



Manager Manual

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Overview

PointOS Professional is a Point Of Sale (POS) software specifically designed to give any size bar, club, or restaurant all of the tools it needs in a bar POS or restaurant POS at an affordable price. With integrated credit cards, inventory tracking, customer tracking, full reporting, and an easy-to-use interface, PointOS is a touchscreen POS that will save you time and money.

Features

Professional Main Features

- Runs on Windows XP or Vista
- Touch Screen Operated
- Easy to Learn and Use
- Food/Liquor Inventory Control
- Free Tech Support
- Works With QuickBooks®

Point Of Sale Features

- Simple Order Entry Screens
- Delivery with Caller ID
- Integrated Credit Cards
- Gift Cards and Personal Checks
- Multiple Servers on One Station
- Print to Kitchen or Service Bar
- Order, Transfers, Splits and Combines
- Employee Time Card System
- UPC Bar Code Scanning
- Server Cash Accountability
- Item and Check Discounting
- Automatic Happy Hour Pricing
- Preset, Forced, and Custom Modifiers
- Customer Tabs and Order Tracking
- Server/Cash Drawer Stations
- Employee Email System
- Employee/VIP Discounting
- Categorized Payouts
- Print Item Recipes from Order Entry
- Cash Drawer Transfers
- Room Setup with Table Layout
- Open and Closing Reports
- Incident Reports
- Manual Customer Info/Email Entry

Back Office Features

- System Dashboard
- Integrated Online Help
- Auto Archiving And Maintenance
- Customizable Security Settings
- Tax Reporting
- Export Reports To Excel
- Auto Email Reports
- Online Reporting
- Customer Maintenance
- Credit Card Batch Scheduling
- Employee/Entertainment Scheduling
- Payroll Reports
- Inventory Shopping List
- Par Inventory Recommendations
- Send Customer Newsletter

Integrated Music System

- Touch Screen Music Player
- Request Songs From Any Station
- Windows Media Player Integration
- Multiple Playlists
- Customer Songs Auto Added
- Auto Find Music
- Print Song Lists

Optional ID Scanning

- Driver's License Scanning For Age Verification
- Customer Song Lists
- Quick Customer Adding
- Customer Sales Tracking
- Age Appropriate Order Entry Screen
- Pictures on Customer Tabs
- Customer Profiles/Notes

System Requirements

Minimum Requirements

- Windows XP SP3 or Vista
- 256 MB Ram

Multi-Station Server Requirements

- Do Not Use XP Home/Vista Home Basic

Recommended Hardware (optional)

- Touch Screen Monitor
- Receipt Printer
- MMF Cash Drawer

For Bar Code Scanning (optional)

- Bar Code Reader

For ID Verification (optional)

- Scan Shell (*hardware only*)

For Credit Cards (optional)

- Merchant Warehouse Account
- Magnetic Strip Reader

Software (optional)

- QuickBooks[®] (Not QB POS)

Manager Manual Conventions

This manual provides information on using the screens in the *Manager Dashboard* and Manager Menus of PointOS Professional.

The conventions include using **bold** face for interactions with menus or fields on a screen. The manual also uses *italics* to indicate screen names.

The Manager Manual is organized by menu from the *Manager Dashboard*.

Overview of Installation and New Install Process

After you download the PointOS software, you will install the software. The Installation Process is simplified by the InstallAware Wizard.

Then, the PointOS software will guide you through the following steps of the new install process:

- Select Database (optionally Create New or Choose one from the server, depending on type of install)
- Name Station
- Printer Setup
- Main Setup (for server install)
- Create Employees (for server install)

After you have completed these steps, you can begin using PointOS Professional.

NOTE: You can install multiple stations of PointOS. Refer to “Setting Up Multiple Stations” on page 163 for more information.

Installation

When you begin the installation process, the system begins the PointOS Professional InstallAware Wizard. Follow the on screen prompts to install PointOS Professional. As part of the installation, the system prompts you to select the **Setup Type**.



Figure 1: InstallAware Wizard Setup Type

- For the computer station that will act as your server, select **Client and Server**.
- For all other stations, select **Client Only**.

To install PointOS Door Manager, check the **Add DoorMan Client** box.

Continue to follow the on screen prompts to complete the installation and registration process.

Select A Database

When you start PointOS Professional for the first time on the computer station being used as a server, the system prompts you to select a database.

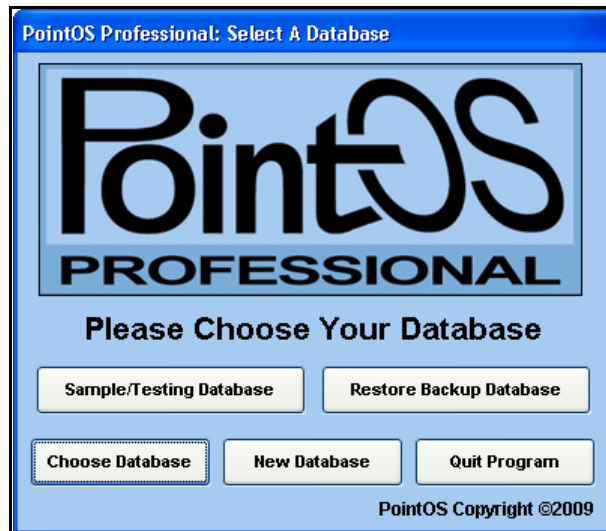


Figure 2: Select a Database

Select one of the following options or select **Quit Program** to close PointOS:

- **Sample/Testing Database** - a sample database in the Demo version of the software to try out the software
- **Choose Database** - to select an existing database from the server
- **New Database** - to create a new database

Choose Database and New Database are discussed later in this chapter.

You can also select **Restore Backup Database**. Refer to “Restore Database” on page 28 for more information.

NOTE: Restoring the database is intended for emergency recovery of data only.

Select **Quit Program** to close PointOS.

Choose Database

When you start a station installed as Client Only for the first time, the system prompts you to choose a database.



Figure 3: Select A Database - Choose Database

1. First, select the computer used as a server on your network from the **Pick Your Server Name** drop down list. If the computer names are not listed, select **Refresh**.
2. Select the database name from the **Database Name** drop down list.

NOTE: All stations can access the same database.

3. Check the **Set as Default Database** box to use this database as the default database.
4. Select **Test Connection** to check the connection to the selected database.
5. Select the **Select Database** option to continue or select **Quit Program** to close PointOS.

Troubleshooting

If the computer name does not appear on the list of servers, try the following:

- Reboot all network computers.
- Make sure all computers are on the same workgroup.
- Setup all the computers with the same login name and password and make sure those accounts have administrative rights.
- Make sure you are not running any antivirus programs that would block your computers from seeing SQL Server on the shared database computer.

New Database

1. To start a new database, select **New Database** from the *Select a Database* screen.

The system displays the *Choose New Database* screen.

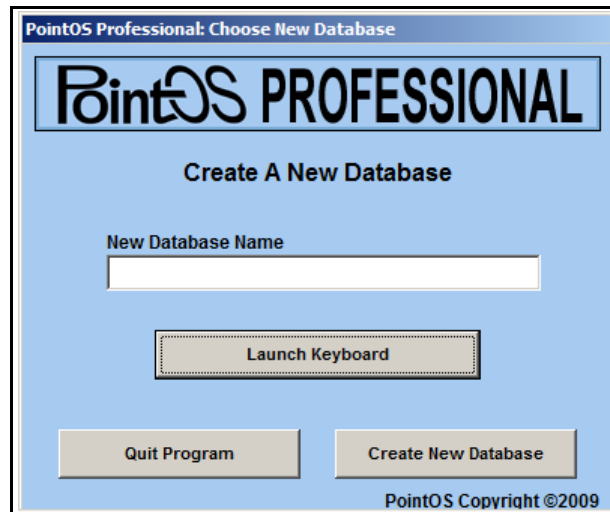


Figure 4: Choose New Database

2. Enter the **New Database Name**. To use the touch-screen keyboard, select **Launch Keyboard**.

3. Select **Create New Database** or select **Quit Program** to close PointOS.

The system continues with the new station setup process.

Name Station

When you open PointOS Professional on a station for the first time, the system prompts you to name the station.

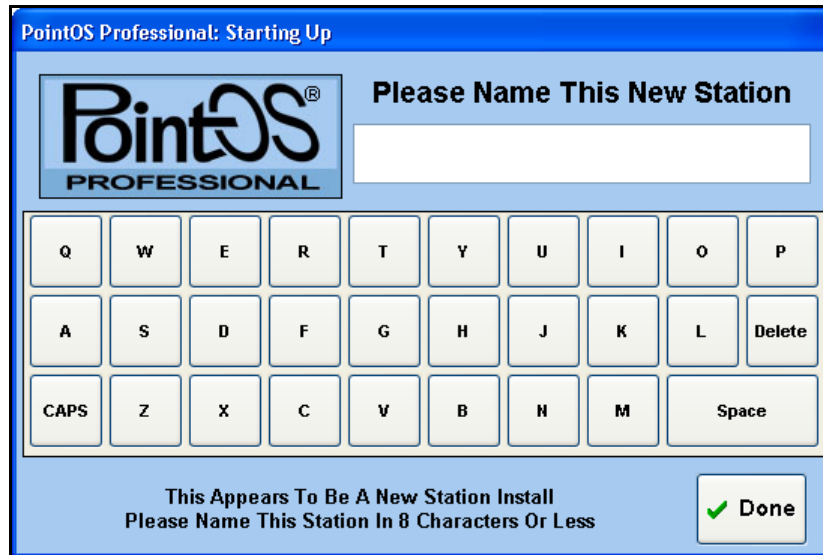


Figure 5: Name Station

1. Enter the name for this station. The station name must be unique on the network, but can be anything you like. It should be descriptive of where the station is located, such as Upfront, Back Bar, or Office. It must be 8 characters or less.

NOTE: The system automatically adds a station number.

2. Select **Done**.

Printer Setup

After you name the station, the system prompts you to choose your attached receipt printer.



Figure 6: Choose Printer

1. From the **Installed Printer** drop down list, select the printer that matches your attached receipt printer.

NOTE: The printers listed are those setup in Windows Printers. Refer to “Setting Up a Generic Driver for Receipt Printing” on page 164 for more information.

2. If your printer is not on the list, select **Generic**.
3. If you have no printer attached, select **No Printer**. You can always add one later using the *Station Settings* area of the *Manager Dashboard*.

NOTE: If you choose the incorrect printer driver or generic driver, you may be unable to pop an attached cash drawer or cut the paper.

If your printer is not on the list and the generic driver does not work, you can try other drivers by the same manufacturer or contact us at support@pointos.com and we can help you find a compatible driver.

4. Select the **Printer Profile** for the attached printer from the drop down list.
5. Check the **Printer Has An AutoCutter** box, if applicable.
6. Select **OK**.

Main Setup

The system displays an alert guiding you to complete the *Main Setup* next.

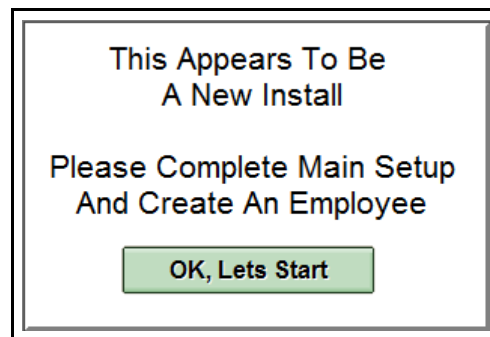


Figure 7: New Install Alert

1. Select **OK, Lets Start**.

The system displays the *Main Setup* screen.

Figure 8: Main Setup Screen

Company Information and Company Contact Information

1. Enter your **Company Information**:
 - **Company Name**
 - **Street Address**
 - **Address 2**
 - **City**
 - **State**
 - **Zip Code**
2. Enter the **Company Contact Information**:
 - Area code and **Phone Number** (numbers only)
 - **Fax Number**
 - Contact **Email Address** (optional)
 - **Website** address (optional)

Other Settings and Receipt Message

1. From the *Other Settings* area, select either **Standard (USA)** or **Metric** from the **Measurements** drop down list.
2. From the *Other Settings* area, set the **Day Start Time**. You should select a time when your bar, club, or restaurant is not operating to provide a breaking point between operating days. Refer to “Setting the Time” on page 165 for more information about using the system clock.
3. Check the **Enable No ID Prompt** box if desired. This will require an ID scan for orders. If no ID is scanned, the system displays the *No ID Reason* screen.

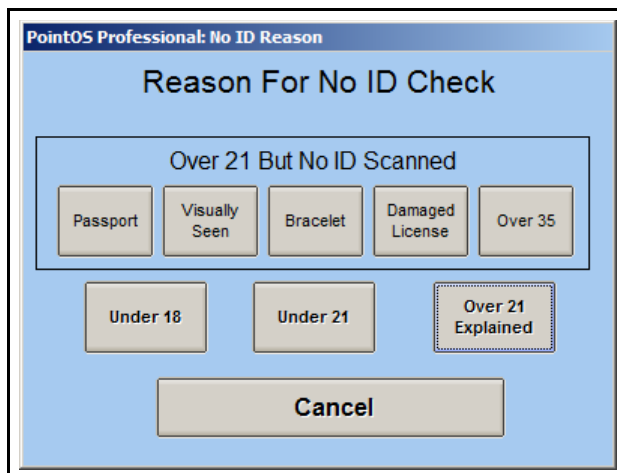


Figure 9: Reason for No ID Check

NOTE: These reasons can be edited in *Report Setup*. Refer to “Report Setup” on page 63 for more information.

4. Check the **Enabled Void Item Control** box to ask why the item was voided. This will track whether a voided item was taken out of inventory or not. If you have **Enabled Void Item Control**, then when you void an item, the system displays the *Item Inventory* screen. If you select **No**, the order is voided with no affect on inventory. If you select **Yes**, then the item is removed from inventory even though the order was voided.

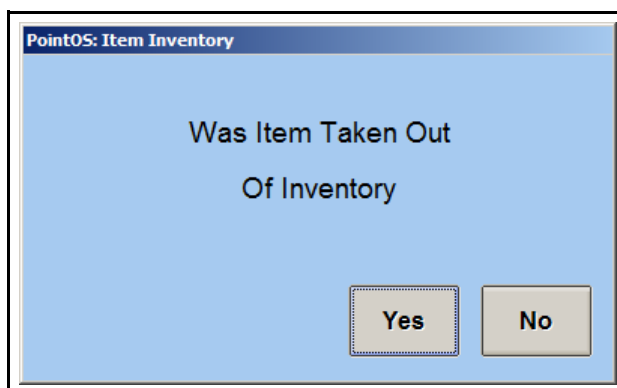


Figure 10: Item Inventory

5. Enter a **Receipt Message** to use as a footer for all printed sales receipts.

Menu Page Graphic and Appearance Settings

1. Make sure you have saved your graphic in jpg format with an image size of 740 x 240 in the *Backgrounds* folder of your database.
2. Select **Choose Graphic** from the *Appearance Settings* area of the *Main Setup* screen.

The system displays an alert notifying you to make sure your graphic is in the right format and in the correct location. All graphics must be in the shared (network) PointOS Database folder.

3. Select **OK**.

The system opens the *Choose Main Menu Graphic* dialog box, open to the correct location.

4. Choose your graphic and select **Open** or select **Cancel** to return to the *Main Setup* screen.

The system displays the selected graphic in the *Menu Page Graphic* area of the *Main Setup* screen.

5. Select a color to use on the background of the *Menu Page* from the **Background Color** drop down list.

Total Stations Licensed

The system displays the number of stations you currently have licensed with PointOS.

NOTE: The license is concurrent connections to the database. The software can be installed on as many computers as you like, but if you try to connect more the system displays the *Stations Manager* screen with a warning instructing you to shut down another station. Refer to “Stations Manager” on page 151 for more information.

1. Select **Upgrade For More Stations**.

The system displays the *Upgrade* screen.

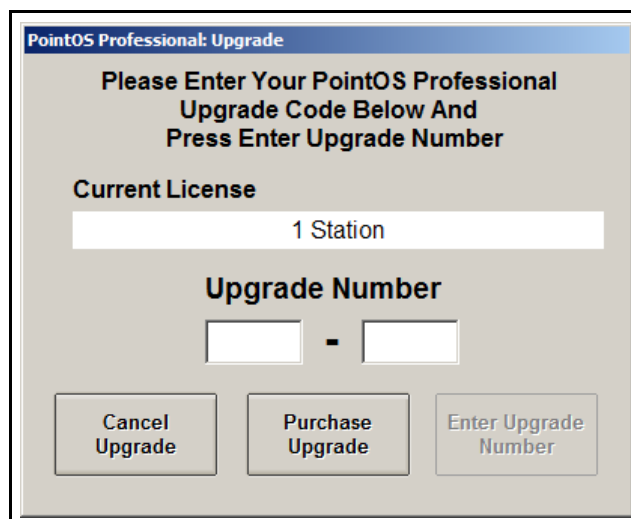


Figure 11: Upgrade

2. Either enter your **Upgrade Number**, select **Purchase Upgrade** to go to the PointOS website *Purchase* page, or select **Cancel Upgrade** to close the *Upgrade* screen.
3. After you have entered a valid Upgrade Number, select **Enter Upgrade Number**.

The system displays the new number of stations licensed in the license area.

Save Main Setup

1. Select **Save** to save your *Main Setup* selections, or **Cancel** to close the *Main Setup* screen without saving changes.

The system displays an alert notifying you that *Main Setup* options have been saved.

Employee Setup

The system displays the *Employee Setup* screen next.

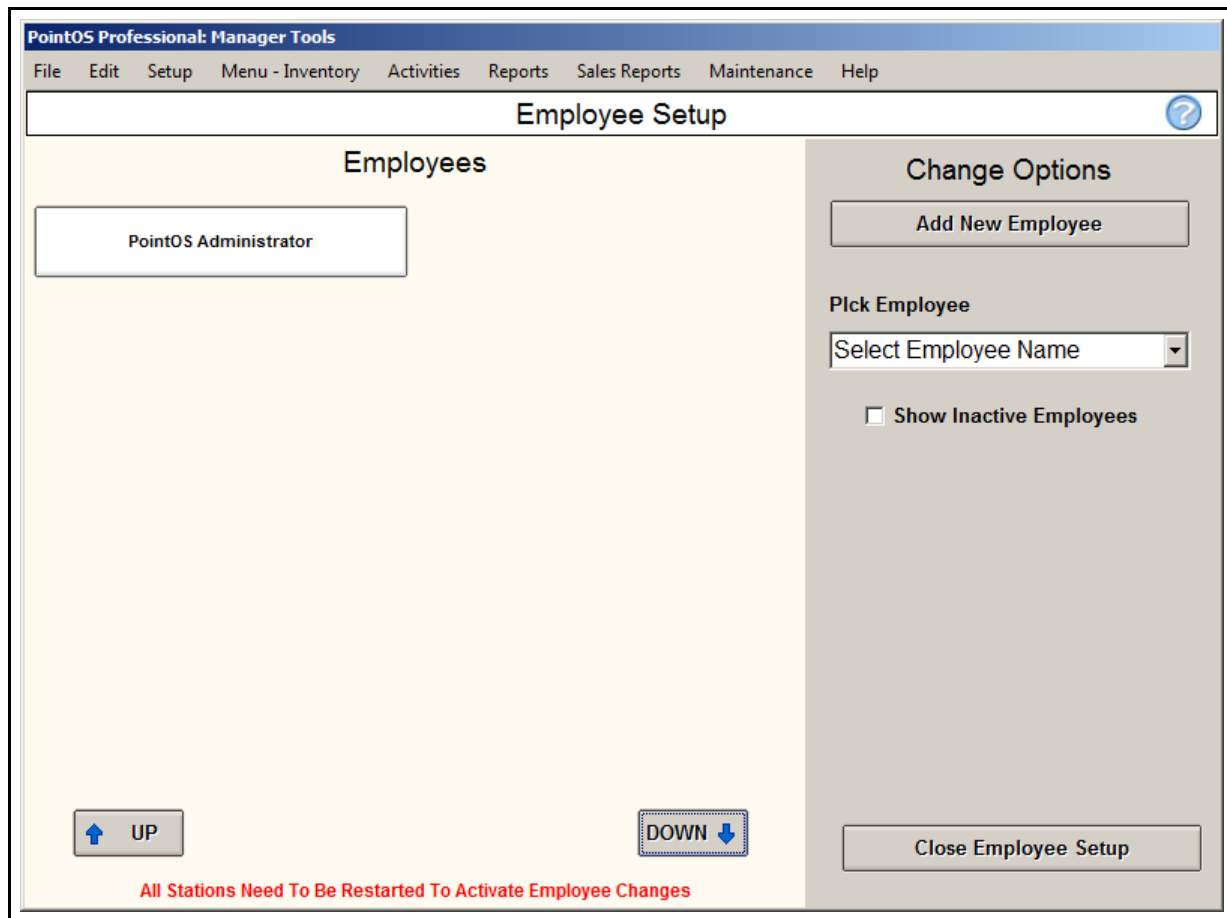


Figure 12: Employee Setup

You can add new employees or change the settings for the default employee - **PointOS Administrator**. Once you have added other employees, you can also change their settings. For all three options, you will use the *Change Employee Options* screen.

1. Select **Add New Employee** from the *Change Options* area to open the *Change Employee Options* screen to create a new employee in the system. Once you have added employees, they are listed in the *Employees* list of the *Employee Setup* screen.
2. Select **PointOS Administrator** from the *Employees* list to open the *Change Employee Options* screen for the PointOS Administrator and change the employee settings. Once you

have saved the information, the PointOS Administrator is listed by employee name in the *Employees* list.

3. Select an employee's name from the *Employees* list to open the *Change Employee Options* screen for that employee and change the employee settings.

The employees are listed in the *Employees* list in alphabetical order. Use the **Up** or **Down** arrows to scroll through a long list of employees. For a quick method to scroll to the employee, select the employee's name from the **Pick Employee** drop down list.

4. Check the **Show Inactive Employees** box to include inactive employees in the *Employees* list.

NOTE: You will have to restart all stations to see changes to the *Employees* list.

5. Select **Close Employee Setup** when you have finished.

Change Employee Options

The *Change Employee Options* screen allows you to add new employees or change information for employees you have already added to PointOS.

When you select **Add New Employee** or an employee name, the system displays the *Change Employee Options* screen.

The screenshot shows the 'Employee Setup' window with the following fields and sections:

- Employee Information:** First Name, Last Name, Date Of Birth (dropdown), Social Security Number, Hire Date (dropdown with 'Set As Now' button), Termination Date (dropdown with 'Set As Now' button), Job Title, Hourly Wage, Default Payroll Salary (dropdown with 'No Default Salary Level' option), and a 'Prompt For Salary' checkbox.
- Employee Address:** Street Address, Apartment Number, City, State (dropdown with 'Choose State' option), and Zip Code.
- Employee Photo:** A placeholder box labeled 'No Photo Scanned'.
- Security Settings:** Security Level (dropdown), Add ID Card button, Access Code, and Employee Color (dropdown).
- Set As Customer:** Select Employee Name (dropdown with 'Find Employee From Customers' option), a checked 'Employee Is Active' checkbox, and buttons for Cancel, Deactivate, and Save.

Figure 13: Change Employee Options

1. Enter or update the *Employee Information*:
 - Enter the employee's **First Name**.
 - Enter the employee's **Last Name**.
 - Enter the employee's **Date of Birth**. You can also use the drop down arrow to select the date from the calendar.
 - Enter the employee's **Hire Date**. You can also use the drop down arrow to select the date from the calendar. Select **Set as Now** to select today's date.
 - When the employee is terminated, enter the employee's **Termination Date**. You can also use the drop down arrow to select the date from the calendar. Select **Set as Now** to select today's date.
 - Enter the employee's **Job Title**.
 - Enter the employee's **Hourly Wage**. This information will show up on payroll reports.
 - To use a default salary level, select the **Default Payroll Salary** drop down arrow. These items are set up on the *Payroll Setup* screen. Refer to "Payroll Setup" on page 62 for more information.
 - Check the **Prompt for Salary** box to enable multiple job descriptions and hourly rates for this employee. When the employee clocks in, he or she will need to select the appropriate job description, as defined in the *Payroll Setup* screen.
2. Enter or update the *Employee Address*:
 - Enter the employee's **Street Address**.
 - Enter the employee's **Apartment**.
 - Enter the employee's **City**.
 - Select the employee's **State** from the drop down list.
 - Enter the employee's **Zip Code**.
3. Enter the *Employee Contact Information*:
 - Enter the employee's **Home Phone Number**.
 - Enter the employee's **Cell Phone Number**.
 - Enter the employee's **Email Address**. If the employee has an email address, he or she can receive messages from the *Message Center*.
4. The **Employee Photo** displays a photo scanned for this employee, if applicable. You must first entered the employee as a customer on the front end *Order Entry - Start New Tab - New Customer* screen and scanned his or her picture.
5. Select the employee's security level from the **Security Level** drop down list. The security level allows or prevents the employee from entering certain areas of the system, as defined in the *Security Setup* options. Refer to "Security Settings" on page 71 for more information.
6. To scan a new ID card for the employee, select **Add ID Card**.
 - The system displays the *Add Employee ID Card* screen.
 - Swipe the card in the card reader or select **Do Not Swipe ID Card** to close the *Add Employee ID Card* screen.
7. Enter the employee's **Access Code**. The access code is a four-digit number, usually the last four digits of the employee's social security number. This number must be unique for use on the system. If the employee's email address is on the system, and you have set up email, the system will email the employee his or her access code.

8. Select an **Employee Color** from the drop down list. This color will surround all that employee's tabs on the *Open Tabs* screen to allow quick identification of the correct orders.
9. By default, the **Employee is Active** box is checked. Uncheck the **Employee is Active** box to deactivate the employee, or select **Deactivate**. If you are updating an inactive employee, check the **Employee is Active** box to re-activate the employee or select **Activate**.
10. If you have scanned the employee's ID and entered him or her as a customer first, select the employee's name from the **Select Employee Name** drop down list.
11. Select **Save** to save the employee information, or select **Cancel** the *Change Employee Options* screen without saving the information.

Register PointOS

When you have finished your trial of the PointOS Professional System, you must enter your serial number from your purchase to continue using PointOS Professional.

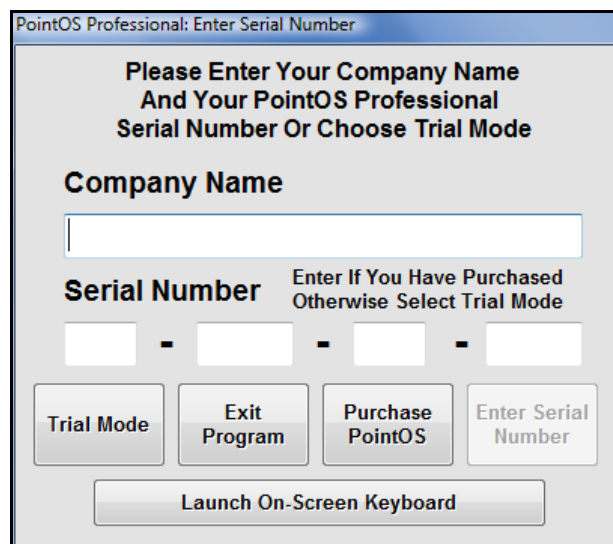


Figure 14: Enter Serial Number

1. Enter your **Company Name**. This must be exactly the same as when you downloaded the software.
2. Enter your **Serial Number**. This is case sensitive.
3. Select **Enter Serial Number**.

NOTE: If you have not yet purchased PointOS Professional, select **Purchase PointOS** to go to the website to complete your purchase.

You can also select **Trial Mode** to continue your trial. Trial Mode is a fully functional, one station license good for 30 days. When you decide to purchase PointOS, you will not lose any data you set up from the trial mode.

Select **Exit Program** to close the program.

This chapter provides an overview to the activities available on the Manager Dashboard, as well as a description and introduction to each item. Most activities are described in detail in other chapters.

Accessing the Manager Dashboard

1. From the *PointOS Main* screen, select **Manager**.

The system displays the *Enter Manager Code* screen.

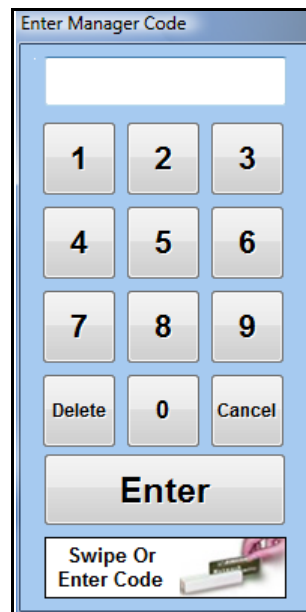


Figure 15: Enter Manager Code

2. Swipe your card or enter the default **Manager code** and press **Enter**.

The system displays the *Manager Dashboard*.

Overview of the Manager Dashboard

The dashboard provides a quick look at what is going on with the system. It also provides fast access to some of the most commonly used features in PointOS Professional. Think of it as the manager's home base for all that's going on with your bar, club, or restaurant.

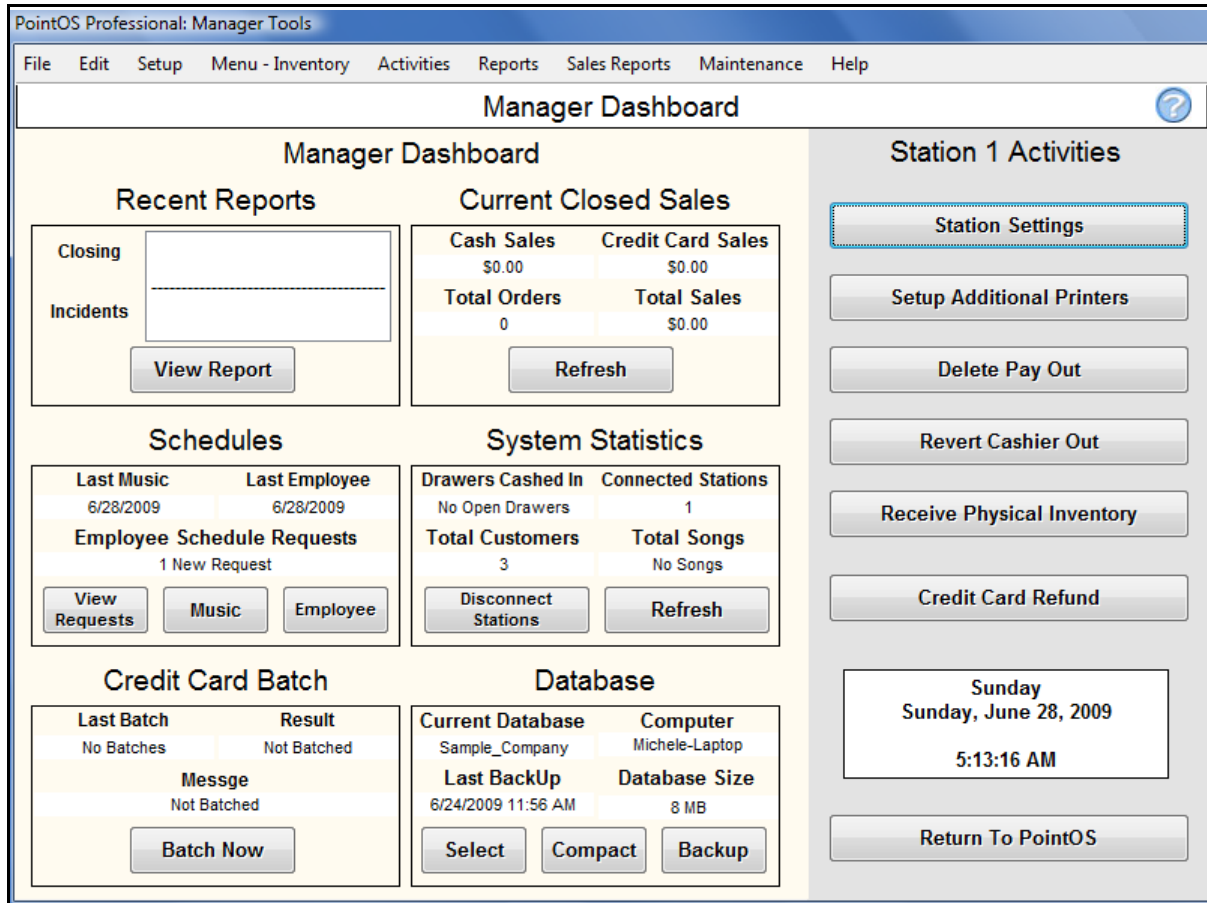


Figure 16: Manager Dashboard

The left side of the screen provides a quick view of the following information, with links to related activities:

- Recent Reports
- Schedules
- Credit Card Batch
- Current Closed Sales
- System Statistics
- Database

The right side of the screen includes links to additional commonly used features in PointOS Professional.

Recent Reports

Recent reports gives you a quick way to view reports that have been submitted by your bartenders or servers. Servers can run a closing report to let you know what has gone on during their shifts. This report includes information about inventory problems, damage, or other information.

A server can also submit a report to describe an incident. This can include fights or medical issues. These reports are valuable for documenting issues and may be a vital tool if you ever end up in court.

View Recent Reports - Closing

1. To view a recent closing report, select the closing report you want to view from the list of reports on the *Manager Dashboard* in the *Recent Reports* area.
2. Select **View Report**.

The system displays the *Closing Reports* screen. Refer to the “Closing Reports” section on page 142 for more information.

View Recent Reports - Incident

1. To view a recent incident report, select the incident report you want to view from the list of reports on the *Manager Dashboard* in the *Recent Reports* area.
2. Select **View Report**.

The system displays the *Incident Reports* screen. Refer to the “Incident Reports” section on page 144 for more information.

Schedules

PointOS allows the manager to create weekly reports for employee and entertainment scheduling. This area will remind you if a weekly report has not been made for one of these two areas. This area also notifies you of any employee schedule requests.

View Schedule Requests

1. To open the *Schedule Requests* screen, select **View Requests** from the *Schedules* area of the *Manager Dashboard*.

The system displays the *Schedule Requests* screen. Refer to the “View Schedule Requests” section on page 107 for more information.

View Entertainment Schedule

1. To open the *Entertainment Schedule* screen, select **Music** from the *Schedules* area of the *Manager Dashboard*.

The system displays the *Entertainment Schedule* screen. Refer to the “Entertainment Schedule” section on page 127 for more information.

View Employee Schedule

1. To open the *Employee Schedule* screen, select **Employee** from the *Schedules* area of the *Manager Dashboard*.

The system displays the *Employee Schedule* screen. Refer to the “Employee Schedule” section on page 106 for more information.

Credit Card Batch

If you are using PointOS for credit card batches, this area displays the results of the last credit card batch attempt. Additionally you can perform a one click manual batch from this area.

If you are using Merchant Warehouse, this area will let you know if there are any connection problems.

Batch Now

1. To open the *Batch Credit Cards* screen, select **Batch Now** from the *Credit Card Batch* area of the *Manager Dashboard*.

The system displays the *Batch Credit Cards* screen. Refer to the “Batch Credit Cards” section on page 133 for more information.

Current Closed Sales

This gives you a live snapshot of your current sales for the day, not including open orders or voids.

1. To refresh the current closed sales information, select **Refresh** from the *Current Closed Sales* area of the *Manager Dashboard*.

The system updates the display with the most recent information.

NOTE: Refer to the “Main Setup” section on page 34 for more information on setting the day start time.

System Statistics

This area shows you several valuable pieces of information about the system:

- Drawers cashed in
- Number of stations connected
- Number of customers
- Number of songs in the system

1. To update the statistics, select **Refresh**.

Disconnect Stations

This area allows you to quickly disconnect all stations.

NOTE: You must disconnect all stations before you can compact or backup a database.

1. To disconnect all stations, select **Disconnect Stations** from the *System Statistics* area of the *Manager Dashboard*.

Database

This area gives you information about your database. You can view the database name, size, and when it was compacted and backed up.

NOTE: We recommend that you backup and compact your database at least once a week.

Select Database

1. If you need to select a new database (for example, if you have a training database setup for new employees), select **Select** from the *Database* area of the *Manager Dashboard*.

The system displays a warning to make sure you want to select a new database.

2. Select **Yes**.

The system restarts PointOS Professional to allow you to select a new database. Refer to “Select A Database” section on page 5 for more information.

Compact Database

If your system is running slow, you can speed it up by compacting the database.

1. To compact the database, select **Compact** from the *Database* area of the *Manager Dashboard*.

Backup Database

1. To backup the database, select **Backup** from the *Database* area of the *Manager Dashboard*. Refer to “Backup Database” section on page 153 for more information.

You can also set this to be done automatically. Refer to “Database Setup” section on page 40 for more information.

Station Activities

The *Station Activities* area of the *Manager Dashboard* includes the following activities:

- Station Settings
- Setup Additional Printers
- Delete Pay Out
- Revert Cashier Out
- Receive Physical Inventory
- Credit Card Refund
- Return to PointOS

Station Settings

The **Station Settings** are specific to the current station. You can setup or change the station printer as well as other settings specific to the current station.

1. To view or edit the station settings, select **Station Settings** to from the *Station Activities* area of the *Manager Dashboard*.

The system displays the *Station Settings* on the right side of the *Manager Dashboard*.

Figure 17: Station Settings

2. Enter the **Station Name**. To use the touch-screen keyboard, select **Keyboard**.
3. To add a receipt printer, select the printer from the **Installed Printer** drop down list.

NOTE: If your printer is not on the list, you will need to add the printer in Windows. Refer to Windows Help for more information on adding a printer. Refer to “Setting Up a Generic Driver for Receipt Printing” section on page 164 for more information on adding a generic printer.

4. Select the printer name from the **Printer Profile** drop down list. If your model is not on the list, either select Generic Printer or a printer with a similar make and model number to the one you have. Newer printers by the same manufacturer often have similar settings.

NOTE: The model is important when using a cash drawer or auto cutting. If you select the incorrect model, your cash drawer may not open. If you cannot find a printer model that works for you, try the advanced printer setup or contact us.

5. If you are using bar codes, select the compatible model from the **Bar Codes** drop down list.

6. To print the company logo on receipts, select the compatible model from the **Receipt Logo** drop down list.

NOTE: Refer to the documentation that came with your printer for more information about uploading a logo to your printer.

7. Check the **Printer Has An AutoCutter** box, if your printer auto cuts the paper after printing.
8. The default **Auto Print Timer** is 60 seconds. You can change it if necessary.
9. The default **Print Width** is 40. You can change it if necessary. You should make it as large as possible without the test <-----> breaking to a new line.
10. Select **Test Printer** print a test page using the current printer settings.
11. Check the **Enable Credit Cards** box to allow credit card sales for this station.

NOTE: Credit cards must be enabled in two places: on the *Payment Setup* screen, and on EACH station where credit cards are accepted (some stations may be cash only).

12. Select which mode to use for PointOS.
 - Check **No Tabs Screen** to keep this station in order entry mode. It will not show the *Tabs* screen.
 - Check the **Multi-Server Mode** box if there is not a cash drawer attached to this station. This will allow multiple servers to use the station for entering orders. When using Multi-Server mode, there is no cash drawer, payouts, or station lock.
13. Select **Save** to save the station settings or select **Cancel** to return to the main view of the *Manager Dashboard*.

Setup Additional Printers

The **Setup Additional Printers** button allows you to setup other printers. This is necessary if you want to send order tickets to a service bar or a kitchen.

NOTE: These printers must be defined from each individual station.

1. To set up additional printers, select **Setup Additional Printers** from the *Station Activities* area of the *Manager Dashboard*.

The system displays the *Additional Printer Settings* on the right side of the *Manager Dashboard*.

The screenshot shows a dialog box titled "Additional Printers Settings". It contains five sections, each for a different printer type: Kitchen Printer 1, Kitchen Printer 2, Service Station 1, Service Station 2, and Other Printer. Each section has a dropdown menu for selecting the printer, a second dropdown menu for "No Large Font", and a checkbox for "Enabled". At the bottom of the dialog are "Cancel" and "Save" buttons.

Figure 18: Additional Printer Settings

You can define the settings for five additional printers:

- Kitchen Printer 1
- Kitchen Printer 2
- Service Station 1
- Service Station 2
- Other

To set up each printer, complete the following steps:

1. Select the printer from the drop down list.

NOTE: If your printer is not on the list, you will need to add the printer in Windows. Refer to Windows Help for more information on adding a printer. Refer to “Setting Up a Generic Driver for Receipt Printing” section on page 164 for more information.

2. Select the compatible model from the second drop down list, or leave the setting as **No Large Font**.
3. Check the **Enabled** box to enable this printer.
4. Select **Save** to save the additional printer settings or select **Cancel** to return to the main view of the *Manager Dashboard*.

Delete Pay Out

Pay Outs are a way of tracking the cash payments for the cash drawer attached to that station.

The **Delete Pay Out** button allows you to delete a pay out made on that station. The station must have an open cash drawer.

NOTE: Deleting or modifying payouts may adversely effect the accuracy of previous reports.

1. To delete a pay out, select **Delete Pay Out** from the *Station Activities* area of the *Manager Dashboard*.

The system opens the *Delete Payout* screen.

Figure 19: Delete Pay Out

The *Delete Pay Out* area lists the date, time, category, pay out name, and amount of any existing pay outs for the selected station.

2. Highlight the pay out you want to delete from the list.

The system displays the Pay Out To, Amount, Payout By, and Description of the selected pay out.

3. Select **Delete Pay Out** to delete the pay out.
4. Select **Done** to close the *Delete Pay Out* screen and return to the *Manager Dashboard*.

Revert Cashier Out

The **Revert Cashier Out** button allows you to cancel a cash out for the last cash drawer cashed out on that station for that day.

1. To cancel a cash out action for the selected station, select **Revert Cashier Out** from the *Station Activities* area of the *Manager Dashboard*.

NOTE: This will only let you revert the last cashier out, from that station, if it was made within the last 24 hours.

The system displays a warning to make sure you want to return the cash drawer.

2. Select **OK**.

The system displays a message notifying you that the cashier out has been successfully reverted.

Receive Physical Inventory

The **Receive Physical Inventory** button in the *Station Activities* area of the *Manager Dashboard* allows touch screen access to control your inventory. This is designed to be used from a touch screen and can be used when inventory comes in without having to enter items in the office, or when an item has been broken and needs to be removed from inventory.

1. To open the *Receive Physical Inventory* screen, select **Receive Physical Inventory** from the *Station Activities* area of the *Manager Dashboard*.

The system displays the *Receive Physical Inventory* screen. Refer to the “Inventory Count” section on page 101 for more information.

Credit Card Refund

If you have credit cards enabled on your system, the **Credit Card Refund** button allows you to issue a credit card refund. The refund will not be available until you batch your credit cards.

1. To issue a credit card refund, select **Credit Card Refund** from the *Station Activities* area of the *Manager Dashboard*.

The system displays the *Credit Card Refund* screen. Refer to the “Credit Card Refund” section on page 133 for more information.

Return to PointOS

Select the **Return to PointOS** button to close the *Manager Dashboard* and return to the *Main* screen.

Overview

The **File** Menu includes options related to the database, printers, and navigation back to the *Main* screen.

Select Database

The **Select Database** option allows you to restart PointOS and select a new database. You might use this if you have set up a training database for new employees.

1. Choose **Select Database** from the **File** menu.

The system displays an alert asking if you want to select a new database.

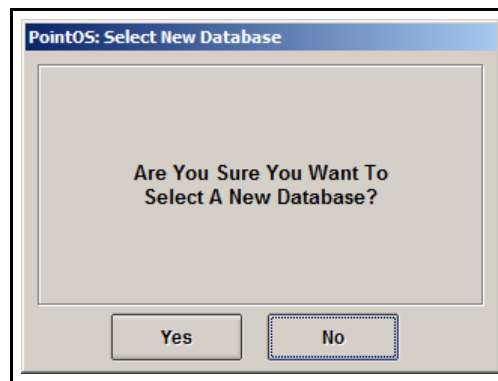


Figure 20: Select New Database Alert

2. Select **Yes**.

The system displays another alert, notifying you that PointOS will restart.

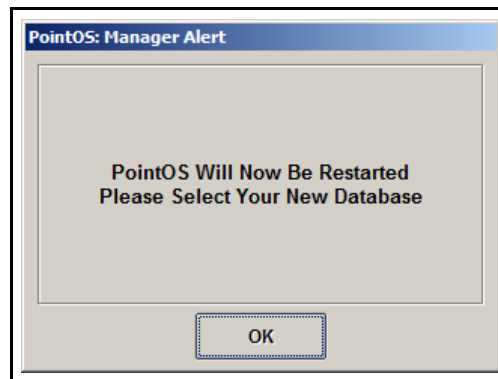


Figure 21: PointOS Restarting Alert

3. Select **OK**.

The system displays the *Select a Database* screen.

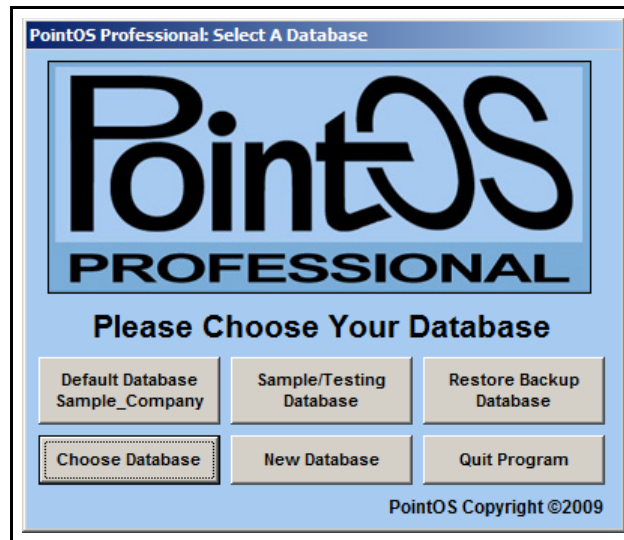


Figure 22: Select A Database

Select one of the following options:

- **Default Database** - the database you have previously created
- **Sample/Testing Database** - a sample database in the Demo version of the software to try out the software
- **New Database** - to create a new database
- **Choose Database** - to select an existing database from the server

Refer to the “Getting Started” Chapter on page 4 for more information about the **Choose Database** and **New Database** options.

You can also select **Restore Backup Database**. Refer to “Restore Database” on page 28 for more information.

Select **Quit Program** to close PointOS.

Restore Database

NOTE: Restoring the database is intended for emergency recovery of data only.

The **Restore Database** option allows you to restore your database to a previously backed up version in case of data loss.

NOTE: You can restore only on a computer that is running the server portion (SQL) and not from a station running client only.

1. Select **Restore Database** from the **File** menu.

The system displays the Windows *Open* dialog box to select the appropriate backup file.

2. Highlight the backup file you want to use. Backup databases have the file extension **.bak**.
3. Select **Open** or select **Cancel** to close the dialog box.

The system displays a dialog box to **Name Your Restored Database**.

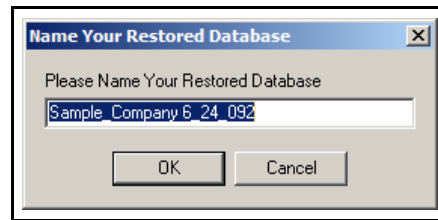


Figure 23: Name Your Restored Database

4. Enter the name for your restored database.
5. Select **OK** or select **Cancel** to close the dialog without restoring the database.

The system displays a message while it restores the database.

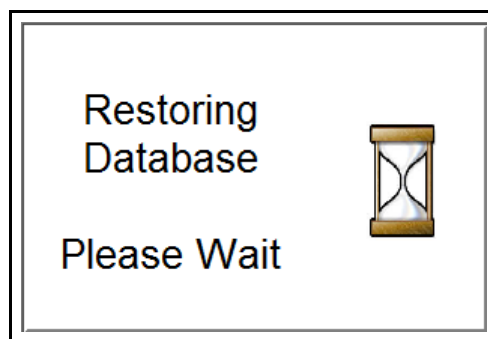


Figure 24: Restoring Database

The system displays an alert to restart the database and select your restored database.

6. Select **OK**.
7. To complete the restore database process, restart PointOS and select the restored database. Refer to "Restart PointOS" on page 32 and "Select A Database" on page 5 for more information.

Report Printer Setup

The **Report Printer Setup** option allows you to select a printer to use for printing reports.

1. Choose **Report Printer Setup** from the **File** menu.

The system displays the *Set Report Printer* screen.

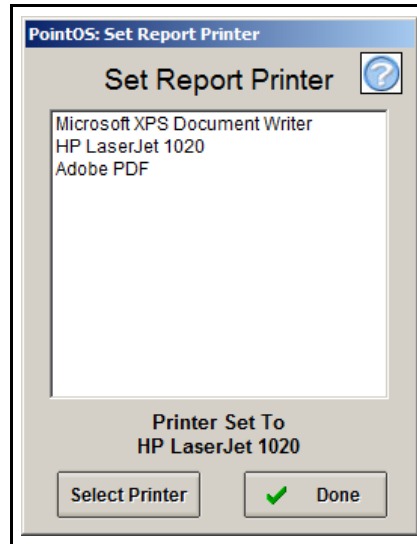


Figure 25: Set Report Printer

2. Highlight one of the printers installed on the station.

NOTE: If your printer is not on the list, you will need to add the printer in Windows. Refer to Windows Help for more information on adding a printer. Refer to “Setting Up a Generic Driver for Receipt Printing” on page 164 for more information.

3. Choose **Select Printer**.
4. Select **Done** to close the *Set Report Printer* screen.

Advanced Printer Add

The **Advanced Printer Add** option allows you to add a new or change existing receipt printers.

NOTE: This option is only for advanced users.

Refer to <http://www.pointos.com/printercodes.html> for some pop/cut codes. If these do not work, you may need to contact the manufacturer.

1. Choose **Advanced Printer Add** from the **File** menu.

The system displays an alert notifying you that this option is only for advanced users.

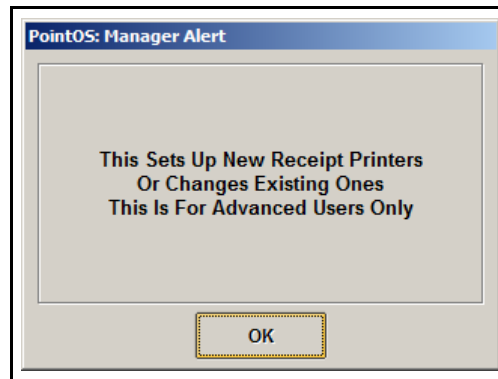


Figure 26: Advanced Printer Alert

2. Select **OK**.

The system displays the *Add New Printer Type* screen.

A dialog box titled "PointOS Professional: Add New Printer Type" with a blue header bar. The main area is light gray and contains the following fields and controls: "Manufacturer" (text box), "Printer Model" (text box), "Drawer Pop Code" (five small text boxes), "Cutter Code" (five small text boxes), "Print Width" (text box with "40" entered), and a checkbox labeled "Has An Auto Cutter". At the bottom are three buttons: "Cancel" (with a red X icon), "Edit Existing", and "Save" (with a printer icon).

Figure 27: Add New Printer Type

3. To add a new printer type:

- Enter the printer **Manufacturer**.
- Enter the **Printer Model**.
- Enter the **Drawer Pop Code**.
- Enter the **Cutter Code**.
- If necessary, change the **Print Width**.
- Check the **Has An Auto Cutter** box, if applicable.
- Select **Save** or select **Cancel** to close the *add New Printer Type* screen.

NOTE: Editing existing printer profiles is NOT recommended.

Restart PointOS

After completing some tasks, you will need to restart PointOS before the changes take effect in the system. The **Restart PointOS** option allows you to quickly restart PointOS.

1. Choose **Restart PointOS** from the **File** menu.

The system displays an alert asking if you want to restart PointOS.

2. Select **Yes** to restart, or select **No** to return to the previous screen.

The system restarts and opens to the *Main* screen.

Return to Point OS

The **Return to PointOS** option allows you to quickly return to the *Main* screen.

1. Select **Return to PointOS** from the **File** menu.

The system immediately returns to the *Main* screen.

Exit

The **Exit** option closes PointOS.

1. Select **Exit** from the **File** menu.

PointOS closes immediately.

Overview

The Edit Menu includes options related to filling out text fields. You can also use the standard Windows shortcuts for these options.

Cut

Highlight the text you want to remove and copy and select **Cut** from the **Edit** menu.

Copy

Highlight the text you want to copy and select **Copy** from the **Edit** menu.

Paste

Place your cursor where you want to paste the copied or cut text and select **Paste** from the **Edit** menu.

Delete

Highlight the text you want to delete and select **Delete** from the **Edit** menu.

Select All

Place your cursor in the field and choose **Select All** from the **Edit** menu. The system highlights all of the text in that field.

Overview

The **Setup** Menu provides access to all of the options you will need to set up to maximize your use of PointOS Professional.

Main Setup

The system opens the *Main Setup* screen as part of the initial startup when you install PointOS.

If you need to change any of the following information, you can return to the *Main Setup* screen:

- Company Information
- Company Contact Information
- Measurements or Day Start Time
- Receipt Message
- Menu page graphic or background color
- Upgrade for additional stations

1. To open the *Main Setup* screen, select **Main Setup** from the **Setup** menu.

The system opens the *Main Setup* screen. Refer to “Main Setup” on page 9 for more information on this screen.

Door Manager Settings

NOTE: This screen is only available if you are using PointOS DoorMan as one of your licensed stations.

The *Door Manager Settings* screen allows you to set your Door Manager settings.

1. To open the *Door Manager Settings* screen, select **Door Manager Settings** from the **Setup** menu.

The system displays the *Door Manager Settings* screen.

Figure 28: Door Manager Settings

2. The *Main Settings* area controls additional information that will automatically occur when you add a new customer to a tab. Check one or more options to include those activities.
3. You can set up to four different cover charges. Complete the following steps for each cover charge:
 - Select the **Minimum Age** from the drop down list.
 - Select the associated **Menu Item** for the cover charge from the drop down list.
 - Check the **Enable Cover Charge** box.
4. Select **Save Door Manager Settings** to save the information.
5. Select **Close Door Manager Options** when you have finished.

Employee Setup

The system opens the *Employee Setup* screen as part of the initial startup when you install PointOS.

You can return to the *Employee Setup* screen later if you need to:

- Add new employees

- Terminate employees
- Inactivate employees or reactivate inactive employees
- Change employee information or security settings

1. To open the *Employee Setup* screen, select **Employee Setup** from the **Setup** menu.

The system opens the *Employee Setup* screen. You can access the *Change Employee Options* screen from the *Employee Setup* screen. Refer to “Employee Setup” on page 13 for more information either screen.

Payment Setup

The *Payment Setup* screen allows you to set all of your payment options and information.

1. To open the *Payment Setup* screen, select **Payment Setup** from the **Setup** menu.

The system displays the *Payment Setup* screen.

Figure 29: Payment Setup Screen

PointOS Professional integrates with Merchant Warehouse for credit card processing. Merchant Warehouse is available FREE with nothing to install.

You must have a Merchant Warehouse account to accept credit cards and gift cards through PointOS. All tech support for Merchant Warehouse is offered by them, and is included with your

merchant account. Refer to “Setting Up a Merchant Warehouse Account” on page 166 for more information.

Complete the following steps to fill out the *Payment Setup* screen:

1. To integrate PointOS with Merchant Warehouse, enter the following information related to your Merchant Warehouse account:

- Site Name
- Site ID
- Site Key

NOTE: This information must be EXACTLY the same as the information from the email from Merchant Warehouse. It is case sensitive. You may want to copy and paste from the email. If you have been incorrectly given a **Site Name** with a ' or & in it, please contact Merchant Warehouse to get a new Site Name. Site Names with apostrophes or ampersands will not work.

2. If you are using a modem instead of a high speed connection, you may want to increase the amount of time in the **Time Out Seconds** field (for example, to 30 seconds). The default is 15 seconds.
3. Select the number of receipt copies to print from the **Receipt Copies Printed** drop down list. Some printers print two copies of all printouts using two ply paper. If you do not have this feature on your printer, set this to two copies.
4. You can select which forms of payments that you will receive. In addition to the various credit card types, you can choose to take gift cards or personal checks. Check the payment options accepted boxes to indicate which types of payments are accepted.

NOTE: A **Merchant Warehouse** account is required to accept credit cards or gift cards as payment.

Credit cards must be enabled in two places: on the *Payment Setup* screen, and on EACH station where credit cards are accepted (some stations may be cash only).

5. To set the security for activating and issuing gift cards to customers, select the security level from the **Create Gift Card Security Level** drop down list. The default level is the same as the security level for taking orders. Gift cards must be added to the menu before they can be sold. Refer to “Menu Setup” on page 74 for more information.
6. You can set up the system to auto batch all credit card sales each day. While you can also use the Merchant Warehouse interface to auto batch, using PointOS provides more control over batching and allows you to see the daily batch result on the *Manager Dashboard*. To setup auto batch:
 - Check the **Auto Batch Daily Charges** box.
 - Select the time to perform the daily batch. Refer “Setting the Time” on page 165 for more information on using the clock to set the time.
 - Check the **Do Not Batch with Open Drawers That Have Credit Card Transactions** box to postpone batching if any open drawers have credit card transactions. This means that if a server forgets to do closeout, he or she will not lose the gratuity.

- Check the **Close Credit From This Computer** box to indicate that this computer only should be used to perform the daily batch.
- Check the **Do Not Batch, Just Clear Pre-Auths** box to clear credit card pre-authorizations without batching.

NOTE: In the rare instance that you are running different databases with the same Merchant Account, you may not want both accounts to batch, but need to clear the pre-authorization on the account that does not batch. If you are using pre authorizations on credit cards, you **must** batch from PointOS. Pre authorizations do a \$.01 sale, and if they are not closed, they will be cleared when batching.

You can also batch credit cards manually. Refer to “Batch Credit Cards” on page 133 for more information.

7. You can set the system to automatically add a percent gratuity to all checks for a selected number of guests. This gratuity amount will be added to cash, personal check, gift card, and credit card sales.
 - Check the **Add Auto Gratuity** check box.
 - Enter the percent to add automatically in the **Auto Gratuity Percent** box.
 - Select the number of guests for which to automatically add gratuity from the **Add For Number of Guests** drop down list.
8. To activate Merchant Warehouse on your system, check the **Enable Merchant Warehouse** box.
9. Instead of using Merchant Warehouse, you can check the **Enable External Terminal** box. PointOS will track and report on credit card charges, but there is no integrated processing.
10. Select **Save** button to complete the Payment Setup or select **Cancel** to close the *Payment Setup* screen without saving.

Taxes Setup

The *Taxes Setup* screen allows you to set several different types of taxes that are on items you sell. Some areas tax different items at different rates. You can set these items to include the price or have them as an add on. Included taxes do not show up on a customer’s tab.

1. To open the *Taxes Setup* screen, select **Taxes Setup** from the **Setup** menu.

The system displays the *Taxes Setup* screen.

PointOS Professional: Manager Tools

File Edit Setup Menu - Inventory Activities Reports Sales Reports Maintenance Help

Taxes Setup

Tax 1

Tax 1 Name
Tax 1

Tax 1 Percent
0 %

☐ Tax 1 Included In Price

Tax 3

Tax 3 Name
Tax 3

Tax 3 Percent
0 %

☐ Tax 3 Included In Price

Tax 2

Tax 2 Name
Tax 2

Tax 2 Percent
0 %

☐ Tax 2 Included In Price

Tax 4

Tax 4 Name
Tax 4

Tax 4 Percent
0 %

☐ Tax 4 Included In Price

☐ Show Taxes On Every Ordered Item On Printed Receipt

All Stations Need To Be Restarted
To Activate Menu Changes

Taxes Options

Taxes Are Entered As A Percent

Example: For A 5% Tax, Enter 5
In The Tax Percent Field

Taxes That Are Included In Price
Will Be Calculated But Will Not
Be Shown On The Check

Save Taxes

Close Taxes Setup

Figure 30: Taxes Setup

You can define up to four different tax rates for different items. For each tax rate, complete the following steps:

1. Enter the name of the tax rate in the **Tax Name** field. You can choose to leave the default names, if desired (i.e., Tax 1, Tax 2, Tax 3, or Tax 4).
2. Enter the number for the percent in the **percent** field. For example, enter 5 for a 5% tax rate.
3. If you want to include the tax in the price of the selected items, select the **Tax Included in Price** box. If you check this, the tax will be calculated, but it will not be shown as a separate item on the check.
4. Check the **Show Taxes On Every Ordered Item On Printer Receipt** box to include the taxes on the printed receipt.
5. Select **Save Taxes** to complete the Taxes Setup and close the screen. The system displays an alert notifying you that all stations must be restarted before the new tax information can be used. Select **OK**. To close the screen without saving changes, select **Close Taxes Setup**.

Database Setup

The *Database Setup* screen contains tools that allow you to keep your database running quickly and efficiently.

1. To open the *Database Setup* screen, select **Database Setup** from the **Setup** menu.

The system displays the *Database Setup* screen.

Figure 31: Database Setup

Auto Maintenance

The auto maintenance feature allow you to archive and backup the database automatically. During auto maintenance, items and orders will be archived and credit card pre-authorizations will be deleted. To set up auto maintenance, complete the following steps:

1. Select how often you would like to archive and backup the database automatically from the **How Often** drop down list.

NOTE: We recommend that you perform maintenance at least once a week. However, for higher volume locations, maintaining the database daily will give you optimal performance.

2. Select when to perform the maintenance. The options change, depending on what you selected in **How Often**:

- If you selected Daily, the only option under **Day of the Week** is Everyday.
- If you selected Weekly, select the day you choose from the **Day of the Week** drop down list.
- If you selected Monthly, select the day of the month you choose from the **Day of the Month** drop down list.

NOTE: Choose a time when no one else will be using PointOS, but when the database station will be running.

3. Enter the time to perform the maintenance in the **Maintenance Time** field. Refer “Setting the Time” on page 165 for more information on using the clock to set the time.
4. Enter the name of the backup file in the **Auto Backup Name** field.
5. Select an **Auto Backup Location**.
 - Select **Choose Location**. The system opens a *Select Directory* dialog box.

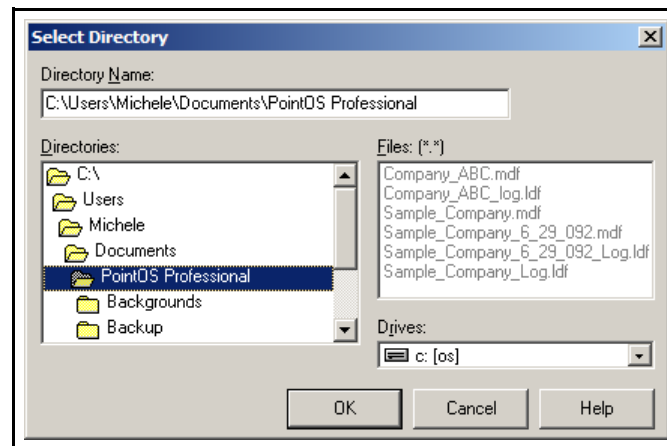


Figure 32: Select Directory

- Select the location for the backup file. The default backup location is *c:/program files/PointOS Professional/Database/Backup*. However, we recommend that you back up to removable media such as a external drive, in case something happens to your computer.
 - Select **OK** to choose the selected location, or select **Cancel** to close the dialog.
6. Check the **Auto Backup from This Computer** box from the computer you want to use for backing up the database. It must be running as the PointOS server (database). Only one station can be set to auto backup. Be sure that computer is running at the time you choose for the auto backup.
 7. Check the **Force Station Restart Backup** box to require other stations to restart after backup. This is not necessary. However, restarting PointOS Professional regularly can keep it running faster.
 8. Check the **Enable Auto Maintenance** box.
 9. Select **Save Auto Maintenance** or select **Close Database Setup** to close the screen without saving the settings.

Manual Database Options

The *Database Options* area allows you to perform many database functions manually from one common screen.

1. Select **Restore from Backup Database** to restore the database using a backup file. Refer to “Restore Database” on page 28 for more information.

NOTE: Restoring from a backup database is only for emergency data recovery.

2. Choose **Select New Database** to restart PointOS using a different database. Refer to “Select Database” on page 27 for more information.
3. To clean up the database, select **Cleanup Database**. Refer to “Database Cleanup” on page 154 for more information.
4. To compact the database, select **Compact Database**. The system takes a few moments to compact the database.
5. You may want to perform a manual database backup when you have made a large change to the system (i.e., you just added a large amount of menu items). First, you may want to disconnect all stations. (Refer to “Disconnect Stations” on page 153 for more information.) To perform a manual backup of the database, select **Backup Database**. Refer to “Backup Database” on page 153 for more information.

Back Up Remote Computer

Select **How to Set PointOS Up for Remote Backup** for a link to the Microsoft website for instructions to enable backups to network drives.

Customer Data Setup

NOTE: This screen is only available if you are using PointOS DoorMan as one of your licensed stations.

The *Customer Data Setup* screen allows you to indicate the required fields when entering a new customer and to define two additional custom fields.

1. To open the *Customer Data Setup* screen, select **Customer Data Setup** from the **Setup** menu.

The system displays the *Customer Data Setup* screen.

PointOS DoorMan: Manager Tools

File Edit Setup Menu - Inventory Activities Reports Sales Reports Maintenance Help

Customer Data Setup

New Customer Data Entry Fields

Select Required Fields

☐ All Address Information
 ☐ Email Address

☐ Street Address
 ☐ All Phone Numbers

☐ City
 ☐ Main Phone

☐ State
 ☐ Mobile Phone

☐ Zip/Postal Code

Customer Data Options

Customer First Name, Last Name, And Birthday Are All Required Fields By Default

Custom Field 1

Field Name

Select Field Type

☐ Active
 ☐ Required

Custom Field 2

Field Name

Select Field Type

☐ Active
 ☐ Required

Save Customer Data Options

Close Customer Data Setup

Figure 33: Customer Data Setup

2. The Customer's first name, last name, and birthday are required fields when entering a new customer. To require additional information, check the box(es) next to the fields to require them.
3. To define a custom field, complete the following steps:
 - Enter the **Field Name**.
 - Choose an option from the **Select Field Type** drop down list.

- If you select Drop Down, you must add the items for the list. Enter the name of the item in the field above the **Add** and **Remove** buttons and select **Add**. You can remove an item by highlighting it in the list and selecting **Remove**.

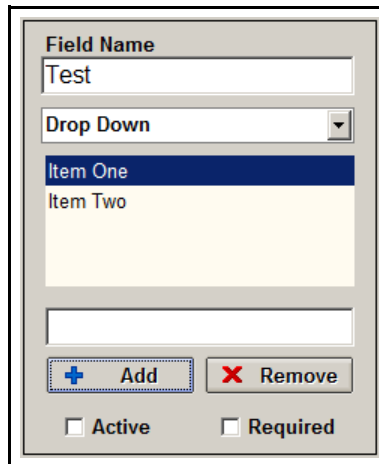
The image shows a software dialog box titled "Field Name". At the top, there is a text input field containing the word "Test". Below this is a dropdown menu currently set to "Drop Down". Under the dropdown is a list box containing two items: "Item One" and "Item Two". "Item One" is highlighted with a blue background. Below the list box is another empty text input field. At the bottom of the dialog, there are two buttons: a blue button with a plus sign and the text "Add", and a red button with a minus sign and the text "Remove". Below these buttons are two checkboxes: "Active" and "Required", both of which are currently unchecked.

Figure 34: Custom Field Drop Down List Definitions

- Check the **Active** box to include the field on the *Customer Activities* screen.
 - Check the **Required** box to make the field required.
4. Select **Save Customer Data Options** to save the changes.
 5. When you have finished defining the customer data, select **Close Customer Data Setup**.

Customer Notice Setup

The *Customer Notice Setup* screen allows you to set up notices to your staff about customer sales milestones or automatic birthday emails to customers. You must have email setup to send emails. Refer to "Email Setup" on page 49 for more information.

1. To open the *Customer Notice Setup* screen, select **Customer Notice Setup** from the **Setup** menu.

The system displays the *Customer Notice Setup* screen.

PointOS Professional: Manager Tools

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Customer Notice Setup ?

Customer Notice Setup

Customer Sales Alerts

Alert At

Alert At

Alert At

Alert At

Alert At

Email Notification

☐ Send Email On Customers Birthday

☐ Send Email From This Computer

Save Notice Settings

Customer Birthday Email

Dear Customer Name,

We just wanted to send you a quick email to wish you a very happy birthday.

We know birthdays are very special, and this is just a little thank you for your business.

From Your Friends At Abc Bar And Grill

Save Birthday Email

Close Customer Notice Setup

Figure 35: Customer Notice Setup

To set up notices to your staff when a customer reaches selected sales milestones, complete the following steps:

1. In each **Customer Sales Alerts** field, enter the sales amount at which you want to notify your sales staff. You can enter the amount in dollars or dollars and cents. You do not need to enter the dollar sign.
2. Select **Save Notice Settings**.

To setup customer birthday emails, complete the following steps:

NOTE: You must have email setup to send emails. Refer to “Email Setup” on page 49 for more information.

1. Edit the **Customer Birthday Email** as desired.
2. Select **Save Birthday Email**.
3. Check the **Send Email on Customers Birthday** box.
4. Check the **Send Email from this Computer** box.

Once you setup birthday emails, they will be sent from the selected computer at 6am every morning.

NOTE: The computer sending the automatic emails must be running at the time you select.

When you have finished using the *Customer Notice Setup* screen, select **Close Customer Notice Setup**.

Delivery Setup

The *Delivery Setup* screen allows you to set up PointOS to take Delivery Orders. You will want to set up one computer with a phone line to capture the caller ID from your customers.

NOTE: You will not be able to enter delivery orders unless you have a phone line attached collecting the customer's Caller ID.

1. You will need to plug a phone line into that computer's fax/modem port. If your computer does not have a phone port, you can purchase an external modem which can be hooked up by USB.
2. To open the *Delivery Setup* screen, select **Customer Notice Setup** from the **Setup** menu.

The system displays the *Delivery Setup* screen.

Figure 36: Delivery Setup

3. Check the **Enable Delivery Mode** box to add a Delivery area to your *Main* screen.
4. On the computer you will use for deliveries, check the **Enable Caller ID From This Computer** box.
5. Select your phone device from the **Select A Phone Device** drop down list. Make sure you choose a device that has Caller ID capabilities.
6. Select the type of orders (Data, Fax, or Voice) you will take from the **Device Data Mode** drop down list.
7. Choose **Select Device**.
8. Select **Save** to save your *Delivery Setup* options or select **Cancel** to close the Delivery Setup without saving the changes.

Delete Caller ID Log

The *Delivery Setup* screen also allows you to clear the caller ID log.

1. Select **Delete Caller ID Log**.

The system displays an alert asking if you are sure you want to delete the caller ID log.

2. Select **OK**.

The system displays an alert notifying you that it has deleted the caller ID log.

Discount Setup

The *Discount Setup* screen allows you to define discounts for various reasons. There is a maximum of seven different types of discounts.

1. To open the *Discount Setup* screen, select **Discount Setup** from the **Setup** menu.

The system displays the *Discount Setup* screen.

Figure 37: Discount Setup

To define a new discount, complete the following steps:

1. Enter a name for the discount in the **Discount Name** field.
2. Enter the percentage off in the **Discount Percent** field.
3. Select **Add New Discount**.

To edit or delete one of the defined discounts, complete the following steps:

1. Highlight the name of the discount you want to edit in the *Discounts* area.
2. Edit the **Discount Name**, if desired.
3. Edit the **Discount Percent**, if desired.
4. To update the discount, select **Update**. To delete the discount, select **Delete**.

You can include one special price. This links to the Special Price item in the Menu Setup. Refer to “Menu Setup” on page 74 for more information.

1. Enter the **Special Price Name** (i.e., ITB).
2. Enter question to include in the prompt when giving the discount in the **Discount Prompt Question** field.

When you have finished using the *Discount Setup* screen, select **Close Discount Setup**.

Email Setup

The *Email Setup* screen allows you to define email for several different features:

- Emailing daily, weekly, and monthly sales reports
- Allowing employees to email each other
- Emailing customers for their birthdays

1. To open the *Email Setup* screen, select **Email Setup** from the **Setup** menu.

The system displays the *Email Setup* screen.

PointOS Professional: Manager Tools

File Edit Setup Menu - Inventory Activities Reports Sales Reports Maintenance Help

Email Setup

Auto Report Email

Email Daily Sales Report

How Often:

Day Of The Week:

Email Monthly Sales Report

How Often:

Day Of The Week:

Email Weekly Sales Report

How Often:

Day Of The Week:

Time To Send Auto Emails

☒ Send From This Computer

☒ Enable Auto Emails

Email Options

Message Center

Security Level To Send Email:

☒ Enable Employee Email

Reports Are Emailed In Microsoft Excel Format And Cannot Be Created Unless You Have Excel Installed On This Computer

Save Email Settings

Close Email Setup

Email Settings

SMTP Server: Port:

SMTP User Name (Optional):

SMTP Password (Optional):

The above information should be from your Internet Service Provider

Company Email Address:

All Stations Need To Be Restarted To Activate Changes

Figure 38: Email Setup

Email Settings

Before you can email reports, customer birthday emails, or enable employee emails, you must setup the email settings.

1. Enter the **SMTP Server** information (**Server** and **Port**). This information is available from your internet service provider. Your ISP, or internet service provider, is the company that provides your internet service. It is **NOT** AOL, Google, or Yahoo.

Here are a few common SMTP server addresses:

NOTE: These are subject to change, and many providers have multiple smtp depending on your geographical location and the type of service you have through them (i.e., DSL vs. Cable modem). Also, some require a certain port, and some require user name and password.

Internet Service Provider	SMTP Address
Adelphia	smtp.blk.adelphia.net
AT&T Worldnet	mailhost.att.net
BellSouth	smtp.blk.adelphia.net
Adelphia	mail.rdu.bellsouth.net
Comcast	smtp.comcast.net
Time Warner RoadRunner	smtp-server.nc.rr.com
AT&T	smtp1.attglobal.net
Bellatlantic.net	smtpout.bellatlantic.net
Charter Pipeline	smtp.charter.net
Cox Communications	smtp.cox-internet.com
Verizon	outgoing.verizon.net

2. If your internet provider requires it, enter your **User Name** to access your internet account.
3. If your internet provider requires it, enter your **Password** to access your internet account.
4. Enter the **Company Email Address**. This is where any replies to automatic emails are sent.

Auto Report Email

You can have the Daily, Weekly, and Monthly Sales reports sent to you automatically. The sales reports are in Microsoft Excel[®] format. You must have Microsoft Excel[®] installed on the computer that sends the sales reports.

To have the sales report emailed to you, complete the following steps:

1. For each type of report, select an item from the **How Often** drop down list. Select **Never** if you do not want to receive that sales report, but you want to enable automatic emailing of the other reports.

2. Depending on whether you selected Daily, Weekly, or Monthly as How Often, select an item from the **Day of the Week** or **Day of the Month** drop down list to indicate when to email the report.
3. Select what time to email the reports in the **Time to Send Auto Emails** drop down list. Refer “Setting the Time” on page 165 for more information on using the clock to set the time.
4. Check the **Send from This Computer** box to indicate which computer to use to send the emails. The computer must have Microsoft Excel[®] installed to send sales reports.
5. Check the **Enable Auto Emails** box to send automatic emails of sales reports as you have indicated.

Message Center

You can allow employees to email each other through the system. These emails are sent to the email addresses used in the Employee Setup. The email addresses remain hidden from the sender and the recipient, and all addresses have the company return address to protect the privacy of your employees.

To setup employee email, complete the following steps:

1. Select the required **Security Level to Send Email** from the drop down box to indicate who can send employee emails.
2. Check the Enable **Employee Email** box to activate the employee email functionality.

Save Email Settings

When you have finished with the email settings, select **Save Email Settings**.

The system displays a message notifying you that the settings have been saved. Then it returns to the *Manager Dashboard*.

If you want to close the *Email Settings* screen without saving changes, select **Close Email Setup**.

Happy Hour Setup

The *Happy Hour Setup* screen allows you to control automatic pricing of items during happy hour times. During the times you set, the menu items will be automatically discounted.

1. To open the *Happy Hour Setup* screen, select **Happy Hour Setup** from the **Setup** menu.

The system displays the *Happy Hour Setup* screen.

PointOS Professional: Manager Tools

File Edit Setup Menu - Inventory Activities Reports Sales Reports Maintenance Help

Happy Hour Setup

Change Happy Hour Options

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Start Time 12:00 am	Start Time 12:00 am	Start Time 12:00 am	Start Time 12:00 am	Start Time 12:00 am	Start Time 12:00 am	Start Time 12:00 am
End Time 12:15 am	End Time 12:15 am	End Time 12:15 am	End Time 12:15 am	End Time 12:15 am	End Time 12:15 am	End Time 12:15 am
0 Hours 15 Minutes	0 Hours 15 Minutes	0 Hours 15 Minutes	0 Hours 15 Minutes	0 Hours 15 Minutes	0 Hours 15 Minutes	0 Hours 15 Minutes
<input type="checkbox"/> Enabled	<input type="checkbox"/> Enabled	<input type="checkbox"/> Enabled	<input type="checkbox"/> Enabled	<input type="checkbox"/> Enabled	<input type="checkbox"/> Enabled	<input type="checkbox"/> Enabled

Update All Days

Start Time: 12:00 am End Time: 12:15 am

☒ Print Happy Hour On Menu Items

All Stations Need To Be Restarted To Activate Happy Hour Changes

Figure 39: Happy Hour Setup

2. To set all days to the same happy hour:
 - Select the **Start Time**. Refer “Setting the Time” on page 165 for more information on using the clock to set the time.
 - Select the **End Time**. The End Time can be the next day (i.e., happy hour runs from 9 p.m. to 4 a.m.).
 - Select **Update All**.

The system updates each day with the selected Start and End times and checks the Enabled box.

3. To update the individual day happy hour times:
 - For each day, select the **Start Time**. Refer “Setting the Time” on page 165 for more information on using the clock to set the time.
 - For each day, select the **End Time**.
 - For each day, check or uncheck the **Enabled** box to indicate whether the happy hour is in effect for that day.
4. Select **Print Happy Hour on Menu Items**, if desired.

5. Select **Save** to save the changes to the happy hour schedule. The system displays a message notifying you that the settings have been saved. Then it returns to the *Manager Dashboard*. If you want to close the *Happy Hour Setup* screen without saving changes, select **Done**.

Membership Setup

NOTE: This screen is only available if you are using PointOS DoorMan as one of your licensed stations.

The *Membership Setup* screen allows you to set up memberships.

1. To open the *Membership Setup* screen, select **Membership Setup** from the **Setup** menu.

The system displays the *Membership Setup* screen.

Figure 40: Membership Setup

Memberships

The left side of the screen lists all of your memberships.

Define a New Membership

To define a new membership, complete the following steps:

1. Select **Add New Membership**.

2. Enter the **Membership Name**.
3. Enter the **Price** for the membership.
4. Select the **Length of Membership** from the drop down list.
5. Select a **Security Level to Choose** from the drop down list.
6. Select a **Security Level to Add Guests** from the drop down list.
7. For one membership, you can create a free guest membership. Check the **This is the Free Guest Membership** box if applicable.
8. Select the tax rate for the membership.
9. Check the **Allow Guests** box to indicate whether members may bring guests.
10. Check the **Require ID Card** to require the ID card.
11. Check the **Discountable** box to indicate the membership may be discounted.
12. Select **Save New Membership**.

The system displays a message notifying you that the membership has been added.

Change a Membership

To change a membership, complete the following steps:

1. Highlight the name of the membership you want to edit in the *Memberships* area.
2. Enter the **Membership Name**.
3. Enter the **Price** for the membership.
4. Select the **Length of Membership** from the drop down list.
5. Select a **Security Level to Choose** from the drop down list.
6. Select a **Security Level to Add Guests** from the drop down list.
7. For one membership, you can create a free guest membership. Check the **This is the Free Guest Membership** box if applicable.
8. Select the tax rate for the membership.
9. Check the **Allow Guests** box to indicate whether members may bring guests.
10. Check the **Require ID Card** to require the ID card.
11. Check the **Discountable** box to indicate the membership may be discounted.
12. Select **Update Membership Settings**.

Delete a Membership

To delete a membership, complete the following steps:

1. Highlight the name of the membership you want to delete in the *Memberships* area.
2. Select **Delete Membership**.

Membership Options

The Membership Options control the membership ID cards.

1. Check the **Enable ID Card Printing** box to enable ID card printing at this station.
- NOTE: Make sure your ID card printer is the default printer in Windows for this computer.
2. Check the **Enable Membership Card Magnetic Stripe Reading** to enable your card reader.
 3. To open the *Membership ID Card Settings*, select **Setup ID Card Printer**.

The system displays the *Membership ID Card Settings* settings.

Figure 41: Membership ID Card Settings

4. To include the customer name on the membership card, check the **Enable Customer Name Text**. Enter the number of pixels from the **Left** and the **Top** of the card to print the customer name text.
5. To include the membership start date on the membership card, check the **Enable Membership Start Text**. Enter the number of pixels from the **Left** and the **Top** of the card to print the membership start date text.
6. To include the membership expiration date on the membership card, check the **Enable Expiration Date Text**. Enter the number of pixels from the **Left** and the **Top** of the card to print the expiration date text.
7. To include the ID Number on the membership card, check the **Enable ID Number Text**. Enter the number of pixels from the **Left** and the **Top** of the card to print the ID Number text.

8. Enter the price of the membership card, if applicable in the **Price Per Card** field.
9. Select the **Font Name** from the drop down list to indicate which font to use for printing the membership card.
10. Select the **Font Size** from the drop down list to indicate which size to use for printing the membership card.
11. Select **Save ID Card Settings** to save the settings.
12. To print a test membership card to test the settings, select **Test Print ID Card**.
13. When you have finished setting the membership card settings, select **Close ID Card Setup**.
14. Select **Save Membership Settings** to save the settings for the selected membership.
15. When you have finished setting up your memberships, select **Close Membership Setup**.

Music Setup

The *Music Setup* screen controls how music is played, requested, and found.

1. To open the *Music Setup* screen, select **Music Setup** from the **Setup** menu.

The system displays the *Music Setup* screen.

PointOS Professional: Manager Tools

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Music Setup

Remote Requests

☐ Allow Other Stations To Request Songs

☐ Auto Add Requests From Other Stations

Add New Songs To Playlist

As Last Song

☒ Do Not Add If Requested Song Is Already In Playlist

Add Song If Requested Song Is Not In Playlist's Next

Do Not Check

☒ Check For New Music On Startup

☒ Make This A Music Station

Music Options

Delete All Music

Update Music

Reset All Damaged Songs

Save Music Settings

Close Music Setup

All Stations Need To Be Restarted To Activate Changes

Figure 42: Music Setup

Music Options

There can only be one music station. You must have a music station for some of these options to work.

1. Check the **Make This a Music Station** box to indicate the computer to use as the music station and DJ for music requests.
2. To automatically add new music when the system starts up, select the **Check For New Music On Startup** box. The system will add any new music from Windows Media Player automatically, each time you start PointOS.

NOTE: Make sure any playlists intended for use with PointOS begin with a +. Refer to “Setting Up Music” on page 167 for more information.

3. To delete music from PointOS so that you can start over with new music, select **Delete All Music**.
4. To manually update new music from Windows Media Player, select **Update Music**.
5. When a song will not play, the system tags it as damaged. PointOS does not delete or change the song, but the song will no longer come up in searches or playlists. Select **Reset All Damaged Songs** to reset the songs. However, we do not recommend using this setting. As you use the system, the damaged songs will cycle out of PointOS.

Remote Requests

To allow other cash register stations to make song requests, complete the following steps:

1. Check the **Allow Other Stations To Request Songs** box to enable remote requests.
2. Check the **Auto Add Requests From Other Stations** box to set the music station to serve as automatic D.J. for music requests.
3. For automatic requests, where to add the requested song in the current playlist by selecting either First Song or Last Song from the **Add New Songs to Playlist** drop down list.
4. Check the **Do Not Add If Requested Song Is Already in Playlist** box to avoid duplicates of a song in the playlist.
5. If the **Do Not Add If Requested Song Is Already in Playlist** box is UNCHECKED, you can select where in the playlist to add the song (either the next song or the last song on the list). Select an option from the **Add Song If Requested Song Is Not In Playlist's Next** drop down list.

Save Music Setup

When you have finished with the music setup, select **Save Music Settings**.

The system displays a message notifying you that the settings have been saved. Then it returns to the *Manager Dashboard*.

If you want to close the *Music Setup* screen without saving changes, select **Close Music Setup**.

Online Reporting Setup

The *Online Reporting Setup* screen allows you to set up online reporting. Online reporting is a useful tool to check your sales and other reporting from home or anywhere in the world. It gives you the control to stay on top of your business, even when you are not there.

NOTE: No sales or customer data is stored by our servers. All data is stored on your database, and only you will be able to access it.

1. To open the *Online Reporting Setup* screen, select **Online Reporting Setup** from the **Setup** menu.

The system displays the *Online Reporting Setup* screen.

The screenshot shows the 'Online Reporting Setup' window. The 'Online Login Information' section has a 'Login ID' field with the text 'abcbarandg' and a note '10 Characters Or Less With No Spaces'. Below it are 'Password' and 'Re-Enter Password' fields. The 'Online Reporting Terms And Conditions' section contains a scrollable text area with the following text: 'ShakenSoft, LLC's Online Terms and Conditions', 'Terms of use', '1. Your agreement to these terms of use', 'Please read these Terms of Use carefully before accessing or using PointOS online reporting. By accessing or using this website you signify your understanding of and agreement to these Terms of Use. The information, services and materials on this website are provided by the ShakenSoft, LLC, subject to your agreement to the following Terms of Use.', '2. Accessing our website', and 'Access to this website is permitted on a temporary basis, and ShakenSoft, LLC reserves the'. Below this is a checkbox labeled 'I Accept Your Online Terms And Conditions Agreement'. The 'Online Reporting Options' section has a button 'Use Online Reporting At www.mypointos.com' and a larger button 'Sign Up Now For To Begin Using PointOS Professional Online Reporting'. At the bottom are 'Sign Up Now' and 'Close Online Reporting Setup' buttons.

Figure 43: Online Reporting Setup Screen 1

1. Enter an online reporting **LogIn ID**. This ID must be unique to your company. If you select one that is already taken, the system prompts you to enter a different LogIn ID.
2. Enter a password to use with online reporting in the **Password** field.
3. Re-enter the password in the **Re-Enter Password** field.
4. Read the **Online Reporting Terms and Conditions**.
5. Check the **I Accept Your Online Terms and Conditions Agreement** box.

6. Select **Sign Up Now**. Or select **Close Online Reporting Setup** to close the screen without signing up for online reporting.

The system displays an alert notifying you that your account has been created. The alert contains your site ID. You will also receive an email with your user name and registered email address.

The system displays additional options for the *Online Reporting Setup*.

Figure 44: Online Reporting Setup Screen 2

Check Connection to Server

Once your account is setup, you will need to setup a computer to allow connections with the reporting server.

1. Select **Test Your Connection** to see if the computer can communicate with the server using your current settings.

Setup Connection to Server

To set up the computer to communicate with the reporting server, complete the following steps:

1. Setup your port. Refer to “Setting Up A Port” on page 168 for more information.
2. Setup your firewall. Refer to “Setting Up Your Firewall for Online Reporting” on page 170 for more information.

3. Setup your router. Refer to “Setting Up Your Router” on page 171 for more information.

Send Beacon to Server

1. To have the information sent automatically, check the **Send Online Beacon to PointOS From This Computer** box.
2. Select **Save**.

When you do not have a constant IP, you will need to send the beacon manually to send an update to the server with your current IP address.

1. To send the beacon manually, select **Send Beacon To Server Now**.

Online Login Information

The *Online Login Information* area displays your **Login ID**.

If you have forgotten your online reporting password, select **Email Me My Password**.

To change your password, complete the following steps:

1. Select **Change My Password**.

The system displays the *Change Online Password* area.

Figure 45: Change Online Password

2. Enter your **Old Password**.
3. Re-enter your **Old Password**.
4. Enter the **New Password**.
5. Select **Change My Password** to save the changes or select **Cancel Password Change** to close the *Change Online Password* area.

Cancel Online Reporting Account

You also have the option to cancel your account.

1. Select **Cancel My Online Account**.

Read Terms and Conditions

To read the Terms and Conditions of online reporting, complete the following steps:

1. Select **Review the Terms and Conditions**.

The system displays the *Online Reporting Terms and Conditions* area.

PointOS Professional: Manager Tools

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Online Reporting Setup

Online Login Information

Login ID
mbwiedemer

Email Me My Password

Change My Password

Online Reporting Options

Setup Your Port

Setup Your Firewall

Setup Your Router

Test Your Connection

Online Reporting Terms And Conditions

ShakenSoft, LLC's Online Terms and Conditions
Terms of use
1. Your agreement to these terms of use
Please read these Terms of Use carefully before accessing or using PointOS online reporting. By accessing or using this website you signify your understanding of and agreement to these Terms of Use. The information, services and materials on this website are provided by the ShakenSoft, LLC, subject to your agreement to the following Terms of Use.
2. Accessing our website
Access to this website is permitted on a temporary basis, and ShakenSoft, LLC reserves the

Use Online Reporting At
www.mypointos.com

UserID: mbwiedemer
Site ID:1056

Close Terms And Conditions

Close Online Reporting Setup

Figure 46: Online Reporting Terms and Conditions

2. When you have finished, select **Close Terms and Conditions**.

Close Online Reporting Setup

When you have finished setting up online reporting, select **Close Online Reporting Setup**.

Payroll Setup

The *Payroll Setup* screen allows you to define multiple job descriptions for various hourly rates for an employee to use when he or she clocks in. It also defines the default salary levels used in the *Employee Setup* screen.

1. To open the *Payroll Setup* screen, select **Payroll Setup** from the **Setup** menu.

The system displays the *Payroll Setup* screen.

The screenshot shows the 'Payroll Setup' window from 'PointOS Professional: Manager Tools'. The menu bar includes File, Edit, Setup, Menu - Inventory, Activities, Reports, Sales Reports, Maintenance, and Help. The window title is 'Payroll Setup'. The main area is split into two panes. The left pane, titled 'Payroll Setup', contains a 'Salary Names' list (currently empty) and an 'Hourly Rates' section. The 'Hourly Rates' section has a 'Salary Name' text box, an 'Hourly Rate' text box, and 'Delete' and 'Update' buttons. Below these is an 'Add New Salary' button. The right pane, titled 'Payroll Options', contains two checkboxes: 'No Clock In For Owners' (checked) and 'Prompt Employees For Salary Level At Clock In' (unchecked). Below the checkboxes are 'Save Settings' and 'Close Payroll Setup' buttons.

Figure 47: Payroll Setup

To define a new job description pay rate, complete the following steps:

1. Enter a name for the salary in the **Salary Name** field.
2. Enter the hourly rate in the **Hourly Rate** field.
3. Select **Add New Salary**.

To edit or delete one of the defined salaries, complete the following steps:

1. Highlight the name of the salary you want to edit in the *Salary Names* area.

2. Edit the **Salary Name**, if desired.
3. Edit the **Hourly Rate**, if desired.
4. To update the salary, select **Update**. To delete the salary, select **Delete**.

Once you have created your salaries, check the **Prompt Employees For Salary At Clock In** box to have employees select from multiple applicable salaries at clock in. To use employees' default salary levels, leave the box unchecked.

If desired, check the **No Clock In For Owners** box so that the system does not use time clock features for owners.

Select **Save Settings** to save the new or updated payroll settings.

When you have finished using the *Payroll Setup* screen, select **Close Payroll Setup**.

Report Setup

The *Report Setup* screen allows you to define locations in your establishment, weather conditions specific to your area, and reasons for not scanning an ID specific to your needs. These items appear on incident, opening, and closing reports.

1. To open the *Report Setup* screen, select **Report Setup** from the **Setup** menu.

The system displays the *Report Setup* screen.

Define Report Locations

Locations are used throughout reporting and with menu items and inventory items.

1. Select **Location Areas** under *Report Options*.

The system displays the *Change Location Areas* information.

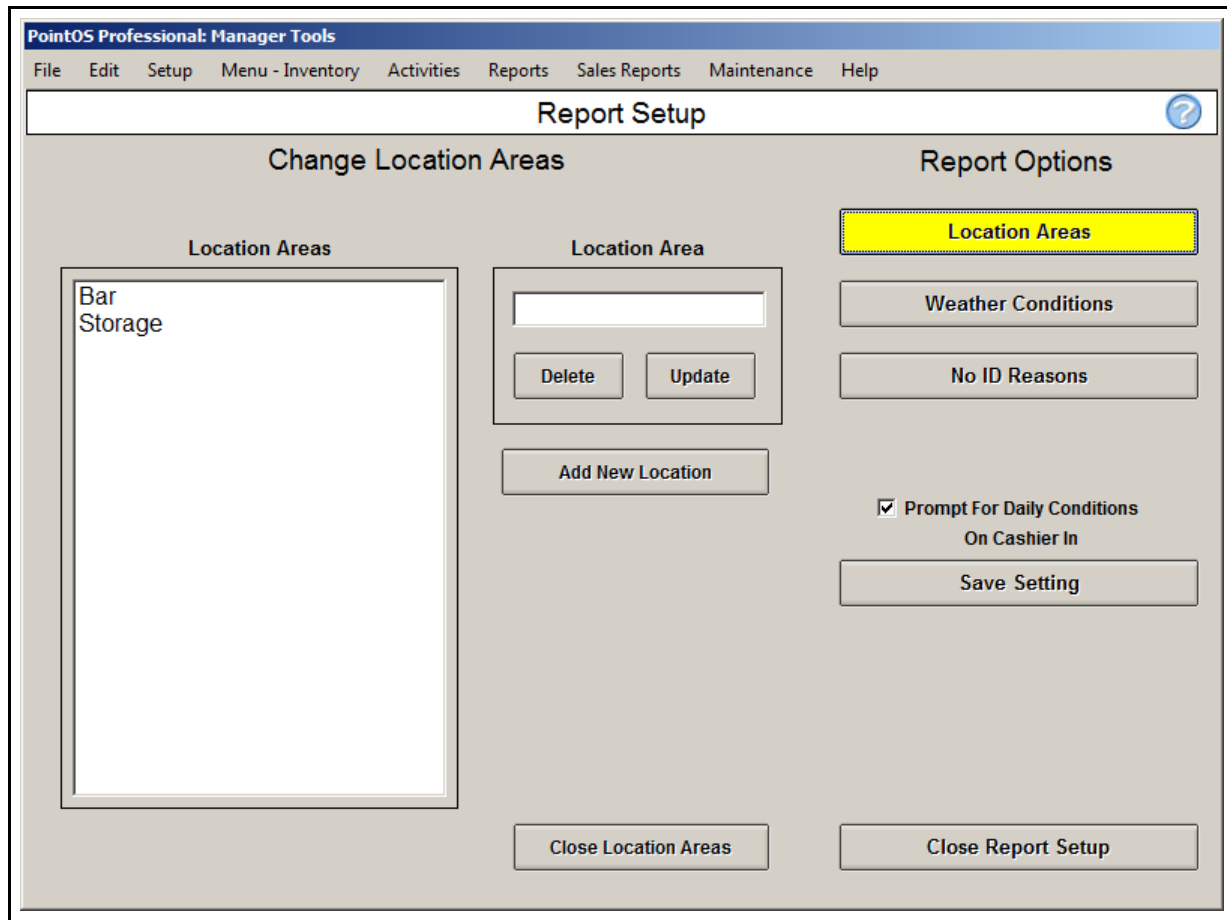


Figure 48: Report Setup: Change Location Areas

To add a new location, complete the following steps:

1. Select **Add New Location**.

The system displays an *Add New Location Area* dialog box.

2. Enter the name of the new location.
3. Select **OK** to save the new location, or select **Cancel** to close the dialog box without saving.

To edit an existing location, complete the following steps:

1. Highlight the name of the location you want to edit from the *Location Areas*.
2. Edit the location name, if desired.
3. To update the location, select **Update**. To delete the location, select **Delete**.

When you have finished working with Location Areas, select **Close Location Areas**.

Define Weather Conditions

1. Select **Weather Conditions** under *Report Options*.

The system displays the *Change Weather Condition List* information.

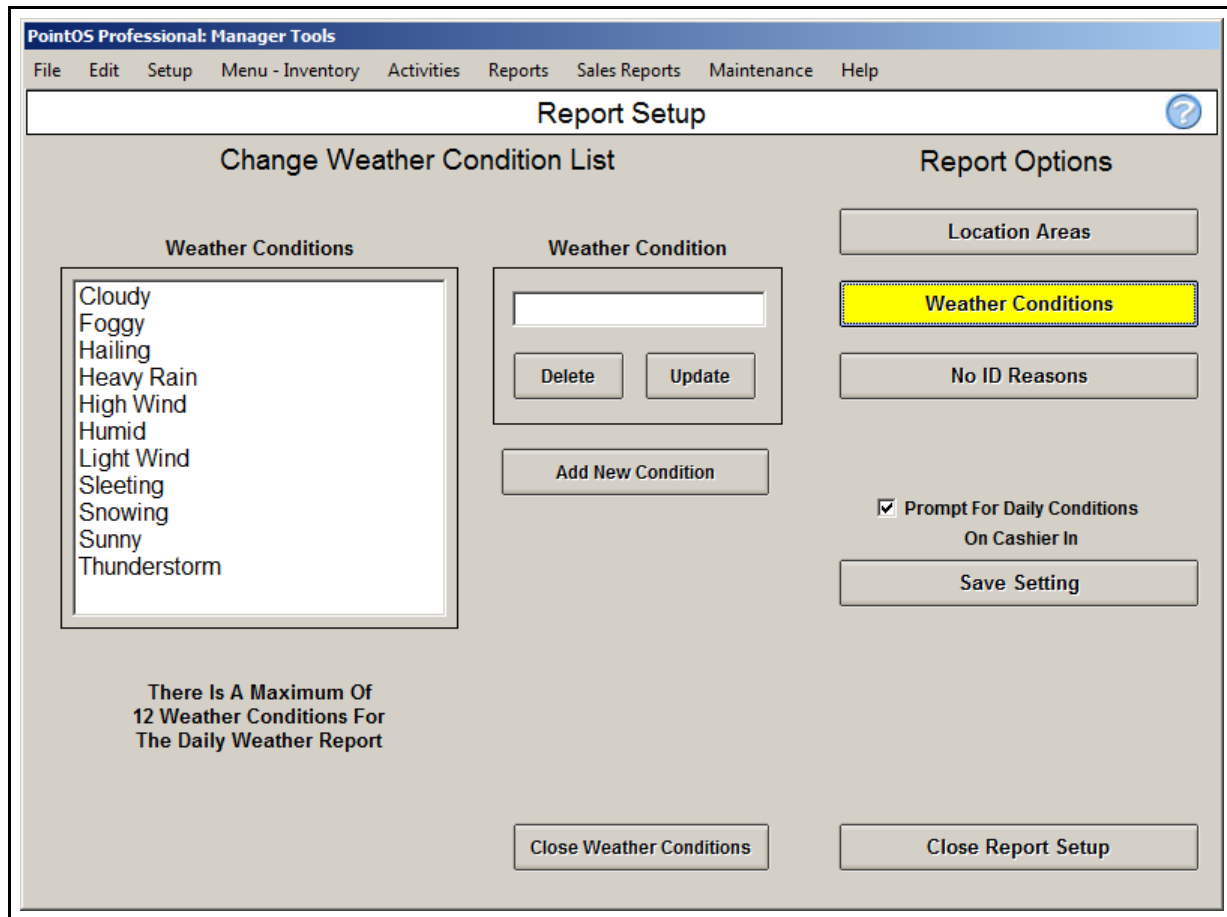


Figure 49: Report Setup: Change Weather Condition List

To add a new weather condition, complete the following steps:

NOTE: There is a maximum of 12 Weather Conditions. If you have already added weather conditions, you cannot add more than 12. You must delete or update other conditions instead.

1. Select **Add New Condition**.

The system displays an *Add New Weather Condition* dialog box.

2. Enter the name of the new weather condition.
3. Select **OK** to save the new weather condition, or select **Cancel** to close the dialog box without saving.

To edit an existing weather condition, complete the following steps:

1. Highlight the name of the weather condition you want to edit from the *Weather Conditions*.
2. Edit the weather condition name, if desired.
3. To update the weather condition, select **Update**. To delete the weather condition, select **Delete**.

When you have finished working with Weather Conditions, select **Close Weather Conditions**.

Define No ID Reasons

The No ID Reasons are the options that are displayed when a tab is started without scanning an ID.

NOTE: You can turn off the No ID Reasons prompt under the *Main Setup*. Refer to “Other Settings and Receipt Message” on page 11 for more information.

1. Select **No ID Reasons** under *Report Options*.

The system displays the *No ID Reason Setup* information.

Figure 50: Report Setup: Change Weather Condition List

To add a new reason, complete the following steps:

NOTE: There is a maximum of 5 No ID Reasons. You must delete one of the existing reasons before you can add a new one.

1. Select **Add New Reason**.

The system displays an *Add New No ID Reason* dialog box.

2. Enter the name of the new reason.
3. Select **OK** to save the new reason, or select **Cancel** to close the dialog box without saving.

To edit an existing reason, complete the following steps:

1. Highlight the name of the reason you want to edit from the *No ID Reasons* area.
2. Edit the reason name, if desired.
3. To update the reason, select **Update**. To delete the reason, select **Delete**.

When you have finished working with No ID Reasons, select **Close No ID Reasons**.

Weather Reporting

1. Check the **Prompt for Daily Conditions on Cashier In** box to track weather conditions.
2. Select **Save Setting**.

Close Report Setup

When you have finished setting up reports, select **Close Report Setup**.

Room Setup

The *Room Setup* screen allows you to define the layout of your establishment. This is used instead of or in addition to the *Tabs* screen to give a visual representation of the table layout. Once you have set up your rooms, you can start or edit a tab by clicking on that table in the *Orders* screen.

1. To open the *Room Setup* screen, select **Room Setup** from the **Setup** menu.

The system displays the *Room Builder* screen.

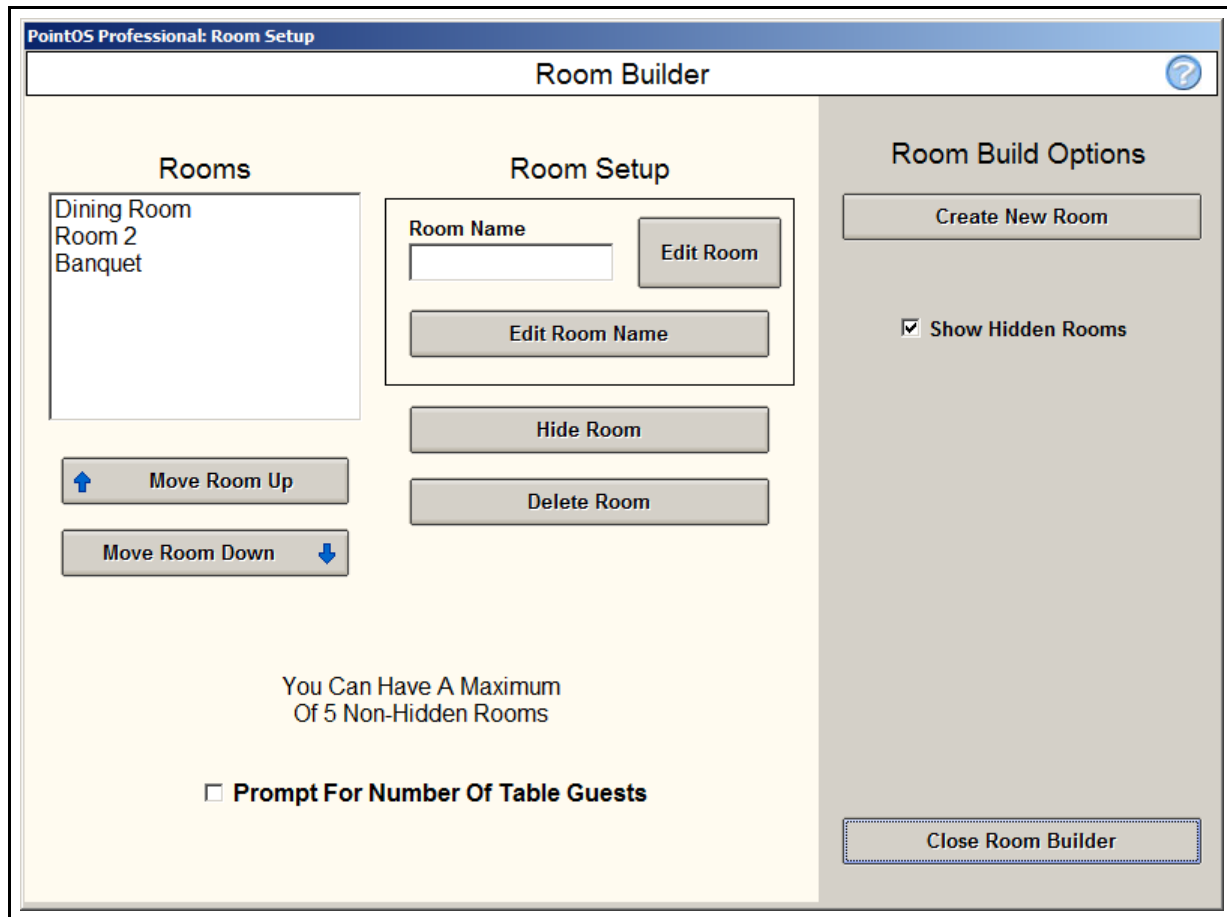


Figure 51: Room Builder: Room Setup

Define Rooms

1. Select **Create New Room** under *Room Build Options*.

The system adds a room to the *Rooms* list with a default name.

NOTE: There is a maximum of 5 visible rooms.

Edit Room Names

1. Highlight the name of the room you want to edit from the *Rooms* area.
2. Edit the room name, if desired.
3. Select **Update Room Name**. To delete the room, select **Delete Room**.

Control Room Appearance on Orders Screen

The rooms appear on the *Orders* screen from left to right.

1. Highlight the name of the room you want to move from the *Rooms* area.
2. Select **Move Room Up** to move the room to the left on the *Orders* screen.

3. Select **Move Room Down** to move the room to the right on the *Orders* screen.

Hide Rooms

1. Highlight the name of the room you want to hide from the *Rooms* area.
2. Select **Hide Room** to remove the room from the *Orders* screen without deleting it.

If you have the **Show Hidden Rooms** box checked, the *Rooms* list includes the hidden room with a note indicating that it is hidden. If the box is unchecked, the hidden room is not shown on the *Rooms* list.

To un-hide a room, complete the following steps:

1. Highlight the name of the room you want to un-hide from the *Rooms* area.
2. Select **Un-Hide Room**.

Define Tables

You can define the shape, size, and orientation of tables in your rooms.

1. Highlight the name of the room for which you want to create tables from the *Rooms* area.
2. Select **Edit Room**.

The system displays the *Room Builder* screen for the selected room.

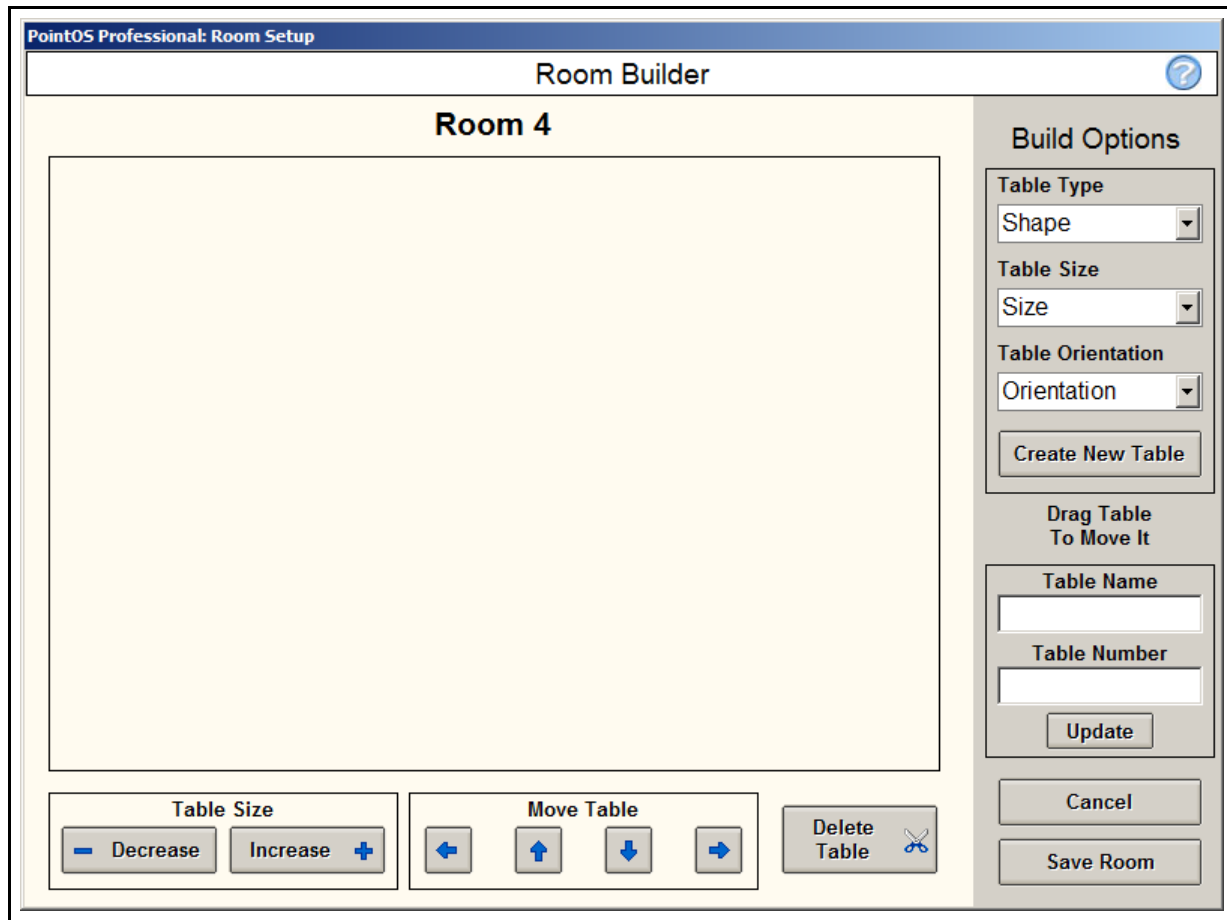


Figure 52: Room Builder: Table Setup

For each table you want to position, complete the following steps:

1. Choose the **Table Type** by selecting an option from the **Shape** drop down list.
2. Select the **Table Size**.
3. Select an option for the **Table Orientation**.
4. Select **Create New Table**.

The system displays a new table in the room.

5. To change the **Table Size**, select **Decrease** or **Increase** or the plus and minus signs next to **Width** and **Height**.
6. To move the table, select one of the directional arrows under *Move Table*. You can also just drag the table to move it.
7. To modify the table name, highlight the table.
 - Update the **Table Name**.
 - Update the **Table Number**.
 - Select **Update**.
8. To delete the table, highlight the table and select **Delete Table**.

- When you have finished with the room setup, select **Save Room**. If you want to close the *Room Builder* screen without saving changes, select **Cancel**.

The system displays a message notifying you that the settings have been saved. Then it returns to the *Room Setup* screen.

Security Settings

The *Security Settings* screen allows you to control how your employees access different areas of PointOS. It sets the minimum security level required for an employee to do each feature.

NOTE: You can set each employee's security level from the *Employee Setup* screen. Refer to "Employee Setup" on page 13 for more information.

- To open the *Security Settings* screen, select **Security Settings** from the **Setup** menu.

The system displays the *Security Settings* screen.

Figure 53: Security Settings

First, define the *Security Level Names* (right side of the screen). Complete the following steps:

- Update each name for the five levels of security available in PointOS.
- If you have changed the security level names and want to restore the default names, select **Restore Default Names**.

3. When you have finished updating the names to reflect your establishment, select **Save Level Names**.

Next, you define a security setting for each type of activity in PointOS.

1. Select a security level from each activity's drop down list.
2. If you have changed security levels for activities, and want to restore the default security settings, select **Restore Default Levels**.
3. When you have finished updating the security levels to reflect your needs, select **Save Secure Area Levels**.

When you have finished defining security levels, select **Close Security Setup**.

Server Mode Setup

The *Server Mode* screen allows you to control how the POS works when in server mode. You can put a station into server mode from the *Station Settings* area of the *Manager Dashboard*.

1. To open the *Server Mode Setup* screen, select **Server Mode Setup** from the **Setup** menu.

The system displays the *Server Mode Setup* screen.

Figure 54: Server Mode Setup

1. Select the amount of time to allow before locking the screen automatically from the **Auto Lock Station In** drop down list.
2. Check the **Go To Screen Saver** box to start the screen saver at that time. You can change your screen saver from the Windows Display Control Panel.
3. Select which printer to automatically send items ordered on a server mode station from the **Print All Items** drop down list. Refer to “Setting Up a Generic Driver for Receipt Printing” on page 164 for more information about setting up printers on the server station.
4. Check the **Prompt For Table Number** box to enable a prompt for the table number.
5. When you have finished with the server mode options, select **Save Server Mode Options**.

The system displays a message notifying you that the settings have been saved. Then it returns to the *Manager Dashboard*.

If you want to close the *Server Mode Setup* screen without saving changes, select **Close Server Mode Setup**.

Overview

The Menu-Inventory Menu includes options to allow you to take advantage of the powerful inventory control features of PointOS.

Your first step will be to create Inventory Items. These are the goods you purchase by the case, bottle, keg, or item. Refer to “Inventory Item Setup” on page 88 for more information on setting up inventory items.

Once you have your inventory established, you can create your *Order Entry* menu by creating menu items. Menu items are the items that the server rings on the register for an order. Refer to “Menu Setup” on page 74 for more information on setting up your menu items.

Inventory items can be menu items, but they can also be one ingredient in a recipe. Recipes are what link inventory items with menu items. For example, you may have one vodka menu item, but vodka may also be an ingredient in other menu items, like Long Island Ice Tea. Refer to “Item Recipes” on page 95 for more information on creating recipes.

Once you have linked your inventory with menu items using recipes, the appropriate inventory count is automatically deducted when a menu item is sold. This information allows you to keep track of your inventory counts, as well as costs for menu items. You can even print order lists.

Menu Setup

The *Menu Setup* screen allows you to make your own *Order Entry* screen. You can set prices, modifiers, and other menu item settings. You also use this screen to navigate to the *Change Menu Item Options* screen.

1. To open the *Menu Setup* screen, select **Menu Setup** from the **Menu - Inventory** menu.

The system displays the *Menu Setup* screen.

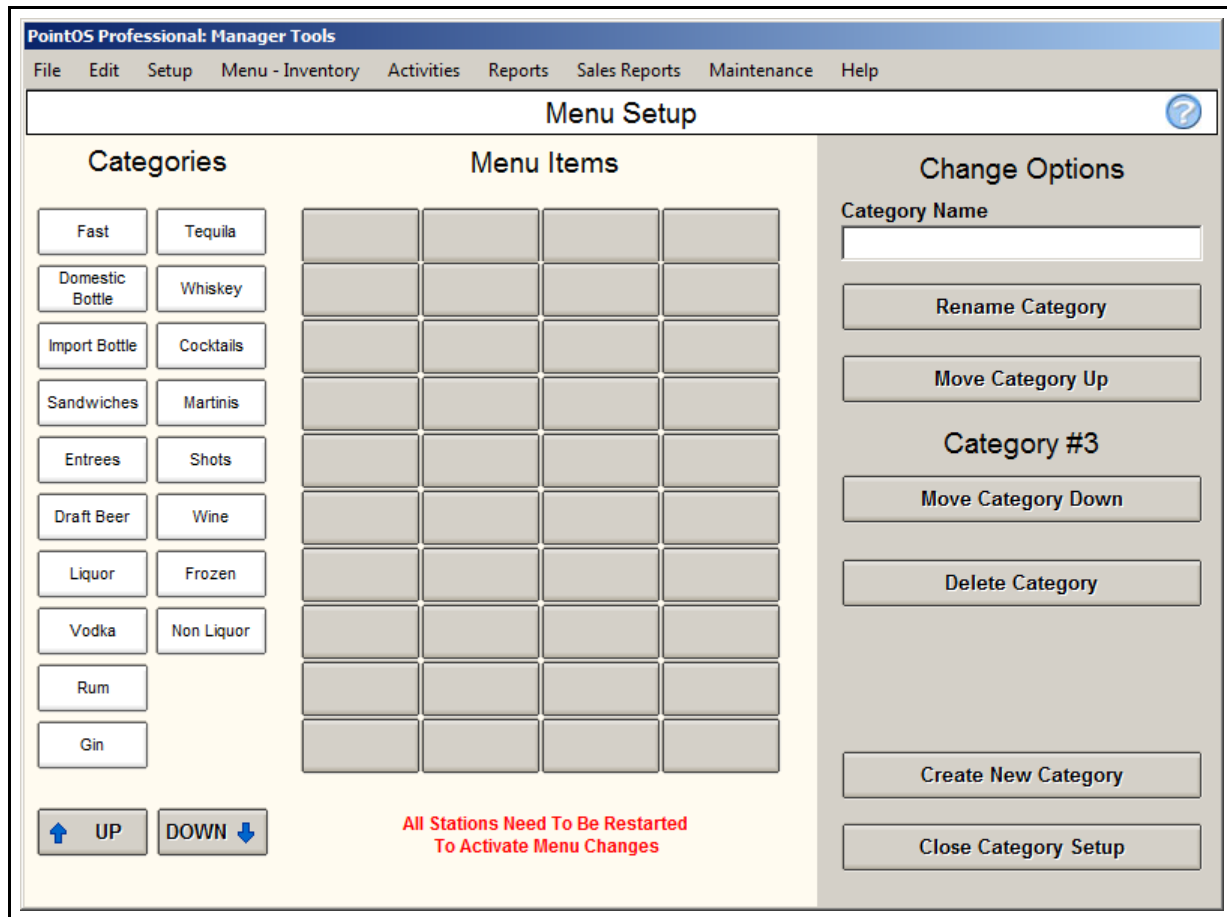


Figure 55: Menu Setup

Categories

The left side of the screen lists all of your categories. You can use the **UP** and **DOWN** arrows to navigate through a long list of categories.

Define a New Category

To define a new category, complete the following steps:

1. Select **Create New Category** from the *Change Options* area.

The system displays the *Add New Category* dialog box.

2. Enter the **Category Name**.
3. Select **OK**.

The system displays a message notifying you that the category has been added.

Change or Delete a Category

To change the categories, complete the following steps:

1. Highlight the name of the category you want to edit in the *Categories* area.
2. Edit the **Category Name**, if desired, and select **Rename Category**.
3. To reorganize the list of *Categories*, use the **Move Category Up** and **Move Category Down** selections until the highlighted category is in the desired position in the list.
4. To delete the category, select **Delete Category**.

Menu Items

When you highlight a category in the *Categories* area, the Menu Items associated with that category are shown in the *Menu Items* area.

You can add new menu items, create shortcuts to items in other categories, or hide menu items. Once a menu item has been created, it cannot be deleted.

Add a New Menu Item

1. From the *Categories* area, highlight the category in which you want the new menu item to appear.
2. Select a blank icon in the *Menu Items* area.

The system displays the *Add New Menu Item* dialog box.

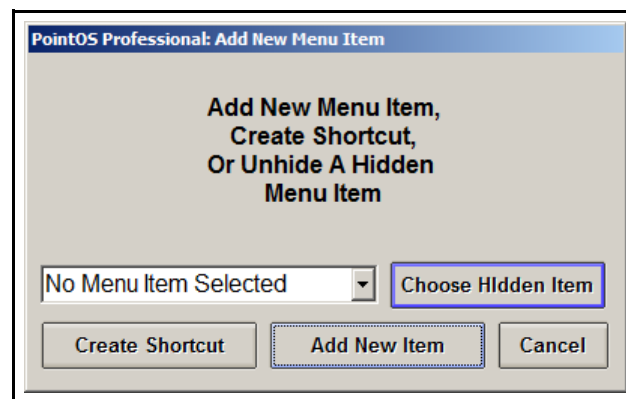


Figure 56: Add New Menu Item

3. Select **Add New Item**.
4. The system displays the *Change Menu Item Options* screen. Refer to “Change Menu Item Options” on page 78 for more information on entering the information for the new menu item.

Create or Delete a Shortcut

Shortcuts are used when you want to include a menu item in more than one category. For example, you may have your most used items in a category called Fast Items. Each of those items can also appear in other categories using shortcuts.

1. From the *Categories* area, highlight the category in which you want the new shortcut to appear.

2. Select a blank icon in the *Menu Items* area.

The system displays the *Add New Menu Item* dialog box.

3. Select **Create Shortcut**.

The system displays another dialog box.

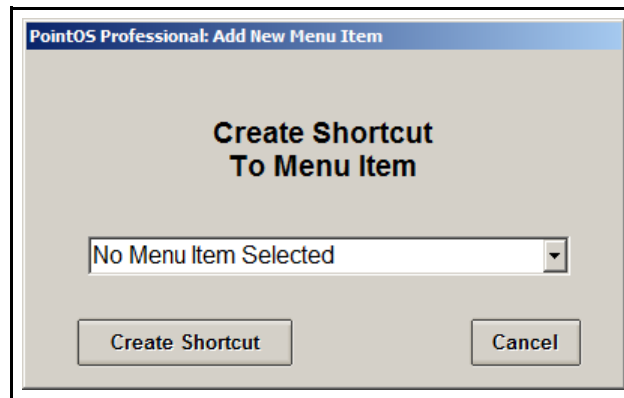


Figure 57: Create Shortcut To Menu Item

4. Select one of your menu items from the drop down list.
5. Select **Create Shortcut** to include the selected menu item in this category. Select **Cancel** to close the dialog box without creating a shortcut.

To delete a shortcut, complete the following steps:

1. From the *Categories* area, highlight the category in which you want to delete a shortcut.
2. Select the shortcut you want to delete.

The system displays a dialog box asking whether you want to remove the shortcut or edit the original item.



Figure 58: Shortcut

3. Select **Remove Shortcut**. Select **Cancel** to close the dialog box without removing the shortcut.

Show a Hidden Menu Item

Items may be hidden from the *Change Menu Item Options* screen. Refer to “Change Menu Item Options” on page 78 for more information.

NOTE: You can use the **Hide Menu Item** option (on the *Change Menu Item Options* screen) to rearrange the order of the menu items. After you have hidden the item, select a blank button in *Menu Items* area where you would like to reposition the menu item.

To unhide the item (so you can change it, move it, or reinstate it to the *Order Entry* screen), complete the following steps:

1. From the *Categories* area, highlight the category in which you want the hidden item to appear.
2. Select a blank button in the *Menu Items* area.

The system displays the *Add New Menu Item* dialog box.

3. The drop down list includes any items in your system that are currently hidden. Select the desired item.
4. Select **Choose Hidden Item**.

Change Menu Item Options

1. From the *Categories* area, highlight the category in which the item you want to change appears.
2. Select the menu item you want to change in the *Menu Items* area.

The system displays the *Change Menu Item Options* screen. Refer to “Change Menu Item” on page 84 for more information on changing the information for the menu item.

If the item you selected is actually a shortcut, the system displays a dialog box asking whether you want to remove the shortcut or edit the original item. Select **Edit Original Item** to open the *Change Menu Item Options* screen for that item.

NOTE: You cannot delete a menu item, because if they item has previously been ordered, this will negatively affect reporting.

Change Menu Item Options

The *Change Menu Item Options* screen allows you to add a new menu item, course separator, or gift card, or change or hide existing menu items. You can also use this screen to navigate to the *Modifier Setup* screen or the *Menu Item Recipe Setup* screen for a selected menu item.

New Menu Item

To enter a new menu item, complete the following steps:

1. Open a *Change Menu Item Options* screen for a new item from the *Menu Setup* screen. Refer to “Add a New Menu Item” on page 76 for the steps to open the *Change Menu Item Options* screen.

The system displays the *Change Menu Item Options* screen for the new item.

Figure 59: Change Menu Item Options - New Menu Item

2. To save data entry time, select an item from the **Same Features As** drop down list. Select an item similar to the one you are entering to automatically fill in many of the required fields.
3. To enter a regular menu item, leave the **Item Type** as **Menu Item**.
4. Enter the **Menu Item Name**.
5. To associate a graphic with the menu item, complete the following steps:
 - Make sure the graphic you want is in the **Buttons** folder of the **PointOS Database**. Many graphics are available when you load PointOS. If you want to use a custom graphic, make sure it is a BMP format graphic sized at 33 x 70 pixels.
 - On the *Change Menu Item Options* screen, select **Graphic**.
 - The system displays an alert reminding you of the size and format requirements. Select **OK**.
 - The system opens a *Choose Button Graphic* dialog box open to the **Buttons** folder of the **PointOS Database**. Select the appropriate graphic and select **Open**.
 - The selected graphic is displayed in the *Select Graphic* area. It will also show on the *Menu Setup* screen for that item and the *Order Entry* screen for that item.

6. If the menu item has age requirements, select the age from the **Minimum Age** drop down list. By choosing a minimum age, the item will only show up for customers who have met that age requirement.
7. To use a button color instead of or in addition to the graphic, select a color from the **Button Color** drop down list.
8. Check one or more of the appropriate boxes to **Apply Taxes**. These options control the sales tax collection for the item. Refer to “Taxes Setup” on page 38 for more information on setting up sales tax.
9. The *Printing* area allows you to choose an additional printer. This is useful when a food item is printed to the kitchen or you are using a service bar. To print the selected menu item to an additional printer, select the desired printer from the **Additional Printer** drop down list and check the **Print To This Additional Printer** box. Refer to “Setup Additional Printers” on page 23 for more information on setting up additional printers.
10. Select an item from the **Modifier Group** drop down list to include a defined Modifier with the menu item. The modifiers are setup on the Modifier Setup screen. Refer to “Modifier Setup” on page 85 for more information.
11. Check the **Force Modifiers** box to open the *Choose Item Modifiers* dialog each time the selected menu item is chosen during Order Entry. If you leave the box unchecked, modifiers are still available on the *Order Entry* screen, but the *Choose Item Modifiers* dialog box does not come up when the item is ordered.
12. Select **Edit Modifiers** to open the *Menu Modifier Setup* screen. Refer to “Modifier Setup” on page 85 for more information.
13. Enter the **Item Prices**:
 - Enter the **Full Price**.
 - Enter the price for customers identified as your Special Discount defined on the *Discount Setup* screen. Refer to “Discount Setup” on page 47 for more information.
 - Enter the **Happy Hour** price.
 - Enter the price for **Employees**.
 - Enter the **Special Price** (to be used with Auto Pricing specials).
 - Check the **Discountable** box to indicate that the item can be discounted.
 - To have the server or wait staff set pricing, check the **User Enters Item Price** box. The price fields become the minimum price for that menu item and that type of pricing.
14. To use **Auto Pricing**:
 - First select the day of the week to use the automatic special pricing.
 - Select the time to start the automatic pricing special from the **Start Time** drop down list.
 - Select the time to end the automatic pricing special from the **End Time** drop down list.
 - Enter the name of the special in the **Special Name** field.
 - Check the **Auto Price** box.
 - Repeat for other days and times, as desired.

NOTE: If many items are on special, we recommend that you use the *Happy Hour Setup* instead. Refer to “Happy Hour Setup” on page 51 for more information.

15. To add the UPC code from a product's packaging to the menu item, select **Add UPC Bar Code**. The system displays an *Add UPC Bar Code* dialog box. Scan the bar code to add it to the menu item. Using this option will allow you to scan an item to add it to a customer's order.
16. Select **Create Item Recipe** to open the *Menu Item Recipe Setup* screen. Refer to "Item Recipes" on page 95 for more information.
17. Select **Hide Item** to remove the item from the current position in the menu. The system displays a warning message to confirm that you want to hide the menu item. All Shortcuts to that menu item are also deleted. Select **Yes** to confirm that you want to hide the item.
18. Select **Save** to save the menu item or **Cancel** to close the *Change Menu Item Options* screen without saving the item. After you save the item, the system returns to the *Menu Setup* screen.

Course Separator

Course Separators provide a separation between parts of a meal like appetizers, entree and desserts. These are only seen on the kitchen prints and do not appear on the customer's check. They do not have any prices attached.

To use course separators, you must add them as a menu item. Complete the following steps:

1. Open a *Change Menu Item Options* screen for a new item from the *Menu Setup* screen. Refer to "Add a New Menu Item" on page 76 for the steps to open the *Change Menu Item Options* screen.
2. Select **Course Separator** from the **Item Type** drop down list.

The *Change Menu Item Options* screen displays the options relevant to a course separator.

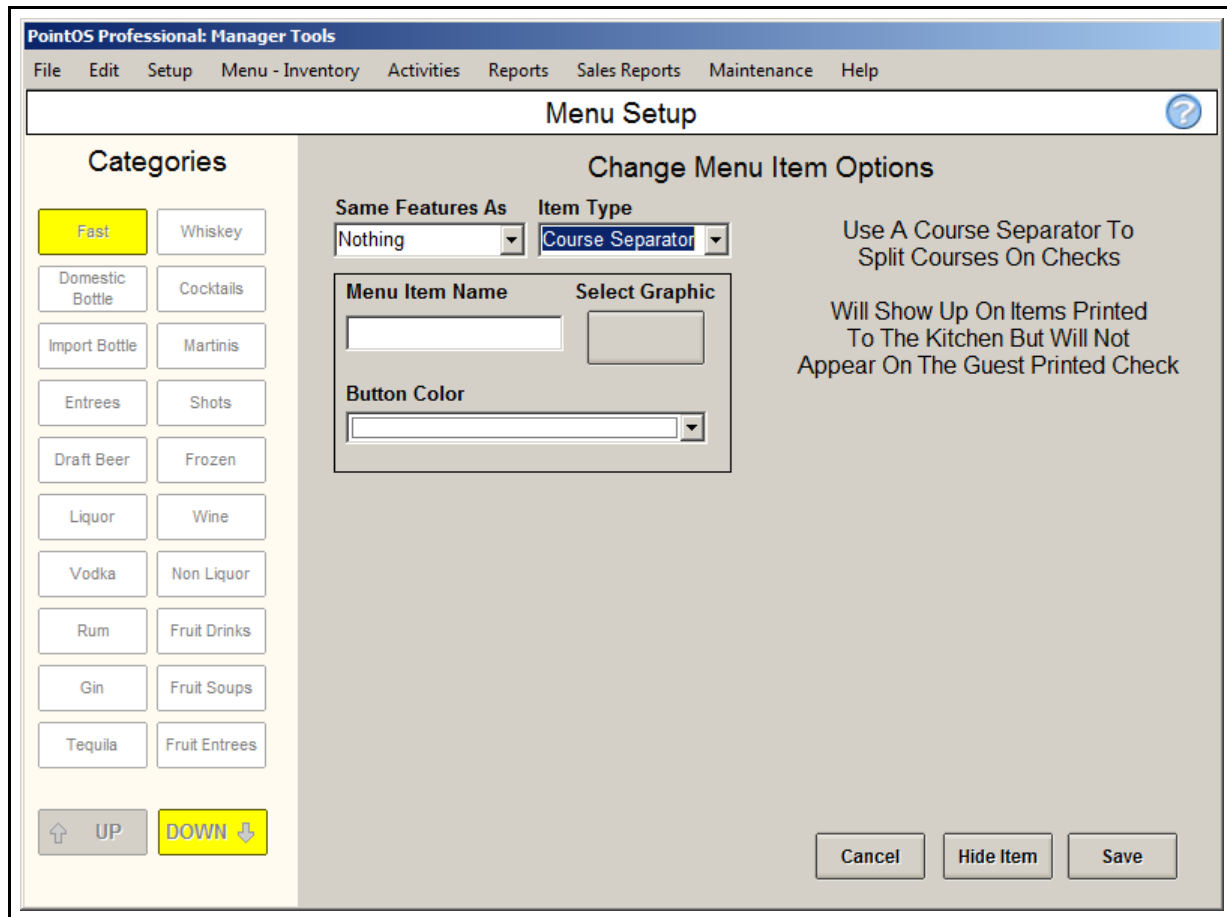


Figure 60: Course Separator Change Menu Item Options

3. Enter the **Menu Item Name**.
4. To associate a graphic with the menu item, complete the following steps:
 - Make sure the graphic you want is in the **Buttons** folder of the **PointOS Database**. Many graphics are available when you load PointOS. If you want to use a custom graphic, make sure it is a BMP format graphic sized at 33 x 70 pixels.
 - On the *Change Menu Item Options* screen, select **Graphic**.
 - The system displays an alert reminding you of the size and format requirements. Select **OK**.
 - The system opens a *Choose Button Graphic* dialog box open to the **Buttons** folder of the **PointOS Database**. Select the appropriate graphic and select **Open**.
 - The selected graphic is displayed in the *Select Graphic* area. It will also show on the *Menu Setup* screen for that item and the *Order Entry* screen for that item.
5. To use a button color instead of or in addition to the graphic, select a color from the **Button Color** drop down list.
6. Select **Hide Item** to remove the item from the current position in the menu. The system displays a warning message to confirm that you want to hide the menu item. All Shortcuts to that menu item are also deleted. Select **Yes** to confirm that you want to hide the item.

7. Select **Save** to save the menu item or **Cancel** to close the *Change Menu Item Options* screen without saving the item. After you save the item, the system returns to the *Menu Setup* screen.

Gift Card

A Merchant Warehouse account is required for using gift cards. You must acquire the gift cards through Merchant Warehouse.

To sell gift cards, you must also add them as a menu item. Complete the following steps:

1. Open a *Change Menu Item Options* screen for a new item from the *Menu Setup* screen. Refer to “Add a New Menu Item” on page 76 for the steps to open the *Change Menu Item Options* screen.
2. Select **Gift Card** from the **Item Type** drop down list.

The *Change Menu Item Options* screen displays the options relevant to a gift card.

Figure 61: Gift Card Change Menu Item Options

3. Enter the **Menu Item Name**.
4. To associate a graphic with the menu item, complete the following steps:
 - Make sure the graphic you want is in the **Buttons** folder of the **PointOS Database**. Many graphics are available when you load PointOS. If you want to use a custom graphic, make sure it is a BMP format graphic sized at 33 x 70 pixels.

- On the *Change Menu Item Options* screen, select **Graphic**.
 - The system displays an alert reminding you of the size and format requirements. Select **OK**.
 - The system opens a *Choose Button Graphic* dialog box open to the **Buttons** folder of the **PointOS Database**. Select the appropriate graphic and select **Open**.
 - The selected graphic is displayed in the *Select Graphic* area. It will also show on the *Menu Setup* screen for that item and the *Order Entry* screen for that item.
5. To use a button color instead of or in addition to the graphic, select a color from the **Button Color** drop down list.
 6. Enter the **Gift Card Price** of the selected gift card.
 7. Select **Hide Item** to remove the item from the current position in the menu. The system displays a warning message to confirm that you want to hide the menu item. All Shortcuts to that menu item are also deleted. Select **Yes** to confirm that you want to hide the item.
 8. Select **Save** to save the menu item or **Cancel** to close the *Change Menu Item Options* screen without saving the item. After you save the item, the system returns to the *Menu Setup* screen.

Change Menu Item

1. Open the *Change Menu Item Options* screen for a selected item from the *Menu Setup* screen. Refer to “Change Menu Item Options” on page 78 for the steps to open the *Change Menu Item Options* screen.

The system displays the *Change Menu Item Options* screen for that item.

The screenshot shows the 'Menu Setup' window with the 'Change Menu Item Options' tab selected. The window is divided into several sections:

- Categories:** A list of categories on the left, including Fast, Tequila, Domestic Bottle, Whiskey, Import Bottle, Cocktails, Sandwiches, Martinis, **Entrees** (highlighted), Shots, Draft Beer, Wine, Liquor, Frozen, Vodka, Non Liquor, Rum, Fruit Drinks, Gin, and Fruit Soups. Navigation buttons 'UP' and 'DOWN' are at the bottom.
- Same Features As:** A dropdown menu set to 'Nothing'.
- Item Type:** A dropdown menu set to 'Menu Item'.
- Menu Item Name:** A text field containing 'Meat Loaf'.
- Select Graphic:** A button labeled 'Meat Loaf' with a yellow background.
- Minimum Age:** A dropdown menu set to 'No Min Age'.
- Button Color:** A color selection dropdown set to yellow.
- Apply Taxes:** Checkboxes for 'Tax 1 (3%)' (checked), 'Tax 2 (0%)', 'Tax 3 (0%)', and 'Tax 4 (0%)'.
- Printing:** A section for 'Additional Printer' with a dropdown set to 'No Additional Printer' and a checkbox for 'Print To This Additional Printer'.
- Modifiers:** A section for 'Modifier Group' with a dropdown set to 'Entree' and a checkbox for 'Force Modifiers'.
- Item Prices:** A section for pricing, including 'Full Price' (\$7.95), 'ITB' (\$5.00), 'Employee Price' (\$5.00), 'Happy Hour Price' (\$5.00), and 'Special Price' (\$5.00). It also has checkboxes for 'Discountable' and 'User Enters Item Price'.
- Auto Prices:** A section for 'Day Of The Week' with a table for days (Sun-Sat) and 'Start Time' (12:00:00 AM) and 'End Time' (12:15:00 AM) dropdowns. It also has fields for 'Special Price' and 'Special Name'.

At the bottom, there are buttons for 'Add UPC Bar Code', 'Create Item Recipe', 'Cancel', 'Hide Item', and 'Save'.

Figure 62: Change Menu Item Options - Existing Menu Item

- Update the menu item information as necessary. Refer to “New Menu Item” on page 78 for more information on each part of the *Change Menu Item Options* screen.

Modifier Setup

Modifier groups are a collection of modifiers that can be applied to a single menu item or multiple menu items. Modifiers are used to make changes to a menu item during ordering and are printed on the customer’s receipt. Modifiers can have an additional cost associated with them, a discount associated with them (or negative price), or no price, which would be used for the service or kitchen staff to prepare the item. Modifiers can also change inventory depletion amounts for items on your menu.

- To open the *Menu Modifier Setup* screen, select **Modifier Setup** from the **Menu-Inventory** menu.

The system displays the *Menu Modifier Setup* screen.

PointOS Professional: Manager Tools

File Edit Setup Menu - Inventory Activities Reports Sales Reports Maintenance Help

Menu Modifier Setup

Modifier Groups

- Beer Special
- CRAFT BREW
- Domestic Beer
- Entrees
- Food
- Fruit
- Import Beer
- Mid-Liquor
- Premium Beer
- Top Shelf Liquor

Up Down

Modifiers

Modifier Order Does Not Matter
Modifiers Are Shown In Alphabetical Order

All Stations Need To Be Restarted
To Activate Modifier Changes

Change Options

Modifier Name
Domestic Beer

Rename Modifier Group

Delete Modifier Group

Create New Modifier Group

Close Modifier Setup

Figure 63: Menu Modifier Setup

Modifier Groups

The left side of the screen lists all of your modifier groups. You can use the **UP** and **DOWN** arrows to navigate through a long list of groups.

Define a New Modifier Group

To define a new modifier group, complete the following steps:

1. Select **Create New Modifier Group** from the *Change Options* area.

The system displays the *Add New Modifier Group* dialog box.

2. Enter the **Modifier Group Name**. A modifier group can be named anything, but this name must be unique. The customer does not see these names.
3. Select **OK**.

The system displays a message notifying you that the modifier group has been added.

Change or Delete a Modifier Group

To change the modifier groups, complete the following steps:

1. Highlight the name of the modifier group you want to edit in the *Modifier Groups* area.
2. Edit the **Modifier Name**, if desired, and select **Rename Modifier Group**.
3. To delete the modifier group, select **Delete Modifier Group**.

Modifiers

When you highlight a modifier group in the *Modifier Groups* area, the Modifiers associated with that group are shown in the *Modifiers* area.

You can add, change, or delete modifiers. Each group can have a maximum of 11 modifiers.

NOTE: A Custom Modifier is automatically included in all modifier groups. The Customer Modifier will allow the server to enter instructions in the *Order Entry* screen.

Change Modifier Options

1. From the *Modifier Groups* area, highlight the group in which you want the new modifier to appear.
2. To add a new modifier, select a blank icon in the *Modifiers* area. To change or delete an existing modifier, select the icon for that modifier.

The system displays the *Change Modifier Options* screen.

Figure 64: Change Modifier Options

3. If the modifier has the same pricing as another item, select the item from the **Same Price As** drop down list to automatically fill the price field.
4. Enter or update the **Modifier Name**. Use something descriptive. Modifiers are shown in alphabetical order. Modifier names are seen by servers and customers.
5. Enter or update the **Modifier Price**.
6. Select an item from the **Forced Sub Modifier Group** drop down list to update inventory of modifiers set up as inventory items.
7. To delete the modifier, select **Delete**.
8. Select **Save** to save the changes and return to the previous screen or **Cancel** to close the screen without saving changes.

Inventory Item Setup

The *Inventory Item Setup* screen allows you to set up your inventory control. You also use this screen to navigate to the *Change Inventory Item* screen.

1. To open the *Inventory Item Setup* screen, select **Inventory Item Setup** from the **Menu - Inventory** menu.

The system displays the *Inventory Item Setup* screen.

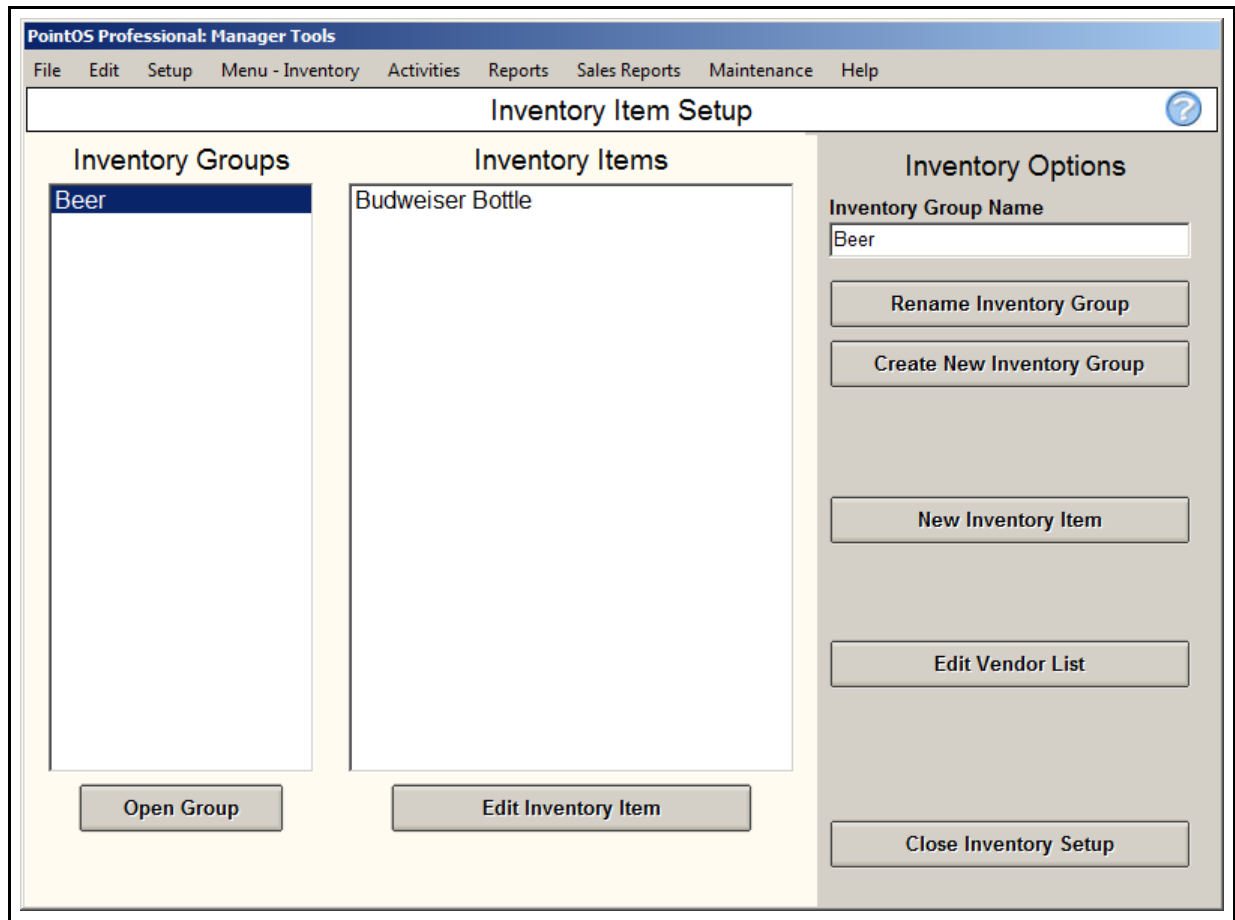


Figure 65: Inventory Item Setup

Inventory Groups

The left side of the screen lists all of your inventory groups. Inventory Groups are used to keep inventory items together. Inventory items must be part of an inventory group.

Define a New Inventory Group

To define a new category, complete the following steps:

1. Enter the **Inventory Group Name**.
2. Select **Create New Inventory Group** from the *Inventory Options* area.

The system displays a message notifying you that the inventory group has been added.

NOTE: You can also define Inventory Groups on the fly as you create new inventory items. Refer to “Change Inventory Item” on page 90 for more information.

Change or Delete an Inventory Group

To change or delete an inventory group, complete the following steps:

1. Highlight the name of the inventory group you want to edit in the *Inventory Groups* area.

2. Select **Open Group**.
3. Edit the **Inventory Group Name**, if desired.
4. To rename the group, select **Rename Inventory Group**. To delete the category, select **Delete Category**.

Inventory Items

When you highlight an inventory group in the *Inventory Groups* area, the Inventory Items associated with that group are shown in the *Inventory Items* area.

To add a new Inventory Item, select **New Inventory Item**.

To change an existing Inventory Item, highlight it in the *Inventory Items* area and select **Edit Inventory Item**.

Whether you are adding a new Inventory Item, or changing an existing item, the system opens the *Change Inventory Item* screen. Refer to “Change Inventory Item” on page 90 for more information.

Vendor List

Inventory Items must also have vendors associated with them. Select **Edit Vendor List** to open the *Vendor Setup* screen. Refer to “Vendor Setup” on page 93 for more information about the Vendor List.

Close Inventory Setup

When you have finished setting up your inventory, select **Close Inventory Setup**.

Change Inventory Item

The *Change Inventory Item* screen allows you to enter the item information and specifics of each inventory item. It also allows you to link your inventory item to menu items with single item recipes. If you set Par Amounts, the system can make recommendations on how much of an item you should purchase.

1. From the *Inventory Item Setup* screen, select **New Inventory Item**, or highlight the inventory item you want to change and select **Edit Inventory Item**.

The system displays the *Change Inventory Item* screen.

Figure 66: Change Inventory Item

2. Enter or edit the **Item Name**.
3. Select an option from the **Location** drop down list to indicate where the item is stored.
4. To add the UPC code from a product's packaging to the inventory item, select **Add UPC Bar Code**. The system displays an *Add UPC Bar Code* dialog box. Scan the bar code to add it to the inventory item. The *Item Description* area displays the description associated with the UPC Bar Code.

NOTE: A UPC Bar Code is required to use this feature.

5. Select the appropriate **Item Inventory Group** from the drop down list. If you would like to add a new group, select **Add Group**. The system displays a dialog box. Enter the name for the new Inventory Group and select **OK**.
6. Select an option from the **Item Type** drop down list. You can select bottles, cans, liquor, keg beer, wine, food by case, food by item, or merchandise. The type of item influences the other inventory specifics you will enter in a moment.
7. Select an option from the **Vendor** drop down list. If you would like to add a new group, select **Add Vendor**. The system opens the **Vendor Setup** screen. Refer to "Vendor Setup" on page 93 for more information.

8. Inventory items should be associated with at least one menu item. This is done using recipes. To add a single item recipe association, select the appropriate menu item from the **Item Name** drop down list. Refer to “Item Recipes” on page 95 for more information on creating recipes to link your inventory with menu items.
9. Select **Make Item Inactive** to remove the item from your current inventory lists.
10. Enter or update the **Inventory Specifics** according to the following chart:

If the Item Type is...	Then complete the following Inventory Specifics
Bottles, Cans, Food by Case	<ul style="list-style-type: none"> • Enter the number of bottles, cans, or servings in the Bottles/Cans/Servings per Case field. • Enter the appropriate cost in the Cost Per Case field. • Enter the Volume per Bottle/Can. (Not applicable for Food by Case) • Select the Volume Measurement type from the drop down list. (Not applicable for Food by Case) • The system calculates and displays the Cost Per Bottle/Can/Serving based on the bottles/cans/servings per case and the cost per case amounts. • Enter the amount you want to always have on hand in the Par Amount field. • Enter the amount you have now in the Starting (Full) Cases field, if desired. • Enter the number of Loose Bottles/Cans/Servings on Hand, if desired. • Select Update to update the calculations with any new data. • The system displays the calculated Starting Value On Hand.
Liquor, Keg, Wine	<ul style="list-style-type: none"> • Enter the Cost Per Bottle/Keg. • Enter the Volume Per Bottle/Keg. • Select the Volume Measurement type from the drop down list. • The system calculates and displays the Cost Per Ounce based on the bottle/keg volume and cost. • Enter the amount you want to always have on hand in the Par Amount field. • Enter the number of full Bottles/Kegs on Hand, if desired. • For partial bottles/kegs on hand, select an amount from the Starting Part Bottle/Keg drop down list. • Select Update to update the calculations with any new data. • The system displays the calculated Starting Value On Hand.

If the Item Type is...	Then complete the following Inventory Specifics
Food by Item, Merchandise	<ul style="list-style-type: none"> Enter the number of Items on Hand, if desired. Select Update to update the calculations with any new data. Enter the Cost per Item. Enter the amount you want to always have on hand in the Par Amount field. The system displays the calculated Value On Hand.

11. Select **Save** to save your changes or **Cancel** to close the *Change Inventory Item Setup* without saving your changes.

Vendor Setup

The *Vendor Setup* screen allows you to set up your vendors. You can keep track of the people you buy from and use this information to print order sheets by vendor.

- To open the *Vendor Setup* screen, select **Vendor Setup** from the **Menu - Inventory** menu.

The system displays the *Vendor Setup* screen.

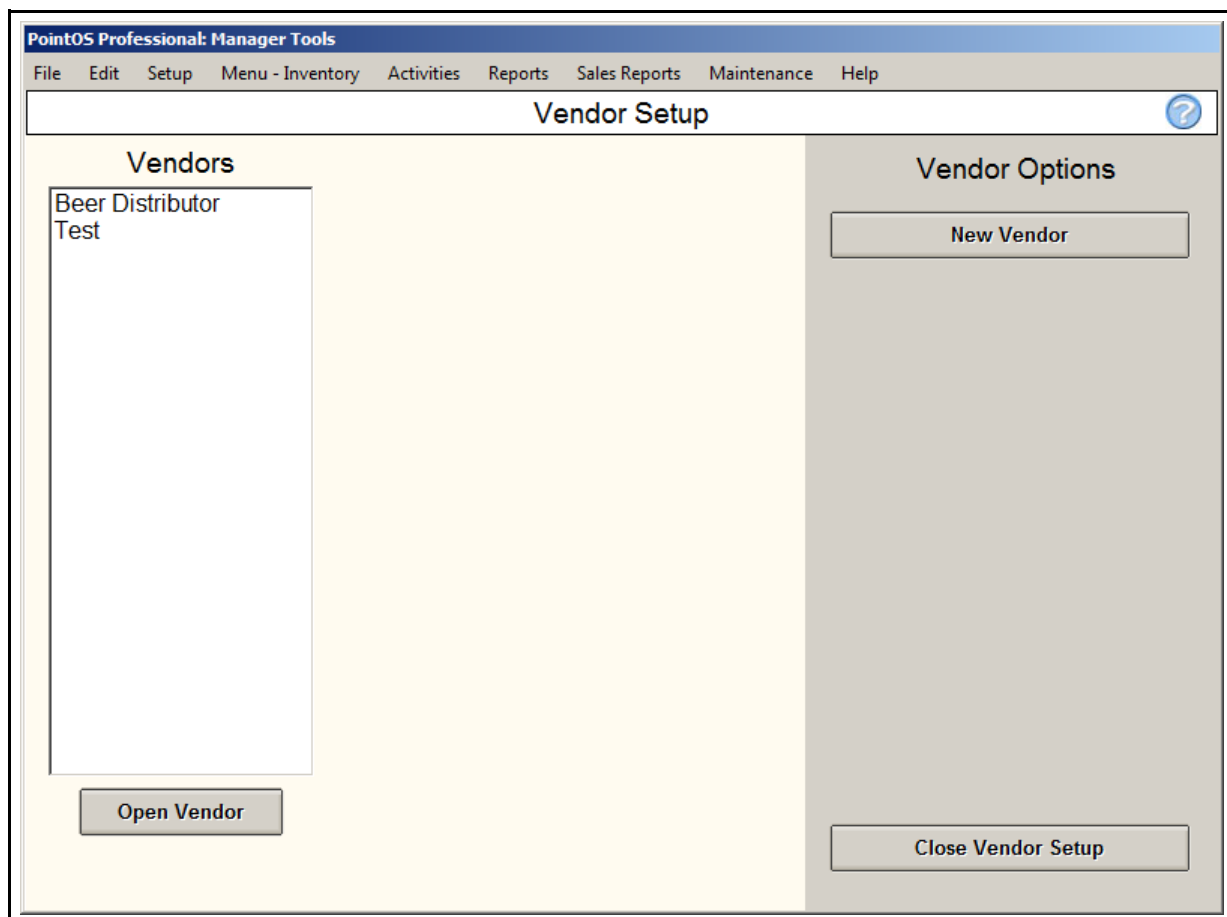


Figure 67: Vendor Setup

The left side of the screen lists all of your vendors.

To define a new vendor, **Select New Vendor**. The system opens a blank *Vendor Information* screen.

To change vendor information, complete the following steps:

1. Highlight the name of the vendor you want to edit in the *Vendors* area.
2. Select **Open Vendor**.

The system opens the *Vendor Information* screen for that vendor.

Close Vendor Setup

When you have finished setting up your vendors, select **Close Vendor Setup**.

Vendor Information

To enter a new vendor or update existing vendor information, you complete the *Vendor Information* screen.

The screenshot shows the 'Vendor Setup' window in PointOS Professional: Manager Tools. The window has a menu bar with 'File', 'Edit', 'Setup', 'Menu - Inventory', 'Activities', 'Reports', 'Sales Reports', 'Maintenance', and 'Help'. The main area is titled 'Vendor Setup' and is divided into three panels. The left panel, 'Vendors', lists 'Beer Distributor' and 'Test' and has an 'Open Vendor' button. The middle panel, 'Vendor Information', contains input fields for 'Vendor Name', 'Account Number', 'Vendor Address', 'Vendor Phone', 'Extension', 'Sales Person', and 'Notes', along with 'Cancel' and 'Save' buttons. The right panel, 'Vendor Options', has a 'New Vendor' button and a 'Close Vendor Setup' button at the bottom.

Figure 68: Vendor Information

1. Enter the **Vendor Name**. This field is required.
2. Enter your **Account Number** with the vendor, if desired.

3. Enter the **Vendor Address**.
4. Enter the **Vendor Phone** Number and **Extension**.
5. Enter the name of the **Sales Person**.
6. Enter any **Notes** about the vendor.
7. Select **Save** to save the vendor reference information or select **Cancel** to close the *Vendor Information* without saving.

Item Recipes

The *Menu Item Recipe Setup* screen allows you to set up the ingredients that go into a menu item. The system then deducts these ingredients from inventory when you sell that menu item.

1. To open the *Menu Item Recipe Setup* screen, select **Item Recipes** from the **Menu - Inventory** menu.

The system displays the *Menu Item Recipe Setup* screen.

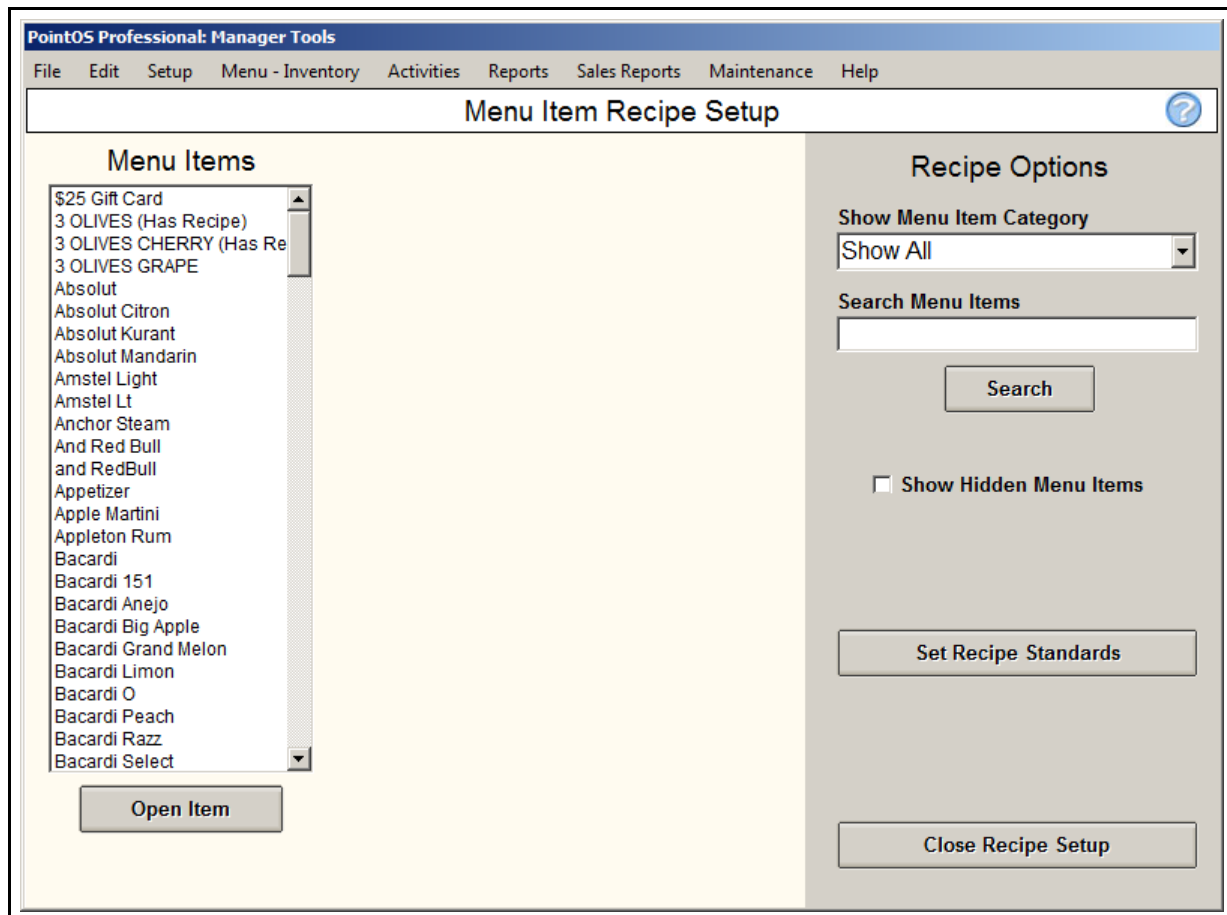


Figure 69: Menu Item Recipe Setup

Menu Items

The left side of the screen lists your *Menu Items*. Menu items that are currently hidden are not listed. To include hidden items in the list, check the **Show Hidden Menu Items** box.

To narrow the list of menu items to one Menu Item Category, select a category from the **Show Menu Item Category** drop down list.

To search for a specific menu item, enter one or more letters in the **Search Menu Items** field and select **Search**. The system returns the *Menu Items* list that include any matches of those characters in that Menu Item Category.

To open the *Item Recipe Information* screen for a menu item, highlight the menu item in the *Menu Items* list and select **Open Item**. The system displays the *Item Recipe Information* for that menu item.

Recipe Standards

Recipe Standards help save time when entering recipes. Select **Set Recipe Standards** from the *Menu Item Recipe Setup* screen to open the *Recipe Standards* area.

The screenshot shows the 'Menu Item Recipe Setup' window. On the left, under 'Recipe Standards', there are two input fields: 'Standard Shot Size' with the value '1.25' and 'Standard Draught Cup Size' with the value '12'. Below these are 'Save Recipe Standards' and 'Close Recipe Standards' buttons. On the right, under 'Recipe Options', there is a 'Show Menu Item Category' dropdown set to 'Show All', a 'Search Menu Items' text box, a 'Search' button, a checked 'Show Hidden Menu Items' checkbox, a prominent yellow 'Set Recipe Standards' button, and a 'Close Recipe Setup' button at the bottom right.

Figure 70: Recipe Standards

1. Enter the standard number of ounces in the **Standard Shot Size** field.
2. Enter the **Standard Draught Cup Size** in ounces.
3. Select **Save Recipe Standards** to save the standards and return to the *Menu Item Recipe Setup* screen or select **Close Recipe Standards** to close the area without saving changes.

Item Recipe Information

The *Item Recipe Information* screen allows you to select up to five inventory items as ingredients in a recipe for the selected menu item. It also allows you to save serving directions and displays the calculated cost per serving.

1. To open the *Item Recipe Information* screen for a menu item, highlight the menu item in the *Menu Items* list on the *Menu Item Recipe Setup* screen and select **Open Item**.

The system displays the *Item Recipe Information* for that menu item.

Figure 71: Item Recipe Setup

2. For up to five ingredients, select the inventory item from the **Ingredient** drop down lists.
3. For each selected ingredient, enter the **Ingredient Amount**.
4. Enter any mixing or serving directions in the *Serving Directions* area. This information will be printed along with the recipe from the *Order Entry* screen.

The system displays the calculated **Cost Per Item** based on the ingredients selected and the information stored on the inventory item for each ingredient.

5. Select **Save Item Recipe** to save the recipe information.

Close Recipe Setup

When you have finished setting up your recipes, select **Close Recipe Setup**.

Modifier Recipes

The *Modifier Recipe Setup* screen allows you to set up the ingredients that go into a modifier. The system then deducts these ingredients from inventory when you sell a menu item using that modifier. You can use modifiers to change a menu item by volume, percent, or add a new ingredient.

1. To open the *Modifier Recipe Setup* screen, select **Modifier Recipes** from the **Menu - Inventory** menu.

The system displays the *Modifier Recipe Setup* screen.

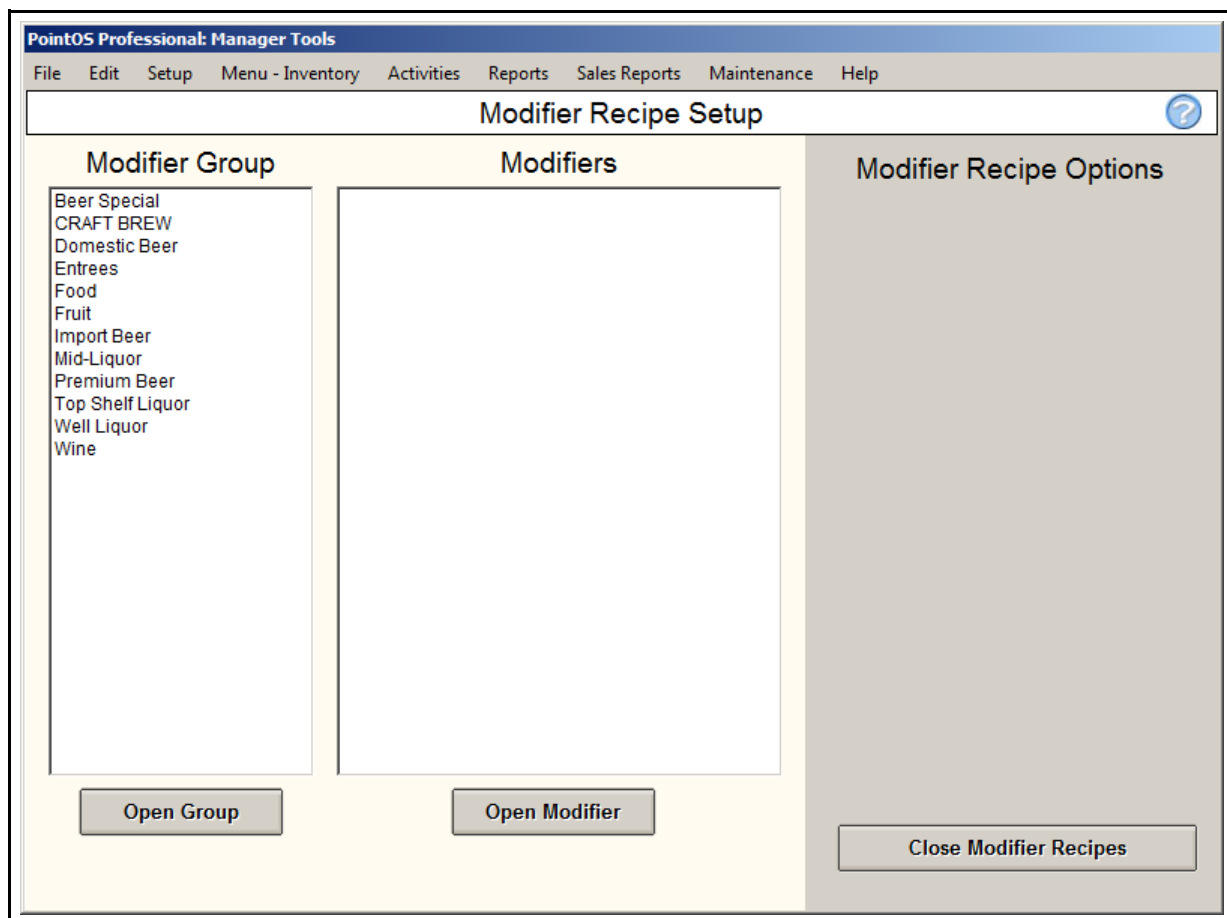


Figure 72: Modifier Recipe Setup

The left side of the screen lists your *Modifier Groups*.

To open the *Modifier Recipe Information* screen for a modifier, complete the following steps:

1. Highlight the modifier group in the *Modifier Group* list.
2. Select **Open Group**.

The system displays the modifiers in that group in the *Modifiers* area.

3. Highlight the modifier you want to change in the *Modifiers* area.
4. Select **Open Modifier**.

The system displays the *Modifier Options* for that menu item.

Figure 73: Modifier Options

The *Modifier Options* screen allows you to choose from several options on how the selected modifier affects inventory. You can change the selected menu item by increasing or decreasing the volume (such as for a half drink or a tall drink). You can change the menu item by having it decrease or increase an item by a percent. You can also select to add another ingredient to a menu item.

1. If the modifier does not affect inventory, select **No Change To Inventory** from the **Modifier Type** drop down list.
2. To change a menu item by a percentage, complete the following steps:
 - Select **Change Item By Percent** from the **Modifier Type** drop down list.
 - Select **Increase or Decrease** from the **Increase or Decrease** drop down list.
 - Enter the percent change in the **Percent Change** field.
3. To change a menu item by volume, complete the following steps:
 - Select **Change Item By Volume** from the **Modifier Type** drop down list.
 - Select **Increase or Decrease** from the **Increase or Decrease** drop down list.

- Enter the percent change in the **Volume Change** field.
4. To change a menu item by adding an ingredient, complete the following steps:
 - Select **Add Ingredient** from the **Modifier Type** drop down list.
 - Select the inventory item from the **Modifier Ingredient** drop down list.
 - Enter the amount in the **Ingredient Amount** field.
 5. Select **Save Modifier Recipe** to save the recipe information.

Close Modifier Recipes

When you have finished setting up your modifier recipes, select **Close Modifier Recipes**.

Menu Item List

The *Menu Item List* shows all menu items currently in the system, including the item category, minimum age requirements, whether there is a recipe for that item, and the cost of the item.

1. To open the *Menu Item List* screen, select **Menu Item List** from the **Menu - Inventory** menu.

The system displays the *Menu Item List* screen.

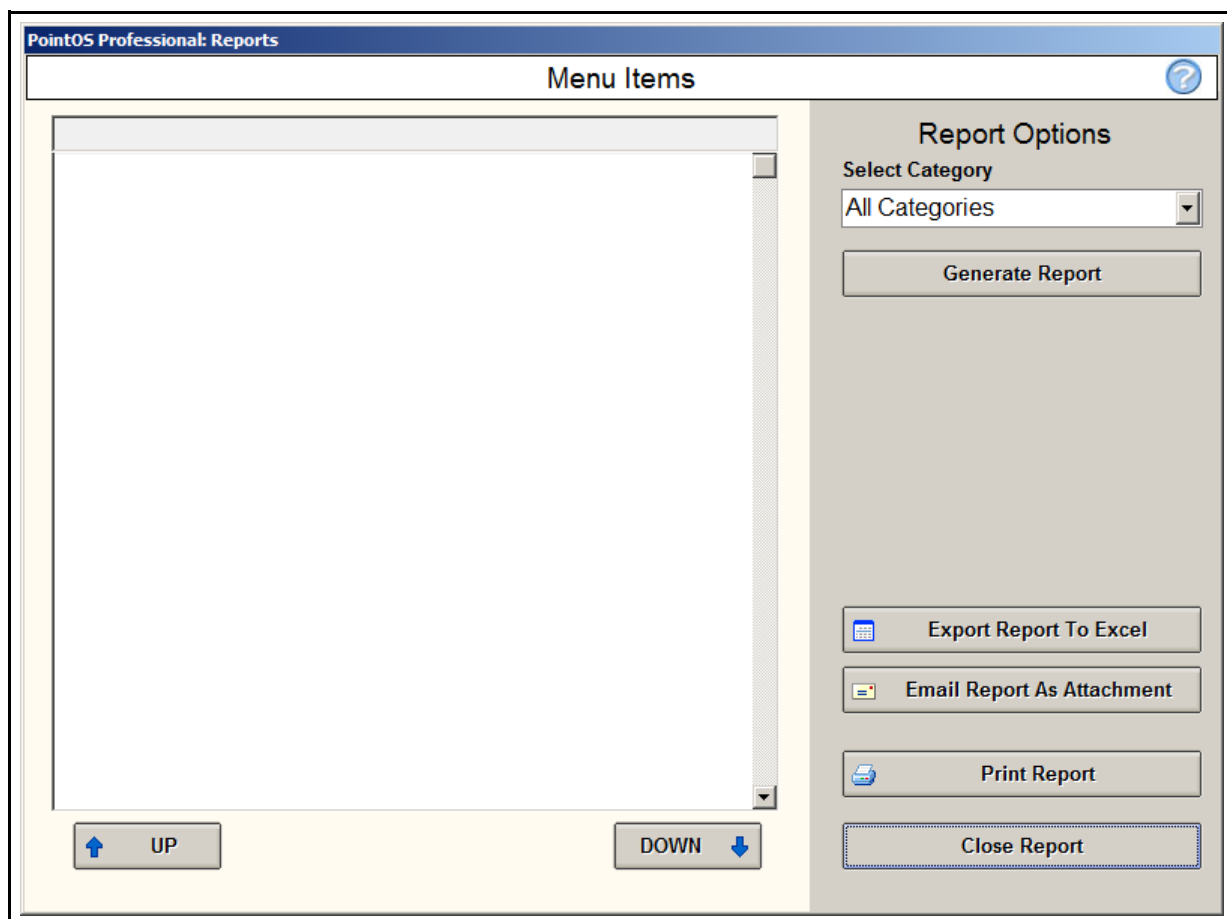


Figure 74: Menu Items

2. To narrow the list of menu items to one Menu Item Category, select a category from the **Select Category** drop down list.
3. Select **Generate Report**.

The system displays the menu items. Use the **Up** and **Down** arrows to navigate through the list of menu items.

4. To export the report to Excel format, select **Export Report to Excel**. The system opens a *Save As* dialog box. Enter a name for the report and select **Save**. The report opens in Excel format.
5. To email the report, select **Email Report as Attachment**. The system opens the *Email Report* screen. Refer to “Email Report” on page 141 for more information.
6. To print the report, select **Print Report**.
7. When you have finished viewing the Menu Item List, select **Close Report**.

Inventory Count

The *Inventory Item Counts* screen shows inventory items and allows you to enter physical counts of items. You can print an inventory report and use this information to figure out your inventory shrinkage.

You can sort the list by vendor, type, group, and/or location.

1. To open the *Inventory Item Counts* screen, select **Inventory Count** from the **Menu - Inventory** menu.

The system displays the *Inventory Item Counts* screen.

PointOS Professional: Manager Tools

File Edit Setup Menu - Inventory Activities Reports Sales Reports Maintenance Help

Inventory Item Counts

Item Name	Type	Group	Vendor
Budweiser Bottle	Bottles	Beer	Beer Distributor

Inventory Count Setup

Sort By Vendor: All Vendors

Sort By Type: Bottles

Sort By Group: All Groups

Sort By Location: All Locations

Show Sorted Items

Find By UPC Bar Code Scan

Zero All Inventory Amounts

Close Inventory Item Counts

Starting Inventory

Full Cases: 0

Loose Bottles: 0

Add/Remove Inventory

Full Cases: 0

Loose Bottles: 0

Last Updated:

Save Inventory Item

Figure 75: Inventory Item Counts

2. To sort the Inventory Items List:
 - Select a vendor from the **Sort by Vendor** drop down list, if desired.
 - Select a inventory type from the **Sort By Type** drop down list, if desired.
 - Select a group from the **Sort By Group** drop down list, if desired.
 - Select a location from the **Sort By Location** drop down list, if desired.
 - Select **Show Sorted Items**.
 - Alternatively, you can use your UPC scanner to find an item. Select **Find By UPC Bar Code Scan** and scan the item's barcode.

The system displays the Inventory Items that match your sorting requirements.

3. Highlight the Inventory Item you want to update in the Inventory Items list.

The *Starting Inventory* area lists the full and partial amounts on hand for that item as of the Last Updated date.

4. To add inventory, enter a number in the **Full** and **Loose** fields. To remove inventory, enter a minus sign followed by the number in the **Full** and **Loose** fields.
5. Select **Save Inventory Item**. Changes made to inventory from the Manager area are available in the **Inventory Change Report**.

NOTE: To start your inventory over, select **Zero All Inventory Amounts**. Warning! This cannot be undone and will reset all inventory items to zero.

When you have finished your inventory update, select **Close Inventory Item Counts**.

Print Count Sheet

Count sheets are blank worksheets that include all inventory items. This is useful for doing a physical inventory count of your location.

To print the inventory count sheets, select **Print Count Sheet** from the **Menu - Inventory** menu.

NOTE: Your report printer must be setup. Refer to “Report Printer Setup” on page 30 for more information.

The system prints the count sheets on your report printer.

Overview

The Activities Menu includes options to many of the functions that you will use to schedule and manage your bar, club, or restaurant. You can create schedules for employees and entertainment. You can also manage your customer information.

Adjust Time Cards

The *Adjust Time Cards* screen allows you to adjust, correct, or delete an employee's time card.

1. To open the *Adjust Time Cards* screen, select **Adjust Time Cards** from the **Activities** menu.

The system displays the *Adjust Time Cards* screen.

Figure 76: Adjust Time Cards

Find a Time Card to Adjust

The left side of the *Adjust Time Cards* screen lists your employees' clock in times. To search for a particular time card in the list, complete the following steps:

1. Select an employee name from the **Employee Names** drop down list. To include inactive employees in the list, check the **Show Inactive Employees** box.
2. Select the drop down list next to **Search by Clock in Date** to find a time card on a specific date. Select the appropriate date from the calendar.
3. Select **Search**.

The system displays any time cards that match the search criteria in the *Clock Ins* area.

Adjust a Time Card

To correct a past time card, complete the following steps:

1. Highlight the time card you want to adjust in the *Clock Ins* area.
2. Select **Modify Times**.

The system displays the time card details in the middle of the *Adjust Time Cards* screen.

3. If the employee uses more than one job description/salary, you can select a new salary from the **Job Description/Salary** drop down list.
4. Change the **Clock In Time** by selecting a new options from the **Clock In Date** and/or **Clock In Time** drop down lists.
5. Change the **Clock Out Time** by selecting a new options from the **Clock Out Date** and/or **Clock Out Time** drop down lists.

The system displays the total number of hours worked.

6. Select **Modify Time Card**.

The system displays a message alerting you that the time card has been updated.

Delete a Time Card

To delete a past time card, complete the following steps:

1. Highlight the time card you want to delete in the *Clock Ins* area.
2. Select **Delete Time Card**.

The system displays a warning message to verify that you want to delete this time card.

3. Select **Yes** to continue or **No** to close the warning without deleting the time card.

The system displays a message alerting you that the time card has been deleted.

Close the Time Cards

When you have finished adjusting time cards, select **Close Adjust Time Cards**.

Employee Schedule

The *Employee Schedule* screen allows you to set up the weekly schedule for employees. Employees can view this schedule from the Time Clock area of PointOS.

1. To open the *Employee Schedule* screen, select **Employee Schedule** from the **Activities** menu.

The system displays the *Employee Schedule* screen.

The screenshot shows the 'Employee Schedule' window in PointOS Professional. The title bar reads 'PointOS Professional: Manager Tools'. The menu bar includes 'File', 'Edit', 'Setup', 'Menu - Inventory', 'Activities', 'Reports', 'Sales Reports', 'Maintenance', and 'Help'. The main window title is 'Employee Schedule'. Below the title bar, there are navigation buttons: 'Back One Week' (left arrow) and 'Forward One Week' (right arrow). The central text indicates the 'Week Starting Sunday, July 19, 2009'. Below this, there are seven columns representing the days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. Each column contains a large empty box for scheduling, with the date (e.g., 7/19/09) and an 'Add' button at the bottom. At the bottom of the window, there is an 'Add To Schedule' section with a 'Copy Previous Week' button, 'Time In' and 'Time Out' dropdown menus (both set to 12:00 pm), an 'Employee' dropdown menu (set to 'Select Employee Name'), a 'Copy To Next Week' button, and a row of four buttons: 'Email Schedule To All Employees', 'Go To Current Week', 'Save', and 'Done'.

Figure 77: Employee Schedule

Navigate the Employee Schedule

1. Select **Back One Week** to go to the previous week's schedule.
2. Select **Forward One Week** to go to the next week's schedule.
3. Select **Go To Current Week** to return to the schedule for the current week.

Create an Employee Schedule

Complete the following steps to create an employee schedule.

1. Select the employee from the **Employee** drop down list.
2. Select the starting time from the **Time In** drop down list.
3. Select the ending time from the **Time Out** drop down list.

4. Select **Add** on the day(s) to add that employee at the selected time.
5. Repeat for all the days that employee works, selecting a new **Time In** and **Time Out** for different days as necessary.
6. Repeat for all of the employees.
7. Select **Save** to save the schedule information.

You can also speed scheduling up by copying a schedule.

1. Select **Copy Previous Week** to copy the previous week's schedule to the current week.
2. Select **Copy To Next Week** to copy the current schedule to the next week.

Email the Schedule to Employees

You can email the employee schedule to all employees that have an email addresses in the employee profile.

NOTE: You must have set up email on your system. Refer to "Email Setup" on page 49 for more information.

1. Select **Email Schedule to All Employees**.

Close the Employee Schedule

When you have finished creating the employee schedule, select **Done**.

View Schedule Requests

If employees want to change their schedules, they can make schedule requests from the *Time Clock* area. The *View Schedule Requests* screen allows you to review, approve, or decline employee scheduling requests to help in creating your employee work schedule. The system notifies employees about the status of their requests.

1. To open the *View Schedule Requests* screen, select **View Schedule Requests** from the **Activities** menu.

The system displays the *View Schedule Requests* screen.

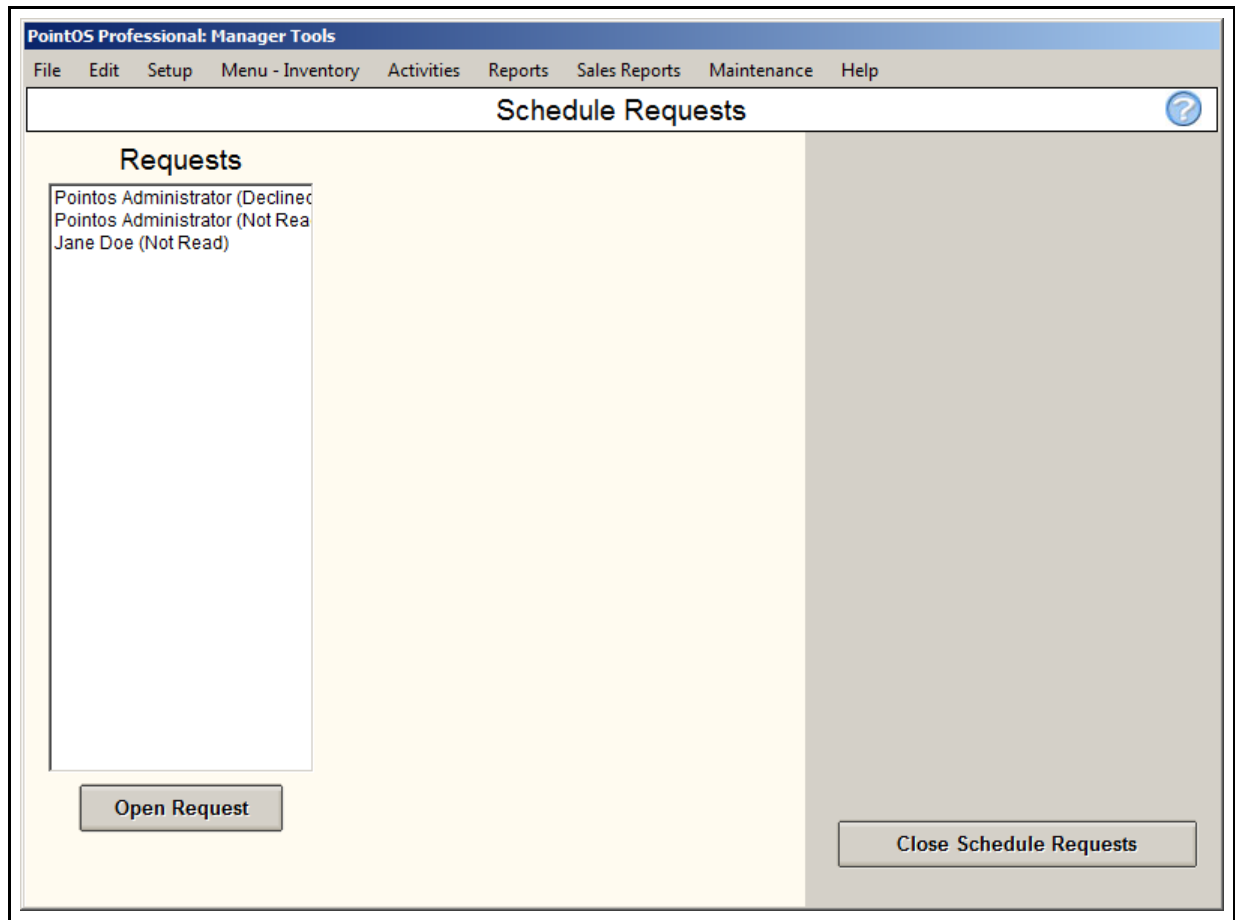


Figure 78: Schedule Requests

The system displays a list of any schedule requests, including the status of the request, in the *Requests* area.

1. Highlight the request you want to review.
2. Select **Open Request**.

The system displays the *Request Information*.

PointOS Professional: Manager Tools

File Edit Setup Menu - Inventory Activities Reports Sales Reports Maintenance Help

Schedule Requests

Requests

- Pointos Administrator (Declined)
- Pointos Administrator (Not Read)
- Jane Doe (Not Read)

Open Request

Request Information

Employee Name
Jane Doe

Requested Start Date
Monday 7/20/09

Requested End Date
Monday 7/20/09

Description
OFF BY THREE FOR DR

Request Made On
Monday 7/20/09

Manager Response

Response Description

Response Made On

Decline Request ❌

Approve Request ✅

Close Schedule Request

Figure 79: Request Information

The *Request Information* includes the employee's name, the start date of the request, the end date of the request, a description of the request, and the date the employee made the request. To respond to the request, complete the following steps:

1. Enter a message to describe your response, if desired, in the **Response Description**.
2. To decline the request, select **Decline Request**. To approve the request, select **Approve Request**.

When the employee goes to the *Time Clock* area, the system displays a message indicating whether the request is approved or declined, with any description you provided in the **Response Description**. The employee can reply if necessary.

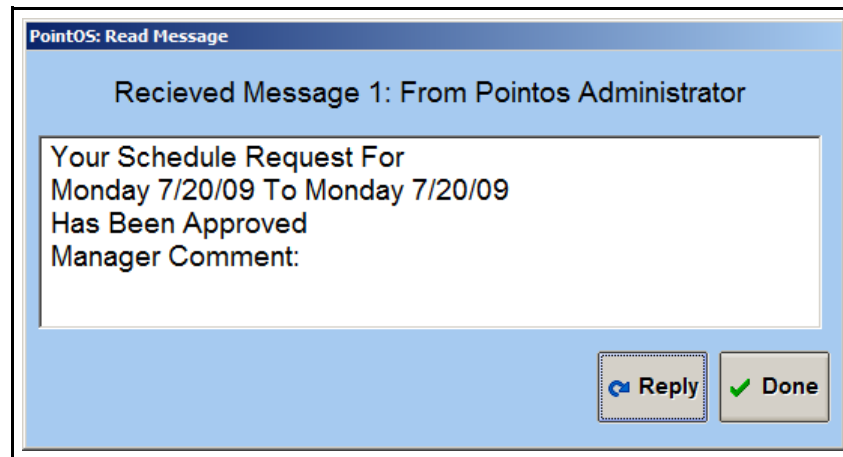


Figure 80: Schedule Request Message

Close the View Schedule Requests Screen

When you have finished viewing a request, select **Close Schedule Request**.

Select **Close Schedule Requests** to close the screen.

Customer Activities

The *Customer Activities* screen allows you to see a list of customers, search for an existing customer, or add a new customer.

1. To open the *Customer Activities* screen, select **Add/Edit Customers** from the **Activities** menu.

The system displays the *Customer Activities* screen.

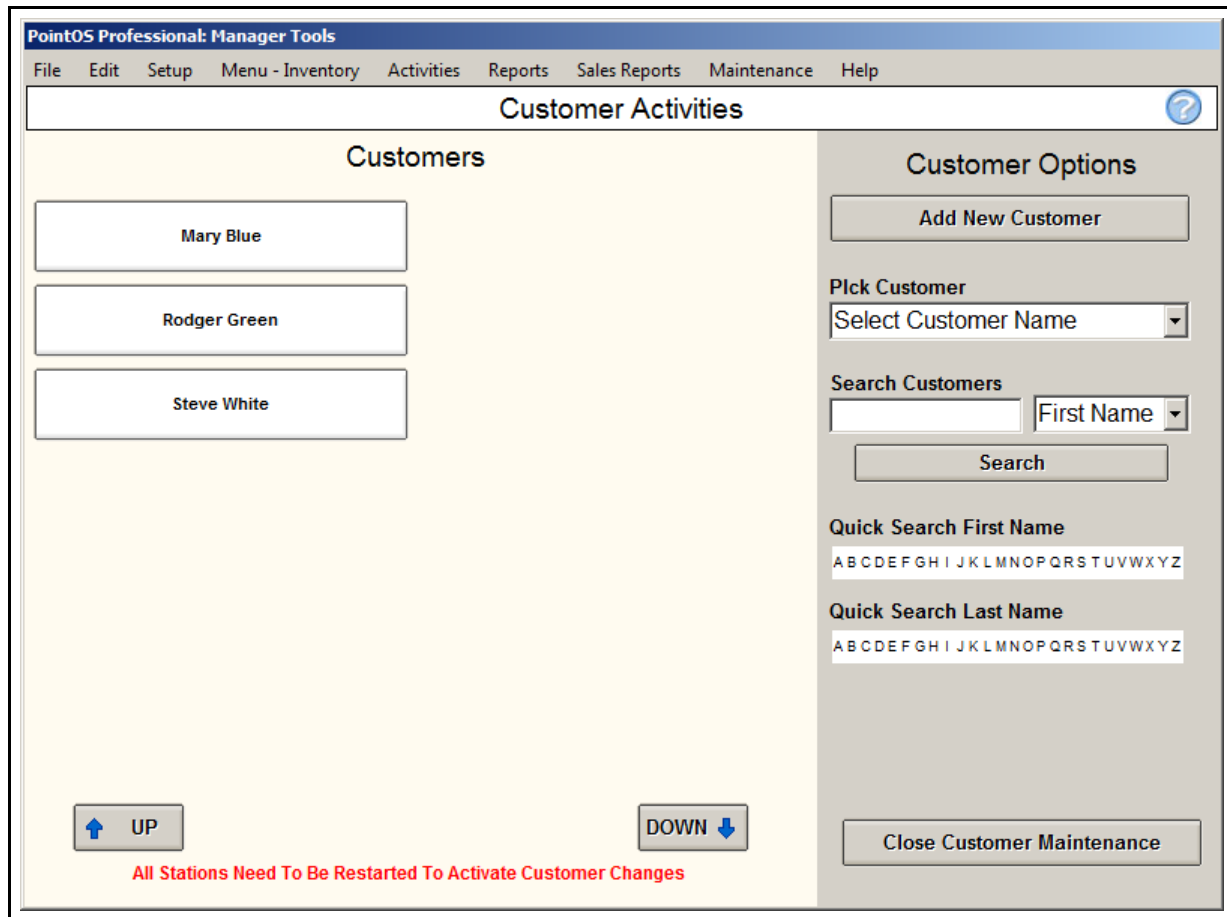


Figure 81: Customer Activities

The *Customers* area lists the customers in your system. Use the **Up** or **Down** arrows to navigate through the list.

To find a specific customer, you can select the customer's name from the **Pick Customer** drop down list. Or complete the following steps to search for a customer.

1. Enter one or more letters in the **Search Customers** field.
2. Select whether those letters are from the customer's first name or last name from the drop down list.
3. Select **Search**.

The system displays the customer record(s) that match your search criteria in the *Customers* area.

You can also select a letter from the **Quick Search First Name** or **Quick Search Last Name** to narrow the list to customers whose name starts with the selected letter.

To open the *Change Customer Options* screen, select the customer you want to update or select **Add New Customer**. Refer to "Change Customer Options" on page 112 for more information.

When you have finished viewing the customer list, select **Close Customer Maintenance**.

Change Customer Options

The *Change Customer Options* screen allows you to maintain several details about your customers, including a scanned driver's license and setting special customer pricing. If you want to scan the customer's driver's license, you must have a compatible scanner. Add the customer from the front end *Order Entry - Start New Tab - New Customer* screen. **The New Customer screen on the front end is the only entry point for photos.** Then you can view the data on this screen.

NOTE: Make sure to get the customer's permission before collecting his or her data. You must follow all local and federal privacy laws.

1. To open the *Change Customer Options* screen, go to the *Customer Activities* screen and select the desired customer or select **Add New Customer**.

The system displays the *Change Customer Options* screen.

Figure 82: Change Customer Options

Enter New Customer or Update Existing Customer

1. Enter or update the **Customer Information**:
 - Enter the customer's **First Name**.
 - Enter the customer's **Last Name**.
 - Enter the day/month/year of the customer's **Date of Birth** or select the drop down arrow to use the calendar.
 - Enter the customer's **Driver's License Number**.
2. Enter or update the **Customer Address**:
 - Enter the customer's **Street Address**.
 - Enter the customer's **Apartment Number**, if applicable.
 - Enter the customer's **City**.
 - Select the customer's **State** from the drop down list.
 - Enter the customer's **Zip Code**.
3. Enter or update the **Employee Contact Information**:
 - Enter the customer's Home Phone Number.
 - Enter the customer's Cell Phone Number.
 - Enter the customer's Email Address.
4. Check the **Subscribed to Newsletter** box to put the customer on the newsletter mailing list. If the customer wants to unsubscribe, uncheck the box to remove the customer from the newsletter mailing list.
5. If you have added the customer from the front end *Order Entry - Start New Tab - New Customer* screen, the photo is displayed here.
6. If the customer's driver's license has been scanned, select **View Customer's Driver's License** to see the *Driver's License Photo* screen. Select **Close** when you have finished viewing the license.
7. To give the customer special pricing, select a pricing option from **Customer Price Level** drop down list.
8. Enter any notes you'd like to keep about the customer in the **Customer Notes** field.
9. To include additional information about the customer, you can enter it in **Custom Field 1** or **Custom Field 2**.
10. Select **Save** button to complete the *Change Customer Options* screen or select **Cancel** to close the *Change Customer Options* screen without saving.

Ban Customer

To ban a customer, complete the following steps:

1. Check the **Customer is Banned** box.

The system enters the date and the name of the employee who banned the customer.

2. Enter a reason for banning the customer in the **Banned Reason** field.

To unban the customer, uncheck the **Customer is Banned** box.

3. Select **Save** button to complete the *Change Customer Options* screen or select **Cancel** to close the *Change Customer Options* screen without saving.

Delete Customer

1. Select **Delete Customer**.

The system displays a warning to verify that you want to delete this customer.

2. Select **Yes** to continue or **No** to close the warning without deleting the customer.

Customer Mail List

The *Customer Mail List* screen allows you to view a mailing list of all customers in your database. This list can be exported to several different formats or used to create mailing address labels.

1. To open the *Customer Mail List* screen, select **Customer Mail List** from the **Activities** menu.

The system displays the *Customer Mail List* screen.

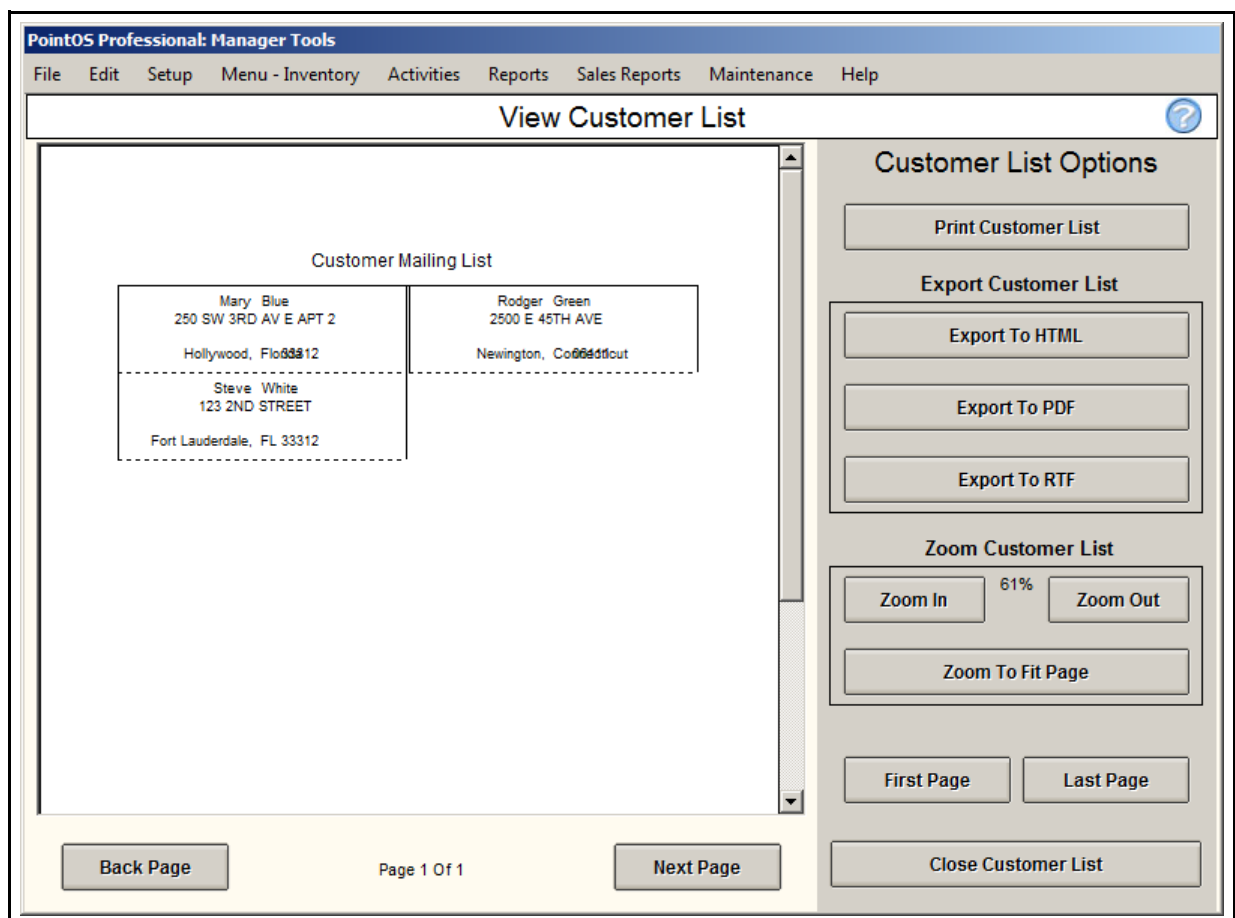


Figure 83: View Customer List

Customer Mailing List

The left side of the screen shows the customer mailing list. You can use the **Back Page** and **Next Page** arrows to navigate through several pages of customer labels. Select **First Page** to go to the first page of the list. Select **Last Page** to go to the last page of the list.

To print the customer mailing list on Avery Mailing Labels, select **Print Customer List**.

To change the view of the customer mailing list, you can use the Zoom features:

- Select **Zoom In** one or more times to enlarge the view of the customer mailing list.
- Select **Zoom Out** one or more times to reduce the view of the customer mailing list.
- Select **Zoom to Fit Page** to return the view of the customer mailing list to one page width.

Export Customer List

You can export your customer list to three different formats:

- To open the customer list in HTML (in your default web browser), select **Export to HTML**.
- To open the customer list in Adobe PDF®, select **Export to PDF**.
- To open the customer list in your default word processor in the RTF format, select **Export to RTF**.

Close Customer List

When you have finished viewing the customer list, select **Close Customer List**.

Send Email Newsletter

You can easily add a customer's email address on the *New Customer* screen of the front end of PointOS. With customers' email addresses, you can send an html newsletter. Using the send newsletter feature of PointOS is an easy way to increase your sales, by staying in touch with your customers. Let them know your entertainment schedule, news, specials, or other information.

The *Send Newsletter* screen allows you to write, format, and send an html newsletter to your customers.

1. To open the *Send Newsletter* screen, select **Send Newsletter** from the **Activities** menu.

The system displays the *Send Newsletter* screen.

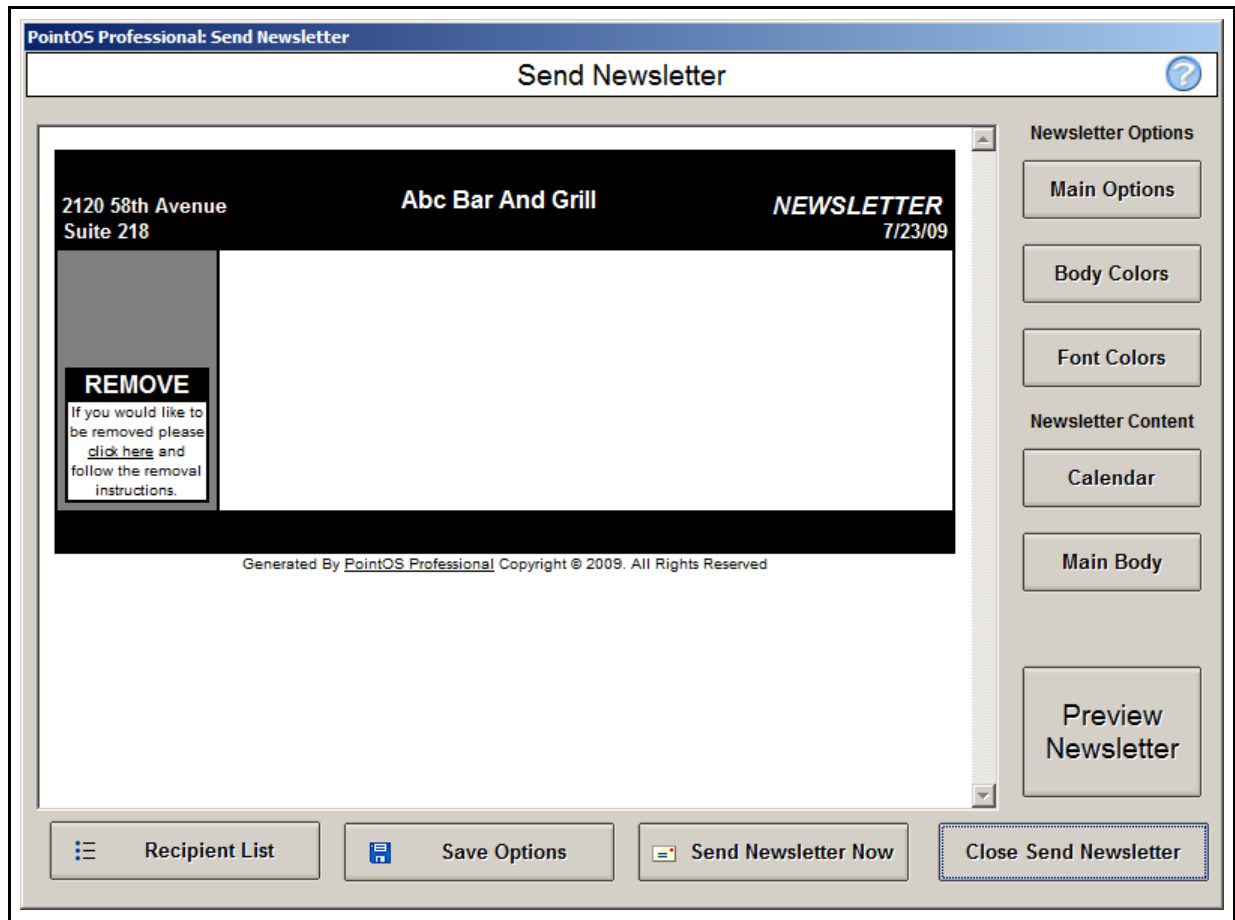


Figure 84: Send Newsletter

You can preview your newsletter from any newsletter screen by selecting **Preview Newsletter**.

Overview of Newsletter

You can save a template for your newsletters to use the same options and colors every time you send a newsletter. Once you have set the look of the newsletter, you save those options. Then you can add content, including a preset entertainment calendar, for a specific newsletter. After creating your content, you select the recipients to receive the newsletter. Then you can send the newsletter.

Before you can send newsletters, make sure you have set your SMTP address on the *Email Setup* screen. Refer to “Email Setup” on page 49 for more information.

Main Options

You will need to set your *Main Newsletter Options* first. These include the name of your company, address, logo, etc.

To open the *Main Newsletter Options*, go to the *Send Newsletter* screen and select **Main Options**.

The system displays the *Main Newsletter Options* screen.

Figure 85: Main Newsletter Options

The system displays the *Company Information* stored in PointOS.

1. If you wish your *Company Information* to appear differently on your newsletter, you can change it:
 - Update the **Company Name**.
 - Update the **Address** (line 1 and 2).
2. Enter a **Newsletter Tagline**, which will appear at the bottom of the newsletter. You may wish to use your company slogan.
3. Customers will be able to see the email addresses on your newsletter, so you may not want to use the same address that you use for reporting. To change the addresses:
 - Update the return email address for customer email comments in the **Newsletter Return Email Address**.
 - Update the customer unsubscribe email address to allow customers on your list to unsubscribe from your newsletter in the **Newsletter Unsubscribe Email Address**.

4. To include a company logo on the newsletter, complete the following steps:
 - Make sure you have saved your graphic in jpg format with an image size of 140 x 90 in the *Backgrounds* folder of your database.
 - Select **Choose Logo**.
 - The system displays an alert notifying you to make sure your graphic is in the right format and in the correct location. Select **OK**.
 - The system opens the *Choose Newsletter Logo Graphic* dialog box, open to the correct location. Choose your graphic and select **Open** or select **Cancel** to return to the *Main Newsletter Options* screen.
 - The system displays the selected logo on the *Main Newsletter Options* screen.
5. If you want to include a link to your website on the newsletter, enter the **Website URL**.
6. If you want to include a link to a map on the newsletter, complete the following steps:
 - Find your location using a map service like Google or Yahoo.
 - Copy the address link into the **Link to Map Website** field of the *Main Newsletter Options* screen.
7. To reset the Main Options to the defaults, select **Reset Defaults**.
8. When you have finished selecting the Main Options, select **Close Main Options**.

Body Colors

Next, you can select the look for your newsletter by selecting the body colors.

1. To open the *Newsletter Body Colors*, go to the *Send Newsletter* screen and select **Body Colors**.

The system displays the *Newsletter Body Colors* screen.

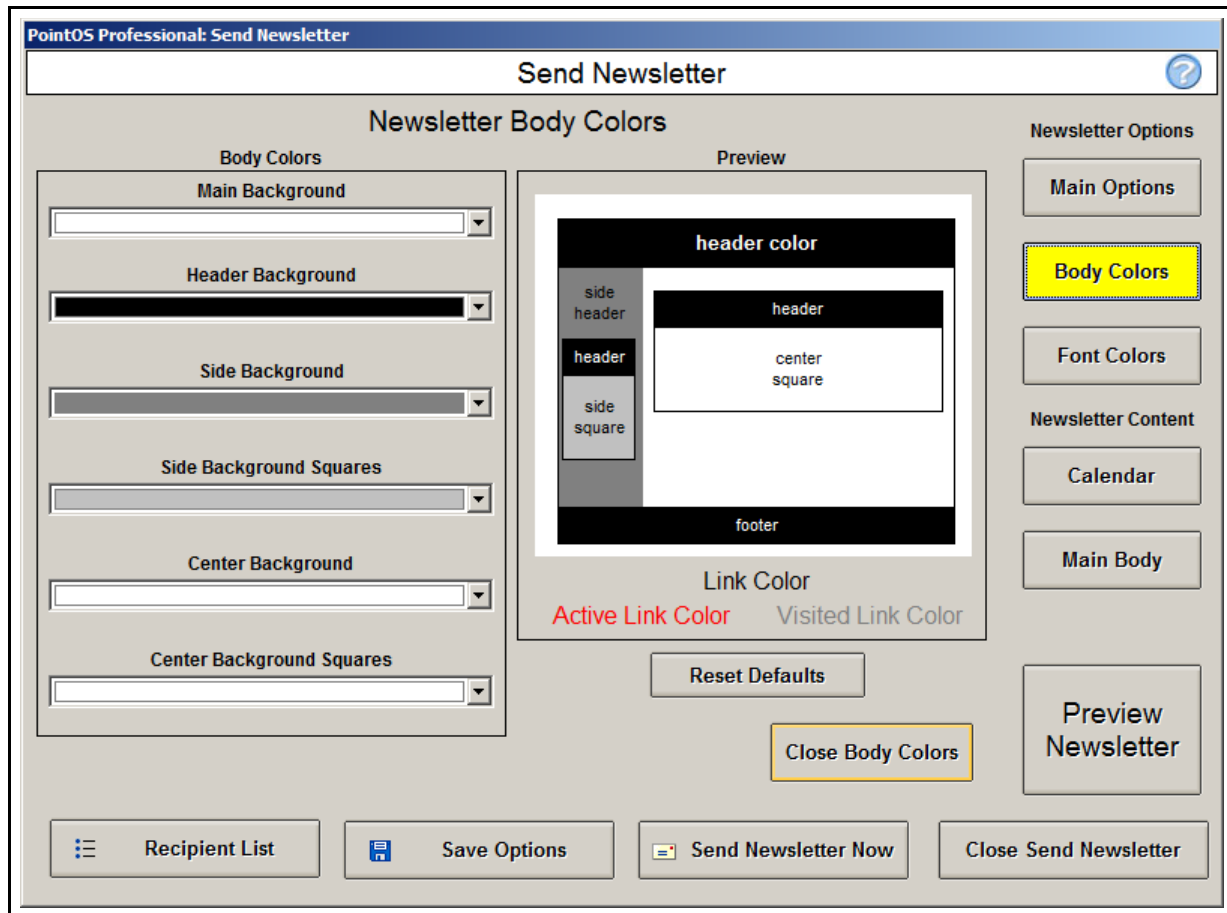


Figure 86: Newsletter Body Colors

2. Use the drop down arrows to select a color choice for each option. The *Preview* area shows how the newsletter colors will appear.
3. To reset the colors to the defaults, select **Reset Defaults**.
4. When you have finished selecting the Body Colors, select **Close Body Colors**.

Font Options

Next, you can continue refining the look for your newsletter by selecting the font colors.

1. To open the *Newsletter Font Colors*, go to the *Send Newsletter* screen and select **Font Colors**.

The system displays the *Newsletter Font Colors* screen.

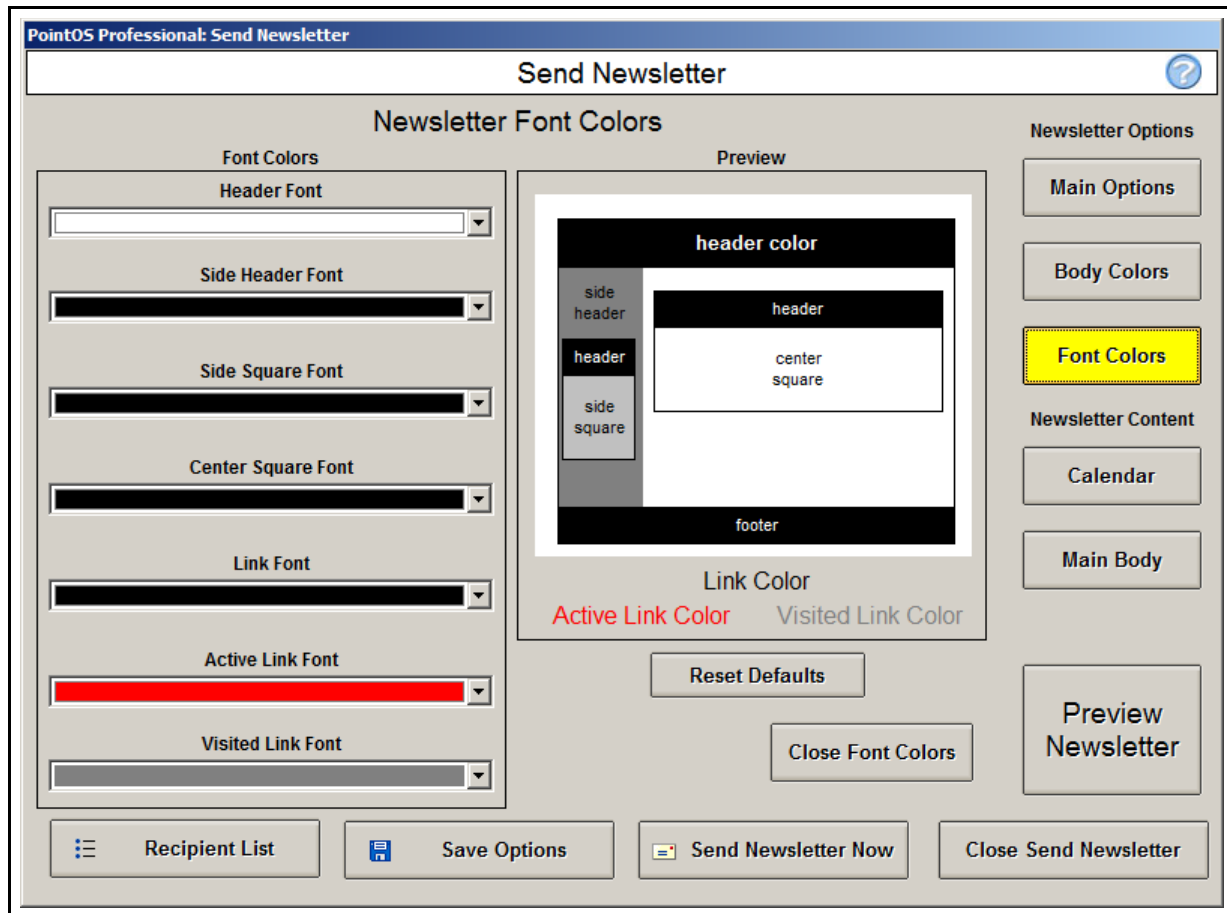


Figure 87: Newsletter Font Colors

2. Use the drop down arrows to select a color choice for each option. The *Preview* area shows how the newsletter colors will appear.
3. To reset the colors to the defaults, select **Reset Defaults**.
4. When you have finished selecting the Font Colors, select **Close Font Colors**.

Save Options

After you have set your Main Options, your Body Colors, and your Font Colors for the newsletter, select **Save Options** to keep your selections for future newsletters.

NOTE: The Calendar and Main Body content cannot be saved using the **Save Options** button.

Calendar

Use the **Calendar** feature to add your *Entertainment Schedule* to your newsletter. Make sure you have completed your Entertainment Schedule for the week you want to include in the newsletter first. Refer to “Entertainment Schedule” on page 127 for more information.

1. To open the *Newsletter Calendar*, go to the *Send Newsletter* screen and select **Calendar**.

The system displays the *Newsletter Calendar* screen.

Figure 88: Newsletter Calendar

2. Select a week to include in the newsletter from the **Add A Calendar Week** drop down list.
3. Select **Update Newsletter Calendar** to add the entire entertainment schedule for the selected week to the newsletter.
4. To manually enter items to the calendar, enter the desired text under that day.
5. To clear a selected day from the calendar, select **Clear** under that day. To clear the entire calendar, select **Clear All**.
6. When you have finished updating the entertainment schedule calendar, select **Close Calendar**.

Main Body

Use the **Main Body** feature to write your newsletter content.

1. To open the *Newsletter Content*, go to the *Send Newsletter* screen and select **Main Body**.

The system displays the *Newsletter Content* screen.

Figure 89: Newsletter Content

There are four boxes available for the newsletter.

2. You can use the default header names of “About Us,” “News,” “Events,” and “Other Information,” or you can give each header a custom name by replacing the name with new text.
3. For each box, enter the text in the content box. You can use html coding to enhance your content, including links to websites or graphics (must be posted on the web). Use `
` for line breaks. Select **Clear** from each box to remove the text from that box.
4. Select **Clear All** to remove all text from content boxes.
5. When you have finished updating the content, select **Close Content**.

Send to Recipients

Use the **Recipient List** feature to manage your customer email list.

1. To open the *Choose Newsletter Recipients*, go to the *Send Newsletter* screen and select **Recipient List**.

The system displays the *Choose Newsletter Recipients* screen.

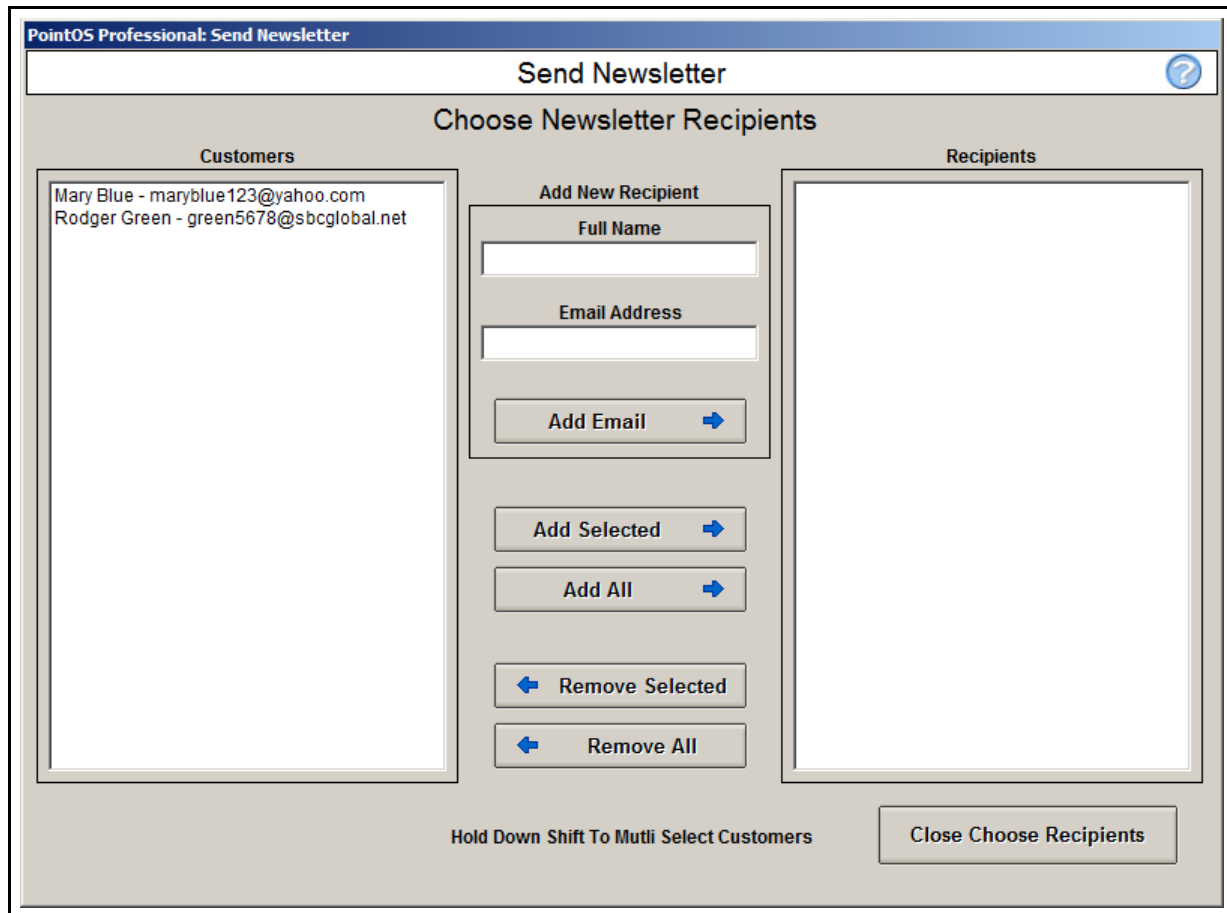


Figure 90: Choose Newsletter Recipients

The left side lists your customer names and email addresses.

2. To add customers individually to the newsletter recipient list, highlight the customer name in the *Customers* area. You can hold down the SHIFT or CTRL keys to select more than one customer. Select **Add Selected**. To remove one or more customers from the newsletter recipient list, highlight the customer name(s) in the *Recipients* area and select **Remove Selected**.

NOTE: Customers who have unsubscribed will not appear on this list.

3. To add all customers to the newsletter recipient list, select **Add All**. To remove all customers from the newsletter recipient list, select **Remove All**.
4. To manually add a customer email address that does not appear in the *Customers* area, complete the following steps:
 - Enter the customer's **Full Name**.
 - Enter the customer's **Email Address**.
 - Select **Add Email**.
5. When you have finished selecting the newsletter recipients, select **Close Choose Recipients**.

6. Select **Send Newsletter Now** on the *Send Newsletter* screen to send the newsletter to the selected recipients.

Unsubscribe Newsletter Customers

NOTE: This screen is only available if you are using PointOS DoorMan as one of your licensed stations.

The *Unsubscribe Newsletter Customers* screen allows you to subscribe or unsubscribe your customers to your HTML newsletter. *Email Settings* must be correctly setup for this to work. Refer to “Email Setup” on page 49 for more information.

1. To open the *Unsubscribe Newsletter Customers* screen, select **Unsubscribe Customers** from the **Activities** menu.

The system displays the *Unsubscribe Newsletter Customers* screen.

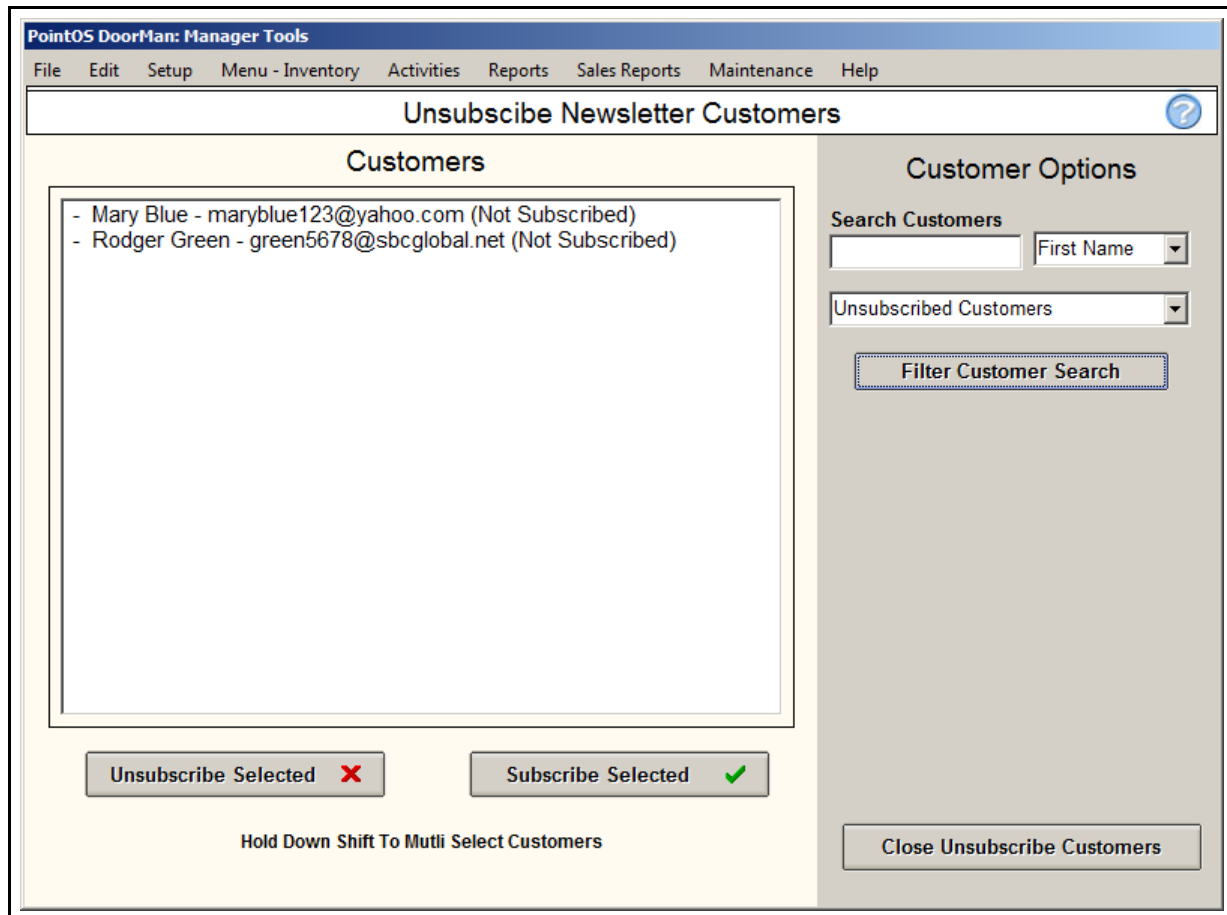


Figure 91: Unsubscribe Newsletter Customers

Find Customer

The *Customers* area lists the customers in your system for whom you have email addresses.

2. To find a specific customer, use the *Customer Options*.
 - Enter one or more letters of the customers name in the **Search Customers** field and select which name it is from the drop down list.
 - To filter the list of names, select an option from the **Unsubscribed Customers** drop down list.
 - Select **Filter Customer Search**. The system displays the customers that match your search criteria in the *Customers* area.

Subscribe or Unsubscribe Customer

1. Highlight the customer whose subscription status you want to change in the *Customers* area. To select more than one customer, hold down the **Shift** key while selecting the customers.
2. To unsubscribe the selected customers from the email newsletter list, select **Unsubscribe Selected**. To add the selected customers to the email newsletter list, select **Subscribe Selected**.

Close Unsubscribe Customers

When you have finished working with customer newsletter subscriptions, select **Close Unsubscribe Customers**.

Manage Memberships

NOTE: This screen is only available if you are using PointOS DoorMan as one of your licensed stations.

The *Manage Memberships* screen allows you to manage your customer memberships.

1. To open the *Manage Memberships* screen, select **Manage Memberships** from the **Activities** menu.

The system displays the *Manage Memberships* screen.

Figure 92: Manage Memberships

Find Customer

The *Customers* area lists the customers in your system.

2. To find a specific customer, use the *Search Customers*.
 - Select the **Customer Name** from the drop down list.
 - Check the **Show Non Members** box to include all customers in the list.
 - To search by **Membership Date**, select the drop down arrow to choose the date from the calendar.
 - Select **Search**. The system displays the customers that match your search criteria in the *Customers* area.

Update Membership Information

1. Highlight the customer you want to update in the *Customers* area.
2. Choose **Select Customer**.

The *Customer Information* area displays the membership information for that customer, including a notation if the customer is not a member.

3. To change the membership type or create a membership for the selected customer, select a **Membership Type** from the drop down list. If you are creating a new membership, the system displays a warning to verify you want to create a new membership. Select **Yes** to continue, or **No** to close the warning without creating a new membership.
4. Select the **Number of Allowed Guests** from the drop down list.
5. Enter the **Membership Begin Date**. You can use the drop down list to select the date from the calendar.
6. Enter the **Membership End Date**. You can use the drop down list to select the date from the calendar.
7. Select **Update Membership Information** to save the changes.

Print Membership Card

NOTE: To print membership cards, you must have a compatible id card printer.

1. Highlight the customer for whom you want to print a membership card in the *Customers* area.
2. Choose **Select Customer**.
3. Select **Print Membership Card**.

The system displays the *Print Membership Card* screen.

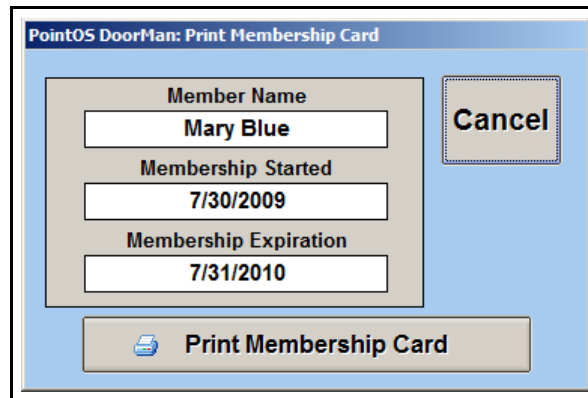
The screenshot shows a software window titled "PointOS DoorMan: Print Membership Card". Inside the window, there is a light blue background. On the left, there is a white rectangular area containing three text boxes. The first box is labeled "Member Name" and contains the text "Mary Blue". The second box is labeled "Membership Started" and contains the date "7/30/2009". The third box is labeled "Membership Expiration" and contains the date "7/31/2010". To the right of these boxes is a "Cancel" button. At the bottom of the window is a large button labeled "Print Membership Card" with a printer icon to its left.

Figure 93: Print Membership Card

4. Select **Print Membership Card** to print the card or **Cancel** to close the screen without printing the card.

Close Manage Memberships

When you have finished working with memberships, select **Close Manage Memberships**.

Entertainment Schedule

The *Entertainment Schedule* screen allows you to set up the weekly entertainment schedule. Employees can view (or print for customers) this schedule from the Time Card area.

1. To open the *Entertainment Schedule* screen, select **Entertainment Schedule** from the **Activities** menu.

The system displays the *Entertainment Schedule* screen.

The screenshot shows the 'Entertainment Schedule' window in 'PointOS Professional: Manager Tools'. The menu bar includes File, Edit, Setup, Menu - Inventory, Activities, Reports, Sales Reports, Maintenance, and Help. The main title is 'Entertainment Schedule'. Below the title, there are navigation buttons: 'Back One Week' (with a left arrow), 'Week Starting Sunday, July 19, 2009', and 'Forward One Week' (with a right arrow). The calendar grid shows days from Sunday to Saturday. Each day has a date (e.g., 7/19/09) and an 'Add' button. Below the calendar is the 'Add To Schedule' section, which includes a 'Category' dropdown (with 'Type Or Select Category' as the placeholder), an 'Entertainment Name' dropdown, 'Start Time' and 'End Time' dropdowns (both set to '12:00 pm'), a 'Pay Out Message' text area, and a 'Pay Out Amount' text area. There is an 'Update Entertainment Info' button. On the left side of the 'Add To Schedule' section is a 'Copy Previous Week' button, and on the right is a 'Copy To Next Week' button. At the bottom are 'Go To Current Week', 'Save', and 'Done' buttons.

Figure 94: Entertainment Schedule

Navigate the Entertainment Schedule

1. Select **Back One Week** to go to the previous week's schedule.
2. Select **Forward One Week** to go to the next week's schedule.
3. Select **Go To Current Week** to return to the schedule for the current week.

Create an Entertainment Schedule

Complete the following steps to create an entertainment schedule.

1. Select the category from the **Category** drop down list or create a new category by entering the name.
2. Select the entertainment name from the **Entertainment Name** drop down list or create a new item in the selected category by entering the name.
3. Select the starting time in the **Start Time** field.
4. Select the ending time in the **End Time** field.
5. To include a pay out message for this entertainment, enter the message in the **Pay Out Message** field.

6. To indicate the pay out amount for this entertainment, enter the amount in the **Pay Out Amount** field.
7. Select **Update Entertainment Info** to save the entertainment.
8. Select **Add** on the day(s) to add that entertainment at the selected time.
9. Repeat for multiple days, selecting a new **Start Time** and **End Time** for different days as necessary.
10. Repeat for all of the entertainment you have scheduled for the week.
11. Select **Save** to save the schedule information.

You can also speed scheduling up by copying a schedule.

1. Select **Copy Previous Week** to copy the previous week's schedule to the current week.
2. Select **Copy To Next Week** to copy the current schedule to the next week.

Close the Employee Schedule

When you have finished creating the employee schedule, select **Done**.

View Song List

The *View Song List* screen allows you to view a list of all songs in your database. This list can be printed or exported to several different formats.

1. To open the *View Song List* screen, select **View Song List** from the **Activities** menu.

The system displays the *View Song List* screen.



Figure 95: View Song List

PointOS List

The left side of the screen shows the song list. You can use the **Back Page** and **Next Page** arrows to navigate through several pages of your song list. Select **First Page** to go to the first page of the list. Select **Last Page** to go to the last page of the list.

To print the song list, select **Print Song List**. You must have set up your report printer. Refer to “Report Printer Setup” on page 30 for more information.

To change the view of the song list, you can use the Zoom features:

- Select **Zoom In** one or more times to enlarge the view of the song list.
- Select **Zoom Out** one or more times to reduce the view of the song list.
- Select **Zoom to Fit Page** to return the view of the song list to one page width.

Export Song List

You can export your song list to three different formats:

- To open the song list in HTML (in your default web browser), select **Export to HTML**.
- To open the song list in Adobe PDF®, select **Export to PDF**.

- To open the song list in your default word processor in the RTF format, select **Export to RTF**.

Close Song List

When you have finished viewing the customer list, select **Close View Song List**.

Manage Payouts

Pay outs are the system's way of keeping track of the amount of money you should have on hand after you have paid someone cash. Pay outs can be done in two ways: by a manager in the back end, or by a manager or server from a cash drawer.

The *Manage Pay Outs* screen allows you to create, manage, change, or void pay outs made in the system. Unlike the *Delete Pay Out* area on the *Manager Dashboard*, you can edit pay outs from any drawer, even if it has been closed.

- To open the *Manage Pay Outs* screen, select **Manage Pay Outs** from the **Activities** menu.

The system displays the *Manage Pay Outs* screen.

PointOS Professional: Manager Tools

File Edit Setup Menu - Inventory Activities Reports Sales Reports Maintenance Help

Manage Pay Outs

Date	Time	Category	Pay Out To	Amount
7/23/09	11:48 AM	Band	Pencils With Lead	\$1.00

Pay Out Categories

- Band
- DJ
- Misc
- Security
- Supplies

Pay Out To

Amount

Payout By

☐ **Pay Out Voided**

Description

Comment For Future Pay Outs

Pay Out Category

☐ **Entertainment Category**

New Delete Update

Save Pay Out Done

Figure 96: Manage Pay Outs

Pay Outs

The *Pay Outs* area lists any pay outs that have been made. You can edit the pay out description or comment for future pay outs to a selected payee. You can also void a pay out made from any cash drawer.

1. Highlight the selected pay out in the *Pay Outs* area.
2. To edit the pay out, including a reason for voiding the pay out, update the **Description** or the **Comment for Future Pay Outs**.
3. To void the pay out, select **Pay Out Voided**.
4. Select **Save Pay Out**. The system displays three messages:
 - The system verifies that you want to save changes to the pay out. Select **Yes** to save or **No** to close the box without saving.
 - The system asks if you want to save the pay out to the Payees list for making future pay outs. Select **Yes** to include the item in the Payees list or **No** to close the box without including the item on the list.
 - The system verifies that the pay out has been saved.

Pay Out Categories

Pay outs can be put into several different categories for the purpose of reporting and accounting. These categories appear on the front end *Pay Out* screen. Entertainment categories appear in the *Entertainment Schedule* screen.

1. To create a pay out category:
 - Enter the category name in the **Pay Out Category** field. Check the **Entertainment Category** box if applicable.
 - Select **New**.
 - The system notifies you that the category is added. Select **OK** to close the dialog box.
2. To rename a pay out category:
 - Highlight the selected category in the *Pay Out Categories* list.
 - Update the name in the **Pay Out Category** field. Check the **Entertainment Category** box if applicable.
 - Select **Update**.
3. To delete a pay out category:
 - Highlight the selected category in the *Pay Out Categories* list.
 - Select **Delete**.
 - The system verifies that you want to save the pay out category. Select **Yes** to save or **No** to close the box without saving.

Setting Up A Payout

You can set up a pay out for future use. Complete the following steps:

1. Highlight the selected category in the *Pay Out Categories* list.
2. Enter the name in the **Pay Out To** field.
3. Enter the description in the **Description** field.

4. Enter more information in the **Comment for Future Pay Outs** field.
5. Select **Save Pay Out**.

The system verifies that you want to save the pay out category.

6. Select **Yes** to save or **No** to close the box without saving.

Close Manage Pay Outs

When you have finished working with Pay Outs, select **Done**.

Batch Credit Cards

The *Batch Credit Card* screen allows you to manually batch credit cards and clear pre authorizations. Refer to “Payment Setup” on page 36 for more information about automatically batching credit cards.

1. To open the *Batch Credit Cards* screen, select **Batch Credit Cards** from the **Activities** menu.

The system displays the *Batch Credit Cards* screen and begins the process of batching credit cards.

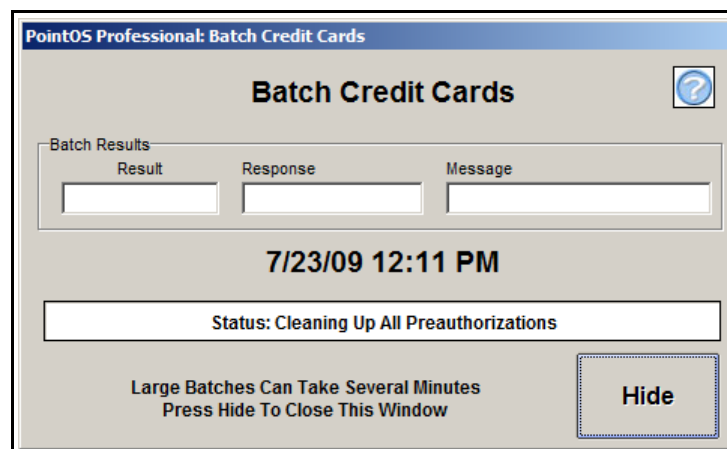


Figure 97: Batch Credit Cards

The system displays the Batch Results, Responses, Message, and current status of the batch.

2. To hide the *Batch Credit Cards* screen while it continues batching, select **Hide**.

Credit Card Refund

NOTE: This option is only available if you have credit cards enabled on your system.

The *Credit Card Refund* screen allows you to issue a refund to a customer’s credit card.

1. To open the *Credit Card Refund* screen, select **Credit Card Refund** from the **Activities** menu.

The system displays the *Credit Card Refund* screen.

PointOS Professional: Manager Tools

File Edit Setup Menu - Inventory Activities Reports Sales Reports Maintenance Help

Credit Card Refund

Credit Card Information

Card Num Enter Card #

Issuer Enter Exp Date

Exp Date

Refund Amount

Amount Enter Refund Amount

Refund Reason

Refund Results

Result

Response

Message

RefNumber

**Refunds Will Be Given After
The Daily Batch Has Completed**

**To Void This Refund
Please Use The Merchant Warehouse
Online Application**

Process Refund To Credit Card

Close Card Refund

Figure 98: Credit Card Refund

To process a credit card refund, complete the following steps:

1. Enter the Credit card Information:
 - Select **Enter Card #** to enter the **Card Number**.
 - Select **Enter Exp Date** to enter the **Expiration Date**.
2. Select **Enter Refund Amount** to enter the **Amount**.
3. Select **Process Refund to Credit Card**.

The *Refund Results* area displays the Result, Response, Message, and Reference Number for the refund.

NOTE: The refund will not be available until you batch your credit cards.

Close Credit Card Refund

When you have finished the refund, select **Close Card Refund**.

Merchant Warehouse

The *Merchant Warehouse* screen allows you to access the Merchant Warehouse online reporting website. From here you can also charge cards, add tips, and batch. However, any transactions made from here, will not be reflected in any of the PointOS reporting.

NOTE: This is only available if you have credit cards enabled on your system.

1. To open the *Merchant Warehouse* screen, select **Go To Merchant Warehouse** from the **Activities** menu.

The system displays the *Merchant Warehouse* screen.

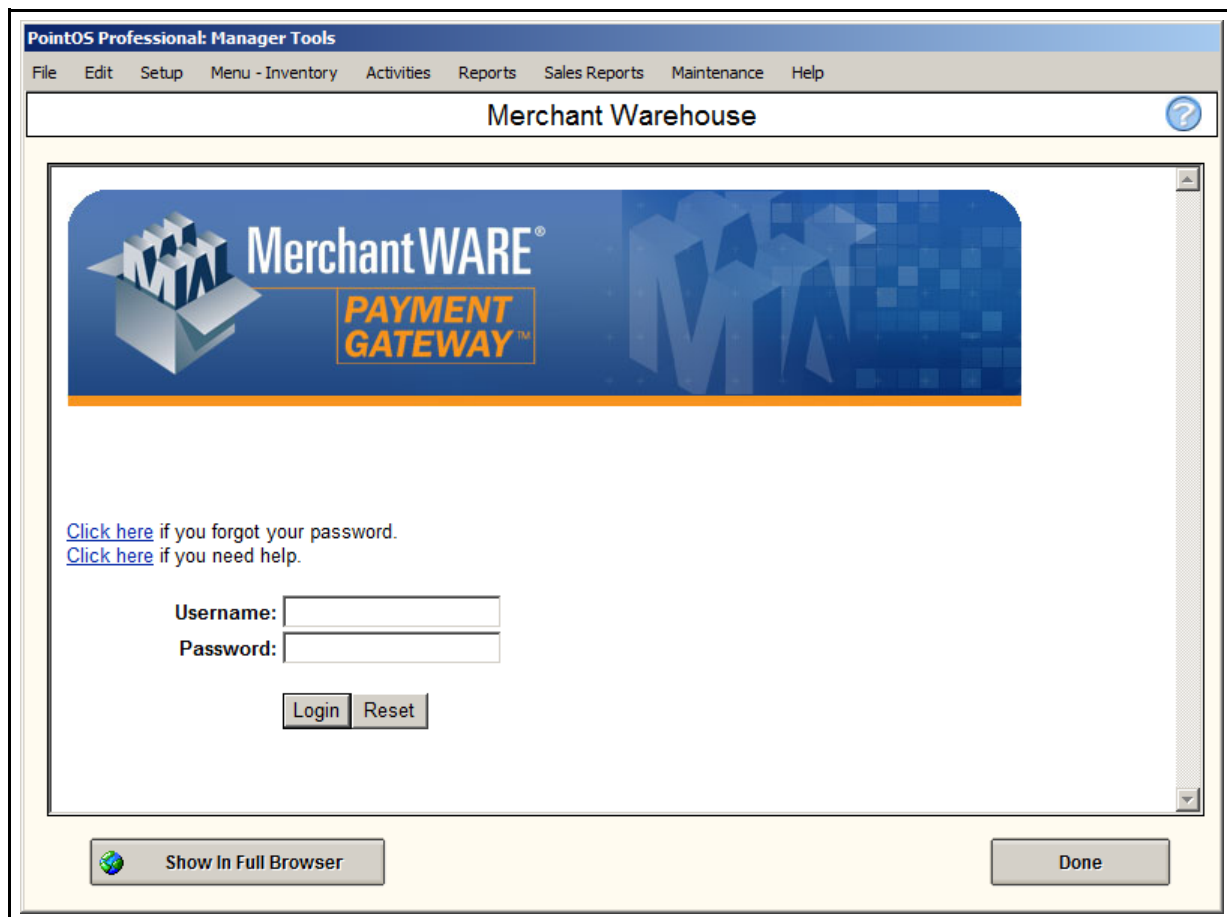


Figure 99: Merchant Warehouse

2. Select **Show In Full Browser** to open the Merchant Warehouse website in your default web browser.
3. Enter your Merchant Warehouse user name in the **Username** field.
4. Enter your **Password**.
5. Select **Login**.
6. Select **Done** to close the website.

PointOS to QuickBooks®

NOTE: PointOS To QuickBooks is not compatible with QuickBooks POS, but it works with all other version of QuickBooks, including QuickBooks Pro.

The *PointOS To QuickBooks*® screen allows you to send sales and payment data directly to QuickBooks®. This connection automatically creates accounts in QuickBooks®.

NOTE: You cannot rename these accounts. Do not modify these accounts in QuickBooks®.

These are the accounts created:

Account Name	Account Type	Parent Name
On Premise Cash	Bank	
Credit Card Refunds	Income	
Visa	Income	Credit Card Refunds
Master Card	Income	Credit Card Refunds
Discover	Income	Credit Card Refunds
American Express	Income	Credit Card Refunds
Main Bank Account	Bank	
Gift Cards Payable	OtherCurrentLiability	
Visa	Bank	Main Bank Account
Master Card	Bank	Main Bank Account
Discover	Bank	Main Bank Account
American Express	Bank	Main Bank Account
Debit	Bank	Main Bank Account
Gift Cards Issued	Income	
Checks To Deposit	Bank	

Account Name	Account Type	Parent Name
POS Payouts	Expense	
Employee Tips Payable	OtherCurrentLiability	
PayOutCegories	Expense	POS Payouts
POS Sales	Income	
Sales Tax Payable	OtherCurrentLiability	
Cash Drawer Discrepancies	OtherExpense	

1. To open the *PointOS To QuickBooks®* screen, select **PointOS to QuickBooks®** from the **Activities** menu.

The system displays the *PointOS To QuickBooks®* screen.

PointOS Professional: Quickbooks

PointOS To QuickBooks®

Connect To Quickbooks

QuickBooks® Options

First Time Setup
To Setup QuickBooks For The First Time
Launch QuickBooks, Then Click The
Check QuickBooks Connection Button

This Will Bring Up A Dialog In QuickBooks
From Here Grant Rights To PointOS Professional
To Be Able To Edit Within QuickBooks.

**To Use PointOS To QuickBooks
You MUST Grant Permission
For PointOS To Access
Your Company's QuickBooks File**

Connection Mode:
Single User

Need QuickBooks?
QuickBooks
Click Here
Save Up To 20%
+ Free Shipping

PointOS To QuickBooks®
Is Not Compatible
With QuickBooks® POS

☐ I Have Read, Understand, And Agree To The Above Terms Of Service

Connect To QuickBooks

PointOS To QuickBooks®

QuickBooks and the QuickBooks logo are trademarks of Intuit Inc., displayed with permission.
Intuit has not endorsed or reviewed this product or statements about this product contained in this document.

Close PointOS To QuickBooks®

Figure 100: PointOS To QuickBooks®

2. Launch QuickBooks® with your company file loaded.

3. To set up your connection, complete the following steps:
 - Read the **Terms of Service** and check the box indicating that you understand them.
 - Select the **Connection Mode** from the drop down list.
 - Select **Connect To QuickBooks®**.
 - QuickBooks® will prompt you to allow the connection from PointOS Professional. Select Yes to allow the connection.
4. Select **Setup QuickBooks® Connection**.

The system displays the *Send To QuickBooks®* screen.

Figure 101: Send to QuickBooks®

5. Check one or more boxes to indicate which areas of information you would like to send to QuickBooks®. To check all boxes, select **Check All Items**.

NOTE: PointOS does not send inventory information to QuickBooks.

PointOS works directly with QuickBooks Payroll Service.

6. Select the **Start Date** to indicate which items to send to QuickBooks®.
7. Select the **End Date** to indicate which items to send to QuickBooks®.

8. Select **Send Information To QuickBooks**.

The *Update Progress* area shows information about the transfer.

9. Select **Detail** to view more information.

The *Update Status* area indicates the status of your transfer.

10. Select **Cancel QuickBooks® Transfer** to stop the transfer before it has finished.

11. Select **Close PointOS to QuickBooks®** when you have finished.

Disable UAC

When using Windows Vista, PointOS to QuickBooks may not operate correctly when User Access Control (UAC) is enabled.

To disable UAC, complete the following steps:

1. Open the **Control Panel**.
2. Under **User Account and Family** settings, select **Add or remove user accounts**.
3. Select one of the user accounts.
4. Select **User Accounts** from the heading.
5. Select **Turn User Account Control On or Off**.
6. Uncheck the **Use User Account Control (UAC) to help protect your computer** box. Select **OK**.

The system will prompt you to reboot your computer. Do so when ready.

Overview

The Reports and Sales Reports menus offer an in-depth view at different activities within PointOS. The screens for each report have similar options and the steps for generating, exporting, or printing the reports are the same.

This chapter explains the basic process for report options, and generating, exporting, and printing the reports. Then it provides a brief description of each report.

Date Range

Most reports include the **Start Date** and **End Date** in the *Report Options*. For reports that show a specific date range, you must select the **Start Date** and the **End Date**. Refer to “Setting the Date” on page 166 for more information.

NOTE: If a start date or end date falls in the middle of a report period, you will get the entire report period. For example, if you ask for a Monthly report but only set the start date half-way through a month, you will get the entire month. Reports also begin and end at the day start time set in Main Settings. Refer to “Main Setup” on page 9 for more information about setting the day start time.

Show Report Detail

Many reports have extra detail that you may want to see.

1. To get more detail on these reports, check the **Show Report Detail** box.

Generate Report

To generate a report, complete the following steps:

1. Select the report you want to generate from the **Reports** menu or the **Sales Reports** menu.
2. In the *Report Options* area, use the drop down arrows to select the options appropriate to the data you want to view for the selected report.
3. Select **Generate Report**. Some reports are very database intensive and may take from 1 to 10 minutes to run. Please be patient.

The system displays the report details in the left side of the screen. Use the **Up** and **Down** arrows to navigate within the report.

Export Report

NOTE: You must have Microsoft[®] Excel installed on the computer generating the report.

To export a report to Microsoft[®] Excel, complete the following steps:

1. After you have generated the report, select **Export Report to Excel**.

The system opens a *Save As* dialog box.

2. Indicate the directory location to save the report and change the file name from the default, if desired.
3. Select **Save**.

The system opens Microsoft[®] Excel with the selected report data.

Email Report

NOTE: You must have Microsoft[®] Excel installed on the computer sending the report.

To send a report as an Email attachment, complete the following steps:

1. After you have generated the report, select **Email Report as Attachment**.

The system opens the *Email Report* screen.

Figure 102: Email Report

2. To narrow the list of employees, select a position from the **Sort By Position** drop down list.
3. Check the box next to the employee(s) to whom you want to send the report. Use the **Up** and **Down** arrows to navigate through the list of employees. Select **Check All** to send the report to all of the employees in the current list.
4. To send the report to up to four additional recipients, enter the recipient's email address in the **Additional Recipients** fields.
5. Select **Send Report To Recipients** to send the report. Select **Do Not Send Report** to close the *Email Report* screen without sending emails.

Print Report

To print a report, complete the following steps:

1. After you have generated the report, select **Export Report to Excel**.

2. Select **Print Report**.

Manager Inventory Change Report

The **Inventory Change Report** gives you a report of any changes made to inventory from the Manager's area.

Current Inventory

The **Current Inventory Report** gives you a report of what goods you currently have on hand to sell, sorted by Vendor, Type, Group, and/or Location. Your inventory is depleted when using Inventory Control.

Item Purchase Report

The **Item Purchase Report** gives you a list of goods that it is time to purchase. The report is broken down by vendors. Recommendations for these purchases come from the Par amount indicated in Inventory Setup. Refer to "Inventory Item Setup" on page 88 for more information.

Item Cost/Price

The **Item Cost/Price Report** provides a list of all of the menu items you have available for sale. It shows the different prices charged for each item.

Gift Cards Issued

The **Gift Cards Issued Report** provides a list of all gift cards sold during the selected time period. It will also allow you to see your outstanding gift card liability.

Closing Reports

When an employee performs the cashier out function in PointOS, he or she creates a Closing Report to let the manager know if anything was broken or if an item has run out of stock.

When you select **Closing Reports** from the **Reports** menu, the system displays the *Closing Reports* screen.

PointOS: Closing Reports

Closing Reports

7/27/09 - (Not Read)

Damaged Area

Bar

Damage Description

Test

Reorder Inventory Items

Test

Other Information

View Report

Report By: PointOS Administrator

Report Date: 7/27/2009 4:28:31 PM

✓ Done

Figure 103: Closing Reports

1. Highlight the report you want to view from the left side of the screen.
2. Select **View Report**.

The system displays the report information in the *Damaged Area*, *Damage Description*, *Reorder Inventory Items*, and *Other Information* areas.

3. Select **Done** when you have finished viewing the Closing Reports.

Incident Reports

Employees can file a report for any type of incident that happens at the location, such as an accident or fight.

When you select **Incident Reports** from the **Reports** menu, the system displays the *Incident Reports* screen.

Figure 104: Incident Reports

1. Highlight the report you want to view from the left side of the screen.
2. Select **View Report**.

The right side of the screen displays the following information:

- Incident time
- Employees involved
- Customers involved
- A description of what happened
- Any injuries
- Whether the Fire, Police, or Rescue services responded
- Who generated the report
- The report date

3. Select **Done** when you have finished viewing the Incident Report.

Today's Conditions

When a cashier cashes in for the day in PointOS, he or she can indicate the weather conditions. The Today's Conditions Reports displays this information, which you can use to evaluate unusual sales conditions.

When you select **Today's Conditions** from the **Reports** menu, the system displays the *Today's Conditions* screen.

Figure 105: Today's Conditions

1. Highlight the report you want to view from the left side of the screen.
2. Select **View Report**.

The system displays the report information in the *Temperature*, *Weather Conditions*, *Today's Events*, and *Other Information* areas.

3. Select **Done** when you have finished viewing the Today's Conditions reports.

Cashier In/Out

The **Cashier In/Out Report** provides details about when each cashier started and ended his or her cash drawer. It also shows if the cash drawers were off and how much a server might owe.

Cash Out Report

The Cash Out Report provides details about each cash out for the selected date(s).

Drawer Reverts

If a server mistakenly closes out a cash drawer, it can be reopened. The **Drawer Reverts Report** indicates you if this has happened and why.

Employee Clock In/Out

The **Employee Clock In/Out Report** indicates what time each server clocked in and out.

Employee Hours

The **Employee Hours Report** provides the time card and reported tips for each employee for the selected time period to use for completing your payroll.

NOTE: PointOS to QuickBooks[®] does not send any payroll information or support QuickBooks[®] payroll service.

Item Discounts

The **Item Discounts Report** indicates if menu items were sold at a reduced price and why. However, this report will not reflect modifiers that affect a menu item with negative dollar amounts.

Order Discounts

The **Order Discounts Report** indicates if an order's total amount was reduced and why. However, this report will not show sales reduced by special pricing set for employees and good customers.

Pay Outs

The **Pay Outs Report** indicates the amount and recipient of any pay outs. Pay outs are a good way of tracking cash payments to entertainment, employees, or vendors. These pay outs are also reflected in the cashier out reports.

Pay Outs By Category

The Pay Outs By Category is similar to the Pay Outs Report, but it provides additional detail about the transactions broken down into categories.

Item Voids

The **Item Voids Report** indicates any items that were removed from a sales check and why.

Order Voids

The **Order Voids Report** indicates any customer orders that were voided and why. Only open orders can be voided by a server.

Access Denied

The **Access Denied Report** provides a list of all unsuccessful attempts to try and access a secure area. This is a good report to run to see if a someone is trying to get into an area that they are not authorized to access.

No Sales

The **No Sales Report** shows you when the cash drawer was popped at the times when no sale transaction was made. This occurs most frequently when a server is making change, but could indicate some sort of fraud. The report also will show you who popped the drawer and at what time.

Door Report

NOTE: This report is only available if you are using PointOS DoorMan as one of your licensed stations.

The **Door Report** provides a listing and total of members through the door on the selected date. It also shows the time the member arrived.

Member Report

NOTE: This report is only available if you are using PointOS DoorMan as one of your licensed stations.

The **Member Report** provides a listing of members, with the membership type and dates, the last visit, and the amount spent.

Active Customer List

The **Active Customer List Report** provides a listing of any changes to the Customer Mailing List for the selected date range. You can use this to ensure that your Customer Mailing List is up to date before doing promotional mailings.

Customers Report

The **Customers Report** indicates all of the customers who have been added to the system during the selected date range. It also indicates how much the new customers spent as well as how often they have visited.

Guest Report

The **Guest Report** indicates all orders with guests entered, including number of items ordered and average sale per guest. It does not include discounts or refunds.

Cost Of Goods

The **Cost of Goods Report** shows what you have spent on ingredients for the things you sell. You can compare that to how much revenue each item generates. This will return a percentage that will give you your overall item cost.

Orders

The **Orders Report** gives you a list of all orders both open and closed. When you select an order in this list, the system displays a copy of the check.

Open Orders

The **Open Orders Report** indicates the orders on the system have not yet been paid.

Payments

The **Payments Report** shows all the payments made during the selected time frame.

Gift Cards

The **Gift Cards Report** indicates the gift cards that have been redeemed as payment during the selected time frame.

Personal Checks

The **Personal Checks Report** indicates the personal checks that have been used as payment during the selected time frame.

Taxes

The **Taxes Report** provides a breakdown of your sales and how much you have collected in taxes. This report will show both add on tax and tax that is included in a menu item price.

Credit Batches

If you are using PointOS to batch your credit cards, the Credit Batches Report indicates the credit card batch amounts and result for the selected time frame.

Credit Card Refunds

The **Credit Card Refunds Report** indicates any credit card refunds that have been processed for the selected time frame.

Daily Report

The **Daily Report** provides detailed information about all days in the selected time frame. This information includes pay outs, drawer over/unders, tips, discounts, voids, cash sales, credit card sales, total orders, items sold, taxes collected, net sales, gross sales, and total cash on hand.

Weekly Report

The **Weekly Report** provides detailed information about all the weeks in the selected time frame. This information includes pay outs, drawer over/unders, tips, discounts, voids, cash sales, credit card sales, total orders, items sold, taxes collected, net sales, gross sales, and total cash on hand.

The entire week is included in the report, regardless of whether the start date or end date are in the middle of a week.

Monthly Report

The **Monthly Report** provides detailed information about all months in the chosen time frame. This information includes pay outs, drawer over/unders, tips, discounts, voids, cash sales, credit card sales, total orders, items sold, taxes collected, net sales, gross sales, and total cash on hand.

The entire month is included in the report, regardless of whether the start date or end date are in the middle of a month.

Sales By Day

The **Sales By Day Report** provides all of the sales for the days included in the selected date range. However, it will not provide as much detail as the daily report.

Sales By Hour

The **Sales By Hour Report** provides all the sales broken down into 24 hours. It also indicates the total items sold.

Sales By Week

The **Sales By Week Report** provides all of the sales broken down into one week blocks. However, it will not provide as much detail as the weekly report.

The entire week is included in the report, regardless of whether the start date or end date are in the middle of a week.

Sales By Month

The **Sales By Month Report** provides all of the sales group in one month blocks. However, it will not provide as much detail as the monthly report, but will run much more quickly.

The entire month is included in the report, regardless of whether the start date or end date are in the middle of a month.

Sales By Item

The **Sales By Item Report** indicates all of the items sold during a specific period of time. It will group the items by type, giving you a total count. To view associated modifiers, check the **Show Report Detail** box.

This report is very database intensive and may take quite a while to execute.

Item Sales By Hour

The **Item Sales By Hour Report** indicates all of the items sold during a specific period of time broken down into 24 hour increments. It will group the items by type, giving you a total count. To view associated modifiers, check the **Show Report Detail** box.

This report is very database intensive and may take quite a while to execute.

Item Sales By Server

The **Item Sales By Server Report** indicates the sales by server. It also shows what items each server sold during the selected date range.

Item Sales By Server Ring

The Item Sales By Server Ring indicates the sales by server on each transaction.

Sales By Category

The **Sales By Category Report** indicates items sold in specific categories.

Sales By Payment Type

The **Sales By Payment Type Report** breaks down sales for a selected time period into the different kinds of payments, including cash and credit cards.

Sales By Delivery

The Sales By Delivery Report indicates the sales made for delivery for a specific period of time.

Sales By Server

The Sales By Server Report indicates sales for a selected time period broken down into the different servers that were active during this period.

Sales By Station

The Sales By Station Report indicates sales for a selected time period broken down into the different stations that were active during this period.

Item Sales By Room

The **Item Sales By Room Report** breaks down the sales by room. It also indicates what items were sold from that room, during the selected date range.

This report is very database intensive and may take quite a while to execute.

Overview

The maintenance area allows you to keep your system running fast and efficiently. You can archive sales, speed up and back up the database, and delete unnecessary or sensitive data such as credit cards.

Stations Manager

The *Stations Manager* screen allows you to shut down or force a restart of all connected stations. This is required for backing up or compacting the database, or when making some changes to the system.

1. To open the *Stations Manager* screen, select **Stations Manager** from the **Maintenance** menu.

The system displays the *Stations Manager* screen.

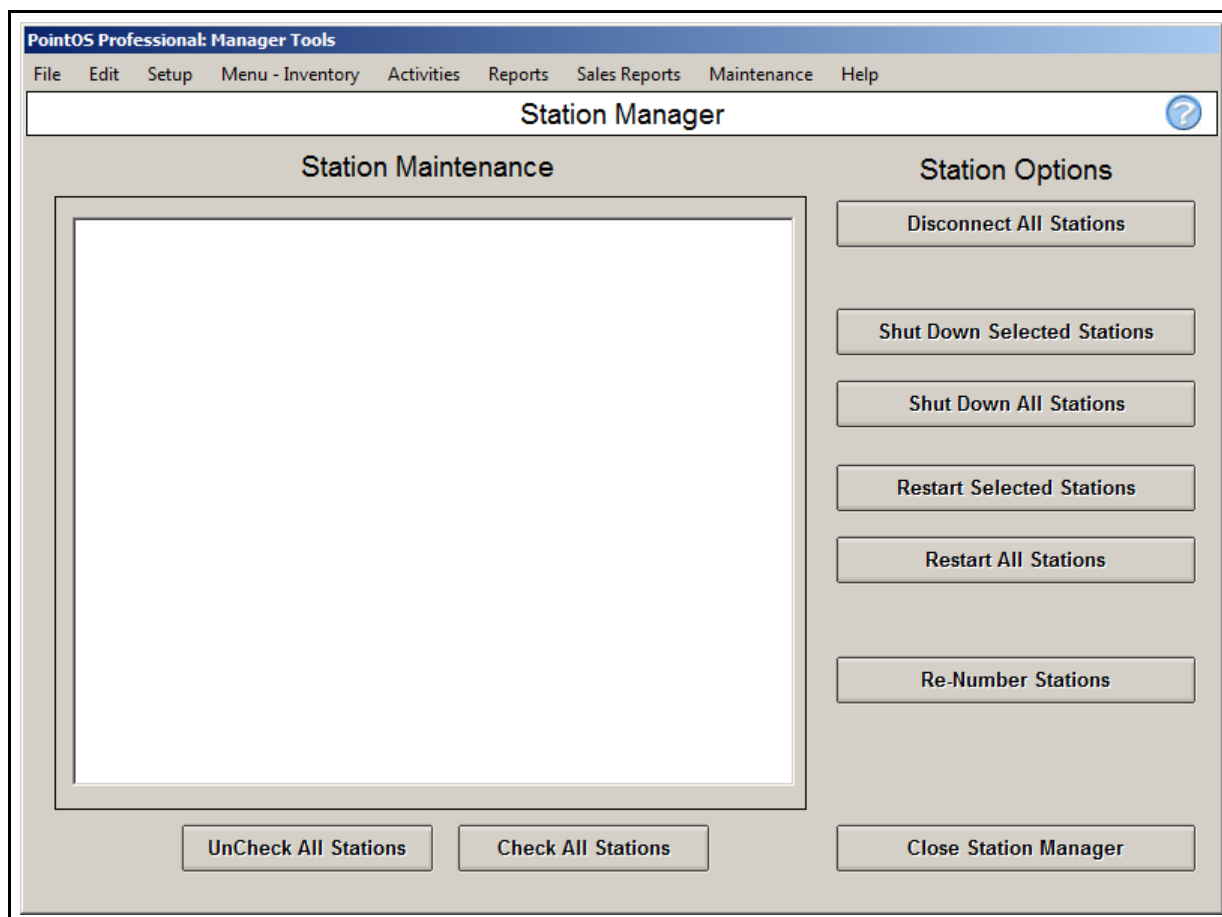


Figure 106: Stations Manager

The *Station Maintenance* area lists the stations that are currently connected to your database. Select a station by checking the box next to the listing. You can select **Uncheck All Stations** or **Check All Stations** to quickly indicate the stations with which you want to work.

2. To disconnect all stations, select **Disconnect All Stations**.
3. To shut down the selected stations, select **Shut Down Selected Stations**. To shut down all stations, select **Shut Down All Stations**.
4. To restart the selected stations, select **Shut Down Selected Stations**. To restart all stations, select **Shut Down All Stations**.

Re-number Stations

NOTE: To renumber stations, all stations must be disconnected and you cannot have any cash drawers logged in.

1. To re-number the stations, select **Re-Number Stations**.

The system displays the *Re-Number Stations* screen.

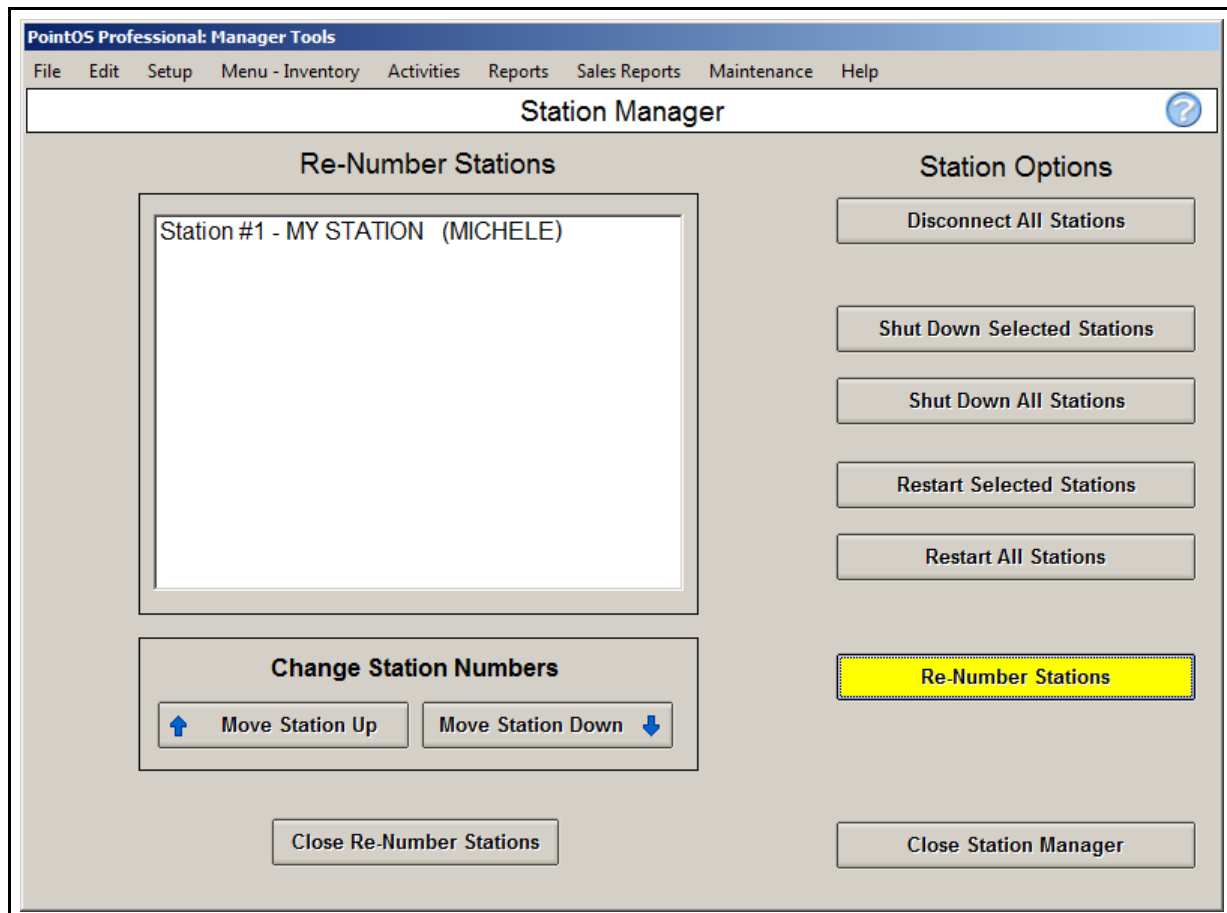


Figure 107: Re-Number Stations

2. Highlight the station you want to re-number.
3. Use the **Move Station Up** and **Move Station Down** arrows to reorder your list of stations.

4. When you have finished re-numbering the stations, select **Close Re-Number Stations**.

Close Station Manager

When you have finished managing the stations, select **Close Station Manager**.

Disconnect Stations

The **Disconnect Stations** option forces all stations to stop receiving or sending information to or from the database. This is required when backing up or compacting the database. It may take up to a minute to disconnect all stations.

1. To quickly disconnect all stations, select **Disconnect Stations** from the **Maintenance** menu.

The system displays a Manager Alert reminding you that the process takes a few moments.

2. Select **OK**.

Shut Down All Stations

The **Shut Down All Stations** option forces all stations to disconnect. This is useful when upgrading the system. This function may take up to two minutes to complete.

1. To shut down all stations, select **Shut Down All Stations** from the **Maintenance** menu.

The system displays a warning message.

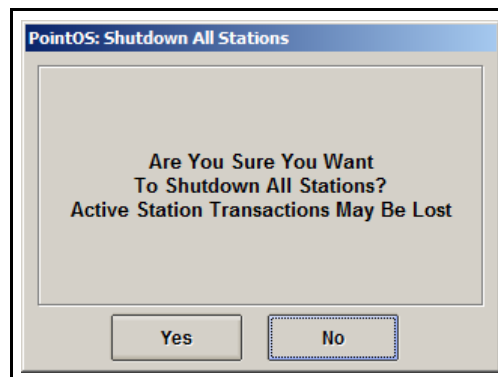


Figure 108: Shutdown All Stations

2. Select **Yes** to continue, or select **No** to close the warning without shutting down the stations.

Backup Database

The **Backup Database** option allows you to create a copy of your database. This protects you if your computer ever becomes broken or corrupted. We recommend that you backup at least once a week.

NOTE: You can also set the system to backup automatically. Refer to “Database Setup” on page 40 for more information.

You can back up to a remote device. Refer to <http://support.microsoft.com/kb/207187> for more information.

1. To perform a database backup, select **Backup Database** from the **Maintenance** menu.

NOTE: You must use the computer running the server portion of PointOS to back up the database. The system displays a dialog box to confirm that you want to backup the database.

2. Select **Yes** to continue, or select **No** to close the dialog box without performing a backup.

The system displays a *Create Database Backup* dialog box to save the database backup.

3. You can change the name of the database if necessary, but the file should be saved in the default *Backup* directory. Select **Save** to save the backup, or select **Cancel** to close the dialog box without saving a backup.

The system displays a *Manager Alert* notifying you that the backup was saved successfully. It also displays the location of the saved backup.

Database Cleanup

The *Database Cleanup* screen allows you to remove old or unnecessary information from your system to help reduce the size of the database and improve performance. We recommend that you clean the database every 6 to 12 months.

NOTE: This will not delete any settings, menu items, modifiers, employees, or customers.

DELETED DATA CANNOT BE RECOVERED. MAKE SURE YOU NO LONGER NEED THE DATA BEFORE DELETING.

NOTE: You should always make a backup of your database prior to running database cleanup.

1. To open the *Database Cleanup* screen, select **Database Cleanup** from the **Maintenance** menu.

The system displays the *Database Cleanup* screen.

Figure 109: Database Cleanup

2. To backup the database, select **Backup Database**.
3. Indicate the type of data you want to remove from the database by checking one or more boxes next to the selected data type. You can select **Check All** to quickly check all of the boxes. If you check all boxes and want to remove them, select **Uncheck All**.

NOTE: It is a good idea to remove Logs because they will not affect any of the most vital reporting.

4. To remove data prior to a specific date, select a **Cleanup Date** from the drop down list. Select one of the following options to remove data:
 - Select **Delete Checked From Before Date** to remove the data corresponding to the items you checked prior to the selected date.
 - Select **Delete All Data From Before Date** to remove all data prior to the selected date.
 To remove data up to the current date, select one of the following options:
 - Select **Delete Checked Data** to remove the data corresponding to the items you checked.
 - Select **Delete All Data** to remove all data.

The system displays a warning message to verify that you want to delete the selected data.

5. Select **Yes** to continue, or select **No** to close the warning without cleaning the database.

The system displays a warning message to notify you that this cannot be undone.

6. Select **Yes** to continue, or select **No** to close the warning without cleaning the database.

Close Database Cleanup

When you have finished cleaning the database, select **Close Database Cleanup**.

Calibrate Scanner

NOTE: This option is only available if you have a compatible scanner attached.

The **Calibrate Scanner** option allows you to calibrate your new ID scanner.

1. Select **Calibrate Scanner** from the **Maintenance** menu.
2. Use the calibration paper that came with your scanner. You can also download and print out a new calibration sheet from the manufacturer's website.

Clean Scanner

The **Clean Scanner** option allows you to clean your ID scanner if you are experiencing any problems with it.

1. Select **Clean Scanner** from the **Maintenance** menu.
2. Use the cleaning paper that came with your scanner, and follow the manufacturer's directions.

Archive Items

The **Archive Items** option allows you to move old items to the archive part of the database to help speed up the system. Doing this along with compacting the database can greatly increase system speed. It does not delete information or affect reporting. You should archive items regularly as part of routine database maintenance. You can set items to archive automatically when compacting the database. Archive items is done automatically when using auto system maintenance. Refer to "Database Setup" on page 40 for more information.

1. Select **Archive Items** from the **Maintenance** menu.

The system displays a warning message asking if you want to archive all closed items.

2. Select **Yes** to continue, or select **No** to close the warning without archiving old items.

Archive Orders

The **Archive Orders** option allows you to move old orders to the archive part of the database to help speed up the system. It does not delete information or affect reporting. You should archive orders regularly as part of routine database maintenance. You can set old orders to archive automatically when compacting the database. Refer to "Database Setup" on page 40 for more information.

1. Select **Archive Orders** from the **Maintenance** menu.

The system displays a warning message asking if you want to archive all closed orders.

2. Select **Yes** to continue, or select **No** to close the warning without archiving old orders.

Delete PreAuths

The **Delete PreAuths** command credits back the \$.01 on all preauths that have not been batched yet. This is done automatically when compacting the database. Refer to “Database Setup” on page 40 for more information. If you are not using compact database, you should delete pre-authorizations frequently.

1. Select **Delete PreAuths** from the **Maintenance** menu.

The system displays a warning message asking if you want to delete all pre-authorizations.

2. Select **Yes** to continue, or select **No** to close the warning without deleting the pre-authorizations.

Update All Music

When you add new songs to Windows Media Player, you should update all music to add the songs to the PointOS database.

NOTE: This is also done usually at startup.

1. Select **Update All Music** from the **Maintenance** menu.

The system displays a warning message asking if you want to update the music.

2. Select **Yes** to continue, or select **No** to close the warning without updating the music.

Reset Damaged Songs

If a song fails to play, the PointOS database tags it as damaged. The Reset Damaged Songs option allows you to restore the damaged songs.

1. Select **Reset Damaged Songs** from the **Maintenance** menu.

The system displays a warning message asking if you want to reset the songs.

2. Select **Yes** to continue, or select **No** to close the warning without resetting the songs.

Delete All Music

The **Delete All Music** option allows you to start over with new music. This function removes all music information from the database, and may have adverse effects on customer song lists.

NOTE: This **DOES NOT** delete any music files from your computer, just from the PointOS database. This selection is completely safe.

1. Select **Delete All Music** from the **Maintenance** menu.

The system displays a warning message asking if you want to delete the music.

2. Select **Yes** to continue, or select **No** to close the warning without deleting the music.

Overview

The Help menu provides additional resources and support.

Online Manual

The Online Manual provides online support for using the manager functions of PointOS.

1. Select **Online Manual** from the **Help** menu.

The system displays the PointOS Professional Manager Help in a new tab of your browser window.

Check for Update

The **Check for Update** option opens the PointOS Updater.

NOTE: Updating PointOS will not uninstall SQL. You **WILL NOT** lose any data.

1. Select **Check for Update** from the **Help** menu.

The system displays the *PointOS Professional: Update Available* screen.

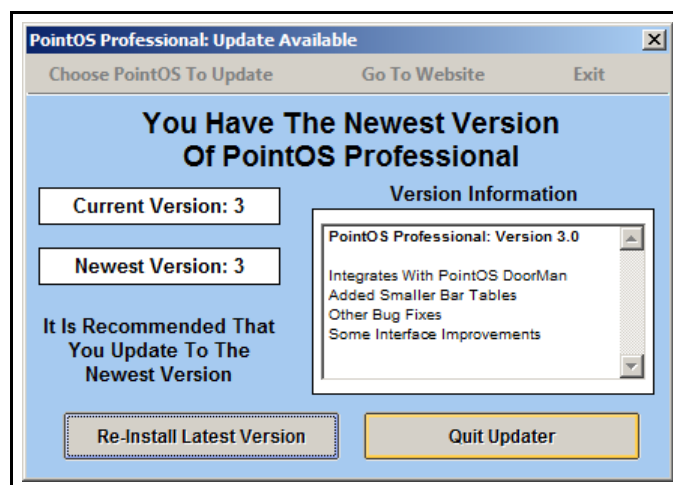


Figure 110: PointOS Updater

The Updater displays the status of your software and information about the latest version of PointOS.

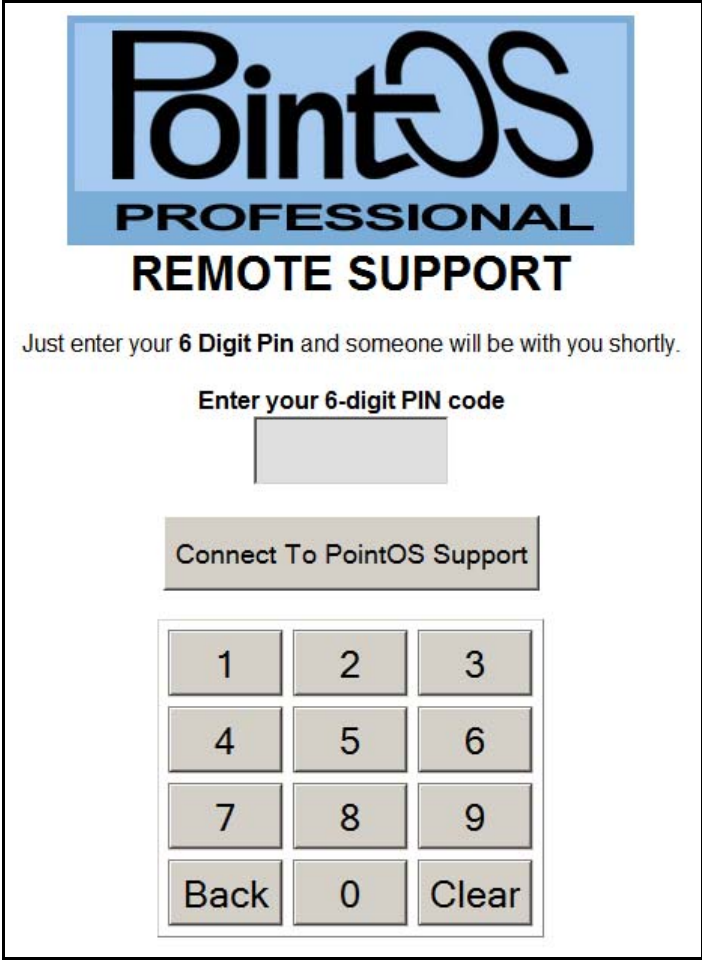
2. To re-install the software, select **Re-install Latest Version**.
3. Select the software to update from the **Choose PointOS To Update** drop down list.
4. To go to the website to get more information about the current version, select **Go To Website**.
5. When you have finished, select **Quit Updater** or **Exit**.

Remote Support

The **Remote Support** option allows PointOS technical support staff to access your system for assistance with troubleshooting.

1. Select **Remote Support** from the **Help** menu.

The system opens your web browser to the PointOS Professional Remote Support page.



PointOS
PROFESSIONAL
REMOTE SUPPORT

Just enter your **6 Digit Pin** and someone will be with you shortly.

Enter your 6-digit PIN code

Connect To PointOS Support

1	2	3
4	5	6
7	8	9
Back	0	Clear

Figure 111: Remote Support

2. Enter the six-digit PIN provided by PointOS technical support and select **Connect To PointOS Support**.

The system opens the *Rescue Gateway* screen, which provides a log of activities during the remote support session.

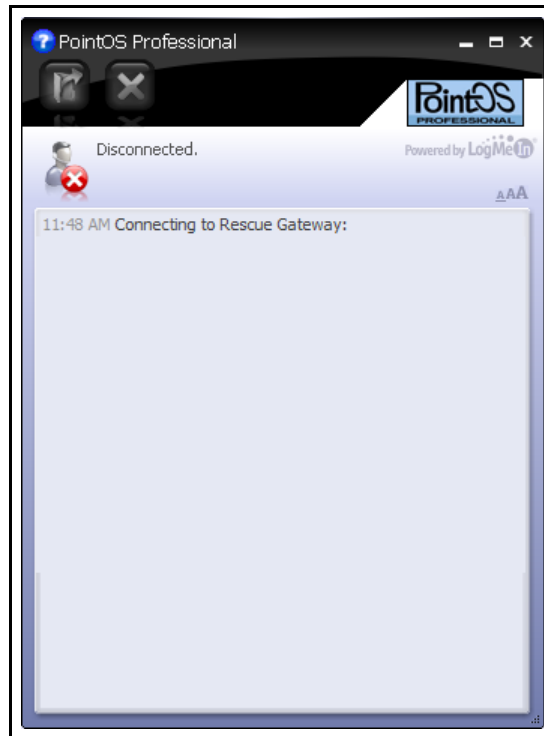


Figure 112: Rescue Gateway

During Remote Support, PointOS technical support will have control of your computer for troubleshooting. When the session ends, you can close the *Rescue Gateway* screen.

Upgrade PointOS

The Upgrade PointOS option allows you to purchase or enter an upgrade in your PointOS license.

1. Select **Upgrade PointOS** from the **Help** menu.

The system displays the Upgrade screen.

Figure 113: Upgrade

2. To purchase an upgrade, select **Purchase Upgrade**. The system opens the PointOS purchase website in your browser. You can purchase up to 9 additional stations (for a total of 10 stations).
3. When you have your code, enter the **Upgrade Number** and select **Enter Upgrade Number**. Or select **Cancel Upgrade** to close the *Upgrade* screen without entering an upgrade.

Contact Us

The Contact Us option allows you to send an email to PointOS.

1. Select **Contact Us** from the **Help** menu.

The system displays the *Contact Us* screen.

Figure 114: Contact Us

2. Select a **Subject** for your email from the drop down list.

3. Update or enter **Your Email Address**.
4. Enter your **Message**.
5. Select **Send** to deliver the email or **Cancel** to close the *Contact Us* screen without sending the email.

License Agreement

The **License Agreement** option displays the license agreement under which you installed PointOS.

1. Select **License Agreement** from the **Help** menu.

The system displays the License Agreement.



Figure 115: License Agreement

2. Select **Close** when you have finished viewing the license agreement.

About PointOS

The **About PointOS** option displays the PointOS company information, as well as the registration, version, and build date information.

1. Select **About PointOS** from the **Help** menu.

The system displays the *About PointOS* screen.

2. Select **Close** when you have finished viewing the information.

This chapter includes instructions on completing tasks that are not specific to an individual screen.

Setting Up Multiple Stations

You can connect multiple clients to one central database computer. Keep the following in mind when selecting the computers for the server and the client(s).

- The central database computer cannot be running Windows XP Home Edition or Windows Vista Home Basic.
- The client computers may be any Windows XP or Windows Vista machine.

To set up multiple stations, complete the following steps:

3. Make sure that all of the computers are on the same workgroup. Refer to Windows help for more information on setting up a workgroup.
4. Install PointOS Client and Server on the computer that will serve as the central database computer. Refer to “Installation” on page 4 for more information about installing PointOS Client and Server.
5. Setup your database on the server computer. Refer to “New Database” on page 7 for more information on setting up a new database.
6. Install PointOS Client Only on the client computer(s) that connect to the central database server. Refer to “Installation” on page 4 for more information about installing PointOS Client only.
7. While installing PointOS Client Only on the client computers, select the computer name of the central database server and the database you created. If the computer does not show up on the list, your workgroup or firewall are not set up correctly.

Setting Up XP Server Rights Manually

The PointOS Installer should grant access rights to the SQL server on the database computer. However, the operating system protection sometimes interferes. In this case, you must set the rights manually.

To set rights manually for an XP computer used as the central database server, complete the following steps:

1. Select **Control Panel** from the Windows **Start** menu.
2. Select **Administrative Tools**.
3. Select **Computer Management**.
4. From the *Computer Management* screen, select **Local Users And Groups**.
5. Select **Groups**.

The 3 SQL server groups for PointOS are:

- SQLServer2005MSSQLServerADHelperUser\$SHAKENSOFT
 - SQLServer2005MSSQLServerADHelperUser\$SHAKENSOFT
 - SQLServer2005SQLBrowserUser\$SHAKENSOFT
6. You will need to add everyone in your network to all three SQL server groups. Complete the following steps:
- Select the group name.
 - Select **Add** to add a user.
 - The system displays a dialog box to select the users. Enter the object name **everyone**.
 - Select **OK**.
 - Repeat for the other two SQL server groups.

To setup rights manually for a Vista computer used as the central database server, complete the following steps:

1. Find your computer name by going to **Control Panels – System – Advanced System Settings**. Select the **Computer Name** tab.
2. Select **Run** from the **Start Menu**
3. Enter **cmd**.
4. Right click on **cmd** when it comes up in the search results. Select **Run as Administrator**. (This step is only necessary if you have UAC enabled.)
5. In the command window, enter the instructions indicated below, substituting your computer's name found in step one for each instance of "**computername**". Press **ENTER** after each line.
 - net localgroup SQLServer2005SQLBrowserUser\$**computername** Everyone /add
 - net localgroup SQLServer2005MSSQLUser\$**computername**\$SHAKENSOFT Everyone /add
 - net localgroup SQLServer2005MSSQLServerADHelperUser\$**computername**\$ Everyone /add

Setting Up a Generic Driver for Receipt Printing

Windows must recognize your receipt printer before it will work with PointOS Professional. You may install the printer using the provided drivers from the manufacturer, but sometimes these drivers are hard to find. Instead, you may use the Generic - Text Only driver included with Windows.

NOTE: The generic driver may not work for all receipt printers.

Complete the following steps to set up your receipt printer with a generic driver.

1. Select **Control Panel** from the Windows **Start** menu.
2. Select **Add Printer**.

The system displays the *Add Printer Wizard*.

3. Select **Next** to continue.

4. On the *Local or Network* screen, select **Add a Local Printer attached to this computer**. If you are using Windows XP, uncheck the **Automatically detect and install my Plug and Play printer**.
5. On the *Select a Printer Port* screen, select **USB001(Virtual printer port for USB)** from the **Use the Following Port** drop down list. Select **Next** to continue.
6. On the *Install Printer Software* screen, select **Generic** in the *Manufacturer* area.
7. Select **Generic/Text Only** in the *Printers* area.
8. Select **Next** to continue.
9. On the *Name Your Printer* screen, keep the **Generic/Text Only** name in the **Printer Name** field.
10. For **Do you want to use this printer as the default printer**, select **No**. In Windows XP, uncheck the **Set as the default printer** box.
11. On the *Printer Sharing* screen, select **Do not share this printer**. Select **Next** to continue.
12. On the *Print Test Page* screen, select **No** for **Do you want to print a test page**. Select **Next** to continue.
13. Select **Finish** to finish adding your printer.
14. If Windows XP displays the *Print to File* screen, select **Cancel**.
15. Restart PointOS to load the new printer into the system.

Setting the Time

You can use the system clock to set times in many of the PointOS screens.

1. For a time field, select the drop down arrow to display the system clock.

The system displays the clock.

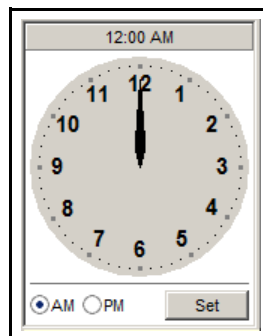


Figure 116: Set Day Start Time

2. Using the mouse, left click to set the hour.
3. Right click to set the minutes. Hold down the Control key while you click to constrain the minutes to five minute increments.
4. Select **AM** or **PM**.
5. Select **Set**.

Setting the Date

You can use a calendar to set dates in many of the PointOS screens.

1. For a date fields, select the drop down arrow to display the calendar.

The system displays the calendar.

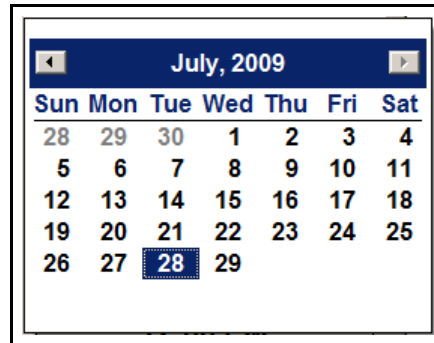


Figure 117: Calendar

2. Using the mouse, click the date you want to select. You can select the left or right arrows to move back or forward one month at a time.

Setting Up a Merchant Warehouse Account

Getting a Merchant Warehouse account and using them is **completely FREE**. Once you get an account, setup in PointOS takes just minutes. Complete the following steps to obtain a Merchant Warehouse Account.

1. From the *Payment Setup* screen, select **Get a Merchant Warehouse Account**.

The system displays the PointOS website showing the form where you can get a Merchant Warehouse Account.

MerchantWarehouse

* Please Note: Required fields have been denoted by a red asterisk.

Company: *

Company Name

Contact: *

First Name & Last Name

Email: *

Email Address

Phone: * *

Phone Number Extension

Products Sold / Services Provided:

Description of Products or Services Served

Comments:

CONTINUE ►

Figure 118: Merchant Warehouse Form to Get an Account

2. Fill out the required information and follow the instructions to complete the process. Make sure to mention PointOS Professional to get proper pricing and setup.

You will receive an email from Merchant Warehouse containing information about your account, including the Site Name, Site ID, and Site Key.

3. Once you have a Merchant Warehouse Account, you must enter the correct information and options on the *Payment Setup* screen. Refer to “Payment Setup” on page 36 for more information.
4. Make sure to enable credit cards for EACH station that will accept credit cards. Refer to “Station Settings” on page 22 for more information.
5. Restart PointOS to finalize the new settings.

Setting Up Music

PointOS integrates with Windows Media Player to allow you easy control over your music from within the Media Player environment.

Importing Music

All music in PointOS comes from Windows Media Player. PointOS works with either Windows Media Player 10 or 11. Any audio file Windows Media Player will play, can be also be played by PointOS.

NOTE: Because Windows Media Player will not play songs downloaded from iTunes, PointOS will also not play songs from iTunes.

1. You can rip songs from compact discs that you own, or you can download songs legally from the Internet using sites or services like Napster or Yahoo!

NOTE: In addition to having a legal copy of this song, all locations are also responsible, as with any entertainment, of having the appropriate music licenses (ASCAP, BMI, etc.).

2. Use the Windows Media Player interface to add or delete songs to your library. You can have WMP automatically search for new music by choosing **File – Add To Library**.
3. You can create a playlist using Windows Media Player. You must start all playlists to be used in PointOS with a plus sign (i.e., +Happy Hour Music, +Great Mix, +Guitar Rock, etc.).

Once a song is in Windows Media Player, PointOS will automatically add all songs on startup. You can also add songs manually. Refer to “Update All Music” on page 157 for more information.

Printing Song Lists

You can print a list of songs to allow your customers to make requests. Refer to “View Song List” on page 129 for more information.

Hooking Up To Your Stereo

You can hook the PointOS music system up to your stereo in two ways.

- The first is to simply run a wire from the sound output of your computer to the input of your stereo. You can get these wires inexpensively at any electronics store.
- The second way is to use a music bridge. This is a hardware device that sends your music digitally to your stereo. There are several options to choose from, but a great one for the money is the [Linksys Music Bridge](#). This uses Wi-Fi or Ethernet cable to send a digital music signal directly to your stereo. It is available online or at many electronics retailers.

Setting Up A Port

Online reporting requires you to set up a port. Complete the following steps:

1. Select the Windows **Start** Menu.
2. Select **Microsoft SQL Server 2005**.
3. Select **Configuration Tools**.
4. Select **SQL Server Configuration Manager**.
5. Expand **SQL Server Network Configuration**.
6. Select **Protocols for SHAKENSOFT**.

The system displays the Protocols in the window on the right.

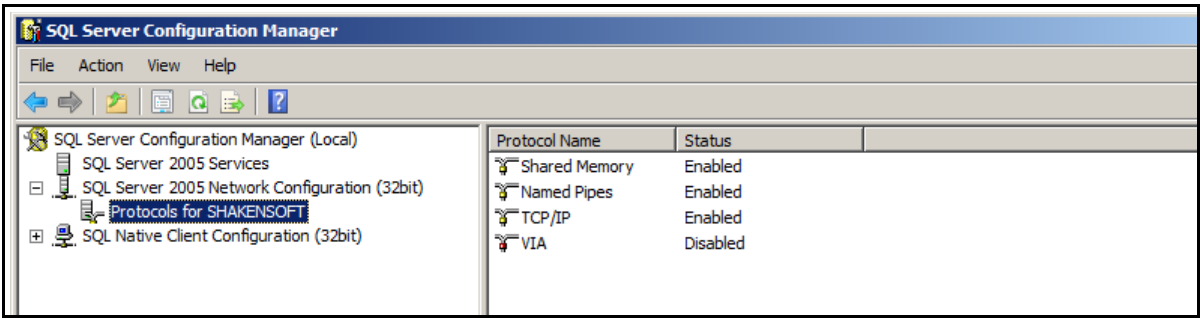


Figure 119: SQL Server Configuration Manager

- 7. Make sure the TCP/IP protocol is **Enabled**. If not, right click **TCP/IP** and select **Enable**.
- 8. Right click **TCP/IP** and select **Properties**.

The system opens the TCP/IP Properties dialog box.

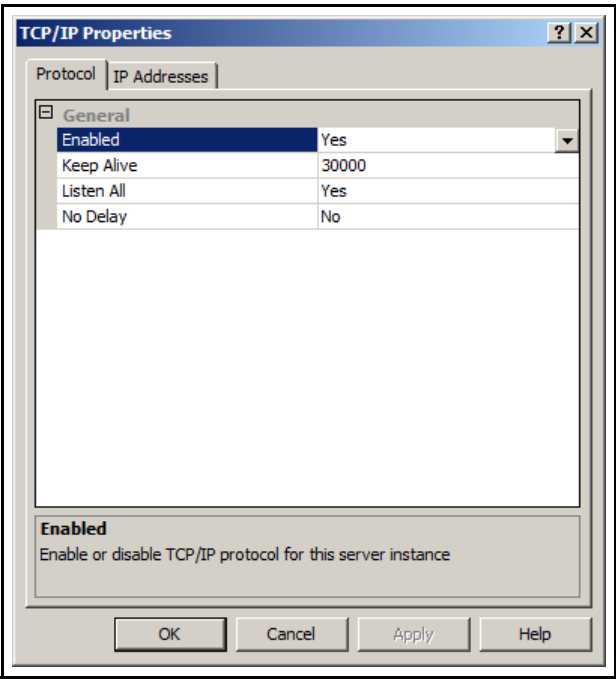


Figure 120: TCP/IP Properties

- 9. Select the **IP Addresses** tab.

10. Scroll down to the end of the list of properties.

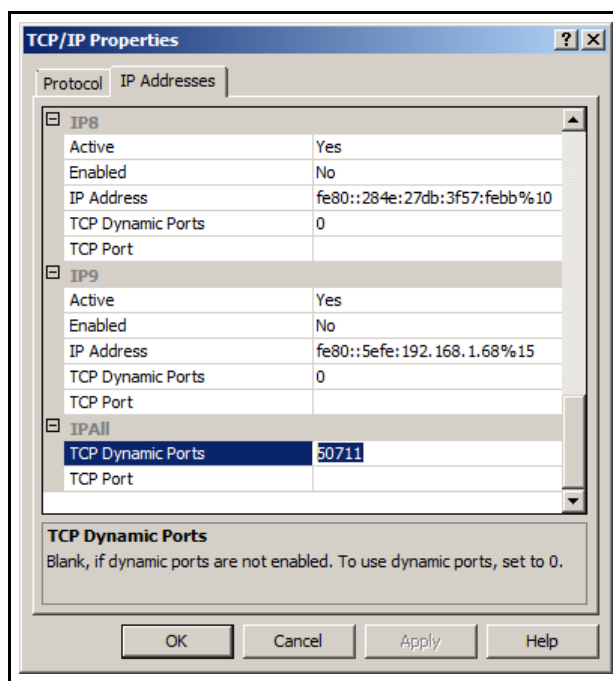


Figure 121: IP Addresses

11. Change the value next to **TCP Dynamic Ports** to 1433.

12. Select **OK**.

13. You must restart the SQL Server for the changes to take effect.

Setting Up Your Firewall for Online Reporting

To use online reporting you have to make sure that your firewall is allowing connections in or out of your computer. You will only want to allow access to SQL Server on port 1433.

These steps apply to the version of Windows Firewall that is included in Windows XP Service Pack 2 (SP2) and in Windows Server 2003. If you are using a different firewall system, see your firewall documentation for more information.

If you are running a firewall on the computer that is running SQL Server 2005, external connections to SQL Server 2005 will be blocked unless SQL Server 2005 and the SQL Server Browser service can communicate through the firewall. You must create an exception for each instance of SQL Server 2005 that you want to accept remote connections and an exception for the SQL Server Browser service.

SQL Server 2005 uses an instance ID as part of the path when you install its program files. To create an exception for each instance of SQL Server, you must know the correct instance ID. **The instance ID is SHAKENSOFT.**

To create an exception for SQL Server 2005 in Windows Firewall, complete the following steps:

1. In *Windows Firewall*, select the *Exceptions* tab.
2. Select **Add Program**.

3. In the *Add a Program* window, select **Browse**.
4. Select the C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\sqlservr.exe executable program.
5. Select **Open**.
6. Select **OK**.

To create an exception for the SQL Server Browser service in Windows Firewall, complete the following steps:

1. In *Windows Firewall*, select the *Exceptions* tab.
2. Select **Add Program**.
3. In the *Add a Program* window, select **Browse**.
4. Select the C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe executable program.
5. Select **Open**.
6. Select **OK**.

Setting Up Your Router

To setup your router for online reporting, you will need to use port forwarding. You will need to allow your router to send all commands from the PointOS server to the computer that hosts your database. The solution is to open up a door, or port, in your router for the information to come through.

Most applications have specific ports that need to be opened for them to work, for your PointOS database that port is 1433.

Updating PointOS

You can use the PointOS Updater to check for the latest version of PointOS. Refer to “Check for Update” on page 158 for more information.

If the Updater fails, you can download the latest version from the PointOS website and reinstall the software. The reinstall will not uninstall SQL. You **WILL NOT** lose any data.

The following table outlines some common problems with PointOS and some possible solutions.

Problem	Possible Solution
The system appears to be running slow.	<p>When the system is running slow there are several things you can do to speed it up.</p> <ul style="list-style-type: none"> • Compact the database. Refer to “Compact Database” on page 21 for more information. • Archive closed items and orders. Refer to “Archive Items” on page 156 and “Archive Orders” on page 156 for more information. • Cleanup unnecessary data. If your database is very large, you can remove data with the Database Cleanup tool. “Database Cleanup” on page 154 for more information. • Reboot your computer <p>The system can be setup with auto maintenance to prevent future slowdowns from happening. “Database Setup” on page 40 for more information.</p>
Some of the pictures on the screen do not appear to line up.	If you are using Windows Vista, make sure your font DPI is set to 96 DPI.
PointOS is only taking up part of the screen.	The screen resolution must be set to 800 x 600. Refer to Windows Help for more information.
The task bar is covering some of the controls, like music.	The Windows Task Bar should be set to auto hide. Refer to Windows Help for more information.
I cannot back up the database.	To run a backup of the database, you must be running the Server portion of PointOS Professional. The backup can only be done from the computer that holds the database you are trying to backup. Refer to “Backup Database” on page 153 for more information.
The cash drawer won’t pop.	<p>First check your cables and then make sure your printer is turned on, has paper, and a ribbon or ink.</p> <p>If the cash drawer still doesn’t pop, the printer may not be setup with the correct model. Refer to “Station Settings” on page 22 for more information on setting up the printer.</p>

Problem	Possible Solution
The receipt is not printing correctly; the text is breaking to another line.	The print width might not be set correctly. Refer to “Station Settings” on page 22 for more information.
Reports are taking a very long time to run.	Some reports are going through a lot of data, and do take a very long time. This may be normal. However, you can speed this up by archiving orders and items prior to running these reports. Refer to “Database Cleanup” on page 154, “Archive Items” on page 156, and “Archive Orders” on page 156 for more information.
I need to recover from a backup database.	To recover a backup database, go to the <i>Manager Dashboard</i> , and choose Select Database . When the system displays the database selection window, you can choose the appropriate backup file. PointOS database files end in .bak. Refer to “Restore Database” on page 28 for more information.
I want to move my database to a new computer.	To move your database to a new computer, you will need to first perform a database backup from the computer where the database is located. Then copy the .bak and .ldf files that are usually located in the PointOS Database/Backup folder to your new computer using a shared network driver, cd, or flash drive. Once the database has been copied to the new computer, you will use the Restore Database feature. Refer to “Restore Database” on page 28 for more information.
I have multiple stations sharing one database, and I cannot get them to recognize the database when I select it.	To setup a Windows network to be able to share a PointOS database: <ul style="list-style-type: none">• Make sure all computers are on the same workgroup.• Setup all the computers with the same login name and password and make sure those accounts have administrative rights.• Make sure your antivirus program or firewall is not blocking your computers from seeing SQL Server on the shared database computer. Refer to Windows Help for more information on setting up a Windows network.

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