and then click **Workstations**.
 2. Double-click the workstation to be used with the MSR.
 3. Click the **Options** tab, and then click the **Display/Security** subtab.
 4. Select the appropriate MSR security options.

Table 17-11 MSR Security Options

Option	Description
12 - Mag Card Entry Required for Employee ID	Select this option to allow all employee ID entries at the workstation to be made by swiping a magnetic employee ID card. The workstation does not accept an employee ID number entered through the keyboard or touchscreen.
50 - Mag Card or Fingerprint Scan Required for Employee ID	Select this option to allow all employee ID entries at the workstation to be made using a fingerprint scan or by swiping a magnetic card. That is, employees must swipe a card or scan a fingerprint.
51 - Mag Card and Fingerprint Scan Required for Employee ID	Select this option to allow all employee ID entries at the workstation to be made using a fingerprint scan and by swiping a magnetic card. That is, employees must both swipe a card and scan a fingerprint.

5. If you are using an encrypted MSR, complete the following steps:
 - a. Click the **Hardware/Cash Drawer** subtab.
 - b. Select **55 - Enable Encrypted Magnetic Stripe Reader Support**.

After you select this option, you cannot turn it off. Before setting this option, ensure that the credit card processor or gateway supports encryption functionality.
6. Click the **Devices** tab.
7. Click **Add**, and then select a magnetic stripe reader from the **Select Peripheral Device Type** drop-down list.
8. Select the COM Port Settings (if necessary), and then click **OK**.
9. Click **Save**.

Configure Barcode Reader

A barcode is an optical machine-readable representation of data. Barcodes are used to quickly order items. Workstation operators scan barcodes using barcode scanners attached to

workstations. When a barcode is scanned, the workstation software processes the data and matches it with a menu item configured in the Symphony Essentials database.

1. Select the Enterprise, property, or revenue center click **Configuration**, and then click **Barcodes**.
2. Insert a barcode record.
3. In the **Barcode** column, enter the numeric value that the barcode represents.
4. Click the ellipsis point (...) button in the **Master** column, select the master menu item record to be ordered when the barcode is entered, and then click **OK**.
5. In the **Definition** column, select the Menu Item Definition (belonging to the selected Menu Item Master) to be ordered when the barcode is entered. If you select **0 - All Definitions**, the workstation determines which definition to order at the time the barcode is entered, based on active menu levels and other criteria.

This column is only active when you set the Menu Item Master column to a value other than **0 - None**.

6. In the **Price #** column, select the Menu Item Price (belonging to the selected Menu Item Definition) to be ordered when the barcode is entered. If you select **0 - All Prices**, the workstation determines which price to order at the time the barcode is entered, based on active menu levels and other criteria.

This column is only active when you set the Menu Item Definition column to a value other than **0 - All Definitions**.

7. In the **Alternate Price** column, enter the price to charge for the item when the barcode is entered.

This value is used only when you set a value greater than 0.00; if the value is 0.00, the price from the Menu Item Price record is used.

8. In the **Alternate Prep Cost** column, enter the prep cost to use for the item when it is ordered by the barcode.

This value is used only when you set a value greater than 0.00; if the value is 0.00, the prep cost from the Menu Item Price record is used.

9. Click **Save**.
10. Select the Enterprise or property, click **Setup**, and then click **Barcode Format Sets**.
11. Insert a barcode format set record, and then double-click it.
12. Click **Add**.
13. In the **Input Length** field, enter the number of digits in the scanned barcodes.
14. In the **Returned Start** field, enter the first digit to use in the numeric value to return.
15. In the **Returned Length** field, enter the number of digits to read as the numeric value to return.
16. Click **Save**.
17. Select the property, click **Setup**, and then click **Workstations**.
18. Double-click the workstation to be used with the barcode reader.
19. Click the **Transactions** tab.
20. Select the **Barcode Format Set** for the workstation to use.

The Barcode Format Set determines how the workstation reads barcodes of various lengths.

21. Click the **Devices** tab.
22. Click **Add**, and then select the barcode reader from the **Select Peripheral Device Type** drop-down list.
23. Select the COM Port Settings (if necessary), and then click **OK**.
24. Click **Save**.

Kitchen Display System (KDS)

When a property (location) is added to the enterprise, one KDS controller record is automatically added in the EMC for the property. One Expo Station is allowed for each property, plus up to five Prep Stations per property.

Configure KDS Controller

1. Select the property, click **Setup**, and then click **KDS Controllers**.
2. Double-click the KDS controller record to open it.
3. On the **General** tab, change the **Name** if needed.

The **KDS Controller ID** value is automatically generated by the system and you cannot change it.

4. Set the fields and options as described in the following table:

Table 18-1 KDS Controller General Settings

Fields and Options	Description
1 - Prevent Chit Bump on Expo Display if Chit Exists on Prep Display	Select this option to prevent a chit from being bumped from an Expo Display if the chit still exists on one of the Prep Displays.
4 - Expo-only Items Display as Done	Select this option to change the status of menu items that do not go to Prep Stations to Done when they fire.
12 - Recall to Original Position	Select this option to have recalled orders appear in their original position before being bumped. When deselected, recalled orders appear first on the display.
Display Language	Select the language. The default is set to English.
Enable Reset All Time	Select this option and then set the daily time when the KDS Controller deletes all data. Deselect this option to have the KDS Controller retain all data and not reset.

5. Click the **Service Host** tab, click **Select** adjacent to the **Service Host** field, select a service host from the list, and then click **OK**.
6. Click **Save**.

Configure KDS Display

1. Select the property, click **Setup**, and then click **KDS Displays**.
2. Double-click the KDS display record to open it.

3. (Optional) On the **General** tab, change the **Number**, **Name**, **KDS Controller**, and **IP Address**.
4. Select the **KDS Tool Bar** from the drop-down list.
5. Select the orientation type for the display in the **Display Orientation** drop-down list.
6. Set the options as described in the following table:

Table 18-2 KDS Display Options

Option	Description
1 - Enable Item Select	Select this option to allow kitchen staff to select items on the chit.
6 - Disable Item Double Touch Bump	Select this option to prevent kitchen staff from bumping items from KDS Displays using double touch.
7 - Allow Remote View	Select this option to allow other KDS Displays to remotely view orders on this display.
8 - Allow Remote Actions	Select this option to allow other KDS Displays to perform Done, Recall, and Review actions on this display while in Remote View. To enable other KDS Displays to remotely view orders, but prevent them from performing actions on this display, select 7 - Allow Remote View , and deselect 8 - Allow Remote Actions .

7. Click the **Display** tab.
8. Set the Display Screen Options:
 - **Display Type**: Select the type of KDS Display (**2 - Expo** or **3 - Prep**).
 - **Tool Bar Position**: Select the location of the tool bar on the display.
9. Set the Chit Display Options as described in the following table:

Table 18-3 KDS Chit Display Options

Field	Description
KDS Chit Layout Style	Select the type of layout for the order chits on the display. Depending on the chit layout style that you select, the Order Type Font drop-down list becomes active. To preview the chit layout styles, click Help , and then select the chit style.

Table 18-3 (Cont.) KDS Chit Display Options

Field	Description
Serpentine Mode	Select the arrangement of order chits on the display: • 0 - TSR: Select to arrange the KDS with the number of vertical columns set in the Chit Columns drop-down list. Incoming orders appear starting from the top left corner, filling the first column, then spilling into the top of the next column, and so on. TSR Mode only works on PC-based KDS Displays. • 1 - Horizontal: Select to arrange the KDS with the number of horizontal rows set in the Chit Rows drop-down list. Incoming orders appear from left to right, row by row, starting from the top left corner and moving across. • 2 - Vertical: Select to arrange the KDS with the number of vertical columns set in the Chit Columns drop-down list, and using the Chit Rows drop-down list set the number of rows to appear. Incoming orders appear starting from the bottom right corner, moving up and then moving to the left.
Menu Item Font	Select the font size for menu items to appear on the display.
Order Type Font	Select the font size for the Order Type text to appear on the display.

10. Click **Save**.

Assign KDS Controller to Revenue Center

1. Select the property, click **Setup**, and then click **RVC Configuration**.
2. Double-click the revenue center for which you want to assign the KDS Controller.
3. On the **General** tab, select the **KDS Controller** from the drop-down list.
4. Click **Save**.

Configure KDS Order Device

1. Select the revenue center, click **Setup**, and then click **Order Devices**.
2. Double-click the record of an order device to open it.
3. On the **General** tab, select **1 - Remote** from the **Device Type** drop-down list, select **1 - KDS** from the **Primary Device Type** drop-down list, and then select the appropriate KDS Display record from the **Device** drop-down list.
4. If you have a backup printer, select it from the **Backup Device** drop-down list.

A backup device can only be configured as a printer device. A configured printer for a backup device only works for a KDS when the KDS Controller or Service Host is down; it does not work when the Restaurant Display Controller (RDC) is offline or powered off.

5. In the **Order Device Redirect** drop-down list, select the KDS order device that you selected in Step 4.
6. In the **Condiment Sort Type** drop-down list, select the method for sorting condiments on the order device:
 - **No Condiment Sorting:** Select to list condiments in the order in which they are added to the check by the workstation operator.
 - **Sort Allowed Condiments:** Select to sort only allowed condiments. Required condiments remain in the same position in which order they were ordered; required condiments are not sorted.
 - **Sort all condiments:** Select to sort all condiments.
7. In the **Menu Item Printing** drop-down list, select which items to route to this KDS:
 - **All Items:** Select to route all menu items.
 - **Only Items with Condiments:** Select to route only menu items with condiments.
 - **Only Items without Condiments:** Select to route only menu items without condiments.
8. (Optional) Change the **Language**.
9. Click the **KDS** tab, and then set the following:

Table 18-4 Order Devices KDS Fields

Field	Description
First Alert Timeout	If you are using the KDS Coursing function, enter the time in seconds when course 1 items display the first alert and second alert respectively. Chits showing a first alert are shaded yellow, while the chits showing a second alert are shaded red.
Second Alert Timeout	If you are using the KDS Coursing function, enter the time in seconds when any course except course 1 displays the first and second alert respectively. Chits showing a first alert are shaded yellow, while the chits showing a second alert are shaded red.
Primary Runner Chit Printer	Select a printer where runner chits print when orders are bumped from the KDS device.
Backup Runner Chit Printer	Select a printer where runner chits print when orders are bumped from the KDS device if the application cannot establish communication to the primary runner chit printer.
New Order Notification Timeout (seconds)	Enter the length of time in seconds that newly added items flash on the screen. When this threshold is reached, items appear normally.

10. Click the **Options** tab, and then select the appropriate KDS Options as described in the following table:

Table 18-5 Order Devices KDS Options

Option	Description
1 - Enable KDS Consolidation	Select this option to consolidate identical items with different modifiers onto one line, preceded by the quantity on the KDS Display.
3 - Single Item Per Sub-Order	Select this option to show every item on an order on its own chit. This option is enabled for KDS Menu Item Prep Timing.
4 - Print on Prep Done	Select this option to print a runner chit when the order is marked as Done at a Prep Station. Only items from this Prep Station print.
5 - Print on Expo Done	Select this option to print a runner chit when the order is marked as Done at the Expo Station.
6 - Print on All Prep Done	Select this option to print a runner chit when an order is complete at all Prep Stations and before the order is bumped from the Expo Display.
7 - Sort by Seat	Select this option to sort check detail by seat number. Deselect this option to have items display in the order in which they were ordered.
14 - Multiple Condiments Per Line	Select this option to display condiments in a continuous line on each order chit. Deselect this option to print each condiment on a separate line beneath the referenced menu item. To compress the condiments into a single line, you must not print condiments in red.
15 - Display New Order Notification	Select this option to make new orders flash when appearing on the KDS Display.
22 - Match Voids with Order Chits	Select this option to have voided order chits appear directly in front of the order it relates to.
24 - Print check on Expo Done	Select this option to print a check or receipt at the Runner Chit printer when the order is bumped from the Expo.
28 - Use Deli Chit Format for Runner Chits	Select this option to print the order number using a larger and bold font on the top and bottom of runner chits.
31 - Always Show Quantity	Select this option to show the quantity for every condiment ordered on a KDS display, even if the quantity is 1. When set, condiments must be added to the check singly, that is, without using the on screen numeric key pad for multiple condiment orders. You must deselect option 1 - Enable KDS Consolidation for this feature to work. When deselected, the quantity is implied from the item preceding it on the order chit.

11. Click **Save**.

Configure KDS Highlight Schemes

The following KDS Highlight Schemes are automatically created for every organization:

Table 18-6 KDS Highlight Schemes

Number	Name	Foreground Color	Background Color
1	Black / Yellow	Black	#FFFF80
2	Black / Red	Black	#FF0000
3	Black / Blue	Black	#0080FF
4	Black / Orange	Black	#FF8000
5	Black / Pink	Black	#FF80C0
6	Black / Green	Black	#80FF00
7	Black / Purple	Black	#FF00FF
8	Black / Olive	Black	#808000

1. Select the Enterprise, property, or revenue center, click **Configuration**, and then click **Menu Item Classes**.
2. Double-click the appropriate menu item class to open it.
3. In the **Kds Highlight Scheme** drop-down list, select the highlight color scheme.
4. Click **Save**.
5. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Order Type Parameters**.
6. Click the **KDS Highlight Scheme** column arrow adjacent to the appropriate order type, and then select in which color to show the order type label on KDS chits.
7. Click **Save**.
8. Repeats Steps 1 through 7 to add more highlight schemes for other menu item classes.

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Reporting and Data

The following Symphony Essentials reports are accessible at the workstation. These reports do not require configuration.

Figure 19-1 Reports Available for TSR

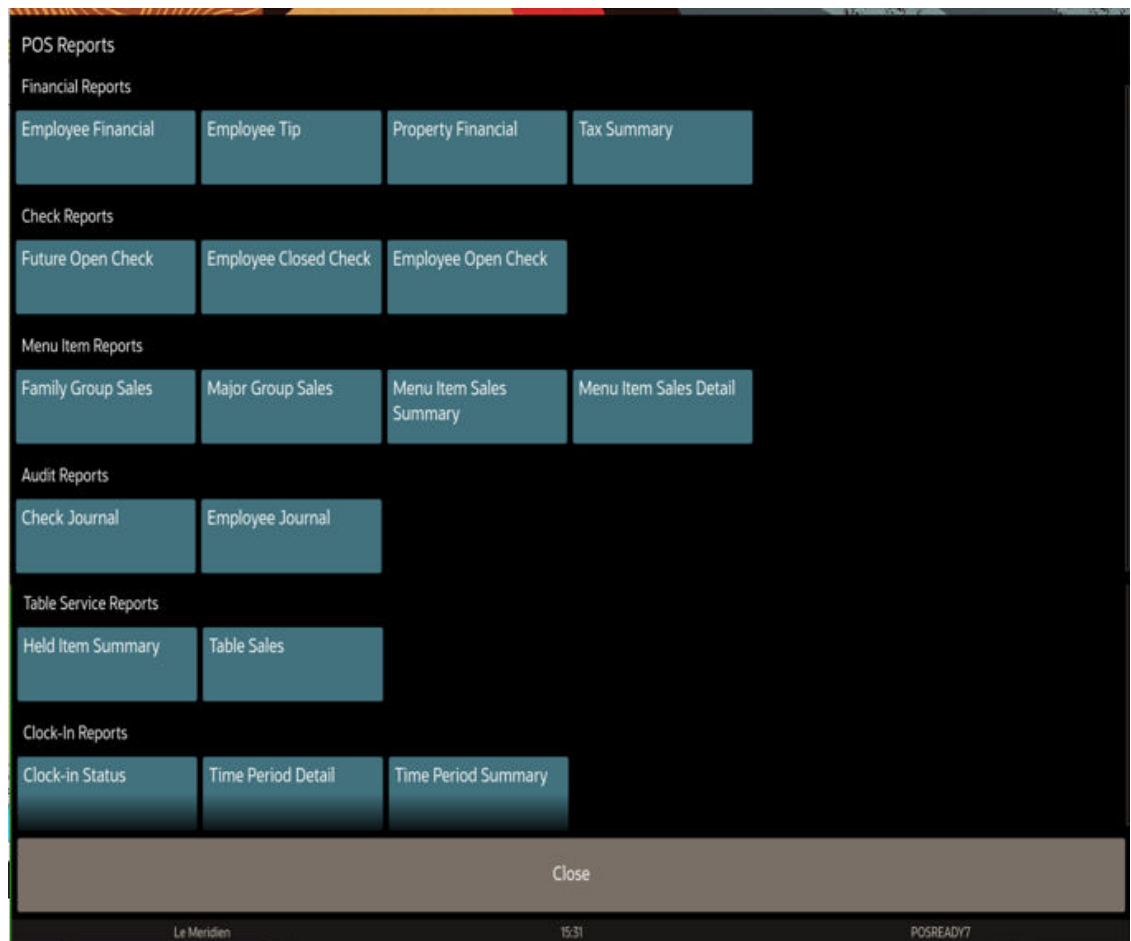


Figure 19-2 Reports Available for QSR and Bar



Enable VAT Reports

You can show or hide value added tax (VAT) reports on the Reports page in Symphony Essentials Edition.

1. Select the Enterprise, property, or revenue center, click **Setup**, and then click **Control Parameters**.
2. Click the **Options** tab.
3. To show the VAT reports, select **71 - Enable VAT Reports**. To hide the VAT reports, deselect this option.
4. Click **Save**.

Enable Fiscal Reports

If fiscal is installed for customers in the following countries, you can enable fiscal buttons to appear on the Linux workstations within the location/property.

- Sweden
- Mexico
- Brazil
- Puerto Rico
- Colombia

- Peru
- Panama

Fiscal functionality is not supported on Android devices.

1. Select the property, click **Setup**, and then click **Property Parameters**.
2. Click the **Simphony Essentials** tab.
3. To enable fiscal buttons for a location, select the country in the **Fiscal Location** drop-down list. If the property does not require fiscal reporting, select **None**.

If you select a fiscal location, the relevant buttons and fiscal functionality are activated for the selected location.

4. Click **Save**.

20

Auditing

You can use the Audit Trail module to view additions, changes, and deletions made through the EMC and through PMC Procedures. In addition, the Audit Trail reports on successful and failed logins to EMC, PMC Report takers, Key Manager activity, and Audit Trail purges.

In almost every module, you can audit an individual record or a group of similar records. The results usually show the record or records at a specific position. For example, consider the following actions:

1. Add a Tender Media record at Object Number 1234.
2. Change the record's name to Cash.
3. Delete the record.
4. Add a new record at Object Number 1234.
5. Change the record's name to MasterCard.

After performing these steps, the Audit This Record results show all five of the changes (not just the changes for steps 4 and 5). Although the first Tender Media record was deleted, it is considered "this record" for functional purposes. In short, all records at the same object number are treated as "this record" and are included in the results.

Use Audit Trail

You must have the privilege to access the audit trail at the Enterprise or property level. When an Audit Trail report is taken, the activity is logged to the Audit Trail. All Audit Trail Reports taken are logged as an Enterprise level activity. You can use the Audit Trail two different ways: to view the history of a specific record or to perform a general search throughout the entire system.

1. Select the Enterprise or property, click **Tasks**, and then click **Audit Trail**.
2. To perform a quick search on the **Search** tab:
 - a. Select the timeframe from the **All Changes In** drop-down list.
 - b. Click the **Run Quick Search** button.

When you perform a quick search, the application ignores the values in the standard search fields.

3. To perform a standard search, enter or select information in the following fields, and then click the **Search** button.

Table 20-1 Audit Trail Standard Search Fields

Field	Description
Application	Select an application from the drop-down list. Depending on your selection, the Module drop-down list is active or dimmed. For example, when you select EMC , the Module drop-down list shows a list of EMC modules.

Table 20-1 (Cont.) Audit Trail Standard Search Fields

Field	Description
Module	Select a module from the drop-down list. This field is active only when the Application selection allows a choice of modules. Depending on your selection, the Object Numbers field is active or dimmed. For example, when you select EMC from the Application drop-down list and Discounts from the Module drop-down list, the Object Numbers field becomes active.
(Optional) Object Numbers	Enter an object number or range to retrieve results based on specific records only. Leave this field blank to have the Audit Trail find all object numbers.
Operation	Select an operation from the drop-down list. This field is active based on a combination of the Application and Module selections.
Zone/Location	Select a location. When you open the Audit Trail from the Enterprise level, this field allows a selection of any property or revenue centers. When you open the Audit Trail from the property level, this field allows a selection of revenue centers within the property.
Employee	Click the Select link, select an employee, and then click OK . When you select a specific employee, only changes made by that employee are included in the results. Click the Me link to include only the logged-in employee.
Date Range	Select the date range to use to query the Audit Trail. Select User-Defined to activate the Start and End fields.
(Optional) Start and End	To narrow your query to a specific date or date range, select the start and end dates and times. Select All Dates to include all dates in the query.
(Optional) Old/New Values	Enter text for use in the query. This can be useful in finding a specific change to a record, such as when a Hamburger item was renamed to Cheeseburger.
Preserve Previous Results	Select this option to merge the search results with the previous search results, instead of overwriting them. Deselect this option to see only the results of the most recent search.

4. If the number of results that will be returned exceeds the pre-set thresholds for Audit Trail results (for example, 10,000 records or more), the application prompts you to confirm the action.
5. To view the search results for a quick search or a standard search, click the **Results** tab.

- a. To save the results, click the **Save to Disk** button, select the directory, and then click the **Save** button.
 - b. To copy the results into another application (such as Notepad or email) without storing the information, click the **Formatted Results** button, and then click the **Copy** button.
6. To manually remove old records from the Audit Trail table in the database, click the **Purge** tab.

The **Purge** tab is visible only at the Enterprise level, and you must have the Purge Audit Trail privilege.

7. Select the date before which the records will be purged, and then click the **Purge** button. For example, if you select 9/1/2016, the application deletes all records from September 1, 2016 and earlier.

Records are deleted based on the UTC date of the Audit Trail record.

In addition to this manually initiated purge, the Data Transfer Service (DTS) purges Audit Trail records automatically.

Use Audit This Record

1. Select the Enterprise or property, and then open a module that contains at least one record.
2. Highlight one or more records, right-click inside the first column, and then select either **Audit This Record** (single record) or **Audit Selected Records** (multiple records). The **Audit Record** tab shows the information for the selected records.

Alternatively, from the EMC toolbar, click **Edit**, and then select **Audit This Record**.

3. To run specific queries on the selected record or records, click the **Show Advanced Options** link.
4. Use the same search parameters that are available in the Audit Trail module. See [Use Audit Trail](#) for more information.

Administrator Procedures

This chapter contains information and instructions to perform administrative operations and tasks. These include:

- Using the Client Application Loader (CAL) to update workstations and software versions
- Submitting data import and export job requests

Client Application Loader (CAL)

The Client Application Loader (CAL) allows seamless distribution, installation, and maintenance of Symphony Essentials software from a CAL server to all POS client workstations and service hosts. The CAL stores software packages in the transaction database, providing a central storage location. The CAL enables POS clients to:

- Obtain a list of configured workstations from the CAL servers.
- Establish unique workstation IDs and network configuration (either Dynamic Host Configuration Protocol (DHCP) or static Internet Protocol (IP) based on the information received from the CAL server).

CAL packages are a method of distributing software to the POS clients through an installation script. Rather than having to manually install software on a POS client workstation, a CAL package automates this process over the network. This increases the efficiency of deploying and upgrading POS client software on the workstation.

Update POS Client Workstations

1. The POS client workstation device periodically checks for application updates.
2. The CAL installs the packages according to the deployment order specified in the CAL Packages module. The workstation device might restart several times.

Update Software Version

Changing the deployment package version causes the new version to immediately start deploying to the POS client workstation device. Depending on the **Action To Take (Install or Skip)**, the system may begin immediate deployment.

1. Select the Enterprise, click **Setup**, and then click **CAL Packages**.
2. Expand the **Simphony** subgroup in the left pane, and highlight the CAL package to deploy.
You need to deploy the following packages in the order listed:
 - a. CAL Client
 - b. Service Host Download
 - c. Service Host
3. Click the **Deployment Schedules** tab.
4. Highlight the CAL package.

5. Click **Change Package Version**.
6. In the **Choose CAL Package to upload** drop-down list, select the appropriate package version for deployment, and then click **OK**.
7. In the **Deployment Type** drop-down list, select the type of deployment:
 - **1 - Property/Enterprise:** Click the ellipsis point (...) button and select one or more properties where the package downloads.
If you select this deployment type, the CAL package deploys to all service hosts at the same time.
 - **2 - Specific Service Host:** Click the ellipsis point (...) button, and then select one or more service hosts or POS client workstations where the package downloads.
8. In the **Action To Take** field, select **0 - Install**.
You can configure multiple deployment schedules for the same CAL package. Symphony Essentials uses the most granular deployment when given multiple deployment schedules. For example, if you configure a deployment schedule for a workstation and for the property, Symphony uses the workstation device deployment. If you configure a CAL package deployment for a property with **0 - Install** and a deployment for a workstation device with **1 - Skip**, the CAL package is not installed on the workstation device.
9. (Optional) In the **Effective From** field, select the start date when the CAL packages automatically stop installing, and select the stop time (in 24-hour format).
You can use this field to schedule Symphony Essentials upgrades.
10. (Optional) In the **Effective To** field, select the date when the CAL packages automatically stop installing, and select the stop time (in 24-hour format).
To keep the installations perpetual, do not set an **Effective To** time.
11. Click **Save**.

Install the Android Service Host

The Android Service Host APK is an Android package file used to distribute and install the POS service host application software on a device running the Android operating system.

- Starting with Symphony Essentials version 19.4, you do not need to use CAL to install, upgrade, or downgrade the Android Service Host. This section describes the steps required to install the Android Service Host using Symphony Essentials version 19.3.1 and later.
- If you are using Symphony Essentials version 19.3 or earlier, you need to use CAL to install or upgrade the Android Service Host. See the *Oracle MICROS Symphony Client Deployment Guide*—specifically **Installing CAL on the Android Device**—for instructions to install the Android Service Host using Symphony Essentials version 19.3 or earlier.

Install the Android Service Host APK for the first time on a new Android mobile device. Login credentials are required for the Symphony EMC and the mobile device in order to install the Android Service Host for the first time.

To install the Android Service Host on Symphony Essentials 19.4 and later:

1. In the EMC, select the property, click **Setup**, and then click **Workstations**.
2. Click the insert icon



on the toolbar.

3. Enter the Android device name, and then click **OK**.
4. Double-click the new Android device record.
5. On the **General** tab, select **2 - Workstation Client** in the **Type** drop-down list.
For Adyen Castles devices, select **7 - Castles Tech S1F2**. See [Add a Workstation](#) for more information.
6. Select the **Workstation Class** for the device.
Smaller devices, such as mobile phones, use **4 - Mobile Table Service Restaurant** or **5 - Mobile Quick Service Restaurant**. Larger Android devices, such as tablets, use **1 - Table Service Restaurant**, **2 - Quick Service Restaurant**, or **3 - Bar**. See [Add a Workstation](#) for more information.
7. Enter the IP address or host name of the service host where the workstation device application runs in the **Address / Host Name** field.
8. Click the **Options** tab, click the **Offline/Misc** subtab, and then enable the following options:
 - **17 - Allow Offline Operations**
 - **45 - Exclude this Workstation from EMC Module Version Validations**
9. Click **Save**.
10. Using the mobile device on which you want to install Android Service Host, access the Symphony Web Portal (SWP) by opening a web browser and entering the following address: `https://[ServerName]/SymphonyApp`.
11. Enter the **User Name**, **Company**, and **Password**, and then click the **Login** button.
Depending on your organization, there may not be a **Company** field.
12. Click **Downloads**.
If you are using a small device in portrait mode, you may have to scroll to the right to see the Downloads option.

Figure 21-1 Welcome to Symphony Page with Downloads Option



On some devices, you need to expand a menu to see the Downloads option.

Figure 21-2 Welcome to Symphony Page with Expand Icon

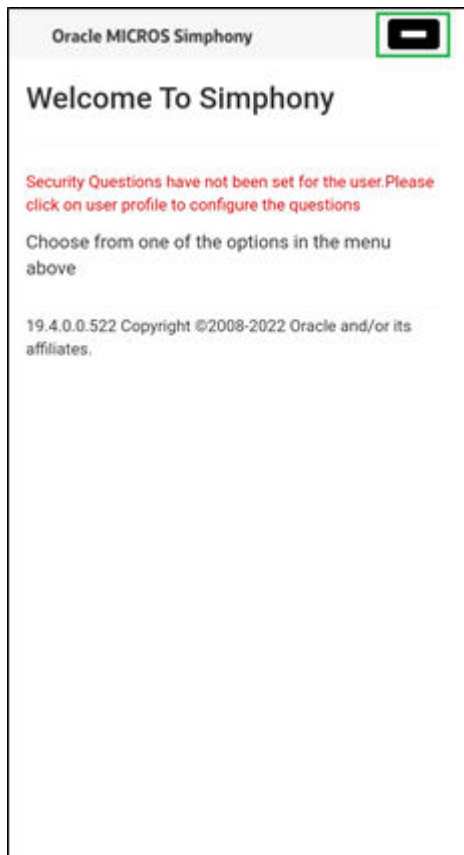
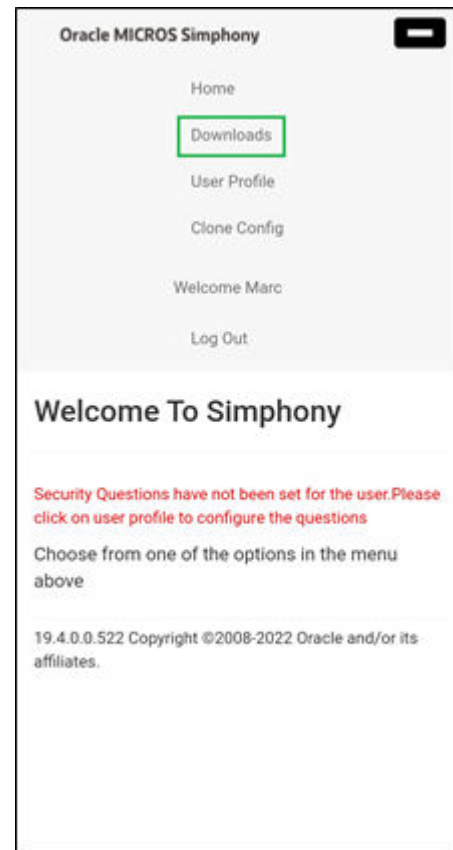


Figure 21-3 Welcome to Symphony Page with Expand Icon and Downloads



13. In the **Download Type** drop-down list, select **Simphony Point of Sale Client Install (Android)**.
14. In the **Version Download Type** drop-down list, select the Simphony Essentials version.
15. Click the **Download** button to download the .apk file.
16. Navigate to the Downloads folder, locate the **AndroidServiceHost.apk** file that you downloaded, and click it to install the application.
17. Click **Continue** or **Install**. When the .apk installation is complete, the message *App installed* appears beneath a check mark.
18. Click **Open** in the lower right area, and then click **Allow**. The Oracle MICROS Symphony launch page appears briefly.

Figure 21-4 Oracle MICROS Symphony Launch Page



19. Enter one of the following:

- **Cloud Code:** Enter the cloud code from your welcome letter to connect to Symphony Essentials.

If you enter more than five characters, the following message appears: *Incorrect Cloud Code, please try again.*

Figure 21-5 Cloud Details

Cloud Details

Cloud Code Server Name

Please enter the cloud code from your welcome letter.

Required

Server URL

Close

Next

- **Server Name:** Enter the URL to connect to the server.

This entry field is free format. If you enter a decimal point, a list of common domain suggestions appears. You can select one of these domains rather than manually entering it.

Figure 21-6 Server Details

Server Details

Cloud Code Server Name

Please enter the Symphony server information.

Required

[Advanced](#)

Server URL:

Close

Next

20. (Optional) To view the Server Port and EGateway information, click **Advanced**. This information may be required for support purposes and should not be changed.

Figure 21-7 Advanced Server Settings



The image shows a screenshot of the 'Advanced Server Settings' dialog box. The title bar is dark blue with the text 'Advanced Server Settings' in white. Below the title bar, there are three input fields. The first is labeled 'Server Port' and contains the value '443'. The second is labeled 'EGateway' and contains the value '/EGateway/EGateway.asmx'. The third is labeled 'Server URL:' and is currently empty. At the bottom of the dialog, there are two buttons: a light gray 'Previous' button and a dark gray 'Next' button.

21. When the Cloud Code or Server Name (entered in Step 19) is valid, the **Next** button becomes active. Click **Next**.
22. In the Enter Symphony Credentials dialog, enter your **User Name**, **Enterprise Name**, and **Password**, and then click **Next**. The Service Host APK is authenticated with the Symphony server.

Depending on your Symphony Essentials system, the **Enterprise Name** may not appear.

Figure 21-8 Enter Symphony Credentials

Enter Symphony Credentials

User Name

Required

Enterprise Name

Required

Password

Required

Previous

Next

23. If prompted, select the location, and then click **Next**. Otherwise, continue to the next step.
This page does not appear for Adyen S1F2 devices. If there is only one location, this page does not appear.

Figure 21-9 Select Location



Select a Location

Search

3 result(s)

Restaurant

Patio Bar

Garden Cafe

Previous

Next

24. Select a workstation device that shows either In Use or Available, and then click **Next**. When you select a workstation, it is highlighted in blue.

In Use means the device has already been through the CAL process.

This page does not appear for Adyen S1F2 devices.

Figure 21-10 Select Workstation

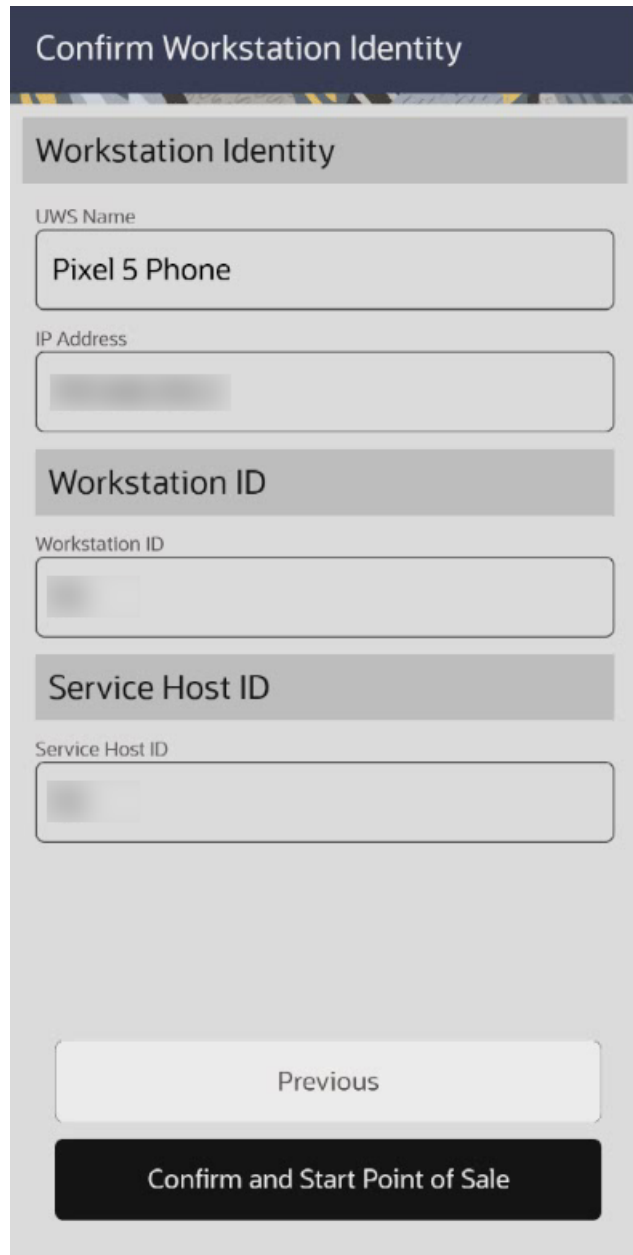
The screenshot displays a mobile application interface titled "Select a Workstation". At the top, there is a search bar with a magnifying glass icon and the text "Search". Below the search bar, it indicates "2 result(s)". The results are listed in a table-like format:

Workstation Name	Status
Pixel 5 Phone	Available
A12 Phone	In Use

Below the list, there are two navigation buttons: "Previous" and "Next".

25. On the Confirm Workstation Identity page, check the information shown, and then click **Confirm and Start Point of Sale** to start Symphony Essentials.

Figure 21-11 Confirm Workstation Identity



The image shows a mobile application interface titled "Confirm Workstation Identity". The form is divided into three main sections, each with a header and a text input field. The first section, "Workstation Identity", contains fields for "UWS Name" (with the value "Pixel 5 Phone") and "IP Address". The second section, "Workstation ID", contains a field for "Workstation ID". The third section, "Service Host ID", contains a field for "Service Host ID". At the bottom of the form are two buttons: a light gray "Previous" button and a dark gray "Confirm and Start Point of Sale" button.

Confirm Workstation Identity

Workstation Identity

UWS Name
Pixel 5 Phone

IP Address

Workstation ID

Workstation ID

Service Host ID

Service Host ID

Previous

Confirm and Start Point of Sale

Figure 21-12 Starting Symphony Essentials



Check and Posting Service (CAPS)

The Check and Posting Service (CAPS) is a required service that runs for each property. CAPS acts as the bridge between the Enterprise and the property, providing resiliency and increasing system performance. As workstation operators perform transactions and other operations on POS clients, CAPS stores the information and then posts in real-time to the Enterprise. Each property must have CAPS configured because without it, information occurring on the POS clients does not post to the Enterprise.

Schedule a Reload Check and Posting Database

You can schedule a full reload of the Check and Posting (CAPS) database for a property. Data in the CAPS workstation database will be deleted and replaced with new data when the reload is run, so access to the option needs to be restricted to support users only. (In the **Roles** module **Actions** tab, enable the **Tasks** action only for the support user role.)

The reload can be scheduled to run once during the next restart. This is a safe time to perform a restart without affecting POS operations when the database content is being removed and replaced. The new reload function is an emergency tool used to recover from data issues such as:

- CAPS being offline when database synchronization changes have been purged
- When a reload cannot be run from the front end (such as for CAPS running as a Service on a client)
- When the Enterprise Egateway and CAPS are not on the same LAN or VPN

The **Reload Check and Posting Database** function is performed once on the next restart of CAPS. This task is not repeated during each startup.

1. Select the property, click **Tasks**, and then click **Tasks**.
2. Click the **Reload Check and Posting Database** button, and then click **OK** to confirm. The Reload Database dialog shows the status as Pending or Idle, which indicates the status of the reload database task. The default value is Idle (not scheduled).
3. To cancel a pending operation, click the button again and confirm the cancellation.

Symphony Web Portal (SWP)

The Symphony Web Portal (SWP) is a website that enables administrators and managers to:

- Import and export Symphony Essentials data
- Download the setup packages (.exe or .apk) for the EMC client and CAL

You can access the SWP using valid Symphony Essentials EMC logon credentials.

Application programming interface (API) documentation is also located in the SWP:

- [https://\[ServerName\]\[:Port Number\]/ImportExportApi/DataService.svc/web/Help](https://[ServerName][:Port Number]/ImportExportApi/DataService.svc/web/Help)
- [https://\[ServerName\]\[:Port Number\]/ImportExportApi/SecurityService.svc/web/Help](https://[ServerName][:Port Number]/ImportExportApi/SecurityService.svc/web/Help)

The port number is only necessary if the default https port (443) is not used.

Start SWP

You need EMC logon credentials to access the SWP.

1. Change the Internet Explorer Compatibility View settings to allow Import/Export buttons and features to be visible:
 - a. Open Internet Explorer, and then press the **Alt** key.
 - b. Select **Tools** and then select **Compatibility View settings**.
 - c. Deselect **Display intranet sites in Compatibility View**.
 - d. Close Internet Explorer.

2. To turn off Enhanced security configuration:
 - a. Open **Control Panel**, and then select **Program and Features**.
 - b. Select **Turn Windows features on or off**. Server Manager is selected.
 - c. Click **Configure IE ESC**.
 - d. Select **Off** for the Enhanced security configuration for Administrators and Users, and then click **OK**.
 - e. Restart Internet Explorer.
3. Open any web browser and enter the following address: `https://[ServerName]/SymphonyApp`.
4. Enter the **User Name** and **Password**, and then click the **Login** button.
5. On the Welcome to Symphony page, select one of the following pages:
 - **Import/Export**: Import or Export data in comma-separated values (CSV) format. [Import and Export of Data – Usage](#) contains more information.
 - **Downloads**: Download setup packages for CAL or the EMC client. [Download CAL and EMC Client Setup Packages](#) contains more information.

Download CAL and EMC Client Setup Packages

You can download the setup packages (.exe or .apk) for the EMC client and CAL.

1. On the Downloads page, select the **Download Type** from the drop-down list:
 - **Client Application Loader (CAL) – Windows**: Select this option to download the CAL package for a device running the Microsoft Windows operating system.
 - **Client Application Loader (CAL) – Android**: Select this option to download the CAL package for a device running the Android mobile operating system.
 - **Enterprise Management Console (EMC)**: Select this option to download the EMC client package.
2. Click the **Download** button.

Update EMC Client

After downloading the EMC client setup package (EMCSetup.exe), you can update the EMC to the latest Symphony Essentials version. EMCSetup.exe contains all files required by EMC to function. The InstallShield Wizard for EMCClient starts after the download completes, and it installs all individual files in the EMCClient folder on the device.

1. Click the buttons to proceed through the InstallShield Wizard.
 The default installation path for the EMC client is `C:\Program Files\Oracle Hospitality`. You can change this path if needed.
2. Double-click the EMC icon on the desktop.

Figure 21-13 EMC Desktop Icon



3. Log in to the EMC.

If a newer version exists, EMC automatically downloads the latest files, and then updates itself. A progress bar indicates the duration of the login and update operation. You will be prompted to log in again after completion of the updates.

Import and Export Data – Configuration

The Symphony Import/Export Service allows you to:

- Import and export Symphony Essentials application data in a comma-separated values (CSV) format, to or from spreadsheet applications
- Import configuration data into the Symphony Essentials application database that can be called by external systems, such as a web service application programming interface (API)
- Export configuration data from Symphony Essentials that can be called by external systems, such as an on premise inventory management application

The main benefits of this service are:

- Allows you to load configuration data in bulk (for example, making a large number of price changes for menu items, which reduces the amount of time it takes to configure systems)
- Allows third parties to integrate with customer databases (either self-hosted or hosted within an Oracle facility), without providing direct access to the application file server or database
- Allows third parties to build custom interfaces

Import/Export Service Components

The Import/Export Service is comprised of four components, plus a Microsoft Windows service. The following table lists the components and their capabilities.

Table 21-1 Data Import/Export Service Components

Component	Functionality
EGateway URL	Provides access to the Symphony Essentials configuration for self-hosted and Enterprise hosting center environments.
Web Service (REST API)	Assists developers with programmatic integration and the development of third-party application programming interfaces (API).
Web Service (SOAP API)	The SOAP API has the same functionality as the REST API, except this web service is constructed using the SOAP format rather than the REST format.
Symphony Web Portal (SWP)	This web application enables you to: • Import and export data manually • Download and store data securely in a database • Export data automatically using the scheduler • Review the status of completed import and export jobs • Access a Help page that provides additional database and API details The SWP is available for all users with Symphony Essentials EMC logon credentials.

Table 21-1 (Cont.) Data Import/Export Service Components

Component	Functionality
Oracle Hospitality Symphony Data Request Processing Service (Microsoft Windows Service)	This Microsoft Windows service runs as part of throttling and scheduling processes (rather than on demand servicing requests).

Configure Import/Export Service Privileges

You need to configure privileges to allow the appropriate employees to view and access the Import/Export service from the Symphony Web Portal (SWP).

1. Select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Select the role, and then click the **EMC Modules** tab.
3. Scroll down to the **Import/Export** setting (located within the **File** column under the Enterprise Modules section). The **View** setting controls the visibility of the Import/Export service on the SWP toolbar for staff assigned this role.
4. To enable visibility of the Import/Export service from the SWP, select the **View** checkbox and **Save**.
5. To hide the Import/Export service from the SWP, leave the **View** checkbox unselected. This is the default setting.

Configure Import/Export Service Date and Time Format

Before configuring the Import/Export Service, you must have the appropriate EMC Enterprise privileges assigned to you.

1. Select the Enterprise level, click **Setup**, and then click **Enterprise Parameters**.
2. Click the **Applications** tab.
3. In the **Default Date Time Format** drop-down list, select the date and time format to use when processing import and export requests.
4. Click **Save**.

Configure Task Schedules for Export Reliability

When upgrading Symphony Essentials, the Dbupgrade automatically creates two tasks for Export Reliability: one for Workstation (WS) and one for Check and Posting (C&P), but only if these tasks have never existed. The tasks are called 'Daily WS Export Reliability with recurrence' and 'Daily C&P Export Reliability with recurrence'. Default values are used for these tasks.

New locations created after the upgrade require task schedules to be created manually. Schedules of an existing organization can be used as a template.

1. Select the Enterprise level, click **Configuration**, and then click **Task Schedules**.
2. Insert a new record for one of the following data export reliability tasks:
 - Daily WS Export Reliability with recurrence
 - Daily C&P Export Reliability with recurrence

3. Double-click the record to open it.
4. On the **General** tab, in the **Service Type** drop-down list, select one of the following, depending on the export reliability task created in Step 2:
 - **7 - Workstation**: Select this option for Daily WS Export Reliability with recurrence.
 - **8 - Check and Posting**: Select this option for Daily C&P Export Reliability with recurrence.
5. Select **7 - Export Reliability** as the **Task Type**.
6. The **Task Data** field must be blank. Changing important details of the scheduler (such as **Task Data**), results in the scheduler not running.
7. In the **Duration (seconds)** field, enter **120** seconds. This is the amount of time needed for the task to run.
8. Click the **Select** link adjacent to the **Time Zone** field. Select the correct time zone from the list, and then click **OK**.
9. In the **Schedule Type** drop-down list, select the frequency to run the export reliability tasks as **4 - Recurring - Daily**:
10. In the Duration section, click the **Enabled** check box, select a **Start date** of **1/1/2000** and select **No end date**.
11. Click the **Recurrence** tab.
12. In the Daily Frequency section, select **Occurs every**, and enter:
 - **45 minutes** starting at **00:05** and ending at **23:10** for the Workstation task.
 - **60 minutes** starting at **00:15** and ending at **23:20** for the Check and Posting task.
13. Click **Save**.
14. Repeat Steps 1 through 13 to create the other Data Export Reliability task schedule.

Increase Import File Size

Complete these steps if the Enterprise requires you to import files larger than the default 4MB size.

1. Browse to [Drive Letter]:\MICROS\Simphony2\SimphonyImportExport\WebApp\ and open the Web.config file.
2. Add the following line within a comment:


```
<httpRuntime targetFramework="4.5" />
```
3. Uncomment the following line:


```
<httpRuntime targetFramework="4.5" executionTimeout="240"
maxRequestLength="10243"/>
```
4. Enter the maximum import file size for the maxRequestLength parameter in Kilobits. By default, this value is set to 10 MB.
5. Save the changes.

Import and Export Data – Usage

Administrators can create and submit data import and export job requests through the Symphony Web Portal (SWP). Exporting data from one application and importing it to another saves time for the administrator or manager. This process allows the data to be functional and

saleable on the new system's POS client workstations. The Import/Export Service enables administrators to:

- Import and export data manually
- Export data automatically using the scheduler
- Review the status of completed import and export jobs
- Access a Help page that provides additional database and application program interface (API) details

Import/Export Prerequisites

- Use a spreadsheet application (for example, Microsoft Excel) that can receive database export and import requests. Data export requests are usually set to output to files that are formatted with comma-separated values (CSV).
- Obtain Symphony Essentials EMC logon credentials to access the SWP.
- You must have the privilege to access the database and run the Symphony Import/Export Service.
- Install a Secured Sockets Layer (SSL) certificate to establish a secure connection.
- Change the Internet Explorer Compatibility View settings to allow Import/Export buttons and features to be visible. See [Start SWP](#) for instructions.

Create Export Schedule

You can extract information from the Symphony configuration database on demand or you can schedule a recurring export job. You can then import this information into an inventory management system.

Integrated menu items can be imported and exported at the Enterprise level only. Single menu item objects (that is, Menu Item Master, Menu Item Class, Menu Item Definition, and Menu Item Price) can be imported and exported at other levels. Other objects (for example, Discount, Employee Class, and Major Group to name a few) can be imported and exported at various levels.

Create a schedule to run an export job on a recurring basis (for example, weekly or monthly). You can create schedules only for exporting files. You cannot create a schedule to import files.

Perform the following steps in the Symphony Web Portal (SWP):

1. Click **Import/Export**.
2. Click **Schedules**.
3. Click **Add Schedule**.
4. In the **Name** field, enter the export schedule name.
5. Select a **Start Date** when the export begins.
6. In the **Time of Day** field, enter the time when the export runs (use 24-hour time in the format hh:mm).
7. Select the frequency of the export schedule:
 - To run the export on a specific day each week, select one or more days of the week. For example, to set the export to occur every Tuesday, select **Tuesday**.

- To run the export on a specific date each month, enter one or more dates (separated by commas) in the **Dates to Run** field. For example, to set the export to occur on the 3rd and the 15th day of each month, enter **3, 15**.
 - 8. Select **Active**, and then click **Create**.
 - 9. To disable an active schedule from the Schedules page, click the **Disable** link adjacent to the appropriate schedule.
- You can deactivate a schedule, but you cannot delete it. When you deactivate a schedule, export jobs associated with that schedule do not process.

Generate File to Export

Perform the following steps in the Symphony Web Portal (SWP):

1. Click **Import/Export**.
2. On the Import/Export Request Parameters page, select the **Export** option.
3. In the **Hierarchy Selection** area, select one or more hierarchies (Enterprise, property, or revenue center), and then use the arrow buttons to include hierarchies in the export.
Select **Include Inherited** prior to selecting a hierarchy to include children in the selection.
You can export an integrated menu item (fully configured menu items) Object Type at the Enterprise level only; if you select the property or revenue center levels, you will receive an error later.
4. In the **Parameter Selection** area, select the **Language** in which to export the data.
5. (Optional) In the **Date Since** field, select the date from which to export information.
The **Date Since** applies to both new and modified information. For example, select 08/01/2020, to export information that was new or modified since August 1, 2020. For the most recent export, select the current date.
When a date is selected in the **Date Since** field, any record for that object that has been changed (either directly or as a result of another update) will be exported once, no matter how many times it has been changed since the selected date.
6. Select the **Format** for the export file:
 - **Excel Compatible CSV (ANSI)**: Select this option to edit the file using Excel, Notepad or Notepad++. This option is only available for the English language.
 - **International CSV (UNICODE)**: Select this option to edit the file using Notepad or Notepad++. This option is available for all character sets and languages.
 - **Pipe Delimited (UNICODE)**: Select this option to edit the file using Unicode. This option is available for all character sets and languages.
7. (Optional) Change the **Schedule** for your export.
 - To export the file immediately, ensure that the **Schedule** field shows **Process Immediately**. This is a one-time export request.
 - To schedule the export, select the recurrence and time schedule from the **Schedule** drop-down list.

If no schedules exist, nothing appears in the **Schedule** drop-down list. See [Create Export Schedule](#) for more information about schedules.
8. (Optional) Enter the **Request Name**.

This can be a description of the activity (for example, Exporting Menu Items for Enterprise A).

9. Select the type of information to export from the **Object Type** drop-down list.

The information in the **Mandatory Columns** field automatically appears based on the **Object Type** you selected. The column names appear in the exported file and show the type of data to be exported. You cannot change the values in this field.

10. Select the **Data Level**:

- **Selected Hierarchy**: Select this option to export only the current level of hierarchy. For example, if you selected the property in the **Hierarchy Selection** without **Include Inherited** to export discounts, the export only includes discounts that are created for this property, not those created at the Enterprise level or revenue center.
- **Selected Hierarchy With Ancestors**: Select this option to export the current level of hierarchy and the higher levels (parent level). For example, if you created discounts at the property level, selecting this option exports discounts created for the property and the Enterprise levels.
- **Selected Hierarchy With Inherited**: Select this option to export the current level of hierarchy and the lower levels (child levels). For example, if you created discounts at the property level, selecting this option exports discounts created for the property and the revenue center levels.
- **Selected Hierarchy With Ancestors And Inherited**: Select this option to export all levels of hierarchy (for example, Enterprise, property, and revenue center levels).

11. In the **Columns** field, select the information to export. Use **Ctrl + Select** or **Shift + arrows** to highlight multiple column names.

All columns are selected by default. The information in the **Columns** field is a subsection of the **Object Type** selection.

12. (Optional) In the **Object Range Filter** field, enter the object number of the **Object Type** you selected in step 9.

You can also enter a range of object numbers using a dash between the numbers.

13. (Optional) In the **Sort By** field, add one or more sort options for the results.

14. Click the **Submit Request** button.

15. To refresh the page, click the **Refresh** link.

16. To view scheduled exports, click **+** adjacent to the **ID** and the **Request Name**.

17. Click the **Download** link for the export request, and then click the **Open** button.

18. (Optional) Change the file as necessary (insert, update, or delete) using a text editor, such as Notepad, rename the file, and save it in a different location.

When you export a file, the application assigns `SimphonyExport.csv` as the file name. Rename each exported file to keep them organized before importing the files.

Prepare Single Menu Item Data Files for Import

Because there are relationships between the databases and menu items, you must import single menu item data files in a specific order. Importing single menu item data files out of order causes the import job to fail and an inability to add the new menu items on the POS client workstations. If you are importing integrated menu items (fully configured menu items), skip this section.

After you export the required menu item data files but before you import the files, ensure that certain values contained in the prospective import files match in specific columns and rows.

1. Open the export file that contains the Menu Item (MI) Master data, and record the value of the Id column and the corresponding MenuItemName for each menu item to be imported.
2. Open the export file that contains the MI Class data.
 - a. Record the name of each MI Class located in the Name column. Remaining on the same row, scroll to the ObjectNumber column and record the corresponding values there, which are associated with each MI Class name.
 - b. Review the prospective MI Class import data to ensure that all fields are configured in order for the menu items to function as expected.
3. Open the export file that contains the MI Definitions data.
 - a. Enter the ObjectNumber values from the MI Class data file into the MenuItemClass column for each MI Definition.
 - b. Enter or verify that the values in the MenuItemMasterId column in the MI Definitions file match the values of the Id column in the MI Master data file. This holds true for menu items that have multiple definitions.
 - c. For items with multiple definitions, ensure that the DefinitionSequence column is numbered in sequential order.
4. Open the export file that contains the MI Price data.
 - a. Enter or verify that the values in the MenuItemDefId column in the MI Price data file match the values of the Id column in the MI Definitions data file. This holds true for menu items that have multiple prices.
 - b. For items with multiple prices, ensure that the PriceSequence column is numbered in sequential order.

Import Menu Item Files

The default maximum size of an imported file is 4 MB.

Perform the following steps in the Symphony Web Portal (SWP):

1. Click **Import/Export**.
2. On the Import/Export Request Parameters page, select the **Import** option.
3. In the **File Path** field, click **Browse**, select the file to import, and then click **Open**. When you import single menu item data files, do so in the following order:
 - a. Menu Item Master (Select this file first, and then continue with Step 4.)
 - b. Menu Item Class
 - c. Menu Item Definitions
 - d. Menu Item Price
4. Select the **Language**.
5. Select the **Format** for the file:
 - **CSV**: Select this option to edit the file using Excel, Notepad or Notepad++. This option is only available for the English language.
 - **Pipe**: Select this option to edit the file using Unicode. This option is available for all character sets and languages.

6. (Optional) Enter the **Request Name**.

This is a description of the activity (for example, Importing Menu Items for Property A).

7. Select the type of information to import in the **Object Type** drop-down list.

The information in the **Mandatory Columns** and the **Columns** fields automatically appears based on the **Object Type** selected. The column names appear in the imported file and show the type of data to be imported. You cannot change the values in these fields.

8. Click the **Submit Request** button.

9. Click the **Download** link for the import request, and then click the **Open** button.

If you see an error in the **Download Link** column for the import request, click **Help**, scroll down to the Object Info section and locate the object type you selected. Click **+** adjacent to the object type. The Additional Notes column indicates the reason for the error.

10. Click the **Refresh** link to refresh the page.

11. Save the imported files using a text editor, such as Notepad.

12. Repeat Steps 1 through 11 to import each menu item data file (Menu Item Master, Menu Item Class, Menu Item Definitions, Menu Item Price).