

Version

9

MICROSALE

System Documentation

MicroSale
Simple, Complete Food Service Systems

Phone Order Guide

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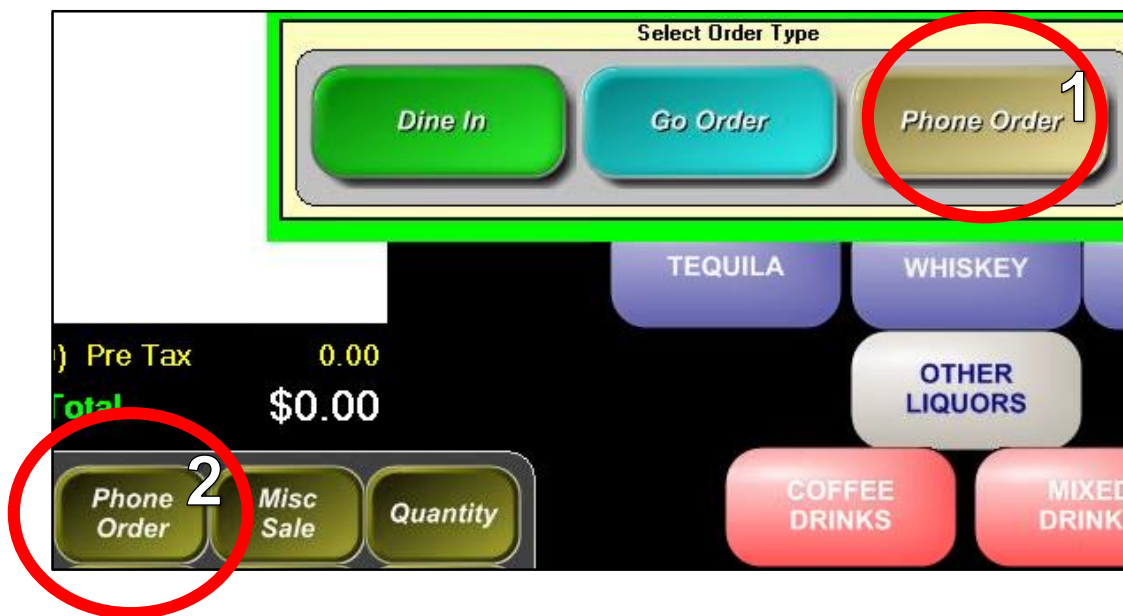
Basics of Phone Orders

Phone orders give you the ability to take an order from the customer and place it on hold for a future pickup or delivery time (I.E. 15 minutes, a few hours, a few days, weeks, etc.).

How to take a Phone Order

Depending on your current system configuration you can access the New Phone Order area two different ways:

1. Your system can be configured to prompt for the order type upon new order entry and logging into the order screen. The "Select Order Type" box will appear upon which you can select "Phone Order".
2. From the Ordering Screen look for the "Phone Order" button usually located near the Virtual Check (refer to the "Edit Order Screen Function Buttons.pdf document).



3. After selecting "Phone Order" a new prompt displays asking whether it is a "New Phone Order" or if you need to "Access Phone Orders" that have already been entered into the system.



New Phone Order will allow you to enter in an order to place on hold for pickup or delivery

Access Phone Order will allow you to edit, review, and close phone orders

4. Let's begin by selecting "New Phone Order"

Key Features of the Phone Order Entry Screen

- › **Change Production Time** – This is the time in which the order(s) will auto-release to the kitchen to be prepared.
For example: let's say we use a Production Time of 20 minutes.
A customer calls in around lunch time and puts in an order for 5:30PM Pick Up or Delivery.
The kitchen ticket will only be sent 20 minutes prior to the specified Pick Up or Delivery Time.
Our customers' ticket will be sent at 5:10PM to the kitchen to be prepared.
- › **Special Instructions** – This WILL print on the customer's receipt so you need to be conscious of what you include in this field. Special instructions could be "Blue house on the corner" or "Buzz apartment 202 for entry".
- › **Delivery @ / Pick Up @** - This button toggles between Delivery and Pick Up depending on which order type you have selected. This section is used to input a specific time such as 5:30 PM.
- › **Ready In** – If you tell the customer their order will be ready in 20 minutes, this is the area where you can enter in "20" and it will add 20 minutes to the current time.
- › **Date Needed** – By default, it is set to "Today" but you can change this to tomorrow, next week, etc. depending on when this order will be Delivered or Picked Up.
- › **Order Type** – This button is a toggle button, meaning that when you select it, it will toggle between Pick Up and Delivery. This is the order type that prints on the top of the kitchen receipt.
- › **Pay Deposit** – You can have your customer pay a deposit for an order. When this is selected you will be prompted to select what method of payment the customer has presented to use for this deposit.
- › **Get Directions** – If "Enable Drive Directions" has been turned on within your system, then this button will load directions for your delivery driver in a matter of seconds at the top, right side of the screen. Refer to Delivery Zone Setup Document.
- › **Search** – Displays an empty list with search options along the bottom to search for a customer by Phone, Address, or name. Once you find the customer and select it, the data will load into the Phone Order Entry screen for you.
- › **Cancel Retry Search** – Use this feature when you have entered in a phone number but the caller decides to put it under a different phone number or name that they have used previously at your restaurant. This will clear out the existing information (Name, Phone #, Address, Etc.) and load the new information in its place.
- › **List All Customers** – Displays the entire list of customers that have been entered into the system previously. You also have the option of searching within this screen by Phone, Address, or Name.
- › **Create Account** – Will allow you to create a House Account on the fly using the information you have filled out for that customer. Please refer to the "House Account" document for further information.
- › **Exit** – Will return you to the Ordering Screen, canceling the current phone order.
- › **Place Order** – Proceeds to the Ordering Screen to finalize the phone order.

- › **Show All Orders** – Depending on if a specific view had previously been selected, selecting this button will reset the view back to showing ALL orders (today and future).
- › **Find Check** – Prompts a keypad to type in a check number to quickly find an open phone order.
- › **Show Unassigned** – Will load a list of only those orders that have yet to be assigned to a delivery driver.
- › **Order for Dine In** – Will remove the specified order from the Phone Order area and mark it as an open table or tab. NOTE: The Check # will change to a 4-digit Check Number based on who selects this button. For Example: If Suzie marks Phone Order #5 as “Dine In” and her check series # starts at 3000, this order will now take on her check series number and could be assigned 3001 (or whatever the next number in her series was). Refer to Order for Dine In document.
- › **Option Menu** – Provides more options to search for a phone order as well as sort and print.
- › **Release Order** – This option is used in sites that do not have a Backoffice that will Auto-Release orders. If your site does not have this feature then you will need to manually Release Orders to the Kitchen for production.
- › **Driver Sales Report** – Prompts to select a specific driver after which will load a Driver Report. This report is similar to an audit and will provide total cash due that the driver will supply to the store. Refer to Driver Sales Report document.
- › **Select Date Pending Orders** – Prompts you to select a specific date or date range to show pending or future phone orders.
- › **Show Todays Pending Orders** – Will list orders that appear outside of the production window (Ex/ 20 Minutes from the current time) but with today's date.
- › **Delivery Only** – Will load a list of only orders marked as Delivery.
- › **Pick Up Only** – Will load a list of only orders marked as Pick Up.

Part 3:

Breakdown of the *Phone Order* Grey Option Bar

- › **Directional Hand button** – Allows you to scroll up and down the Phone Order grid.
- › **Assign Driver/Get Directions** – Loads all phone orders marked as “Delivery”. Select a specific order so that it is highlighted in a blue color and select the “Assign Driver” button. Refer to Assign Driver/Get Directions document.
- › **Close to Cash** – Loads all open phone orders with the option to “Close All” or “Close Selected”
- › **Tender Order** – After selecting this button you will select the order you wish to close. It will bring you to the ordering screen with a “Pay Order” now button available to close the order.
- › **Edit Order** – After selecting this button you will select the order you wish to edit. It will bring you to the ordering screen to make modifications to the order. Press “Done” to put the order back in the “Access Phone Orders” area.
- › **Print Open Orders** – Will print a consolidated list of all open phone orders assigned to the person using this feature. The printout will include the Customer Name, Chk#, Time, and Chk Ttl.
- › **Print Order Slips** – Will prompt you to select a specific employee's name after which it will prompt “Print Delivery Check for NAME? Press No to print all open delivery orders”
- › **Done** – Will bring you back to the Ordering Screen.

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Delivery Zone Setup

Beginning in Version 9, you can set up specific delivery zones (by mileage or drive time) to allow for varying service charges.

How to configure for Delivery Zone Setup

A Delivery Zone requires configuration in two different areas of MicroSale:

1. Our first stop will be the **Discounts, Gratuity, and Maintenance** screen
(You can get there by going to the Managers Menu → Discounts, Gratuity, Maintenance)
 - a. To create delivery charge we must set the following conditions and repeat per each zone/charge you offer:

- > **Name:**
- > **Type:** Charge Amount
- > **Amount:**
- > **Access Level:**
- > **Category:** Service Charge
- > Select **“Save”** when finished

Name	Delivery Chg Zone 1
Type	Charge Amount
Amount	2.00
Access Level	Cashier
Category	Service Charge

- b. Next, we need to create a **Discount Event** so go ahead and select the “Discount Events” button located within the Discounts Gratuity Maintenance screen.

- > In our example we **created** an Event called “Zone 1” but you are welcome to name your delivery zones how you see fit.
- > Then we **linked** it to our previously created “Delivery Chg Zone 1” by selecting the checkbox next to it.
- > Select **“Save”** when finished
- > Repeat as necessary

Discount Search

Zone 1

- Delivery Chg Zone 1

Delete Save Done

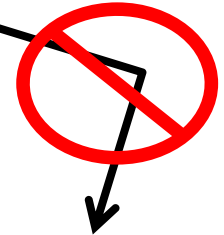
2. Now that we have created our service charge(s) and their corresponding event(s) we can move on to register configuration in the **Register Options by Terminal** section.

(You can get there by going to the Managers Menu → Register Setup → Register Options by Terminal)

a. The following options should be selected within the “General” tab under the “Phone Orders” section:

- › Select the checkbox “Prompt Order Type”
- › Select the checkbox “Enable Drive Directions” (This engages MapQuest and is the ONLY setup required for this utility now)
- › Select the checkbox “Enable Delivery Charge”

Phone Orders	
<input checked="" type="checkbox"/> Enable Call In Orders	<input type="checkbox"/> Auto Release Pending Orders
<input checked="" type="checkbox"/> Prompt Order Type	<input type="checkbox"/> Assign Driver from ID Screen
<input type="checkbox"/> Access Call In Order From Order Screen	<input checked="" type="checkbox"/> Enable Drive Directions
<input type="checkbox"/> Allow Audit Close w/ Open Order	<input checked="" type="checkbox"/> Enable Delivery Charge



b. Now, select the “Delivery Zone Setup” button
Note: If you get a message that states “No Records Found - No Service Charges Found” it simply means that you have neglected setting up the delivery zones and you need to go back to Step 1.

No Records Found
No Service Charges Found.

Delivery Zone Setup	
Zones by	Miles
Zone Setup	Zone 1
Start	0
End	5
Delete	
Save	
Exit	

Breakdown:

- › From our example, “Zone 1” will be triggered when a customer’s address falls within the 0-5mi range from our restaurant.
- › If not, it would use the next zone we configured or would give an “Out of Area” message to the order taker

c. Lastly, let’s assign the Zone(s) to a specific Mile or Minute range:

- › Select Miles or Minutes from the “Zones by” dropdown box
- › Select “Zone 1” from the “Zone Setup” dropdown box
- › Select a Start and End amount
- › Select “Save” (repeat for all zones) and then “Exit” when finished

How to use the *Delivery Zone*

1. Log into the Ordering Screen
2. Select the "Phone Order" button
3. Select "New Phone Order"
4. Select "Delivery" (if prompted) otherwise select "Delivery" from the Phone Order Entry screen by selecting the "Order Type" toggle button
5. Type in the Name and Address of the customer
6. Select the "Get Directions" button
7. Wait a few seconds and the directions will load at the top, right of the Phone Order Entry screen as well as load two new fields called "Delivery Zone" and "Distance"

Delivery Zone	Zone 1	Distance	0.336
---------------	--------	----------	-------

8. Select the "Place Order" button, located at the bottom of the screen
9. The Ordering Screen loads and the Delivery Zone charge displays on the Virtual Check

The screenshot shows the ordering interface with the following fields and buttons:

- Name:** SARAH
- Phone:** 555.1111
- Email:** (empty)
- Address:** 1100 W. BRANDON BLVD
- City:** Brandon
- State:** FL
- Zip:** 33511
- Delivery @:** Ready In
- Ready In:** Now
- Date Needed:** Today
- Order Type:** Delivery
- Pay Deposit:** 0.00
- Delivery Zone:** Zone 1
- Distance:** 0.336
- Special Instructions:** (red box)
- Get Directions:** (button circled in red)

On the right side, there is a summary box with the date 01/22/2015 and the following text:

DISTANCE 0.336
TIME Min(s) 0.67
Start out going east on W toward Leitner Ct.
Make a U-turn onto W Bra
1100 W BRANDON BLVD

At the bottom, there is a "Previous Order Information" button and a "Production" label.

The virtual check shows the following details:

- Customer Name:** SARAH
- Tray 1:** Dealer Copy
- Item 1:** Delivery Chg Zone 1
- Amount:** 2.00

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Creating a Driver

In MicroSale you can configure the system to track hours worked by specific job codes. The "Driver" job code is only required for Quick Service environments in order for deliveries to be assigned to non-managers. In Full Service environments the only requirement is to have an Audit started in order for deliveries to be assigned to non-managers.

How to create a Driver job title

First we need to create a new job title of "Driver" which will be assigned to each employee that will be assigned to delivery orders:

1. Go to the Managers Menu → Register Setup → Tenders Paid Outs Customer Requests More → Select "Misc setup" from the top → Select "Employee Job Codes" from the list
2. Type in the word "Driver" without the quotation marks
3. OPTIONAL: Select the checkbox for "Job Code Requires Audit" only if your delivery driver will be placing orders into the system. Most drivers do not do order entry.
4. Select "Save"
5. Exit when finished

How to assign a Driver job title to an employee

Now we can assign this newly created job title to an employee:

1. Go to the Managers Menu → Employee Maintenance → Employee Maintenance
2. Select the employee from the "Last Name" dropdown menu OR create a new employee
3. Select the Job Title for the employee at the bottom of the screen under the "Job Code / Pay Rates" section
4. Select "Driver" from the list that display upon selecting the "Job Titles" field on the next available row
5. OPTIONAL: Fill in a Pay Rate
6. Select the checkbox for "Hourly"
7. OPTIONAL: Select the checkbox for "Tipped" if this position is tippable
8. OPTIONAL: If the state you reside in uses daily overtime, select the checkbox for "Day OT"
9. Select "Save"
10. Exit when finished (Repeat the steps above for each driver)

General Information			Nick Name (Optional)
Last Name	Smith	Employee Id	None
Middle Name			
First Name	John	Keyboard	Security Base Access Level
			Driver

Jobs Code / Pay Rates				
Job Titles	Pay Rate	Hourly	Tipped	Day OT
Driver	7.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Editing Customer Information

Within the Access Phone Orders screen you can select the option "Change Order / Customer Information". This will launch the Customer Information screen. From here you can make adjustments to the address, date/time, pay a deposit, etc.

Only the Address, City, State, Zip, and Phone fields can be edited on open orders.

Only the Pick Up Time and Pick Up Date can be modified from this section.

Pre Paid Order with Credit Card

This will allow you to take a customer's card ahead of time. For example, maybe they are sending their child into the restaurant to pick up the order and they do not have the payment.

Change Customer Information

Saves the information you changed

Print

This will print the "Driver Instruction Data" which does not include what was ordered but instead includes: Customer Name, Address, City, State, Zip, Phone and Drive Instructions including the distance and minutes.

Pay Deposit

- A "Deposit Paid In" screen displays
- Depending on your settings, you may see Cash, Credit Card, etc.
- Select the deposit type and a keypad displays to enter the amount
- Note: Depending on the deposit type further information may be asked of you such as an Account # and expiration date.
- A deposit slip will print

Customer Information

Name: KATIE
Address: 1100 W. BRANDON BLVD
City: Brandon State: FL
Zip: 33511 Phone: 555.2222

Deposits Paid: 0.00 Check Total: 5.00
Pick Up Time: 10:44 AM Pick Up Date: 1/22

Click Time Or Date To Edit

Information

DISTANCE 0.336
TIME Min(s) 0.67
Start out going east on W Brandon Blvd/FL-60 toward Leitner Ct.
Make a U-turn onto W Brandon Blvd/FL-60.
1100 W BRANDON BLVD is on the right.
DISTANCE 0.336
TIME Min(s) 0.67
Start out going east on W Brandon Blvd/FL-60 toward Leitner Ct.

Click information box for map and directions to customers location.

Pre Paid Order with Credit Card Pay Deposit
Change Customer Information Print Print Receipt
Exit

Print receipt

This will print the customer's itemized receipt that may also include drive directions.

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Driver Sales Report

The Driver Sales Report is similar to an audit but differs in the amount of information it will provide.

Note: Prior to proceeding with this document you should review the documentation on "Creating a Driver" and "Basics of Phone Orders".

Conditions:

- > **Quick Service environment:** a driver needs to be clocked-in *and* have the job title of "Driver" or "Manager" in order to be assigned to a delivery. Each Driver or Manager will have a "Driver Sales Report" to print. The default access level of this report is set to a level 4 or "Assistant Manager". You can modify this level within the "System Access Configuration" area of the Managers Menu.
- > **Full Service environment:** anyone with an open audit can be assigned to a delivery. Thus, the "Driver Sales Report" is **NOT** available to any employee within this configuration regardless of job title or access level. The regular sales audit will breakdown delivery assignments as well as other types of orders such as tabs, tables, express, and pick up.

How to view the Driver Sales Report

The below information is a breakdown of the Driver Sales Report and what its' information and functionality means to you and your employees:

1. From the Ordering Screen select the "Phone Orders" button and then select the "Access Phone Orders" button
2. Select the green-colored "Driver Sales Report" button
3. Select a driver or manager from the list
4. The Driver Sales Report will display with the following options:
 - a. **Cash Drop** – Similar to a "Skim" or "Audit Deposit", the Cash Drop function allows a manager to enter the amount of cash the driver is handing in and in turn records it on their Driver Report. The system will subtract the Cash Drop from the Net Cash Due at the end of the shift as well as notate how much you turned in if you are using this as your final deposit for the driver report.
 - b. **Collect Delivery Charges** – This option is used to pay the driver their delivery charge. When selected the system will enter a paid out for the amount you input (Ex/ the Total Delivery Charges or Net Del. Chg Due Driver)
 - c. **Print Report** – This option enables the on-screen report to print a copy to the receipt printer

John Doe	
*** Open Phone Orders ***	
Net Open Sales	0.00
Open Discounts	0.00
Open Sales Tax	0.00
Total Open Sales	0.00
*** Delivery Sales ***	
Total Delivery Sales	0.00
Cash Drop	0.00
Credit Card Charges	0.00
Credit Card Tips	0.00
Total Charges	0.00
Delivery Charges Paid	0.00
Total Delivery Charges	0.00
Net Cash Due (Restaurant)	0.00
Total Deliveries	0
Total Charges	0

Manager Edit
Select Cash Drop Or Delivery Charges Paid
Enter the New Amount

Cash Drop Collect Delivery Charges

Print Report Exit

- d. **Exit** – This option will return you to the Access Phone Order screen

Breakdown of the *Driver Sales Report*

When you print the report you also receive an additional section labeled “Delivery Tickets” which includes all orders assigned to that driver. This section includes “Address, Chk#, Time, and Chk Ttl”.

- › **Net Open Sales** – This is the combined subtotal of open orders. The total is made of the price of all menu items added together. This does not include discounts or taxes.
- › **Open Discounts** – Total Discounts applied to undelivered orders
- › **Open Sales Tax** – Total Tax of undelivered orders
- › **Total Open Sales** – Total Sales of undelivered orders.
This is calculated by taking the Net Open Sales – Open Discounts + Open Sales Tax
- › **Total Delivery Sales** – Total Sales of delivered (closed) orders.
This is calculated by taking the Net Closed Sales – Closed Discounts + Closed Sales Tax
NOTE: “Total Delivery Sales” will only be visible on the Driver Report when the Total Open Sales is equal to zero. Otherwise, this field will be hidden and instead the “Net Open Sales” and “Total Sales Open & Closed” will be shown in its’ place.
- › **Total Sales Open & Closed** – Total amount for checks that are still open and those that have been closed
- › **Cash Drop** – Any cash drop that was performed by this driver using the “Cash Drop” button
- › **Credit Card Charges** – Includes the overall total of the check
- › **Credit Cards Tips** – Total tips that have been applied to credit card transactions
- › **Total Charges** – Credit Card Charges + Credit Card Tips
- › **Delivery Charges Paid** – Total delivery fee charges paid out to the driver using the “Collect Delivery Charges” button
 - Example: Sue, our delivery driver, is working a double shift today. She wishes to collect on her “Total Delivery Charges” or in other words, what she makes per each delivery. In this example, Sue earns \$1 per each delivery. Sue has delivered 10 orders before clocking out to go on break before her second shift begins. Sue wishes to collect her \$10 (\$1 rate X 10 deliveries) and we, as a manager, need her report to reflect this. So, as a manager we can use the “Collect Delivery Charges” button and record \$10. Now, under the “Delivery Charges Paid” section of her Driver report, it will show \$10 and the “Total Delivery Charges” will be reset to \$0.
- › **Total Delivery Charges** – Total delivery fee charges owed to the driver
- › **Net Del. Chg Due Driver** – Total delivery fee charges owed to the driver. However, this field will only display if the Total Delivery Charges differs from the Net Del. Chg Due Driver total. This will occur when a driver collects his or hers delivery payments and continues to work (such as a double shift or goes on a break).
- › **Net Cash Due (Restaurant)** – Total cash the driver owes the restaurant
- › **Total Deliveries** – Total number of deliveries made by the driver
- › **Total Charges** – Total number of credit card transactions for the driver

Net Del Chg Due Driver – This field will only show if its' amount total does not equal the same as the "Total Delivery Charges" total.

- › This will only occur if the driver goes on break or is finished working their 1st shift and collects the "Total Delivery Charges" amount.
- › The manager would use the "Collect Delivery Charges" button to issue a Paid Out for amount of the "Total Delivery Charges".
- › When the driver comes back from break or beings their 2nd shift then the "Net Del Chg Due Driver" amount would (after the next delivery) not equal the "Total Delivery Charges" amount.
- › This occurs because Total Delivery Charges is the overall total of both owed and paid out amounts and the Net Del Chg Due Driver (total delivery charge) is what is owed still or yet to be paid out to the driver.

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Assign Driver / Get Directions

The area of the Access Phone Orders screen will allow you to get turn-by-turn navigation from the previous customer's house as well as print extra receipt copies, assign a driver, and quickly close open orders.

Locating the Assign Driver / Get Directions button

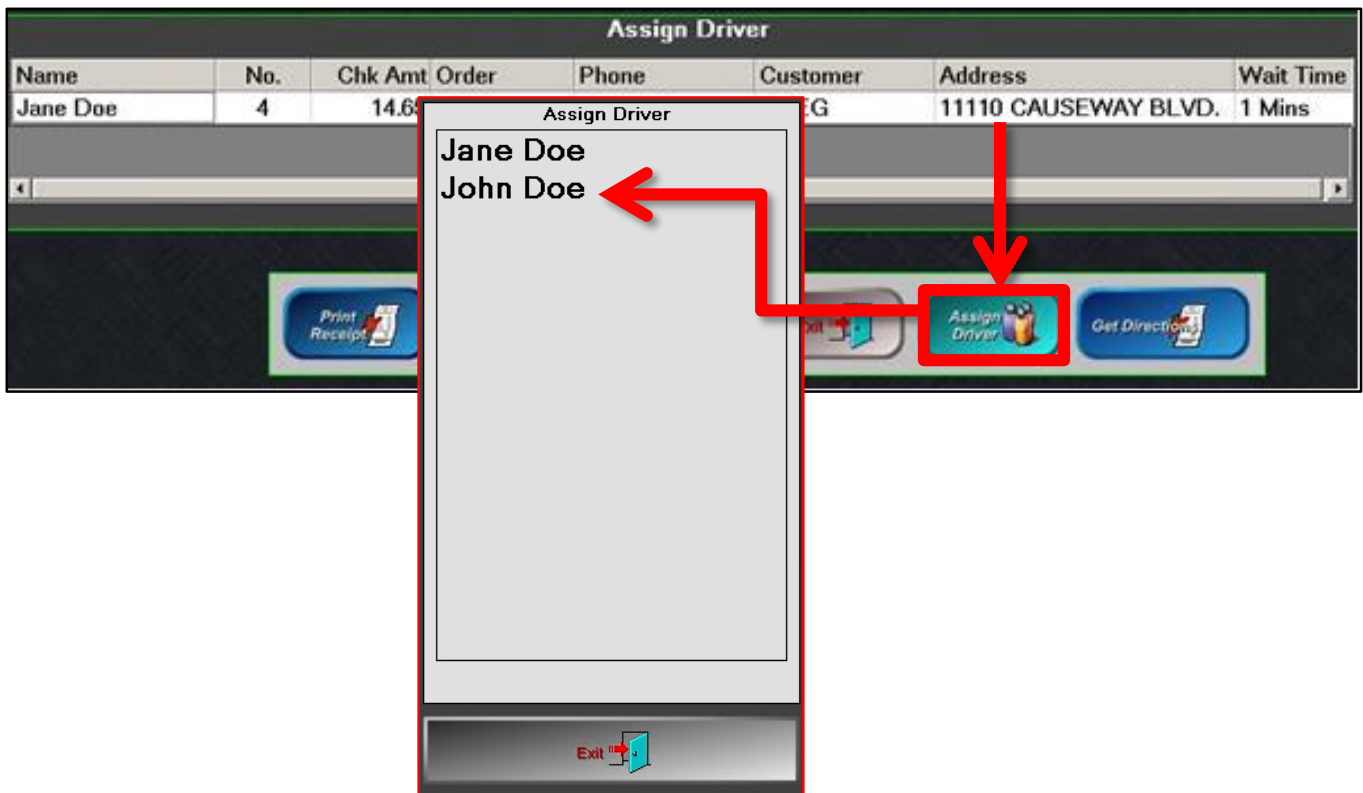
Locating the Get Directions feature can be done in two different ways.

- › Option 1: Enable the Register Option "Assign Driver from ID Screen". This will place the "Driver Access" option onto the ID Screen. Once you select the "Driver Access" button and enter your ID #, you will have the option to choose "Assign Driver Otherwise, you can get to this area by going to Access Phone orders and selecting Assign Driver/Get Directions button.
- › Option 2: Go to the Ordering Screen or Server Screen and select either Phone Order or Access Phone order and then select the "Assign Driver/Get Directions" button.

Using Assign Driver

This will load all phone orders marked as "Delivery" that have not been assigned to a driver/employee.


1. Select Assign Driver/Get Directions button
2. Select the order(s) you wish to assign a driver
3. Select the "Assign Driver" button
4. Select a driver/employee name
5. The order will be removed from the Assign Driver area and will now be assigned to the select employee/driver

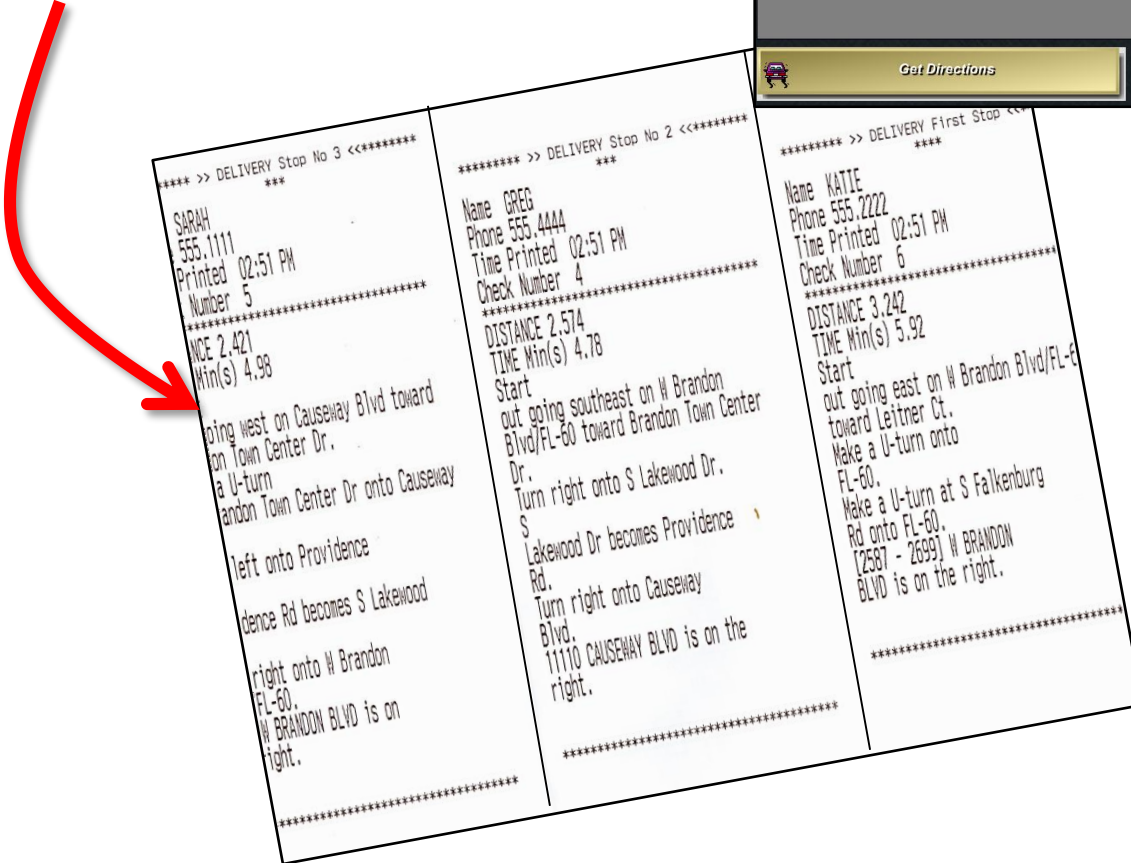


Using Get Directions

Get Directions provides a turn-by-turn print out for each delivery. The directions for the first stop will be from the restaurant to the customer but the preceding directions will start from the last delivery address to the next.

1. Select the Assign Driver/Get Directions button
2. Select Get Directions
3. Select the driver or employee's name
 - a. All current orders assigned to the driver/employee will appear.
4. Select the deliveries in the order you wish to have directions printed
 - a. *Note: Depending on the order of stops you select it will print the directions starting from your last stop.*
5. Each selection you make will add an entry to the "Stops" section.
6. Select Get Directions button
7. A separate slip prints for each delivery

Drivers		John Doe	
Jane Doe	SARAH--555.1111--5		
John Doe	KATIE--555.2222--6		
	GREG--555.4444--4		
		Stops	
		KATIE--555.2222--6	
		GREG--555.4444--4	
		SARAH--555.1111--5	
Get Directions		Exit 	



**** >> DELIVERY Stop No 3 <<*****

Name SARAH
Phone 555.1111
Printed 02:51 PM
Check Number 5

DISTANCE 2.421
TIME Min(s) 4.98

Start
going west on Causeway Blvd toward
on Town Center Dr.
a U-turn
Brandon Town Center Dr onto Causeway
Left onto Providence
Providence Rd becomes S Lakewood
Right onto W Brandon
FL-60.
W BRANDON BLVD is on
the right.

***** >> DELIVERY Stop No 2 <<*****

Name GREG
Phone 555.4444
Time Printed 02:51 PM
Check Number 4

DISTANCE 2.574
TIME Min(s) 4.78

Start
out going southeast on W Brandon
Blvd/FL-60 toward Brandon Town Center
Dr.
Turn right onto S Lakewood Dr.
S
Lakewood Dr becomes Providence
Rd.
Turn right onto Causeway
Blvd.
11110 CAUSEWAY BLVD is on the
right.

***** >> DELIVERY First Stop <<*****

Name KATIE
Phone 555.2222
Time Printed 02:51 PM
Check Number 6

DISTANCE 3.242
TIME Min(s) 5.92

Start
out going east on W Brandon Blvd/FL-60
toward Leitner Ct.
Make a U-turn onto
FL-60.
Make a U-turn at S Falkenburg
Rd onto FL-60.
[2587 - 2699] W BRANDON
BLVD is on the right.

Other features of *Assign Driver / Get Directions*

- > **Print Receipt** – To use this function, first select an order and then select “Print Receipt”. Two receipts will print:
 - An itemized customer receipt with payment delivery directions at the bottom
 - A driver receipt which includes:
 - Driver Name
 - Time & Date it was printed
 - Check No.
 - Customer’s Name, Address, and Phone Number
 - Delivery Time
 - Amount to collect
- > **Close Selected** – To use this function, first select the order(s) you wish to close and then select the “Close Selected” button. All selected orders will close to exact cash (no change will be calculated). Afterwards, the message “Print Slip? Cash Amount Closed \$X.XX)” will display. It is best practice to select “Yes” to print a copy of the closing receipt.
- > **Save / Exit** – Allows you to save any changes you made or exit this area to go back to the Access Phone Orders screen.



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Register Options for Phone Orders

Register Options are configured on a per-terminal basis. This allows the restaurant to function differently depending on the terminal you are logged in to. The following Phone Order Register Options allow for Phone Order Entry and Driver Assignment among many other options available.

Configuring Register Options for Phone Orders

Depending on your current system configuration you can access the New Phone Order area two different ways:

> **Enable Call In Orders –**

This option activates the “Call In Order” function. This will allow you to take Pick Up or Delivery orders.

> **Prompt Order Type –**

This option forces the server/cashier to select whether the call in order is pick up or delivery before the order can be placed.

> **Access Call In Order From**

Order Screen – This option will automatically place the “Phone Order” button onto the top of the Order Screen, within the grey section that also includes the “Pay Order” button. *Note:* This is only available for Quick Service or Quick Bar environments.

> **Allow Audit Close w/ Open Order –** This option allows a server/cashier audit to be closed without having to close any open call in orders.

> **Disable Order History –** This option will allow the system to skip the phone order entry screen which can make order taking quicker. However, customer information and order history is not stored.

> **Disable Credit Card Prompt – Delivery –** This option will disable the prompt to pay with a credit card when placing a delivery order.

> **Receipt Prints On Order Close –** This option will only print the receipt once the order is closed.

> **Print 80 Col Invoice –** This option allows 80-Column invoices to be printed for phone orders in place of the 40-Column receipt.

> **Enable Credit Card Storage –** This option enables the Access Phone Order screen to have the “Credit Card on File” button. This is used to allow a credit card to be stored along with the rest of a phone order customer’s personal information. When the customer calls back for future orders, the system can use the card on file instead of having the customer re-read the card information each time.

> **Prompt for Promise Pick Up Time –** This option will prompt at the end of placing ANY order (not just phone orders) for a specific number of minutes that the order will be ready in.

Phone Orders

<input checked="" type="checkbox"/> Enable Call In Orders	<input checked="" type="checkbox"/> Auto Release Pending Orders
<input checked="" type="checkbox"/> Prompt Order Type	<input checked="" type="checkbox"/> Assign Driver from ID Screen
<input checked="" type="checkbox"/> Access Call In Order From Order Screen	<input checked="" type="checkbox"/> Enable Drive Directions
<input type="checkbox"/> Allow Audit Close w/ Open Order	<input checked="" type="checkbox"/> Enable Delivery Charge
<input type="checkbox"/> Disable Order History	Driver Payment Amount
<input type="checkbox"/> Disable Credit Card Prompt - Delivery	Decimal for Delivery Fee No <input type="text" value="0"/>
<input type="checkbox"/> Receipt Prints On Order Close	Decimal For Percentage
<input type="checkbox"/> Print 80 Col Invoice	Phone Order Default <input type="text" value="Pick Up"/>
<input type="checkbox"/> Enable Credit Card Storage	Call Ahead Time Minutes <input type="text" value="10"/>
<input type="checkbox"/> Prompt for Promise Pick Up Time	Minimum Production Time <input type="text" value="20"/>
<input checked="" type="checkbox"/> Use Caller ID	Minimum Delivery Amount <input type="text" value="0.00"/>
<input type="checkbox"/> Format Phone Number On	Order Routing by <input type="text" value="Time In"/>
<input type="checkbox"/> Disable Pending Order Button	
<input type="checkbox"/> Time Required For Phone Order	
<input type="checkbox"/> Credit Card Slip On Driver Assignment	

- › **User Caller ID** – This option enables the Caller ID function but you must have a compatible Caller ID box attached to one of the terminals.
- › **Format Phone Number On** – Will reformat phone numbers entered with a period between number sets. Example: 5551111 will format to 555.1111 automatically within the system.
- › **Disable Pending Order Button** – This option disables the system from checking for new phone orders.
- › **Time Required For Phone Order** – This option will force the phone order to have either a “Delivery/Pick Up @ Time” or a “Ready In” time assigned to it prior to proceeding out of the Phone Order Entry screen.
- › **Credit Card Slip On Driver Assignment** – Will withhold the credit card sign slip for merchant/customer until the driver is assigned to the order
- › **Auto Release Pending Orders** – This option will work if you have a Back Office license at the site. This will auto-release all pending phone orders without a cashier/server using the “Pending Order” button as it will no longer appear. **ONLY SET THIS OPTION ON ONE TERMINAL.**
- › **Assign Driver from ID Screen** – This option loads the “Delivery Status” and “Driver Access” buttons onto the ID Screen. It will allow you to assign a driver to any available phone order.



The buttons above will be further explained later in this document.

Note: If you are in a Quick Service Environment you will also see a “Place Phone Order” button appear on the screen as well.

- › **Enable Drive Directions** – This option enables the MapQuest integration feature and allows directions to be printed for the delivery driver.
- › **Enable Delivery Charge** – This option will allow a delivery charge to be automatically applied to a qualifying order (See Delivery Zone Setup document).
- › **Driver Payment Amount Decimal for Delivery Fee No Decimal for Percentage** – This option will set the amount that the driver receives from the restaurant per delivery order. If you are using a dollar amount then you need to type the amount with decimals (Example: 1.00). Otherwise, if you are using a percentage than you need to type the percentage without any decimals (Example: 5 will be 5%).
- › **Phone Order Default** – This option will designate all phone orders as “Pick Up” or “Delivery” based on your selection. You can always change this from the Phone Order Entry screen if the default order type is not correct for a specific order.
- › **Call Ahead Time Minutes** – This option will tell the system when to trigger the “Pending Order” button onto the Server Menu or Ordering Screen. When this button is selected the order will be sent to the kitchen for production. You may want this time to be 10 minutes greater than the Minimum Production Time.
- › **Minimum Production Time** – This option sets the time it takes for kitchen to prepare the order. In Version 9 you can change this information on-the-fly from the Phone Order Entry screen.
- › **Minimum Delivery Amount** – This option sets a check total amount that must be reached before a delivery will be valid. Example: You must have a check total of \$15 before a driver will be sent out for delivery. Note: If you set this to zero, it will allow any check total for Delivery orders.

- › **Order Routing by** – This option tells the system if it will apply the delivery charge based off minutes or miles.
- › **Delivery Zone Setup** – See “Delivery Zone Setup” document.

Breakdown of the Register Option - Assign Driver from ID Screen

Let’s recap: this register option loads the “Delivery Status” and “Driver Access” buttons onto the ID Screen. It will allow you to assign a driver to any available

Note: If you are in a Quick Service Environment you will also see a “Place Phone Order” button appear on the screen as well.



Delivery Status:	Place Phone Order:	Driver Access:
<p>The familiar “Access Phone Order” screen will load but the only available options will be to “Change Order/Customer Info”, “Find Check”, and “Done”.</p> <p>The grid of all open orders loads but you cannot select any field within the order.</p>	<p>The familiar Phone Number prompt will display to enter in a phone number.</p> <p><i>Note: You may first be prompted for an order type depending on your configuration.</i></p> <p>You can proceed with placing the phone order as normal. This is just a quick way to place a phone order without having to log into the Ordering Screen first.</p>	<p>The familiar “Access Phone Order” screen will load but the only available options will be to “Change Order/Customer Info”, “Find Check”, “Assign Driver/Get Directions”, “Close to Cash”, “Tender Order”, and “Done”.</p> <p>The grid of all open orders loads and selecting any field within the order will perform the same functions as the actual “Access Phone Order” screen.</p>

Note: In Version 8 of MicroSale the “Driver Access” button would automatically allow you to scan a barcode located on the customer receipt to assign the driver to an order quickly. In Version 9, you can use the “Functions.ini” file to enable this feature.

1. Go to the FTP Site → Msaledealer → MicroSale Version 9 Install Files → M\$CFGINI File
2. Download the “Functions.ini” file to each terminal’s MicroSale folder
3. Change the value for the line “Assign Driver” to “Assign Driver”
4. Save