Full Service | Bar
User Guide

TABLE OF CONTENTS

About MicroSale

Thank you for using MicroSale as your hospitality point of sale solution.

When reading this document, your system should now fully be setup and operational. Your MicroSale representative has set up the software to best meet the needs of your establishment. However, with thousands of settings within the system, tweaks can be made at any time if you would like aspects of the software to work differently.

Time Clock

How to clock-in, clock-out, and declare tips (if applicable)

Clocking In/Out

1 Enter your number and select **In/Out**
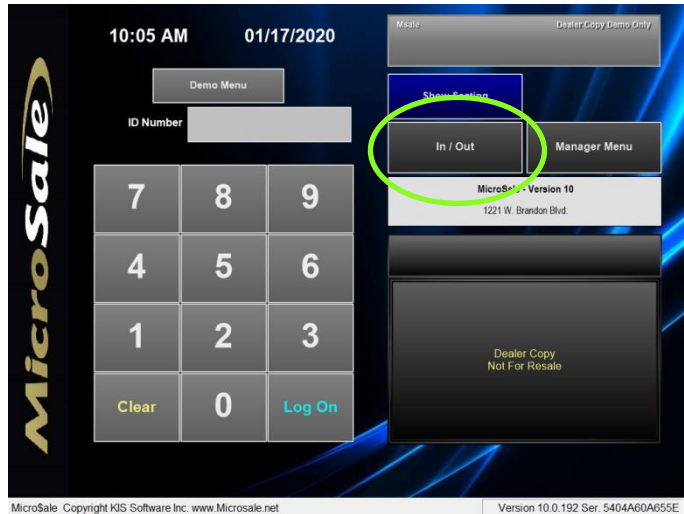
2 Select **Punch In** or **Punch Out**

3 On **Punch In**, select the job code (job title) you will perform during this shift. If you only have one job code (or job title) it will automatically select that role for you.

On **Punch Out**, select Agree or Disagree with the hours worked for the day. If you disagree, a manager will be notified that your hours may be incorrect. *You will be punched out whether you agree or disagree.*

4 On Punch Out (for tipped employees) it will prompt you to declare your cash tips.

5 Enter in your cash tips. Credit card tips are automatically declared.

More Information

Your hours worked for the payroll period are listed on the In/Out Screen

Select "Print Time" to print the details on an attached receipt printer.

Optional Register Settings

If you would prefer cash tips to be declared at the close of the audit, enable the following option on all terminals:

📍 Managers Menu > Register Setup > Terminal Configuration > Full Service > **Cash Tips are declared on audit close** > Save > Exit

Server Audits (Server Reports) and Assigning Cash Drawers to Bartenders

---

ⓘ What is a Server Audit?

An **audit** tracks sales activity for each employee who uses the system for order entry. An employee must have an active (open) **audit** in order to ring up sales and collect payments in MicroSale. Audits are "paper trails" of the activity done by employees during their shifts.

> The Daily Closeout Report, Balance Sheet, Daily Audit Report, and reports show the consolidated sales data from all of the Audits for each business day.

⚠️

To automatically assign an employee to a cash drawer, you must start the audit on the terminal that has a cash drawer attached.

Managers Starting a Server Audit

1 Select **Manager Menu,** enter your number and select **OK**

2 From the Managers Menu, select **Sales Audit**

3 Select an **employee**

4 **The employee's audit is now open and ready**

When using a table layout;
   a. You will be prompted to assign the employee to a specific floor section. You can change the section at any time using "Change Section" on the table layout

When a cash drawer is connected to the terminal and an audit is not yet assigned to the cash drawer; A prompt appears, "Do you want to assign a cash drawer?"

☒ Select **No**, if this specific employee will **not** be using the drawer

☑ Select **Yes** to assign this employee to the cash drawer. Enter the beginning drawer amount when prompted

Assigning an employee to a cash drawer after the audit has been started

Automatically assigning an employee to a cash drawer:

When a cash drawer is connected to the terminal and an audit is not yet assigned to the cash drawer; A prompt appears, "Do you want to assign a cash drawer?"

☑ Select **Yes** to assign this employee to the cash drawer. Enter the beginning drawer amount when prompted

Assigning an employee to a cash drawer after the audit has been started:

1 Go to the **Managers Menu**, and select **Assign Drawer**, and select the employee's name from the list of open Audits below the terminal name
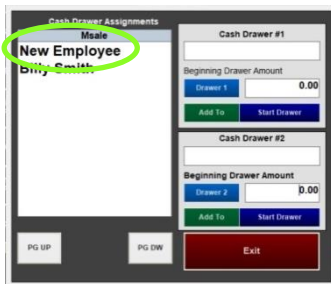
2 Touch the empty box under "**Cash Drawer #1**". If you have two drawers on one terminal, you can assign an employee to Cash Drawer #2 as well
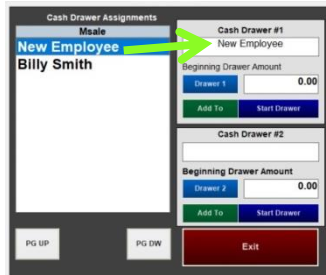
3 Touch the blue button, *Drawer 1* or *Drawer 2*, to enter the beginning drawer amount

4 Select **Start Drawer**
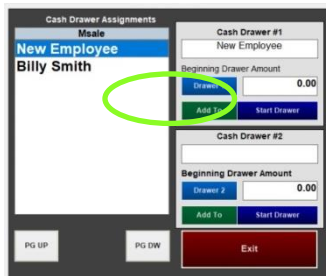
⚠️
EMPLOYEES SHOULD ALWAYS MANUALLY COUNT THE DRAWER TO ENSURE ACCURACY

The employee assigned to the terminal and cash drawer will appear in the top right corner of the ID screen

---

For additional options for bartenders sharing drawers and registers please go to "Bartenders Sharing Registers"

More information on cash drawers

Adding additional cash to the drawer:

Use the green Add To button to add additional cash in the drawer (adds to the beginning drawer amount)

Un-assigning the drawer:

Use the Close Drawer button to un-assign the cash drawer from the employee. This allows an employee to keep their audit open but detaches their audit from the cash drawer. The unassigned employee can continue to place orders and take payments (using server banking) without having to stay at the terminal with the cash drawer. The drawer will no longer open for the employee and the payments collected will not be accounted in the drawer's balance.

Bartenders Sharing Registers

Your restaurant may have multiple bartenders sharing the same register and all accessing a single (or two) cash drawer(s). MicroSale has multiple options to allow you to choose the best setup for your environment. Please view the options below to determine the best solution for your restaurant.

Sharing a drawer, sharing tips, and sharing tabs

When an employee is assigned to a cash drawer, the order screen can only be accessed by that specific employee and management (all other employees can only clock in or out on the register).

If multiple employees (or bartenders) are using the same terminal and cash drawer plus sharing tips, assign a generic audit to the cash drawer such as "AM Bartenders". The generic audit will also combine all credit card tips in one place to allow for easy distribution at the end of the shift.

If you have multiple employees sharing multiple registers, you will need to use 1 generic audit per register (such as AM Bartender1 and AM Bartender2). *You cannot login to multiple registers with the same login # simultaneously.*

Creating generic audits:

1   Create an employee with the generic name such as First Name "AM" and Last Name "Bartender"

2   Assign "AM Bartender" to the proper job title of bartender and tick the checkbox for tipped

3   Assign an access level (bartender) and a primary access number. Choose something short that is easily entered and remembered by staff (such as "1" or "0")

4   Save

Example:

For speed of service, you can set the register to never logout:

By default, the system automatically logs out after an order (or tab is entered). To stay on the order screen (or server menu) after tabs/tables are entered, set the following option on each register:

📍 Managers Menu > Register Setup > Terminal Configuration > Full Service > under "Bar Station", tick the checkbox **Return to server / bar screen after order > Save > Exit**

By default, the system automatically logs out after 30 seconds of inactivity. To stay on the order screen, set the following option on each register:

📍 Managers Menu > Register Setup > Terminal Configuration > Full Service > next to **"Hold the server screen open for (seconds)"** change the dropdown from 30 to 0. Zero (0) disables the register from logging out.

Sharing one drawer but collecting tips separately

By default, when an employee is assigned to a cash drawer, the order screen can only be accessed by that specific employee and management (all other employees can only clock in or out on the register).

To allow each bartender to login separately and share the cash drawer, set the following option on each register:

- Managers Menu > Register Setup > Terminal Configuration > Printer/Cash Drawer (top toolbar) > tick the option **Drawer #1 Opens for all cashiers** > Save > Exit

This option allows multiple bartenders to ring in tabs/tables under their own login number and keep their sales/tips separate from all other bartenders.

If bartenders SHOULD NOT have access all tabs/tables started from other employees, set the following option on each register:

- Managers Menu > Register Setup > Terminal Configuration > Full Service > Additional Options > tick the checkbox **Turn off tab sharing on bar screen (bartenders only see their tabs)** > Save > Exit

Skimming a cash drawer of excess cash

Skimming a cash drawer may be necessary where there is an excess amount of cash in the drawer. It allows money to be taken out of the drawer while being properly accounted on the audit assigned to the drawer.

To skim the drawer, the Skim Drawer function must be assigned to the order screen. If this function is not present, please follow the Register Settings setup in the right column of this page.

1. Login and press **OK** (to go to the order screen)
2. Select **Skim Drawer**
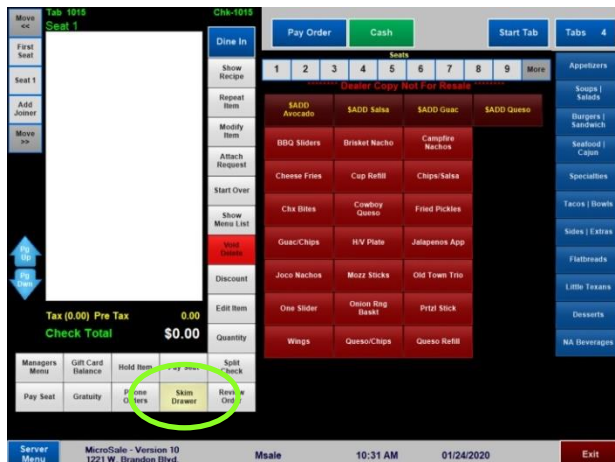
3. Choose the appropriate employee's name and touch anywhere on the row (Total Cash, Ttl Deposit or Drop).
4. Enter in the skim (drop) amount (for $150, type in _150.00_)
5. Select **Done**
6. Verify the drop is correct > Save > Exit
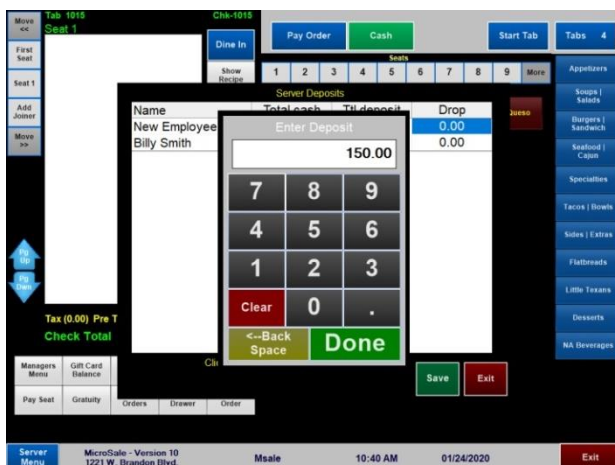
More Information

The Total Cash amount is the total amount of cash that should be in the drawer

The Ttl Deposit is the sum of all of skims (drops) for the shift

Optional Register Settings

To skim the drawer, the Skim Drawer function must be assigned to the order screen. If this function is not present, please follow the following steps:

- Managers Menu > Register Setup > Terminal Configuration > Edit Order Screen Buttons > find Skim Drawer (right column) and assign it to a button (if all buttons have functions assigned, remove a function by left clicking the button and left clicking in one of the two columns)

To automatically prompt for a skim when the drawer reaches a certain threshold of cash, enable the following:

- Managers Menu > Register Setup > Terminal Configuration > Register Options > Printer/Cash Drawer > Advanced Options > type in the desired amount under "Drawer skim cash amount (alert manager to remove excess cash)"

Apply a Tip

1 Log in with your server number
2 Select the **Server Menu** button
3 Select the **Apply Tip** button
4 Type the check number and Select the **Done** button to open the check **OR** Select the **Done** button without typing a check number to display a list of available checks to choose from
5 Touch the field *Tip Amount* and type in the tip.
6 Select **Done** when finished
7 Select the **Apply Tip** button to finish

Edit a Tip

1 Log in with your server number
2 Select the **Server Menu** button
3 Select the **Apply Tip** button.
4 Select the **Done** button without typing a check number to display a list of available checks
5 Touch the field *Tip Amount* and re-enter the tip
6 Select **Done** when finished.

To Delete a Tip

1 Select the **Done** button without typing a check number to display a list of available checks
2 When the number pad appears, simply Select **Done** to leave the new tip amount blank.
3 Select the **Save** button, and MicroSale will ask Are You Sure?
4 Select **Yes** to delete the tip.

(Manager Screen) Edit a Tip

1 Go to the Manager's Menu and select the Credit Card Menu button
2 Find the check and credit card payment and touch anywhere in the row; *a prompt appears;*
3 Touch the Gratuity Amount or Apply Tip
4 Select Done when complete
5 Verify amount and select **Yes**; Select **No** to redo amount

Closing a Server Audit (Server Banking / No Cash Drawer)

⚠️
Credit card tips must be applied before the audit is closed.

A manager can add or edit a tip if necessary: Managers Menu > Credit Card Menu > Select the correct row > Select **Gratuity Amount**

1   To close a **Server Audit**, login from the **ID Screen**, go to the **Server Menu**

2   From the Server Menu, touch Server Report. You will be prompted, "Would you like to close *Name's* Audit? Yes or No?" If you select No, the audit will only print

If your access level does not allow you to close an audit, it will only print when you select "Server Report"– your audit will remain open until a manager closes it for you

Allowing Servers/Bartenders to close their own audit:

By default, audits must be closed by a manager. To allow employees to close their own audit (enabling them to close the audit using the instructions on this page), enable the following option on each register in the restaurant:

📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > Full Service > **Servers can close their own audit** > Save > Exit

Optional Register Settings

To force an audit to be closed before clocking out or force an employee to clock out before closing the audit, choose the desired register option below.

Force employee to close the audit before clocking out (recommended setting):

📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > Full Service > **Server / Bartender audit must be closed before punch ou**t > Finished with section > Save > Exit

Force employee to close the audit after clocking out:

📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > Full Service > **Server / Bartender must be punched out before audit can be closed** > Finished with section > Save > Exit

Employee Closing the Audit (with Cash Drawer)

> ⚠️
> **Credit card tips must be applied before the audit is closed.**
>
> A manager can add or edit a tip if necessary: Managers Menu > Credit Card Menu > Select the correct row > Select **Gratuity Amount**

1   To close a **Server Audit**, login from the **ID Screen**, go to the **Server Menu**

2   From the Server Menu, touch Server Report. You will be prompted, "Would you like to close *Name's* Audit? Yes or No?" If you select **No**, the audit will only print.
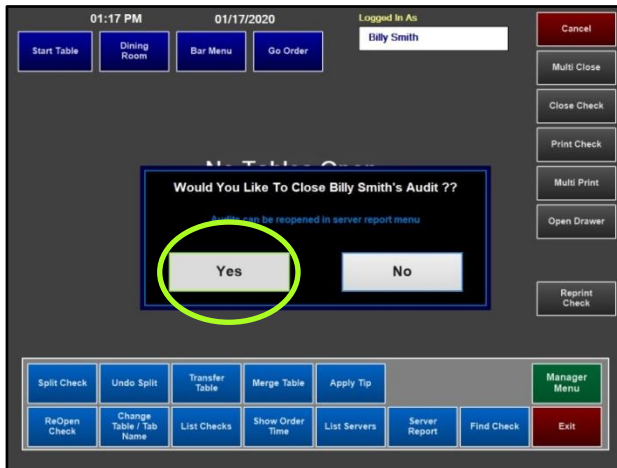
3   When a cash drawer is attached to the audit, a second prompt will appear to deposit cash collected (cash tickets) to the cash drawer.

☑ Select **Yes**, to deposit the cash.

☒ Select **No**, if you do not need to deposit the cash collected

> **If your access level does not allow you to close an audit, it will only print when you select "Server Report"– your audit will remain open until a manager closes it for you**

Manager Closing an Audit or Multiple Audits

1   To close a **Server Audit**, login from the **ID Screen**, go to the **Server Menu** and select **Server Report**
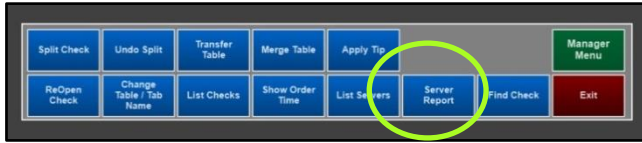
2   Select **Server Audits**
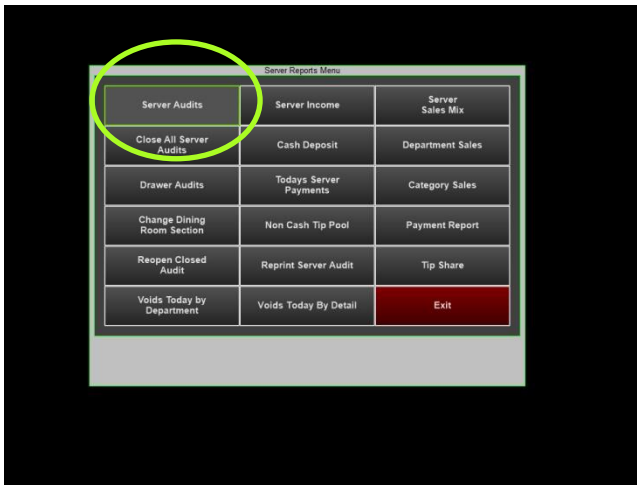
1   Select the appropriate employee and select **Close Server Audit.** The audit should now print on the receipt printer.
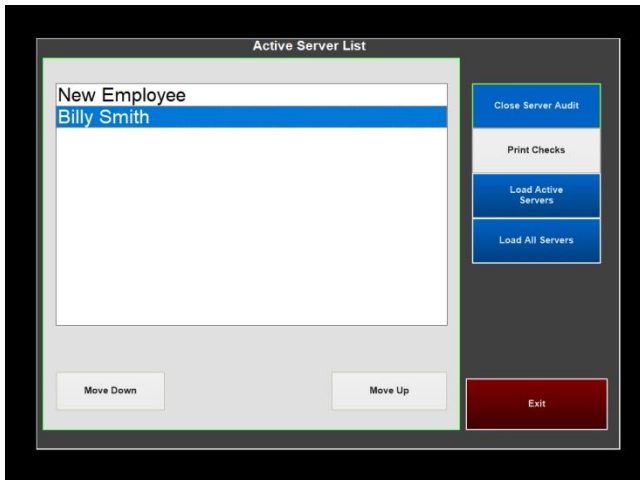
2   *When using a cash drawer, a prompt will appear to deposit all cash collected (cash tickets) to the cash drawer*
   ☑   Select **Yes**, to deposit the cash
   ☒   Select **No**, if you do not need to deposit the cash collected

3   Select **Yes** to close the audit

Closing all Audits at Once

1   Select **Close All Server Audits** from the Server Reports Menu

2   Select **Yes** to confirm closing all audits

3   Select **Yes** to Print Audit Splits

4   Confirm the cash deposit by selecting **Yes**; Select No to enter a different amount (you can edit this total before running the close out if a mistake is made)

⚠️

If you receive a message that checks are open, you must go back and close all checks before proceeding.

Order Entry

Understanding the Server Screen

The server menu or server screen is the main area to manage your checks, perform various functions and used to close server audits as well as access the server/bartender reports. Each function is further explained in this chapter and Managing Checks chapter.

Screen Breakdown

- **Start Table**, **Dining Room** or **Bar Menu** will allow you to take an order

- "**Go Order**" will also bring you to the Ordering Screen to take an order but it will print the word "To Go" on the remote receipt(s) and unless you have the option to set a go order as an open order, the system will force you to pay the order and will not allow it to be placed on hold.

- The "**Logged In As**" shows the employee's name currently logged in. Items rang under this name will be assigned to the logged in employee

- Use the **Phone Order** function when a customer calls and wishes to place an order for Pickup or Delivery.

- **Change Table / Tab Name** is used to change the number or name of the table. This is used if a server makes a mistake when starting a new table and wants to change the table number or when a party moves from one table to another

- **List Checks** can be used to see more open checks than the Server Screen will allow. The limit is 20 on the Server Screen and 28 in the List Checks area.

- **Show Order Time** is used to view the actual time at which each item was ordered and how much time has elapsed (Select Show Order Time and then the check)

- **List Servers** – allows managers to log in under a different employee's name to start a table under their audit or close out a check under their audit.

- **Server Report** is used to do the following based on access level:

    a. Server level (1): If the Register Option "Allow Server to Close Own Audit" is enabled, the server will have access to select this button and be prompted "Would you like to close NAME's Audit?? Yes or No"

    b. Bartender level or higher (2+): Will give you access to the Server Reports screen which allows you to manually close individual audits, close all audits, reopen a closed audit, as well as view a variety of reports relating to the current day.
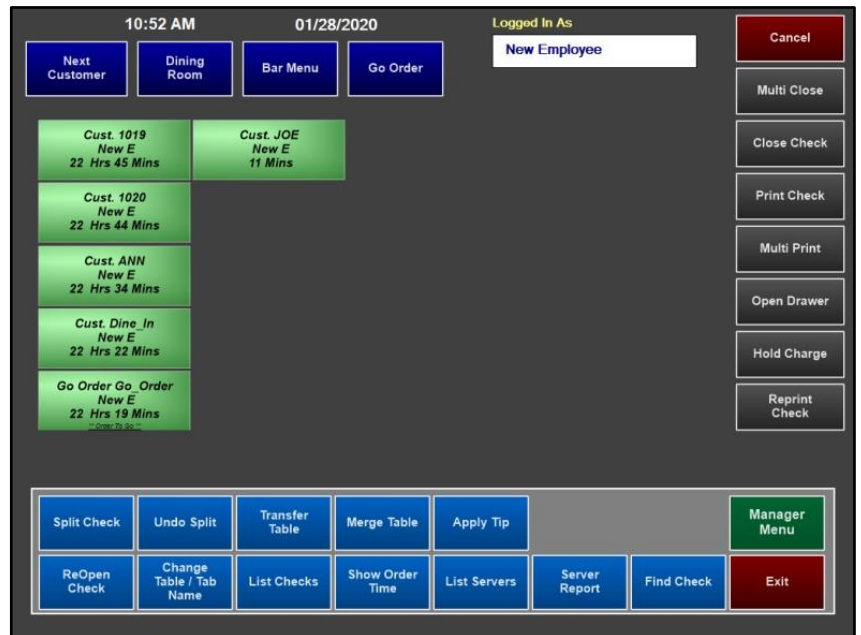
Starting a table (full service)

Starting a table on the table layout

1 Select a table

2 Enter the number in the party when prompted

3 On the order screen, enter in the items and select **Done**
You can access the check from the table layout or from the Server Menu

Starting an order without assigning it to a table on the layout

1 Go to the Server Menu

2 Select **Start Table** (upper left of screen) and enter in a number or name
   a. Enter the number in the party when prompted

3 Place the order and select **Done** to keep the ticket open or **Close Check** to cash out the table
You can access the check from the Server Menu

Starting an order and immediately closing it

In a scenario where you may have customers walking up to order quickly (possibly a drink while they wait or they forgot to order a ranch with a to-go order), Express Order allows you to open and close a check immediately and bypasses the steps of starting a table. **You must immediately cash out an Express Order.**

1 Select **Express Order**
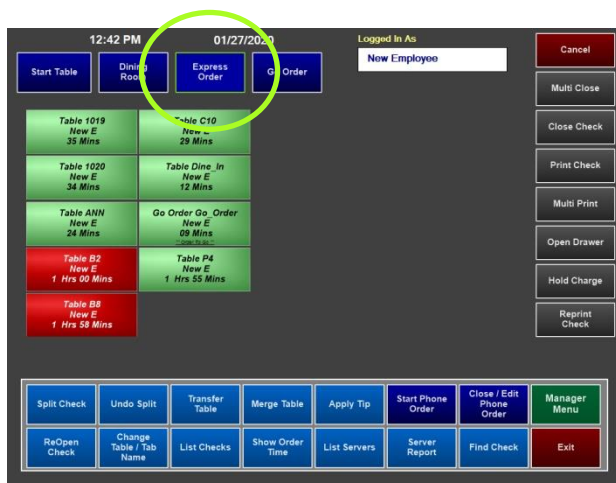
2 Enter in the items and select **Pay Order**

Starting a tab (Quick Bar)

In the Quick Bar register settings, you'll login and immediately be placed on the order screen.

Starting a tab with a credit card (preauthorization; holds card data for payment)

> ⚠️ **Check with your processor before enabling preauthorization in MicroSale.**
> ⚠️ **Not all processors support preauthorization**

1   Enter in the menu items first
2   Select **Start Tab**

   The following prompt appears:
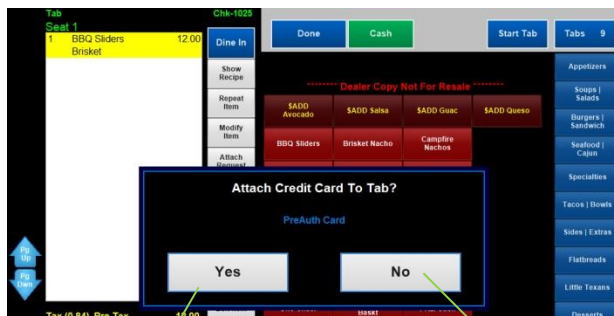
Yes	**No**
Prompts to insert the card into the EMV device	*Prompts to type in a tab name*
1 Please read the message on the device 2 Remove the card when prompted 3 Refer back to the POS screen to complete the start of the tab	*Credit card information is not stored. You will need to collect the credit card at the time of payment.*

If the card is pinged successfully, the tab is named from the credit card (Select **Yes**). Select **No** to use a different name while continuing to hold the card data

If the card is not pinged, select **Start Tab** and try again, or you can open the tab without attaching the credit card to the tab *(select No, when prompted "Attached Credit Card to Tab"?*

Preauthorizing a tab after tab has been started (holding card data on a tab)

1   From the Server Menu, select **Hold Charge**
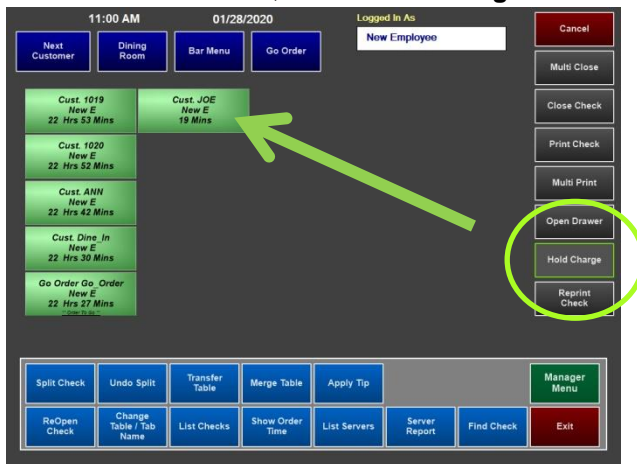
2   Select the appropriate tab

3   When prompted, type in an amount on the EMV device <u>to preauthorize on the tab</u> (the amount entered on the device is a preauthorization only; the true total will not be charged until you are ready to close the check)
   - ⓘ Read the message on the device. Once the charge is captured, it will say Remove Card
   - ⓘ On the POS, it will prompt you to start a tab with the card holder's name. Select **Yes** (it will continue to use the original tab's name)

4   The tab will now appear with a maroon background color. If it does not turn maroon, the screen may have not refreshed. Exit the screen and go back to the Server Menu to verify

Starting a tab (without preauthorization; does not hold card data for payment)

1 You can either select **Start Tab** first or enter in the menu items first

2 If you have entered the menu items before selecting **Start Tab**, select Start Tab and then Start Tab again to type in a tab name
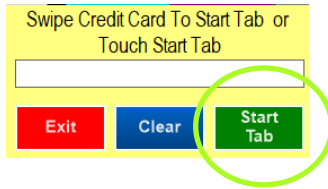
Starting a tab from the Server Menu

If you need to get to the server menu and you are currently on the order screen, select Server Menu in the bottom left corner

1 Choose the appropriate button (bar menu, next customer, dining room, go order)

2 Enter in menu items

3 Select **Done**

More Information on starting tabs from the Server Menu

ⓘ From the Server Menu, you can get back to the order screen by selecting **Bar Menu** or **Next Customer**

ⓘ Select **Dining Room** to assign a tab from the table layout

ⓘ **Go Order** is used for entering in To Go orders. When using To Go, the check is marked as "to go" in the kitchen. Unless you have the option to set a go order as an open order, the system will force you to pay the order and will not allow it to be placed on hold

Printing a customer receipt

You can print a guest check (customer receipt) from multiple places;

- On the tab or table, **Print Check** is listed in the upper right corner of the order screen
- You can use the shortcut, **Print**, on the table layout. Select Print and then the appropriate table
- You can use the shortcut, **Print Check**, on the Server Menu. Select Print Check and then the appropriate check

Print receipt by seat

When using separate seats, by default, one receipt prints and totals each seat separately. To print separate receipts by seat, use one of the two options below.

Using Split Check to print receipts separately per seat

1 From the Server Menu, touch **Split Check** and select the check

2 *On the screen, each seat is shown.* Touch **Done**. *Each seat is now separated and you can print the receipts separately using Print Check or Multi-Print.*

Print by Seat (function button)

📍 Managers Menu > Register Setup > Terminal Configuration > Edit Order Screen Buttons > Add **Print by Seat** to a button and Save

1 Go to the check

2 Select **Print By Seat**. *All checks will print separately*

Print multiple receipts from the server menu

From the server menu, you can quickly print multiple checks at once.

1 Select **Multi Print** and then the checks you need to print (turns purple when selected)

2 Select **Print Check**
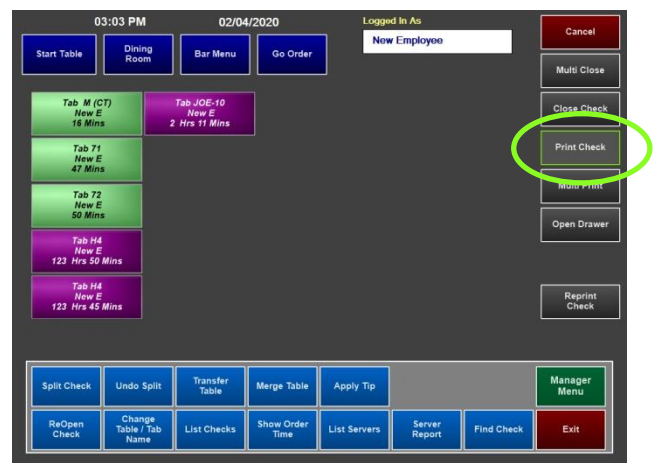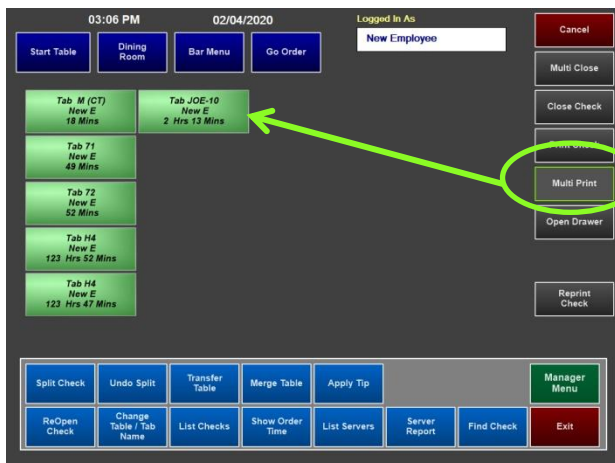
3 *Selected checks print on the receipt printer attached to the terminal.*

Reprinting receipts

Reprint Receipt

You can reprint a customer receipt or credit card slip by going to the Server Menu > **Reprint Check** or by adding a **Reprint Receipt** function on the order screen.

From the Server Menu: Select **Reprint Check** and touch the appropriate check or reprint the last receipt by selecting *Print Last Receipt*

From the order screen (using the function button): Go to the order screen and select **Reprint Receipt**

Reprint credit card slip

You can reprint a customer receipt or credit card slip by going to the Server Menu > **Print CC Slip** or by adding a **Reprint CC Slip** function on the order screen.

From the Server Menu: Select **Print CC Slip** and touch the appropriate check

From the order screen (using the function button): Go to the order screen and select **Print CC Slip**

Closing a check on the table layout

1 From the table layout you can either select the table and then **Close Check** from the order screen, or you can use the shortcut, **Close,** on the table layout
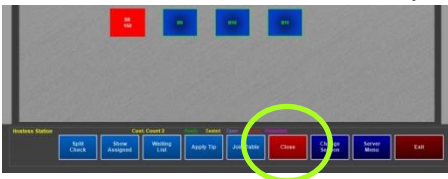
Using 'Close' bypasses the order screen and takes you to the payment screen

2 Select **Close** and then select the table. *If the check has not yet been printed, you must print the check before closing the order.*

3 Close the check using the appropriate payment media

Closing a check from the server menu

From the Server Menu, you can use the shortcut, **Close Check.** *Using 'Close Check' bypasses the order screen and takes you to the payment screen*

Option 2: Select the check (which will take you to the order screen) and then select **Close Check**

1 Select **Close Check and then select the check you need to close**

2 *You will bypass the order screen and be placed on the payment screen*
Verify you are on the correct check/table number by viewing the **Table No.**
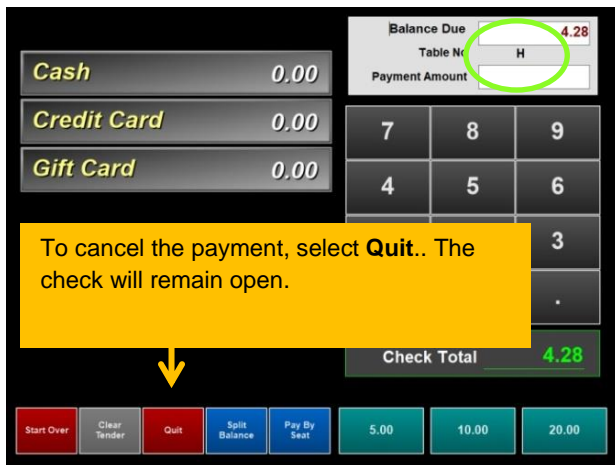
3 Close the check using the appropriate payment media

Closing multiple checks to cash from the server menu at once

From the server menu, you can quickly close multiple checks to cash at once. Depending on your system settings, checks must be printed prior to closing the checks.

1   Select **Multi Close first** and then **select the checks** you need to close (the check turns light green when selected)
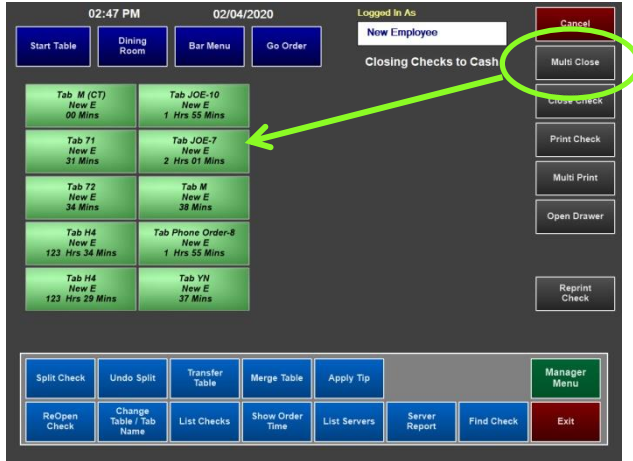
2   Select **Close Check**
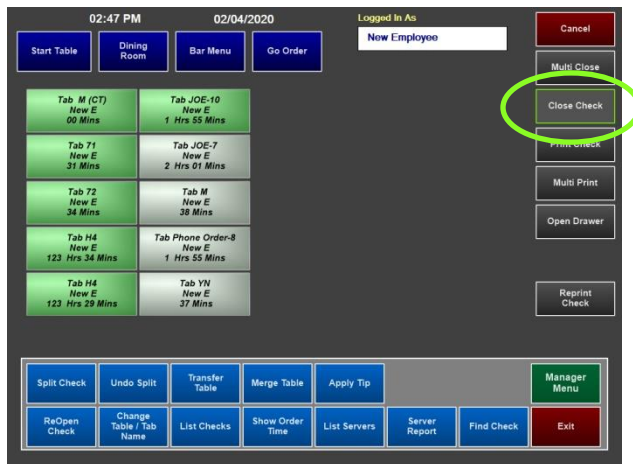
3   Select **Yes** to close the checks selected to cash

Closing a tab with an attached credit card (Quick Bar)

1 Select the appropriate tab

2 Select **Close Check**

The following message prompts:
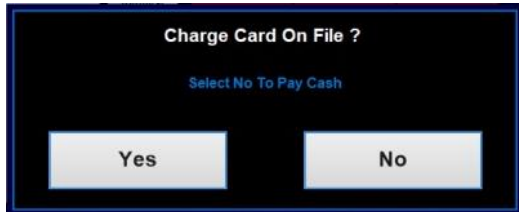
Yes	No
Select **Yes** to use the card attached to the tab (immediately processes the entire check total)	Select **No** to pay by cash or to use a different card than originally provided OR Select **No** if the patron has decided to split the check total with a friend (or second card). You will need both cards on hand to split the payment. Select Credit Card to split the payment on multiple cards.
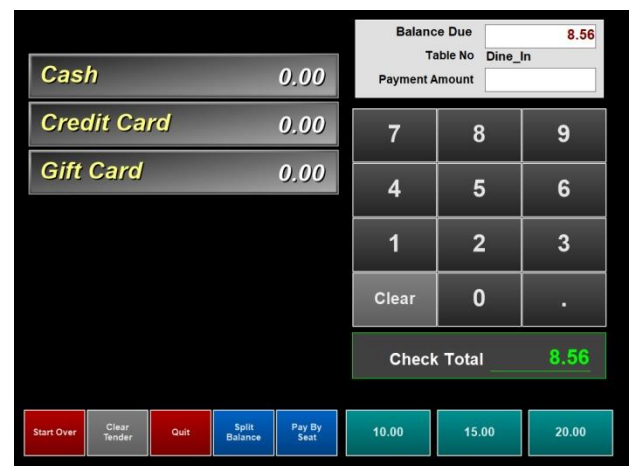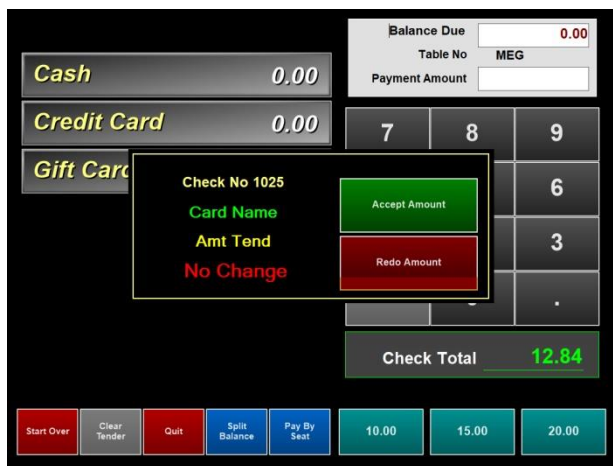
Closing a tab using Pay at the Table

1 Login to the pay at the table device using your employee number
2 All open checks assigned to your employee number are listed
3 Choose the appropriate check number
4 Hand the device to the customer
    a. The device prompts the customer through the check total, adding a tip and printing a receipt (if applicable on the device)

5 The check is now closed in MicroSale and you will no longer see the check on the Server Menu

Pay at the Table is used only to close checks. For tableside ordering, please refer to your MicroSale representative for more information on tablets.

Accepting Payments (Pay Order)

Paying with Cash

1 To enter in a cash amount provided by the customer, type in the amount using the keypad
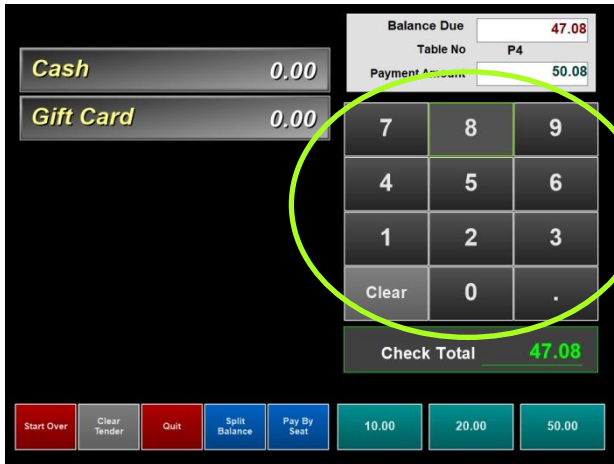
2 Then select the **Cash** button. If correct, select **Accept Amount.** If incorrect, select **Redo Amount**
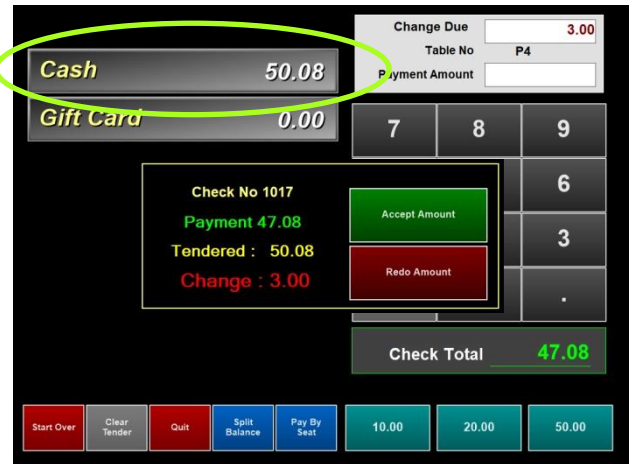
Paying with Exact Cash or No change is needed

1 If paying with exact cash or no change is needed, select **Cash**

2 If correct, Accept Amount. If incorrect, select **Redo Amount** and try again

Paying Partially with Cash and Credit Card or Gift Card

1 Use the keypad and type in the amount of cash that will be contributed to the check total

2 Verify the amount by looking at the **Payment Amount.** If this is incorrect, select Clear Tender or Start Over (buttons located on bottom of screen) and try again
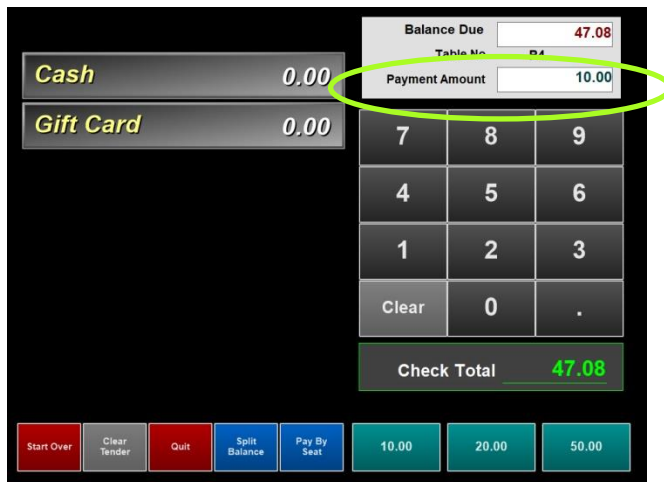
3 After the cash is entered and is shown next to Payment Amount, select the **Cash** button

4 Now choose the second payment media; if paying by gift card, select **Gift Card** and swipe the card. If paying by credit card, select **Credit Card** and swipe the card or dip the card into the EMV device when prompted

Paying with Separate Seats

1   Select **Pay by Seat** on the payment screen
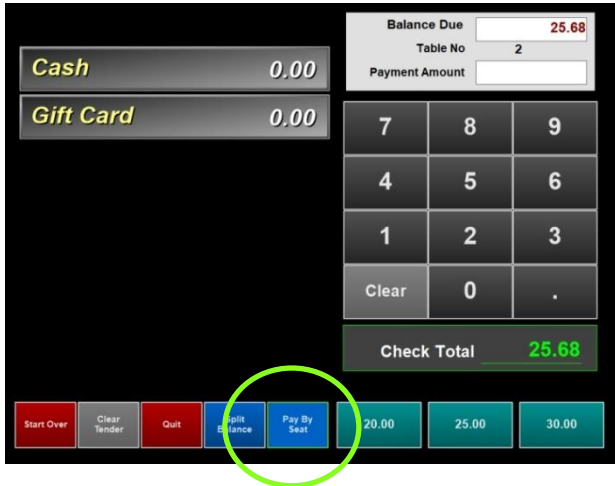
2   The payment screen will show all Seat totals on the right. *Keep the receipt as a reference if needed*
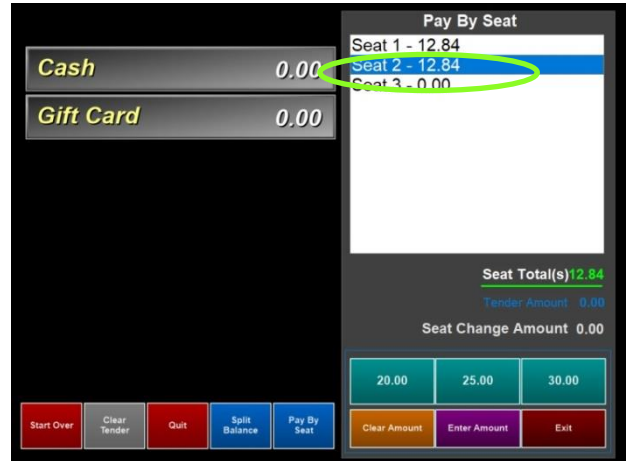
When using a cash drawer; Once **Pay by Seat** is selected the cash drawer will open.

DO NOT CLOSE THE DRAWER until all payment has been accepted

3   Highlight a Seat and use the appropriate tender type
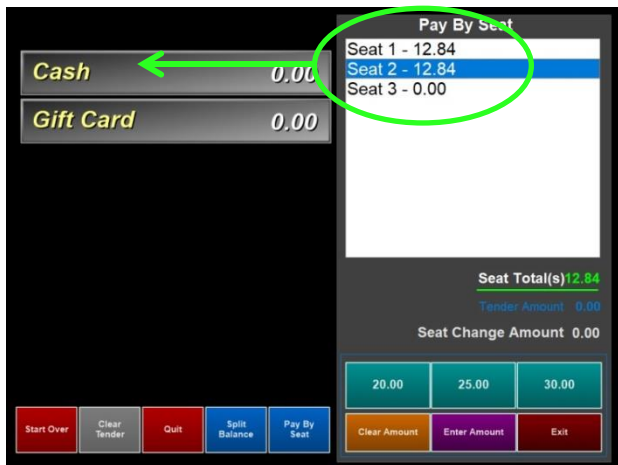
4   Once the Seat has been paid, it is removed from the list. Continue to tender Seats until completed.

Paying with Credit Card

1   Select **Credit Card**
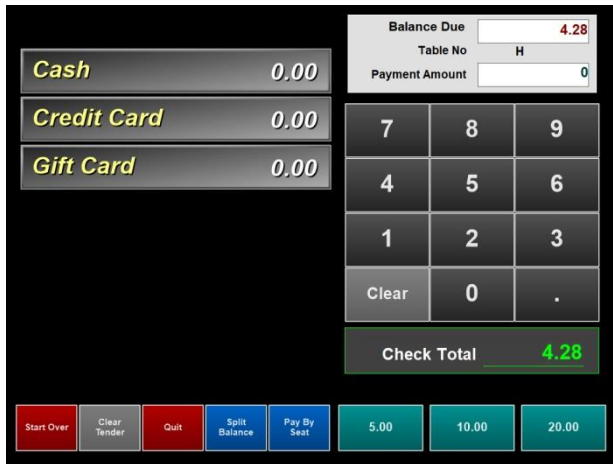
2   Verify the total and select **Done.** *You can add the tip later*
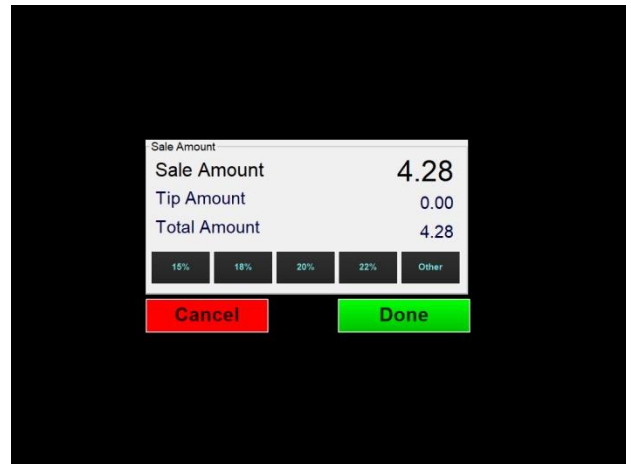
> If you are using a tablet or rotating screen, you can flip this screen to the customer to add a tip now. You can also add the tip later after the check has been closed.

3   When prompted on the screen, insert the card into the device
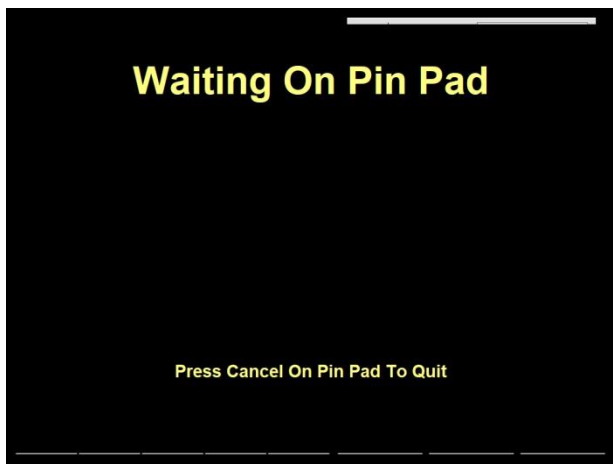
4   Follow the messages on the device. It will prompt you when to remove the card.

The transaction is now complete

Sending orders to a remote printer (kitchen or bar printer)

Items sent to the kitchen or bar appear red with an asterisk (*) in front of the item on the virtual check

Full Service, sending orders to the kitchen/bar

- ⓘ In full service settings (table service), selecting **Done** on the order screen fires the items to the remote printers (bar or kitchen printers) and holds the check open
- ⓘ Using Hold Item or Send/Stay (see instructions below), you can manipulate when items send to the remote printers
- ⓘ If you select **Exit** instead of Done, you will be prompted to send the items to the kitchen or **cancel** the order

Quick Bar, sending orders to the kitchen/bar

- ⓘ If you are immediately on the order screen, and you enter items before you select Start Tab, a tab of the entered items will start and the items will send to the printers. If you select Start Tab before entering items (to name the tab), select **Done** to send the items to the kitchen

Hold Item

Before items send to the kitchen, you can put items on hold to send to the kitchen/bar at a later time. This is ideal when all items are entered at once but some items need to send to the kitchen/bar at a later time.

When items are on hold, the check color turns gray and "Items on Hold" is displayed on the check. On the order screen, each held item shows an "h-".

Holding and Releasing Items (to the kitchen or bar)

1 After items are entered and before they are sent to the kitchen, select **Hold Item.** (Items sent to the kitchen are red with an asterisk)
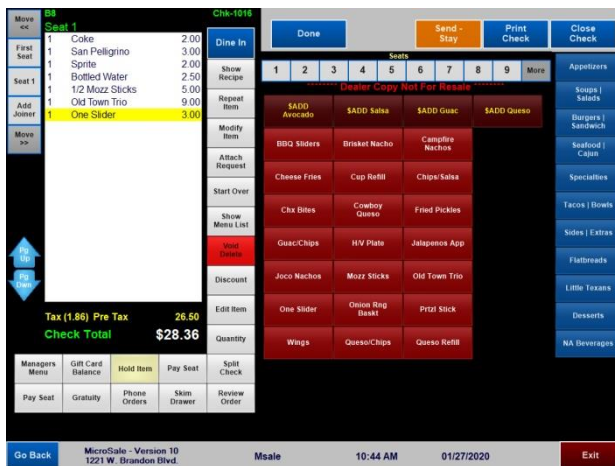
⚠ **If you are using the auto-release timer, enter in the number of minutes to hold the item.** *If you select "Done" without entering a number, the items will only hold for 1 minute. After entering the number of minutes, proceed to step #2>>>*

2 Touch the item(s) to hold. An "h-" signifies the item is held, if the wrong item is selected, touch the item again to deselect

3 Select **Done** when complete

4 To release the items to the kitchen before the timer ends, select the check and touch the items with an "h-" to release

When items are on hold, the check turns gray and shows "Items on Hold" on the check

Setting up your system for holds

Part 1

To enable holds in the system, set the following option(s) on each terminal that needs the feature:

📍 Managers Menu > Register Setup > Terminal Configuration > Full Service > **Turn on menu item holds** > Save > Exit

⚠ To have holds release automatically after a selected number of minutes, also enable the option, "Set terminal to auto release items on hold" > Save > Exit. If you use this option, employees must always use the timer. However, you can manually release holds at any time before the timer ends.

Part 2

After the register options have been set, add the Hold Item function button to the order screen:

📍 Managers Menu > Register Setup > Terminal Configuration > Edit Order Screen Buttons > find **Hold Item** in the one of the two columns of options and add it to an unoccupied button (if all buttons are occupied, replace one of the options that is not used). Save and Exit.

Function buttons deploy to all terminals; you will only need to add the function button once.

Select System Refresh on the Manager Menu on each terminal to update the changes.

Send/Stay

Send/Stay allows you to fire all items to the kitchen/bar while staying on the check. This is ideal when entering items for large parties or ringing in items by section. Example, when ringing in food and drinks together, you may want to ring the drinks and fire them to the bar while continuing to ring in the food.

Send/Stay is available in full service settings only.

1   When you are ready to send items to the kitchen or bar, select **Send – Stay**

2   The items will now appear red with an * in front to signify the items have been fired to the kitchen or bar (print check and close check disappear)

3   Continue to ring in the additional items. Select **Done** when complete (you can use Send – Stay again or Done will send the items and exit the check)

Course Ordering (Change Course)

Course lines are typically used within Fine Dining establishments. When configured, course lines will allow for servers to select menu items to label by course. As well as, the kitchen will be notified when to prepare each course.

Course lines are programmed to each menu item. When using course ordering, add the Change Course function to allow you to change the course of an item if needed (i.e. App as Entrée or Entrée as App).

Setting up Course Ordering

Adding the Function Button
- Managers Menu > Register Setup > Terminal Configuration > Edit Order Screen Buttons > Add **Change Course** to a button and Save

Assigning menu items to courses
Menu items are assigned to specific courses using the Menu Items and Pricing screen

- Managers Menu > Menu Maintenance > **Menu Items and Pricing**
1. Create a new menu item or choose a previously selected item
2. Under Misc Menu Functions, select the dropdown and choose the appropriate course name. By default, MicroSale uses "Course 1", "Course 2", "Course 3", "Course 4", "Course 5". If you need to use customer course names, exit the screen and complete the following setup:
   Custom Course Names
   - Managers Menu > Register Setup > Terminal Configuration > Misc System Configuration Page > Misc Utilities > **Print Alias**
     a. Next to Course Line Names, type in a course name
     b. Select Save
     c. Continue adding courses until complete
     d. Exit
3. After the custom course names are added, go back to Menu Items and Pricing
4. Create a new menu item or choose a previously selected item
5. Under Misc Menu Functions, select the dropdown and choose the appropriate course name
6. Save

Using Course Orders
1. Ring in the menu items
2. If a menu item needs to be reassigned to a different course, select "Change Course" and then the menu item

Check Management

Changing a tab name or transferring a party to another table

1 From the server menu, select **Change Table/Tab Name**
2 Select the tab/check; *prompts to enter in a new name or number. As long as the number entered is a valid table number on the table layout, the party will be transferred over to the new table.*
3 Select **Done**. *The original number/name is replaced with the entered name*
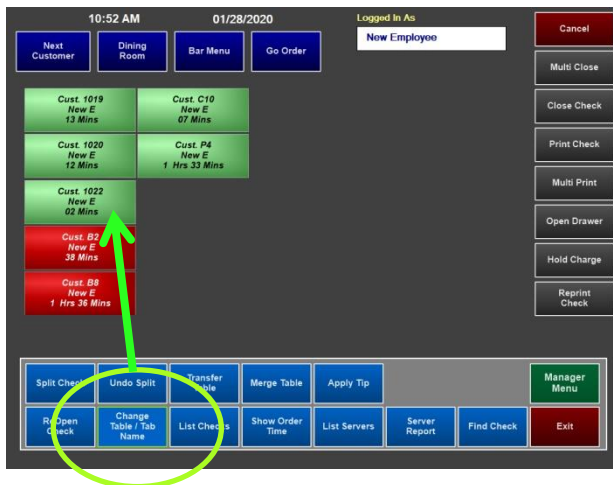
Viewing order times

Using **Show Order Time**, you can see when each item was entered on a check.

1 From the Server Menu, select **Show Order Time**
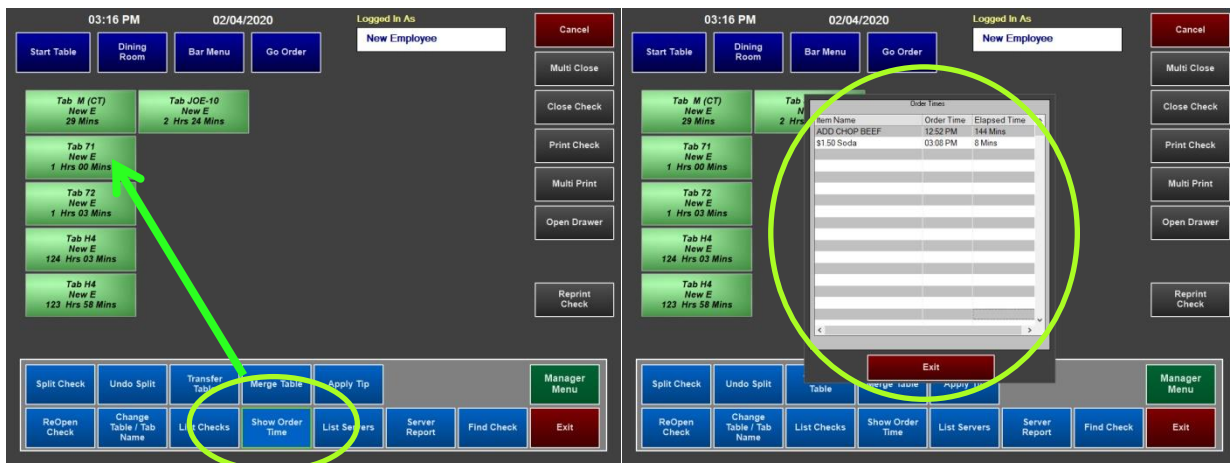
2 Select the check
   After the check is selected, a window appears with the order time and elapsed time
3 Select **Exit** when finished

Transferring Tables or Tabs

Transfer Table allows you to transfer open tables from one server to another. This option is used for shift changes or when a party moves to another server's section after ordering

1 From the Server Menu, select **Transfer Table** and log in with a manager access code to authorize the transfer
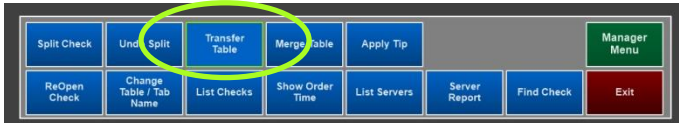
2 Select the appropriate employee from the left list (employees with open checks)

3 Choose the appropriate check from the middle section

4 With the appropriate check highlighted, select the employee on the right side, who will be picking up the check. When completed, the check will show the new employee's name assigned to the check on the Server Menu
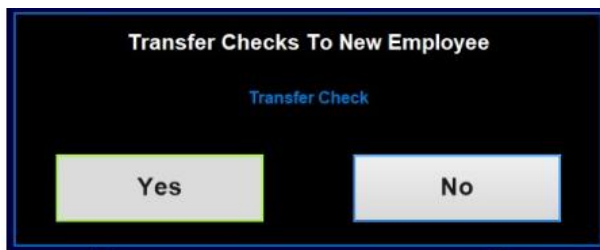
Merging Tables or Tabs

Merge Table allows you to combine checks together. This is helpful when a customer wants to join with another party's check and both tables have already ordered.

1   Select the **Merge Table** button
2   Touch the table you want to merge *(not the destination of the merge!)*
3   At the top of the screen, **Select Destination Table** prompts
4   Now touch the table you want to merge the first table with
5   A confirmation message prompts and a new check number is issued

Splitting Checks and Un-splitting Checks

You can split a check from the server menu or order screen

Splitting a check from the server menu

1   Select the Split Check button first then select the check/tab/table
2   Select "Add Joiner" to add another virtual check to the screen (you can do this as many times as needed)
3   Select the item(s) you wish to move to another check
4   Select the other virtual check to add these items to it
5   Select DONE when you are finished or EXIT to not save your changes

   On the server menu, the check is now separated into two checks

The **Undo Split** function reconsolidates all of the menu items on the check. This is helpful when mistakes are made or when one guest decides to pay the entire check.

Splitting a check from the order screen

Alternately, to splitting a check from the server menu, you can separate the check and split items from the order screen. The Split Check function on the order screen offers more options for splitting up the check; you can split individual menu items in addition to separating items on separate checks.

1   After you are finished taking the order, Select **Split Check**

2   Select **Add Joiner** to add new seats
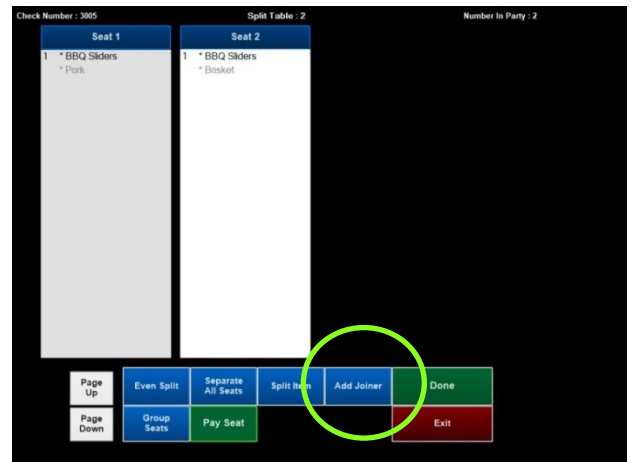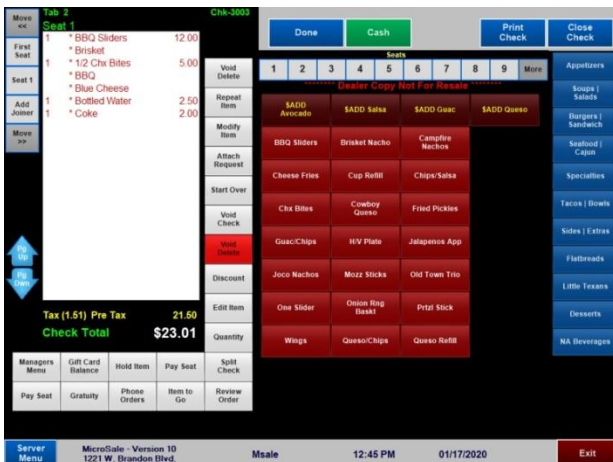
3 Highlight an item, or multiple items, and touch the white area to move the item(s) to a different Seat.

If you need to highlight all items, you can select the blue header at the top of each seat to move all items over.
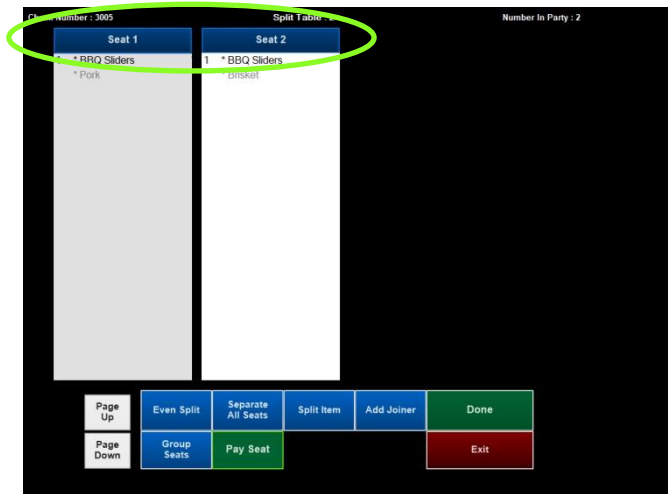
4 Select **Done** when completed.

From this screen, you can do other tasks as well. **Even Split** is used when you want to evenly distribute an item or items across multiple seats. **Split Item** works similarly, however, it will not automatically allocate to separate seats (Even Split is simply a shortcut to approach to Split Item). If you need to regroup seats back together, you can touch the blue header (where it shows the seat number and move all items to a seat) or you can select **Group Seats** which offers the same ability with fewer touches.

Splitting an item

You can split menu items to allow multiple people to share the expense of the item. This is useful to share appetizers, bottles of wine, etc.

1 From the Split Check screen (above), highlight a menu item

2 Select Split Item

3 Choose the number of times the menu items needs to be split; highlight one of the items and touch it on another seat (select Add Joiner to add a new seat).

Evenly split all items on check (Even Split)

You can quickly split all items into even parts and allocate the item(s) to multiple seats at once using "Even Split".

1 From the Split Check screen (above), highlight a menu item

2 Select the appropriate seat

3 Select **Even Split** (this will split **all** items into equal parts!)

4 When prompted, select the number of times you wish to split the item. When you select Done, it will automatically split everything by the selected domination on separate seats

Quickly pay out individual seats from the Split Check screen

The Pay by Seat function adds a new degree of convenience when cashing out individual seats. You can pay individual seats directly from the Split Check screen. This shortcut bypasses the Close Check and Pay by Seat functions.

1   From the Split Check screen, select **Pay Seat**

2   When prompted, select the appropriate seat number (sends you to the payment screen)

3   Now on the payment screen, choose the appropriate payment method

4   After payment is taken, you'll be taken back to the Split Check screen. The paid seat will be cleared from the screen
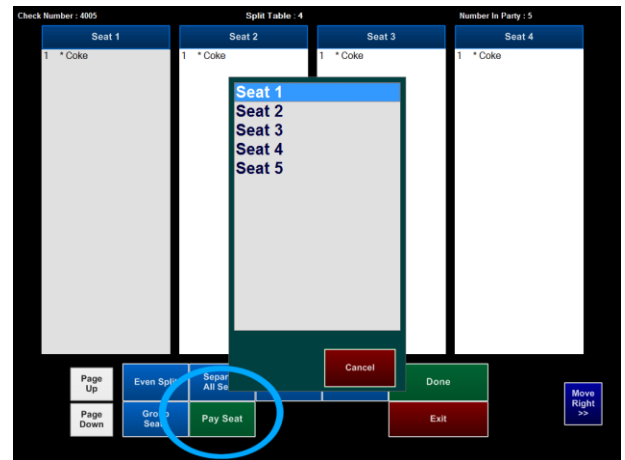
Using "Seats" to separate multiple orders on one ticket

Seats are generally used when tables have seat assignments (to know who ordered each menu item) and then paid together as one check. However, you can also use seats to allow parties to pay separately (pay by seat).

ⓘ If you are using communal tables or serving large parties, use **Add Check to Existing Table**

1   Enter the first order normally *(automatically shows as Seat 1 – you can see this label above the virtual check)*

2   When the second person orders, select **Move >>** to go to a new seat. Alternately, you can choose a new seat number using the *Seats* option on the order screen (if applicable; may not be present depending on your register settings).
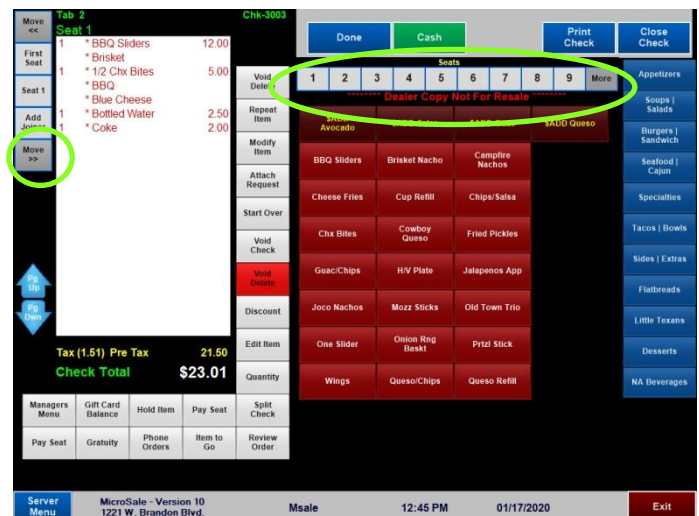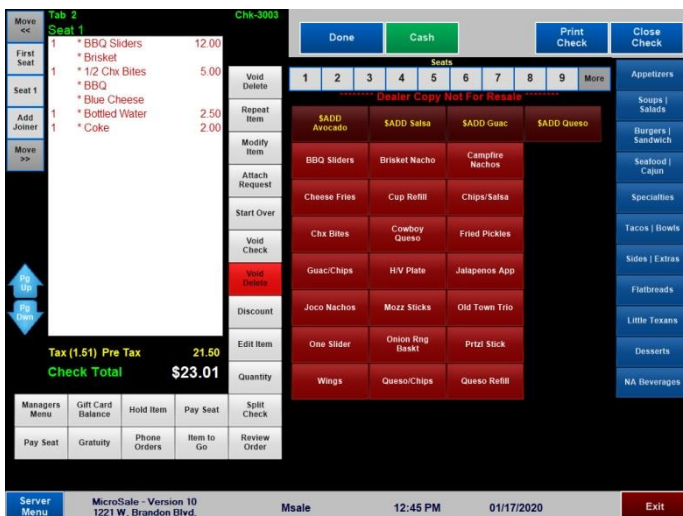
3   Enter the orders on separate seats until completed. Toggle between the orders if necessary by selecting **Move <<** or **Move >>** or by selecting **Review Order.**

   On the left, it shows the total number of seats open

4   When you are completed and ready to close out the check, choose **Pay Seat, Split Check,** or **Close Check. Close Check** will take you to the payment screen. Choose **Pay by Seat** on the bottom of the screen if all seats are paying separately.

   Gray functions to the right or below the virtual check

Adding checks to existing tables

You can attach completely new, independent checks on an occupied table. This feature is perfect for large communal tables or large parties where customers are coming and going with multiple servers sharing the party. Rather than starting new seats on one ticket, this feature eliminates confusion and makes it significantly easier to add and close tickets for groups paying separately.

Using Add Check to Table

This feature is used to allow multiple, independent checks on one table

1 Login with your employee number and go to the table layout

2 Start a check regularly

3 To add an additional check to an occupied table, select **Add Check to Table**. *It will prompt you to choose a table*
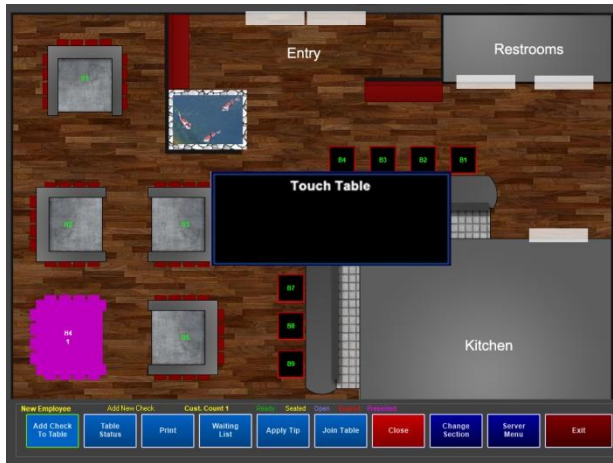
4 Select the **appropriate table**.
   Enter items on the new check regularly

5 To access the additional check(s), touch the table. It will prompt you to choose a check. Touch anywhere in the row to access the check. You can add, edit and close the check(s) regularly.
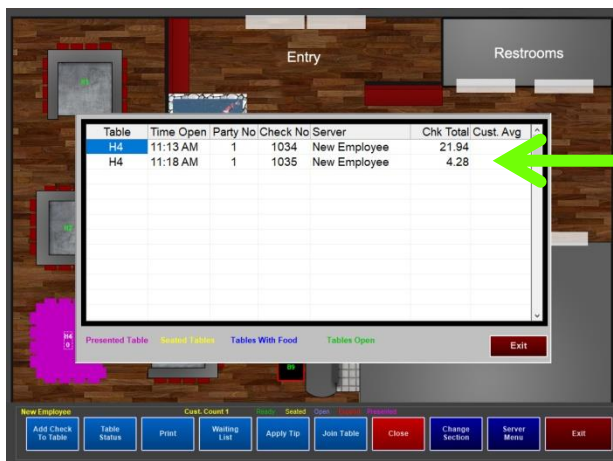
To use this feature, you must enable the register setting:

This feature is available in Full Service using the Table Layout. You will need to enable this on each register using the table layout.

⦿ Managers Menu > Register Setup > Terminal Configuration > Full Service > tick the option **Allow more than 1 check per table (table screen only)** > Finished With Section > **Save**

After the setting is enabled, Add Check to Table appears on the table layout screen.

Reopening Checks

Reopen Check allows you to open a check that was previously closed. This is used when a server accidentally closes the wrong check. After it is reopened, it can be added to and printed like other checks.

> ⚠️
> **WARNING**
> **If you reopen a check, it VOIDS the payment(s) associated with that check. You will have to take payment when you reclose the check.**

1 Select **Reopen Check**
2 Select the check you wish to reopen

Applying a Discount to an Order

There are several types of discounts in MicroSale. Discounts can be programmed to take a percentage off of the entire check, discount a single or multiple items, take off an amount off the check and more. How the discount behaves depends on the discount type. The discount type is labeled under the name of the discount on the discount list (shown in Step 2).

1   Ring items on the check and then select **Discount.**

2   Choose the desired discount to apply to the order

    A manager approval window will appear if the discount is set to a higher access than the employee who is attempting to ring in the discount.

3   Select **Yes** to proceed to enter a manager's number.

4   Enter the number and select **OK**

5   For a multi-select discount, a window appears to choose specific items on the check. Once the items are selected, select "Done". The discount will appear on the virtual check in purple. *If the wrong discount was applied, highlight the discount and Select Void Delete*
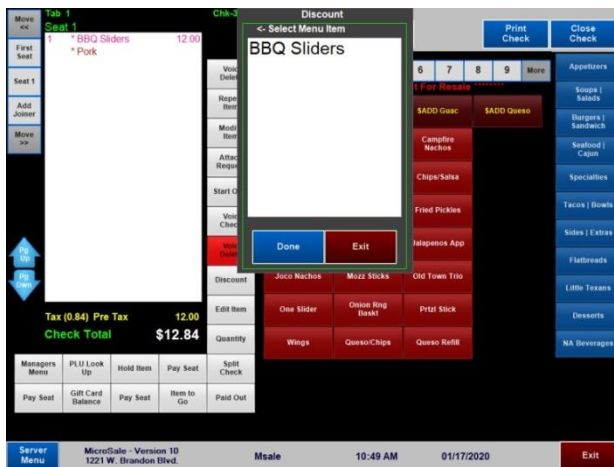
6   After the discount is applied, select **Done** or Pay Order (pay order may appear based on register settings)

Ringing in the next round of multiple drinks

Unlike repeat item which repeats a single item, *Next Round* gives users the ability to quickly ring in multiple drinks in one tap and repeat or edit attached modifications.

Using Next Round

1 Select **Next Round**

2 Select the appropriate menu items that will be repeated
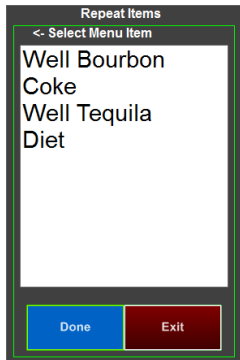
3 Select **Done** when finished

Easily delete modifiers (Delete Item)

The Delete Item function allows users to delete a modifier from a menu item without having to delete the entire item and re-enter it. To use it, select "Delete Item" followed by the menu item or modifier on the virtual check that you want to remove.

Using Delete Item

1 Select **Delete Item**

2 Select a modifier or line item that you wish to delete
   The line item is removed from the check (this function is disabled when items have already been sent to the kitchen)

Tax Exemptions

Using Tax Exempt Item

1 Log in with your Server number

2 Start a check and ring in the items

3 Select Tax Exempt

4 When asked to "Exempt Sales tax for Single Item", touch **Yes**

5 Select item to exempt

Using Tax Exempt Sale

1 Log in with your Server number

2 Start a check and ring in the items

3 When asked to "Exempt Sales tax for Single Item", touch No

4 When asked to "Exempt Sales tax for Entire Check", touch **Yes**

Programming a menu item that is always tax exempt

📍 Managers Menu > Menu Maintenance > **Menu Items and Pricing**

1 Type in a menu item name

2 Use the drop-downs to **select** the appropriate category and department name

3 Type in a regular price

4 If this item needs to print in the kitchen, select **Turn on Remote Printing** and select *Kitchen* in the **Remote Printer #1** box

5 Uncheck the option, "Menu Item is Taxable"

6 *If this item does not get modified and does not have a happy hour, go ahead and select **Save**. You can also save it and make changes at a later time*

Adding a Tax Exempt button to your system:

📍 Managers Menu > Register Setup > Terminal Configuration > Edit Order Screen Buttons > Add **Tax Exempt** to a button and Save > Exit

Issuing a New Gift Card or Reloading a Zero-Balance Gift Card

1 From the order screen, find the gift card button (this may be labeled as gift card, gift certificate, etc., check with the manager to find out where you have this button saved).

2 Select **Gift Card,** enter the desired amount and then Select **Done**

You may have a register setting where it prompts to type in a menu item, select "Done" on the keyboard to bypass this (it will then use the default button name)

3 The gift card amount will be added to the virtual check. Proceed by selecting **Pay Order**

If you are adding a gift card to a table's check, you'll have a **Done** and **Close Check** button. If you are ready to cash the table out, close the order regularly (by printing the check then selecting **Close Check**). If the table is staying open, go ahead and select "Done" to close the check at a later time.
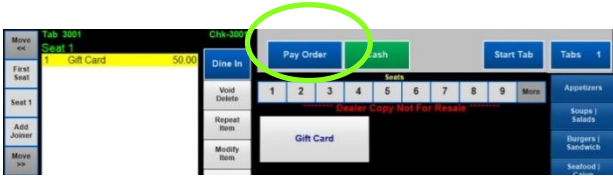
4 **First collect payment with the provided payment media (Cash or Credit Card). You MUST collect payment before you can activate a gift card**

5 After you select **Accept Amount**, a window appears to swipe the gift card

Swipe the gift card or double-tap the white field to manually type in a gift card number
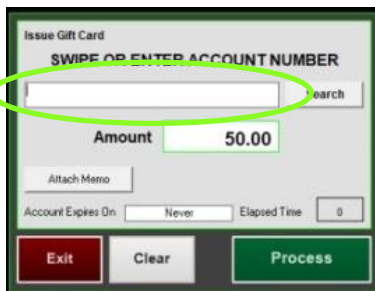
6 After you see data in the account field, select **Process**

The gift card is now loaded and can be handed to the customer

Redeeming a Gift Card

1 Once the order is completed, Select **Pay Order**

or select Print Check followed by **Close Order**, depending on your register settings
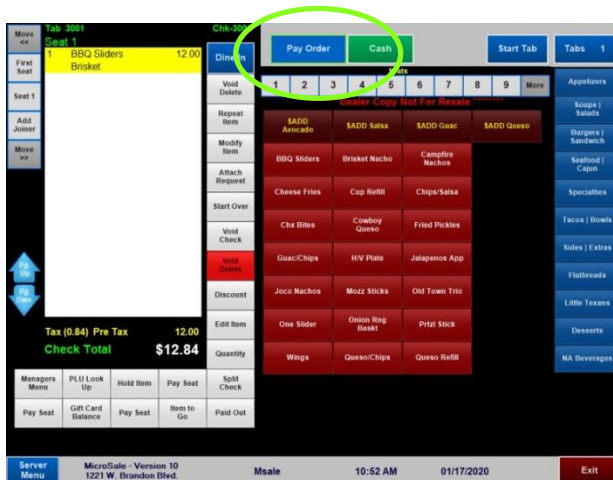
2 On the payment screen, select **Gift Card**

This will process the entire check amount – if the customer only wants to put a specific amount from the gift card on the check, enter the amount using the number pad before selecting **Gift Card**
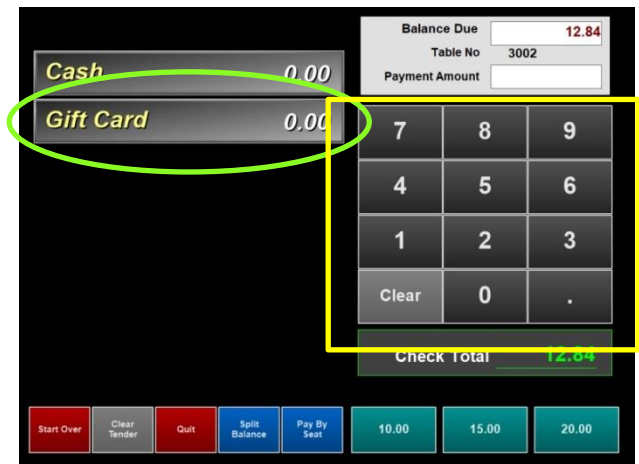
3 Swipe the gift card when prompted
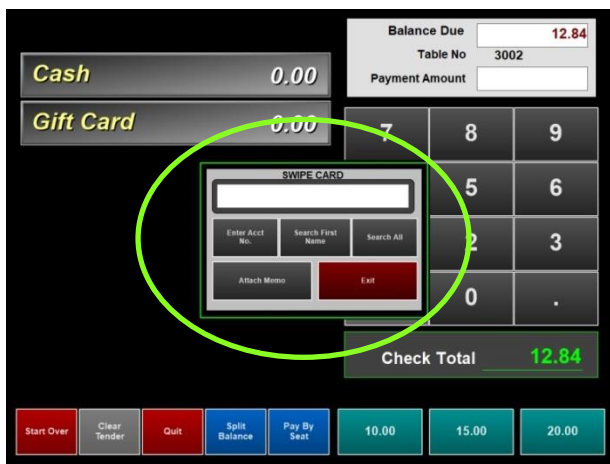
4 The transaction is now complete.

If the gift card is not reading, you can manually enter the gift card number (typically listed on the back of the card)

Manually entering the gift card number:

1 Select **Enter Acct No.**

2 Select **OK**.

If the gift card already has an account balance, it will appear on screen and allow you to choose the account

Checking a Gift Card Balance

1 Select **Gift Card Balance**.
This function button may have a different placement on your screen
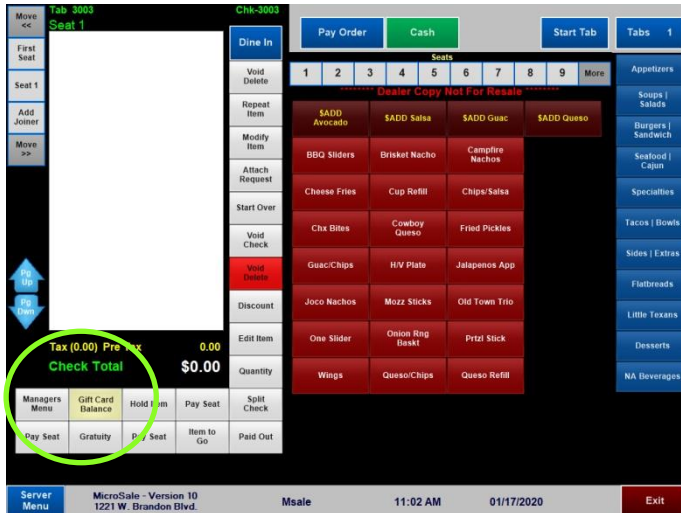
2 Swipe the gift card. If the card does not read, you can select **Enter Acct No.** and enter the gift card number when prompted.
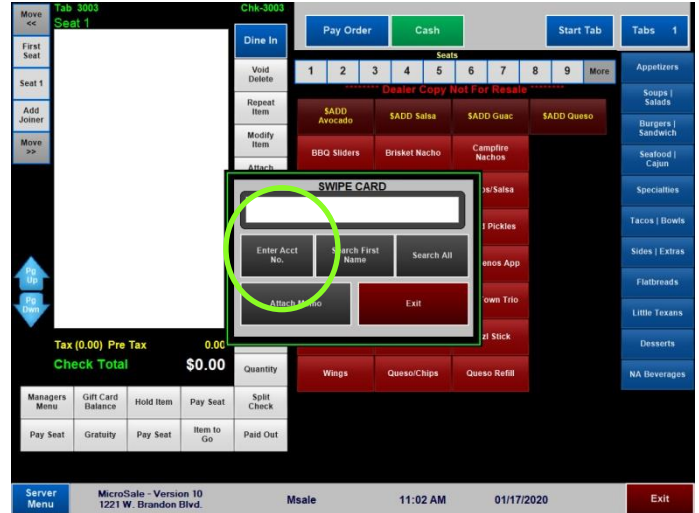
3 The balance will appear on the screen. After selecting **OK**, it will give you the option to print the balance for the customer

Phone Orders

Open Phone Order Button (breakdown)

Each active order is displayed as a button on the phone order management screen (shown to the right). Each order button includes contact information and functionality for managing the order.

All Orders by Open Time Open Orders (#)

By default, the orders are organized by how long each order has been open (in descending order). The total number of open orders are in the ( ).
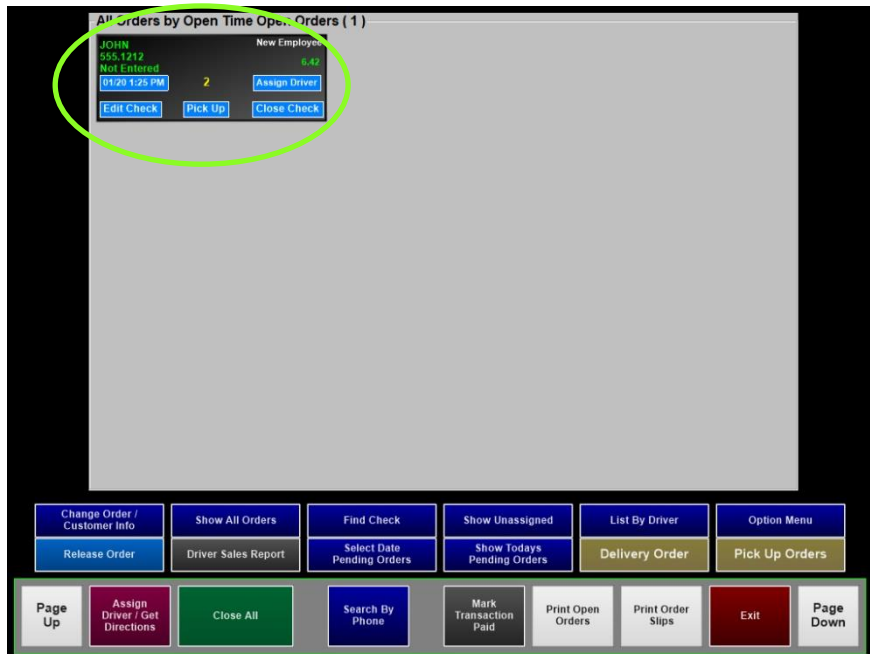
Button Background Color
For a quick visual on the status of the order, the background is black, blue or red. *You can also see the time and date under the customer information.*

- Black: order is past due (example; it's currently 4 PM and the pickup was scheduled for 1:25 PM

- Blue: the order is active

- Red: preorder; when the order is scheduled for a future date

Contact Information
The contact name, phone number and address (if applicable) is on the upper left of the order button. You cannot change the contact information on this button. However, if you need to change the phone number or address, you can do so by using the Customer Order / Customer Info button located on the bottom of the phone order screen.

Promised Pick Up Time
The promised pickup time and date is under the contact information. You can change the time or date by touching the Date and Time. You can also edit this information by using the Customer Order / Customer Info button. Since the order has already been sent to the kitchen, you will need to manually tell the kitchen about this change.

Assign Driver
For delivery, you can assign or reassign a delivery driver by selecting **Assign Driver** on the phone order button

Assigned Employee
The employee who placed the order is in the upper right corner of the screen. The order is assigned to this employee's audit and is responsible for the payment.

Pick Up
If your restaurant takes delivery, you can select this button to change the order from Pick Up to Delivery.

Edit Check
To add or edit an active order, select **Edit Check**. You will be placed on the order screen to add to the order. Select Done when complete.

Close Check
To close the order, select **Close Check**. You will be placed on the order screen to add to the order and/or verify the order. Select Close Check on the order screen when ready to close the order.

Taking a Phone Order (New Order)

For a full phone order manual including delivery instructions, please view the phone and delivery guide:
https://microsale.zendesk.com/hc/en-us/articles/360000489574-List-of-User-Guides-pdf-

1   From the order screen, Select **Phone Orders** and then **New Phone Order**

   Depending on your register settings, you may also access phone orders from the ID screen (if available, an Access Phone Orders button is shown over the In/Out button on the ID screen)
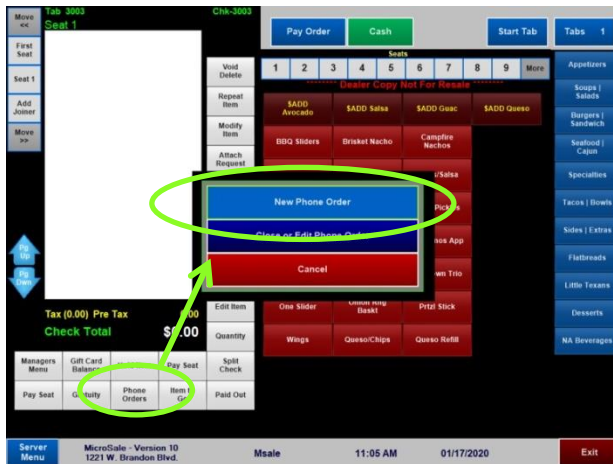
2   Enter the customer's phone number and then select **Done**

   While you can enter the customer's name instead of the phone number using this keyboard, use the phone number to prevent duplicates and confusion. You can attach a name to the phone number from the following screen

   If the customer has not ordered before, you'll receive a quick message that says "No Match Found". No Match Found means the customer has not ordered in the past and the customer information is not matched with your system's saved customer data

3   From this screen, you can enter the customer's name (*touch Name*) plus additional contact information. To change the pickup time/day, touch *Pick Up @*, *Ready In* or *Date Needed*. Touch the label to populate a keypad to enter data

   If the customer has ordered before, this screen will show the full previous order and date the order was placed (under Previous Order Information). You'll have the option to choose one or multiple items to reorder

4   After the name is entered, Select **Place Order**

5   After the order is entered, select **Done** on the order screen.

6   The order is held in the system until the customer comes in to pick up the order (retrieve the order using the **Close or Edit Phone Order** button)
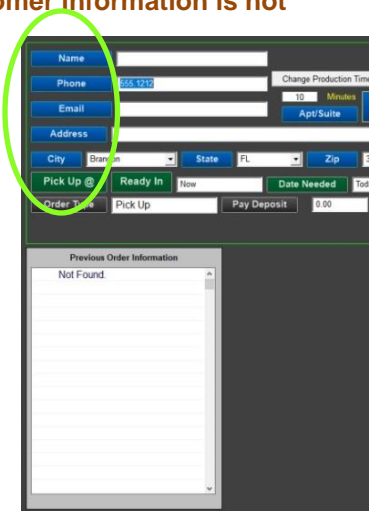
1 From the order screen, Select **Phone Orders** followed by **Close or Edit Phone Order**
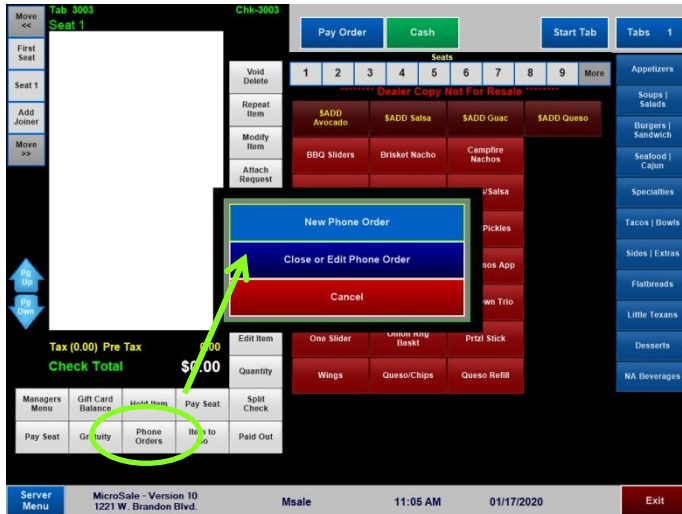
2 All active orders are shown on individual buttons

The name and number are displayed on the top left of each order. If you are ready to close the check, touch **Close Check** on the bottom right of an order. If the customer calls back and would like to add to the order, select **Edit Check**.

3 After selecting **Close Check**, you can review the order, enter additional items or a discount before selecting **Pay Order**

Accidentally selecting Close Check

Canceling Close Check

If you have selected Close Check in error, select **Exit** on the order screen and then select **No** when prompted. You will be exited back to the ID screen and the order will remain active.

Accidentally selecting Close Check instead of Edit Check

If you have selected Close Check instead of Edit Check, you add additional items to the check and then select **Yes** to send the items to the kitchen. You'll then be sent to the payment screen.

To continue to keep this order open and NOT complete payment, select **Quit** to cancel the payment and keep the order active with the new changes.
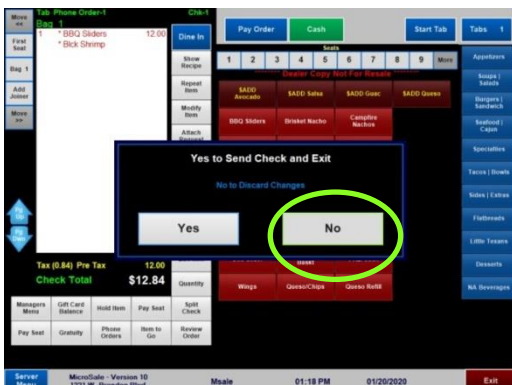
Preorders (pending orders)

A pending order is a phone order that has been placed for a future day. Pending orders are perfect when customers preorder large orders (such as 200 wings for *The Big Game*). Pending orders for the following day will print automatically after the nightly close out, the following steps go over manually printing or viewing pending orders.

A preorder is placed the same as a phone order, however instead of the order sending to the immediately, the date and time must be changed.

1 From the phone order screen, **select Pick Up @** and choose the time when prompted

2 Select **Date Needed** and choose the date when prompted

3 Place the order regularly

4 When accessing open orders, the pending order appears red with the date and time needed (under the customer information)

Release Orders will flash on the screen when the order is within the default minutes of the pickup. You must touch *Release Orders* to allow the orders to print.

However, if your system is set to have Pending Phone Orders to print automatically, you will not see the "Release Orders" message and the order will print automatically to the kitchen 20 minutes before the order is due.

Releasing Preorders Early

If a pending order is going to be picked up earlier than the original time, touch **Release Order** and then touch the appropriate phone order to send the order immediately to the kitchen

Getting the kitchen ready for Preorders

For preorders, the orders will also send the night before the order is due
to prepare the kitchen.

1   If a pending order is going to be picked up earlier than the original time, touch "**Release Order**" and
    then touch the appropriate phone order to send to the kitchen

2   When the customer arrives to pick up the order and pay, choose **Close Check** and close the order
    regularly

Preparing for pending orders (phone orders for a future day)

A pending order is a phone order that has been placed for a future day. Pending orders are perfect when customers
preorder large orders (such as 200 wings for *The Big Game*). Pending orders for the following day will print automatically
after the nightly close out, the following steps go over manually printing or viewing pending orders.

1   On the phone order screen, select **Option Menu**

2   Under Print Pending, choose **Pending Summary** or **Pending Orders**

3   **Pending Orders**
    Tomorrow's pending orders will automatically print out after the nightly close out, however, if you want to manually
    view or print pending orders
        a.   Choose a date range or a specific date to view the orders due within the dates chosen
        b.   For example, to view tomorrow's orders, select the date for tomorrow on the Starting and Ending Date.
             The order details print on the receipt printer

4   **Pending Summary**
    The pending summary prints a summary of all menu items ordered within the date range selected. This report is
    used as a product mix to ensure you have enough inventory on hand to fill the orders

Adding a deposit on a phone order (credit card payment)

A deposit (or portion of the total check) can be taken during the order process. A deposit can be taken before the order is placed or added later (using Change Order / Customer Information).

Adding a deposit before the order is placed

1   From the order screen, Select **Phone Orders**
    Depending on your register settings, you may also access phone orders from the ID screen (if available, an Access Phone Orders button is shown over the In/Out button on the ID screen)

2   Select **New Phone Order**

3   Enter the customer's phone number when prompted
    You can attach a name to the phone number from the following screen

    If the customer has not ordered before, you'll receive a quick message that says "No Match Found". That means the customer has not ordered in the past and the customer information is not matched with your system's saved customer data

4   Enter the customer's name (*touch Name*). *Other customer information is optional.*

5   To change the pickup time/day, touch *Pick Up @*, *Ready In* or *Date Needed*. Touch the label to populate a keypad to enter data

6   To add a deposit, select **Pay Deposit**
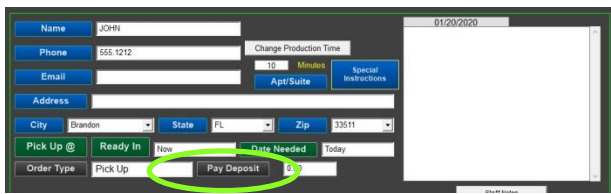
1   *Available payment medias appear;* Touch the desired payment type

    For credit card, touch/select anywhere in the *Credit Card* row

2   Enter the payment amount and use the decimal to finalize the amount before selecting **Done**.

3   After you select Done on the Deposit Paid In screen, it leads to you to the EMV payment screen. Confirm the deposit amount by selecting **Done**

4   You can insert the card (if available) or manually enter the card information. Follow the prompts on the payment device.
    The deposit has been entered and automatically saves

5   Select **Place Order**

Adding a deposit after the order is placed

1   From the order screen, Select **Phone Orders**
    Depending on your register settings, you may also access phone orders from the ID screen (if available, an Access Phone Orders button is shown over the In/Out button on the ID screen)

2   Select **Close or Edit Phone Order**

3   Select **Change Order / Customer Info**

4   *A window opens;* choose the appropriate phone order (selecting/touching anywhere in the row)
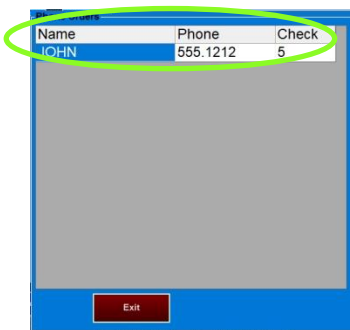
5   On the Customer Information window, select **Pay Deposit**
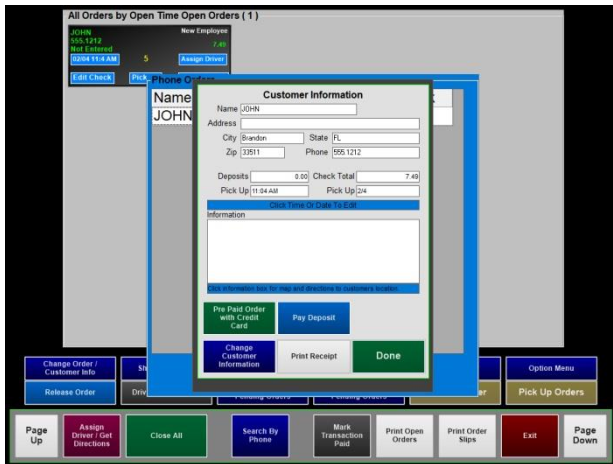
6   *Available payment medias appear;* Touch the desired payment type

    For credit card, touch/select anywhere in the *Credit Card* row
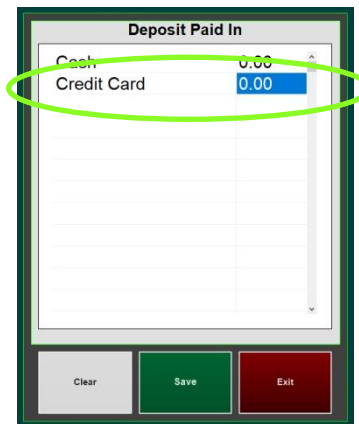
7   Enter the payment amount and use the decimal to finalize the amount before selecting **Done**

8   After you select **Done** on the Deposit Paid In screen, it leads to you to the EMV payment screen. Confirm the deposit amount by selecting **Done.**

9   You can insert the card (if available) or manually enter the card information. Follow the prompts on the payment device.

    The deposit has been entered and automatically saves

Closing a phone order with a deposit

When a deposit is on a phone order, a credit is placed on the check.

1 Access the phone order regularly and select **Close Check**

2 On the payment screen, a Deposit button appears as a payment media with the deposit amount
   The **Balance Due** (or Refund Due) is in the upper right corner and the check total is on the bottom of the screen

3 If there is a Balance Due, select the appropriate payment media to complete the order. (Example, if a customer hands you a credit card, select **Credit Card** and complete the payment)
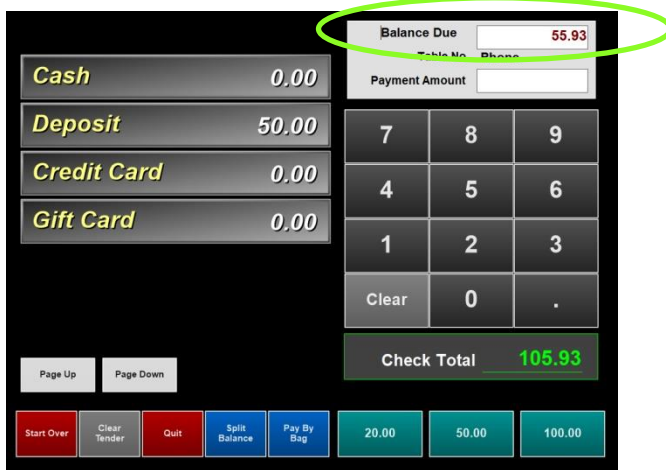
⚠️
WARNING
If the deposit was higher than the check total, you owe the customer money! If you see Refund Due instead of Balance Due, you must refund the customer with cash.

1 To refund the customer with cash, select the button **Deposit**
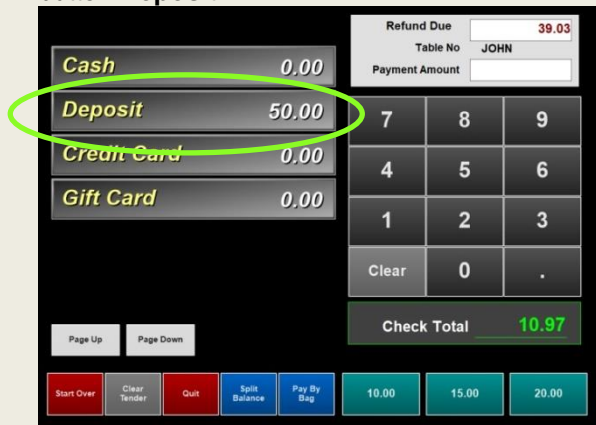
2 *It will prompt the refund amount.* Select **Accept Amount** after the money is taken from the drawer
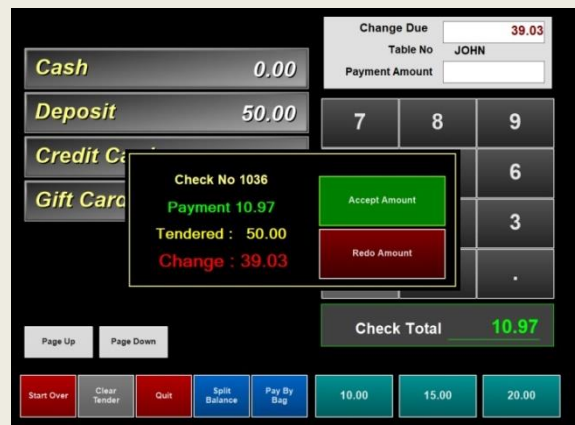
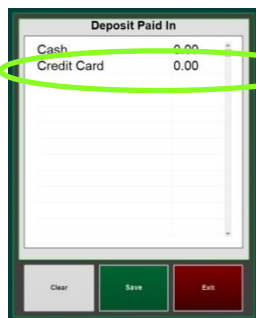# Printing the customer receipt without closing the order

1   From the order screen, Select **Phone Orders**
    Depending on your register settings, you may also access phone orders from the ID screen (if available, an Access Phone Orders button is shown over the In/Out button on the ID screen)

2   Select **Close or Edit Phone Order**

3   Select **Change Order / Customer Info**

4   A window opens; choose the appropriate phone order (selecting/touching anywhere in the row)
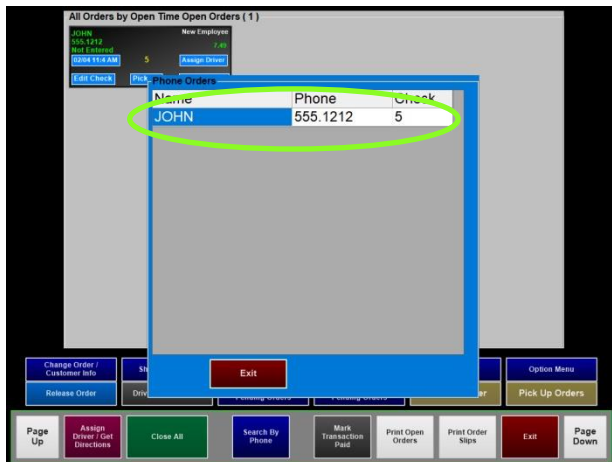
5   On the Customer Information window, select **Print Receipt**
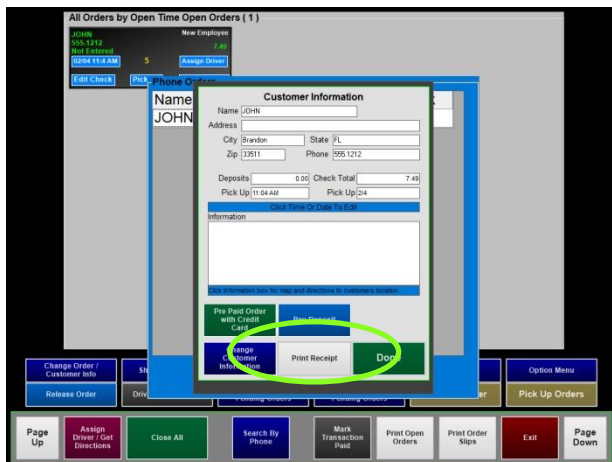
Transferring a phone order to the dining room

If a customer wants to place an order ahead of time but eat in the restaurant, you can ring in the order as a phone order and then transfer it to the dining room. For example, a busy customer has limited time for a lunch break and would like to pre -order his lunch so that it is ready to eat when he arrives.

Marking a phone order for "Dine in" will move the order from the "Access Phone Orders" screen to the table layout or open tab screen (if system is in Quick Bar). *The employee who is performing this function will also be the one who receives this order within their table layout or open tab listing*

1 From the ordering screen select Phone Orders and then **Close or Edit Phone Order**

2 Select **Option Menu**

3 Select **Transfer to Dining Room**

4 Select the order you wish to transfer. The message at the top changes to *Transfer to Dining Room*
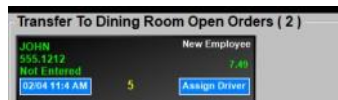
After you select the order, you'll be placed on the order screen.

5 Select **Exit** and then **Yes.** The order is now placed within your open checks

Voiding a Check

There are two ways to void a check in MicroSale; You can void a check through the Managers Menu or by accessing the check on the order screen.

Voiding a check through the Managers Menu

1. Select **Void Check** from the Managers Menu
2. Select the proper check number
   Review the ticket to make sure you have the selected the correct check
3. Select **Void Check**
4. Choose the appropriate **reason** or type in a reason using the button labeled **Keyboard**
5. Select **Yes** to print a voided receipt.

Voiding an Item or Items on a Check

If an item needs to be removed from an order after the kitchen ticket has printed (items will be shown in red if they have been sent to the kitchen) **it will require a void**.

If the menu items on the virtual check are black, it means the items have not been sent to the kitchen and you can simple delete the items from the check.

1. From the order screen, select **Void Delete**
2. Select the item or items that need to be removed and then Select **Void Delete.** Select **Yes** to void.
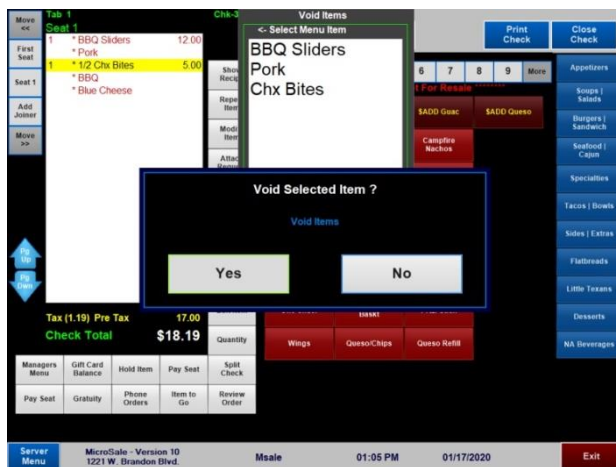
3. Select the void reason or select the **Keyboard**
4. Your items will be shown as void on the virtual check. The customer will not see this void on the printed receipt.

The void will be linked to the employee's name and the manager who approved the void.

If you void all items off the check, the open check will automatically close and appear as a voided check on the Managers Menu.

Adding custom void reasons

MicroSale includes preset void reasons and a keyboard for manual entry.

Adding additional void reasons (an attached keyboard is required):

- 📍 Managers Menu > Register Setup > Terminal Configuration > **Tenders-Job Codes-Paid Out-etc.** > Misc Setup > **Void Reasons**
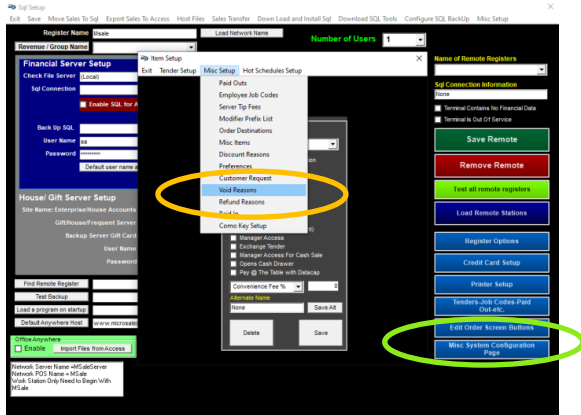
1 From the Void Reasons window, select the **dropdown** to see your preset void reasons

By default, voids place menu items back into your inventory (or product mix), assuming the menu item was not prepared.

3 To have the void remove the item from the inventory (or remove from the product mix), type in a void reason, tick the checkbox **Remove from Inventory** and **Save.**

2 If you do not have Keyboard in the dropdown, select the button, **Add Keyboard**. This will automatically save.

A keyboard button allows you to manually type in a void reason on the fly.

After each new void reason is typed, select Save to add it to your list. Exit the screen when completed.

Void Reasons will deploy automatically to all terminals.
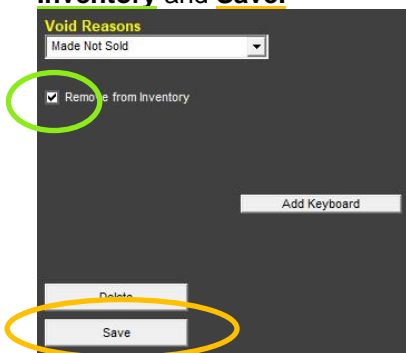
Issuing a Refund

Refunds should be used when the payment needs to be returned to the guest after the food has been prepared and paid for. Refunds are not tied to orders or tickets. The refund will be issued referencing a receipt so that the order can be verified and the refund amount confirmed.

If the receipt is not available, search for the ticket with Transaction Review to confirm the original order and verify the amount owed to the customer.

1 From the Managers Menu, Select **Refund**
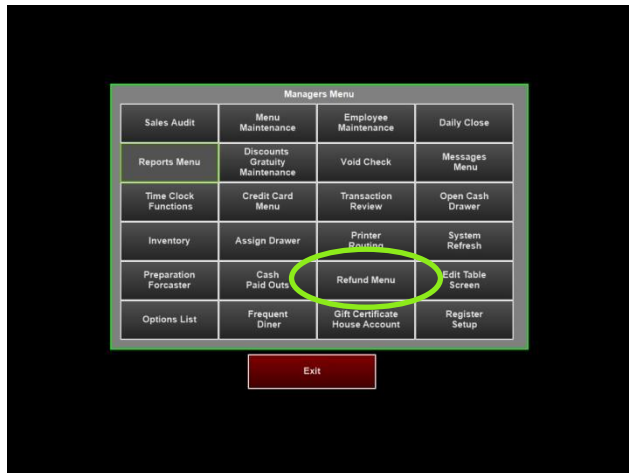
2 Select the **Employee Name** button – it will automatically insert the bartender's name assigned to this register.

3 Select the **Refund Amount** button and enter the total of the items being refunded, excluding tax – the tax amount will fill in automatically

4 Select **Refund Reason** and choose one of the reasons from the list on the right
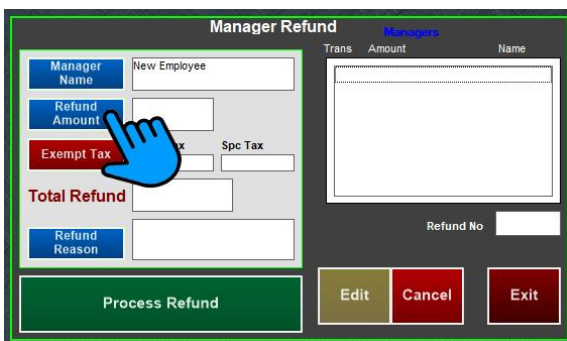
5 Select **Process Refund** and then the preferred method for refund

Back Office Management

All functions in MicroSale are controlled by access levels. Not all employees considered a 'manager' may have the same privileges in the system. To learn more about customizing access, please view Access Levels here:
https://microsale.zendesk.com/hc/en-us/articles/115001027187-Security-Levels-Access-Levels-

Employees and Security Access

Understanding Access Levels

MicroSale utilizes Access Levels for security in the software to prevent unauthorized employees from performing certain functions or accessing information. **A total of 10 levels are coded in the system from 0-9.**
An access level is assigned to an **Access Level Name**. You may change any access level, create your own access names, or change any function's access level number.

> For example, a manager has the access level of 8 (9 being the highest). Each function and section of the software is assigned to an access number; each section can only be accessed if the employee's job code is at or above the set number.

Employees cannot view any employee who has a higher access level. In Employee Maintenance, employees with a higher access are excluded in the dropdown and cannot be accessed.

Adding New Employees

1 From the Manager Menu, Select **Employee Maintenance**
2 On the submenu, Select **Employee Maintenance**

3 Type in **Last Name and First Name** of Employee
Employee ID is used to identify employees for labor tracking outside of MicroSale. You do not need to complete this field.

4 Use the dropdown and select all job titles associated with this employee. If the employee is hourly and/or tipped, make sure you select these options
If you need to add a job title that is not available in the dropdown, please visit the next section, "Adding Custom Job Titles"

While a pay rate is not required in the software as payroll is handled by a third-party, pay rates provide better insight on your reports and labor costs. You can also hide pay rates so anyone will lower access into the system will not be able to view the rates.

5 Select the dropdown and select the base access level of this employee. Put the highest access this employee is allowed to have. For example, if the employee is both a bartender and manager, select **Manager** as the base.

If an employee is a manager or a bartender/server on different shifts, and you do not want them to have manager abilities while clocked in as a bartender/server, finish the instructions through step 8 and visit the Employee and Security Level Register Options at the bottom of this section.

6 Type in the employee's number to access the system- this will be used to log into the order screen and for clocking in/out.

Pick a number that will not be forgotten such as the last four numbers of the employee's social security number.

If your restaurant is using swipe cards, swipe the card in the secondary field.

7 All required fields are now completed. If you would like to add more information, please do so now.

8 Save when completed

Employee and Security Level Register Options

Adding custom job titles

Job titles are defined as roles your employees have in the restaurant. MicroSale includes a list of preset job titles such as Manager, Cook, Bartender, Server, Cashier, and Hostess. You may have other job titles for employees such as Bouncer, Prep, Shift Leader, etc. You can also delete any of the preset job titles that do not match your restaurant.

1 Select **Misc Setup**

2 Select **Employee Job Codes**

3 Type in a **Job Title**
   a. Does this title require a sales audit? – bartenders, servers, cashiers, etc. or anyone who handles sales in the system will require an audit
   b. *For Tip Pooling, please view PDF document*

4 **Save**

Disabling management access

If an employee is both a manager and a bartender/server on different shifts, and you do not want them to have manager abilities while clocked in as a bartender/server, select the following option:

- 📍 Managers Menu > Register Setup > Terminal Configuration > Misc Options (tool bar) > tick the checkbox **Employee Access by job code** > Finished > Save > Exit

Hiding Pay Rates

You can create a custom Access Level to Mask, or hide, pay rates from other employees. This enables other managers to add/edit employees without seeing how much other employees make. While inputting pay rates is not necessary in the POS system, it will enable labor percentages and make your reports more useful.

- 📍 Managers Menu > Register Setup > **System Access Configuration**

1 In the left column, scroll down and select Set Access
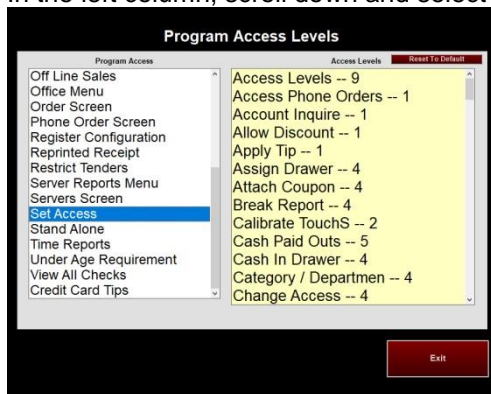
2 Use the onscreen keyboard or your keyboard and type in **MASK RATES**

3 Select **Done**

4 Select an **Access Level** (9 is the highest access level)
  With the level of 9, all managers with the access of 8 and lower will see XX.XX in the Pay Rate area of the employee screen

Reviewing Individual Transactions

The Transaction Review provides detailed financial information for an individual employee, voids, tenders, and check components from the current day or any previous day. This information can be used to track an employee's sales performance, find user errors and pinpoint check details.

Using Transaction Review

1 From the Manager Menu, Select **Transaction Review**
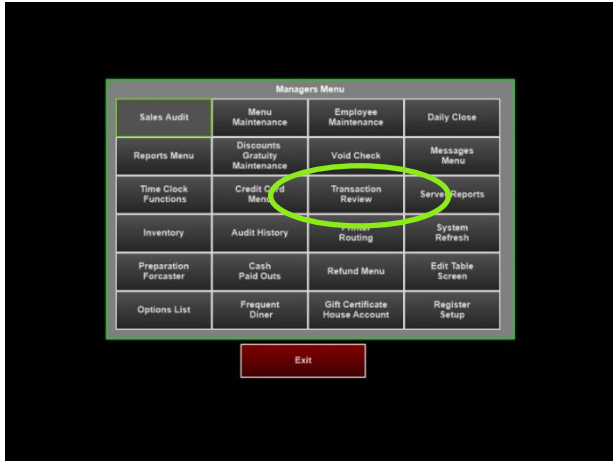
2 Use the search buttons on the bottom of the screen to search today's transactions, use the dates on the left to search individual days this week, or use the view backups to view previously closed week's days.
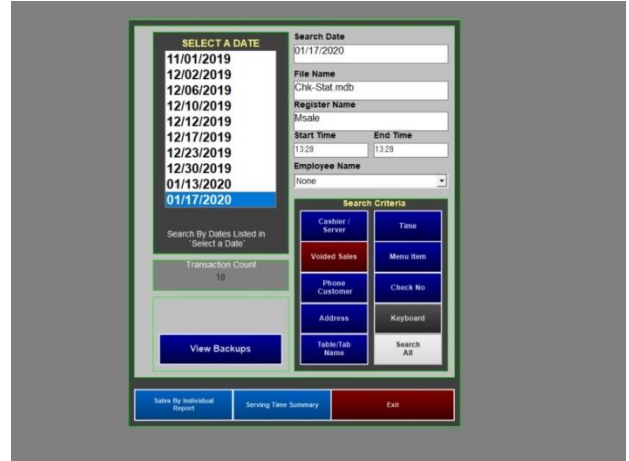
3 After choosing how you would like to search the transaction, click on the row that you would like to view.
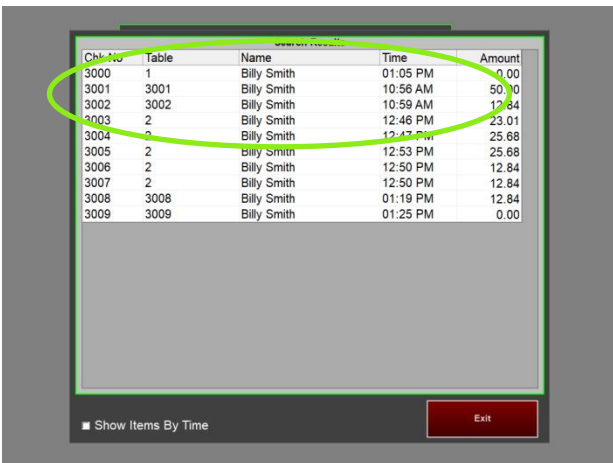
4 On the check detail, you can print a copy, attach a coupon for the customer to use on another visit, view a video clip (if using integrated cameras) or toggle to the next check using "Next Check"
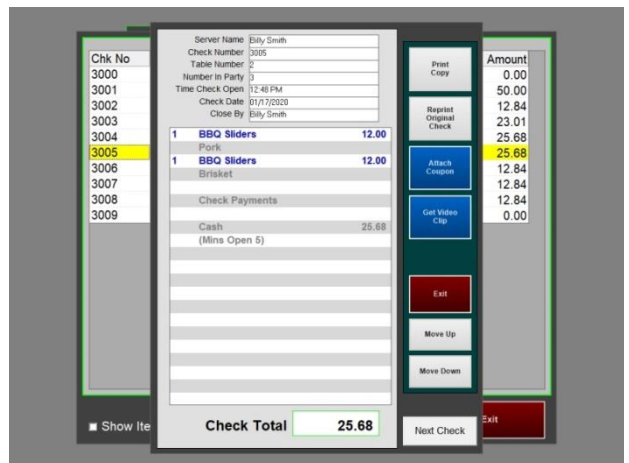
ⓘ **Show Items by Time**
When the option is checked, the transaction detail shows when each item was entered on the check, the time starts when the tab/table was opened.

Required procedures that must be performed every day

You must run a close out (or have the system automatically close out) and then verify the closeout ran before starting the next business day.

Before Running the Closeout:

1. Make sure all open orders are closed [unless it is a phone order for a future day]. Plus check the server screen – there should be no open tabs or tables. If you have open tickets, the system will prompt you to close them before continuing with the closeout.
   a. If you have phone orders for today that were not picked up, discount the check down to a $0.00 balance and close the check or void off all items.
   b. Do not close preorders (pending orders!) a preorder will appear red on the phone order screen.
2. Make sure all audits are closed. If you have open audits, the system will prompt you to close them before continuing with the closeout.
3. **Make sure all of your terminals (workstations) in the restaurant are powered on and on the ID screen of MicroSale.**

Running the Closeout and Batching credit card charges

The Closeout must be performed every day. The closeout can be performed manually or automatically. To set up your system to close automatically, follow the follow next section, "Close Out Optional Settings". The instructions below are for manually closing the day. You can also close the system manually and have the system set to automatically close out as a backup. *If the close out has already ran, the auto-close out does not run.*

1 Select **End of Day Close**
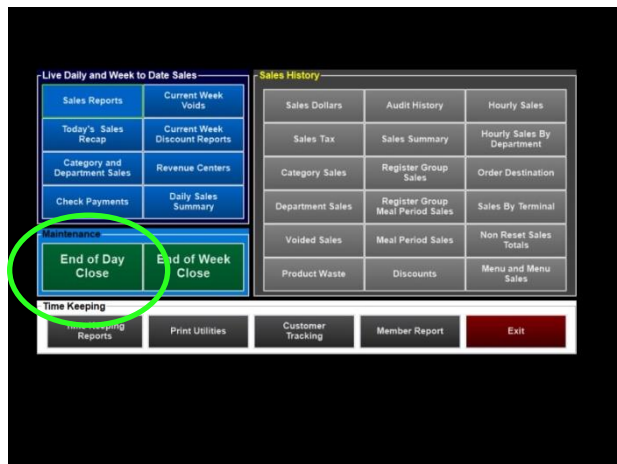
2 Confirm the physical cash on hand matches (or closely matches) the **Cash from Audits** amount.
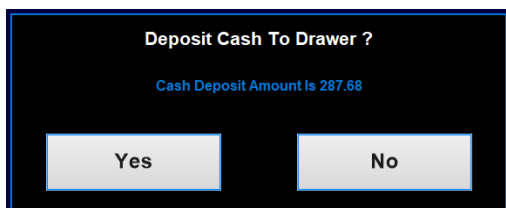
These amounts should have been entered as a deposit for each individual audit

If deposits were not entered, you can enter them now in "Cash From Audits". If you want to add to the deposits already entered instead of overwriting the Cash From Audits Amount, use Bank Deposit 2 and type in the additional amount – failure to enter deposits will show a significant shortage

3   Select **Close Daily Sales** and Select **Yes** to confirm

4   You'll be prompted for various reports to print. Select **No** or Yes

5   Select **Yes** to settle the credit card batch.

6   If this is your end of week, you will be prompted to run a weekly close out. Select **Yes** when prompted.

The close out report is available from the receipt printer or a regular office printer. If you do not have an office printer or virtual printer attached, the report will only be accessible on the receipt printer.

Close Out Optional Settings

Setting the system to auto close

⚠️
WARNING
Set the auto close on ONE terminal only!!!

📍 Managers Menu > Register Setup > Terminal Configuration > Register Options >Terminal Setup > Auto Close System > use the dropdown to replace "None" with an auto close time.

Choose a time that is at least 1-2 hours after your business closes to ensure you are ready to have the system close the day and batch the credit card charges.

If you set this on one of the terminals or your back office, DO NOT set this on any additional terminal in the restaurant.

Allowing the close out to run with employees clocked in

⚠️
WARNING
With this option, employees must have their audits closed and tips entered before the close out runs. **Tips cannot be entered after the batch settles!!!**

Setting the option to allow the close out to run with employees clocked in:

📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > Printing / Cash Drawer > **Time Clock / Misc** > tick the option **End of day runs with employee(s) on the clock** > Save > Exit

Getting your system ready for the day

⚠️

WARNING

DO NOT take any orders until the following is verified

Verify that the daily close was completed from the night before

1 View the **Sales Report** to ensure all numbers are $0.00

📍 Managers Menu > Reports Menu > **Sales Report**
The sales figures should all be zero except for the WTD (Week-to-date) sales totals

2 View the **Daily Sales Summary** to ensure yesterday's date is populated with data

📍 Managers Menu > Reports Menu > **Daily Sales Summary**

If the sales data for yesterday is not in the column for yesterday's date, it means the close out has not ran. **Do not enter new sales until you run the closeout (otherwise the sales for the current day will merge with yesterday)**

3 Verify the **Credit Card Batch** was settled

📍 Managers Menu > **Credit Card Menu**
The onscreen spreadsheet should be empty. If data is shown, the batch has not settled.

If the close out was completed (verifying by completing steps 1 and 2), but the batch has not settled, go ahead and settle the batch now from the Credit Card Menu screen

⚠️

If the close out was not completed, go ahead and run the close out now (Follow the **Ending Your Day** section). When closing the day at the start of a new day, the software will prompt to verify you want to close the day for yesterday. Make sure your batch has settled after you run the close out (step 3)

You are now ready to start your day and use the system

Verify the weekly close was completed (occurs once at the end of the week)

1 Verify the weekly close out was completed

📍 Manages Menu > Reports Menu > **Sales Reports**
The sales figures should all be zero (including the WTD, week-to-date, sales numbers).

If it has been longer than 7 days since the last successful weekly closeout, a message will prompt that will alert you that the closeout has not ran in X amount of days. As long as your daily close has been completed, the weekly close out will occur automatically

If you need to manually run the weekly close out for any reason, select End of Week Close on the Reports Menu. The end of day close must be completed before you close the week. The system will automatically show the weekly summary report to be printed. Exit.

More Information on week settings

The default week in MicroSale is Monday-Sunday. The weekly close out is driven by the 'first day of the week'. It runs automatically on the last day of the week. (If your week starts on Monday and the system is set to a 7-day week, the weekly close out will run on Sunday after the daily close is completed).

Customizing your week in MicroSale

- 📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > **Time Keeping (toolbar)** If your week starts a different day, use the dropdown and select the appropriate day. Save before exiting if any changes are made
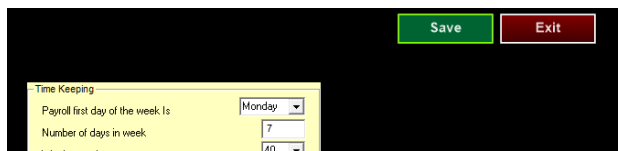
- ⓘ If the restaurant is closed the last day of the week, for example, you are closed on Sunday and your week starts on Monday, set the number of days in a week to 6. The weekly closeout would then initiate on Saturday night. If your restaurant is closed in the middle of the week, for example, Wednesday, the first day of your week must be set to Thursday. The weekly closeout initiates on the last day of the 'number of days in the week'.

Viewing and Using Common Reports

About Reports

Real-time and historical data is available through any of your POS stations. While there are hundreds of reports to accommodate various goals, this section covers the most commonly used reports.

Reports can be emailed daily and weekly. A monthly report can be manually emailed from the store; Run the desired report by the date range and select Email Report. To setup email, please follow the following document: https://microsale.zendesk.com/hc/en-us/articles/115001178107-Setting-up-Email-to-receive-automatic-reports-via-email-

Optionally, MicroSale's ReportingAnywhere provides sales data on your phone (using the smartphone app) and your internet browser. Please contact your MicroSale representative for more information on the ReportingAnywhere subscription service.

Live Sales Reports
Live sales reports can be viewed at any point during your business day.

- Managers Menu > Reports Menu > **Live Daily and Week to Date Sales**

Server Report (Audit Report)
The server report, or server audit, shows the employee's sales activity for the shift. You will use this report to verify transactions, entered tips, balance cash (when using a cash drawer) and to see the net cash due.

- Server Menu > **Server Report** (choose to close or print)

Product Mix Reports
Product Mix Reports show your sales itemized by menu item sold. You have several product mix report options; you can view items sold by department or category, view the mix by the current day, WTD, by hour, or date range, plus you can build a custom product mix to view specifically selected menu items.

- Managers Menu > Reports Menu > Menu and Menu Sales > **Mix By Category/Department**

End of day reports (available after the close out runs)
The closeout report provides a summary of the entire day. It lists tender types (payment medias used), paid outs/paid ins, a summary of all discounts used, void amounts and check numbers voided, total cash that needs to be accounted for, sales totals and week to date totals. You must run a close out in order to finalize the day, batch charges and reset your numbers for the next business day.

> The daily close out report is emailed as the "Daily Sale Summary" and "Daily Balance Report". These reports provide the most pertinent data for your day.

> *The labor totals on the sales reports are merely a snapshot of what your labor totals and percentage were at the time the daily close was ran. If there are still employees clocked in when the closeout runs or if times are edited after the closeout, it will not match the numbers on the labor reports. The labor reports will have the most accurate payroll data.*

Labor Reports
Labor or (Time Keeping) provides information on employees' hours worked, pay rates, tips and more. Time Keeping Reports can be ran based on hours or date and filtered based on individual employee.

- Managers Menu > Reports Menu > **Time Keeping Reports**

Running Reports

Live Sales Reports

Viewing Live Sales with the Dashboard

1 From the Managers Menu, select **Reports Menu**

2 Select **Sales Reports**
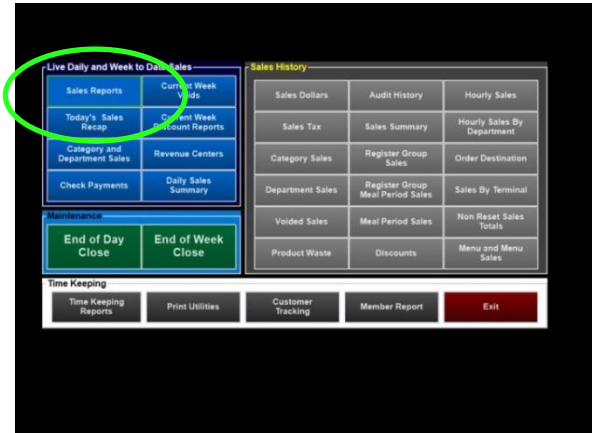
3 View the sales information. If you need to print the information, Select **Print Sales Report**
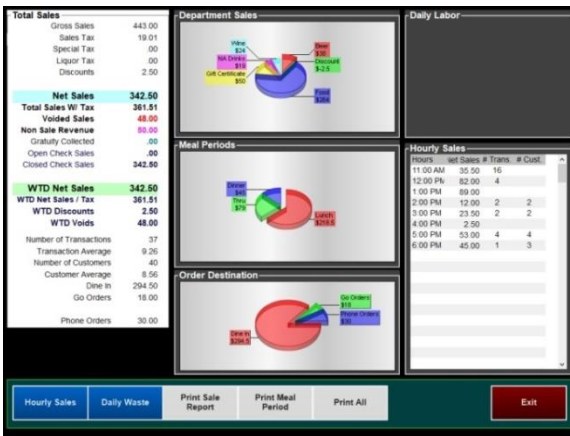
Viewing Live Sales as a PDF

1 From the Reports Menu, Select **Today's Sales Recap**
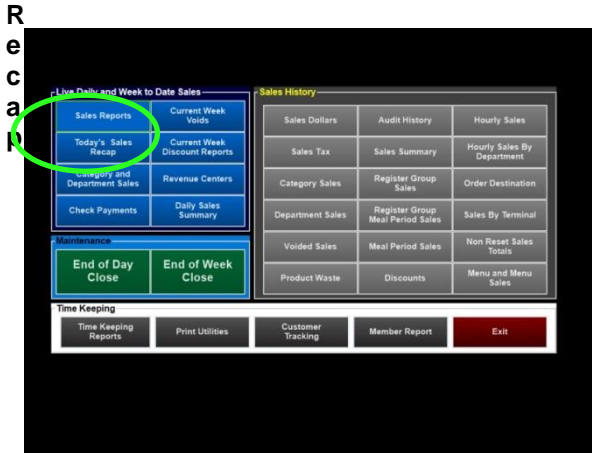
Based on your register options, you will either see this report on the screen as a PDF or it will print to the receipt printer
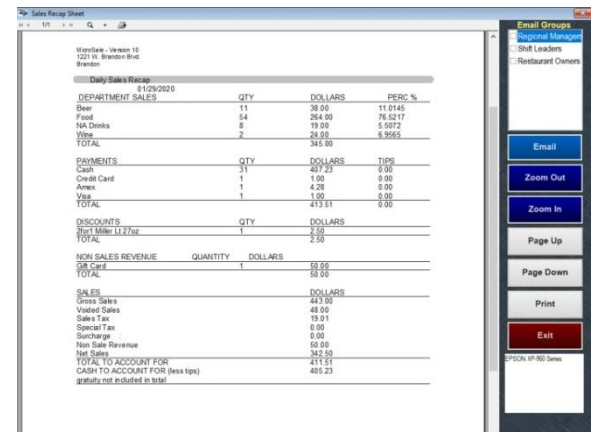
Server Audit Print Out

At the end of an employee's shift, the server or manager will print an **audit** showing all of the sales data for the employee.

All **Credit Card** charges (including tips added), **Gift Card** charges, **House Account** charges, and any other non-cash tenders collected are deducted from the total due.

MicroSale deducts any **Deposits** or **Skims** that were collected from a cash drawer or from a server's bank and placed into the store's safe.

Tip Credit Card Fee chargeback is a small percentage of the employee's credit card tips collected by the store to cover the transaction fee that the store pays to their credit card processor. *This is an optional feature.*

MicroSale deducts any amount from the total due that was **Paid Out** of the cash drawer or server bank such as for returning can or bottle deposits or for any purchases made (beer keg deliveries, produce purchased from a local store, bags of ice, office supplies, etc.).

Sales taxes and surcharges are tracked separately from both Gross Sales and Net Sales.

Server Report

Report For   : Donna Jones
Report Period :
    From 11:39 AM to 1:11:40 PM
Report Date : 8/28/2017
Audit No.   : 1

Payment Type	Amount	No.
Cash	841.51	14
Gift Card	25.00	1
Visa	169.50	4
MasterCard	19.75	1
Total Collected:	1055.76	20

This Total Includes Tips

Total Charged Tips:	44.65
Deposit Collected:	500.00
Tip Credit Card Fee:	3.80
Gratuity Charged:	40.69

Paid Out Name		Paid Out Amount
Bottle Return		9.60
BUD KEG		55.98

Discount Name	Amount	Qty
Employee	13.24	1
Flyer Ad $2 Off	6.00	3
General Discount	38.07	1

Open Check Sales	.00
Closed Check Sales	930.25
Non Sales Revenue	184.09
Gross Sales	1013.50
Total Net Sales	746.16

The "**Audit No.**" or Audit number will always be "1" (one) unless the employee worked more than one shift in the same business day. If an employee works more than one shift in the same day, and the manager closes the first audit before starting a new Audit for the next shift, then this Audit number will increment to indicate that the same employee worked multiple shifts. If the first Audit is not closed, then the employee can just continue using the first Audit during their next shift. It is recommended to close the first Audit and start a new Audit for subsequent shifts only if the manager is going to collect the money from the first Audit, or switch out a cash drawer with a new starting bank for the next shift.

Gross Sales represents everything rung up by the employee including service charges, delivery fees, and gratuity added automatically to large groups, but it does not include credit card tips, credit card tip fee chargebacks, or sales tax, and it does not reflect discounts applied or voided transactions. Thus, the **Gross Sales** is an "inflated" figure that must be adjusted before it can be used to calculate the amount due.

Net Sales reflect the actual sales generated after the **Discounts** and **Voids** have been taken into account.

Non-Sales Revenue is the revenue collected for transactions that are not directly related to the sale of Menu Items. *Non-Sales Revenue are service charges, delivery fees, credit card convenience fees, gratuity added automatically to large groups of guests, deposits collected for future sales not yet rung up, deposits collected that will be returned later (bottle and can deposits), gift cards sold, and any other similar Paid Ins.*

$ 1013.50	**Gross Sales**	
- $ 25.94	**Voids**	
- $ 57.31	**Discounts**	
- $ 143.40	**Non-Sales Revenue - Income**	
- $ 40.69	**Non-Sales Revenue - Gratuity**	
= $ 746.16	**Net Sales**	

The Total Sales Amount is the total amount of payments that should have been collected and DOES NOT include tips.

= $ 746.16	**Net Sales**	
+ $ 39.75	**Sales Tax**	
+ $ 2.50	**Tax Surcharge (Sugar Tax)**	
+ $ 3.80	**Credit Card Tip Fee Chargeback**	
+ $ 143.40	**Non-Sales Revenue - Income**	
	(added back after calculating Net Sales)	

= $ 935.61   **Total Sales Amount** (Total Due)

The **Total Sales Amount** (total due) less the **Non-Cash Tenders**, less any **Cash Collected By Others**, plus any other's **Additional Cash Collected**, less any **Paid Outs**, less any server **Deposits** or **Drawer Skims**, plus any **Tip Pool Amounts**, plus the **Beginning Drawer Balance** will equal the **Net Cash Due Amount** or *the total amount of cash that should be in the cash drawer or server's bank*.

The **Net Cash Amount Due** minus the **Beginning Drawer Balance** equals the amount of cash in the drawer that is part of the store's bank deposit.

Add the **Cash in drawer** amount to the **Deposits Collected** during the shift to calculate the total cash collected from this **Server Audit**.

Net Sales Tax	:	39.75
Discounts	:	57.37
Sugar Tax	:	2.50
Dine In	:	987.58
Count	:	18
Void Sales	:	25.94

--------------------   ----------   ---------

Total Sales Amount	**935.61**

Gratuity has been deducted

(includes credit card fees)

Non Cash Tenders	**214.25**

(includes Charged Gratuity)

Net Cash Due	**488.81**

(Additional Cash Closed Cash Closed Included) 93.36
(Less Cash Closed By Others) 54.75
(Tip out is included) 44.42
(paid outs have been deducted 65.85)

Amount Closed by Others	54.75
Additional Sales Closed	93.36
Beginning Drawer Balance	**250.00**

Net due includes beginning drawer balance

No Sales

Total Tables	18
Total Customers	18
Customer Average	41.45
Avg Table T/O Min	1199.44

Non Sales Items		
Bottle Deposit	144	14.40
0		
Gift Card	2	125.00

Report at least 74.62 in Tips

Server Tip Out Amount(s)

Bartender	Not Collected
Busser	40.17
Barback	Not Collected
Expeditor	4.25
Host(ess)	Not Collected
Total Tip Out Amount	**44.42**

If servers or bartenders have the ability to close checks for other servers or bartenders (not their own checks), then their **Server Audits** will show the **Additional Cash Closed Included** that is then added into the **Total Sales Amount** to be collected. Likewise, if any checks were closed by another server or bartender, then the **Server Audit** will show **Less Cash Closed By Others**, and this amount is then deducted from the total due.

This amount will be included on the Server Audit for the server or bartender who closed the check(s) and actually collected the cash payment(s).

= $ 935.61	**Total Sales Amount** (Total Due)	
- $ 25.00	**Gift Cards Redeemed**	
- $ 169.50	**Visa**	
- $ 19.75	**MasterCard**	
	(non-cash tenders include tips applied)	
+ $ 93.36	**Additional Cash Collected**	
	(cash collected from closing other servers' checks)	
- $ 54.75	**Cash Collected by Others**	
	(checks closed by & cash collected by other servers)	
- $ 65.58	**Paid Outs**	
+ $ 44.42	**Tip Pool Collected**	
- $ 500.00	**Deposit** (Skim from Drawer to Safe)	
+ $ 250.00	**Beginning Drawer Amount**	

= $ 488.81   **Net Cash Amount Due**
(includes beginning drawer amount)

If the **Tip Pool** feature is active, then the **Server Tip Out Amount(s)** will be printed on the **Server Audit**. This feature tracks sales by Menu Department, and certain employees (server, bartender, etc.) will tip out a predetermined percentage of their sales by Department to other employees working under certain job titles. If there is no employee on the clock under one of the assigned Job Titles, then that Job Title will show "Not Collected" for the amount. This example **Server Audit** is for a bartender, so it shows that the "**Bartender**" tip pool amount is "**Not Collected**" because bartenders do not tip out themselves. Bartenders tip out to Bussers and Expeditors (in this example).

## Optional print settings for the server audit

📍 Manager Menu > Register Setup > Terminal Configuration > Register Options > Full Service > Additional Options > The following are options you can enable or disable on the Sales Audit:

1. Server/Bartender department sales prints on audit close

2. Payment types print on audit close

3. Turn off server/bartender printing list of checks on audit close

Running a product mix report

1 Select **Reports Menu**
2 Select **Menu and Menu Sales (lower right of Reports Menu)**
3 Select **Mix By Category/Department**   4 Select **Mix By Department** or **Mix By Category**
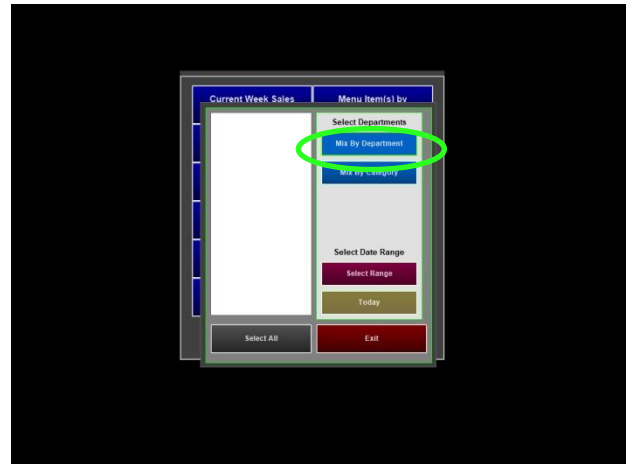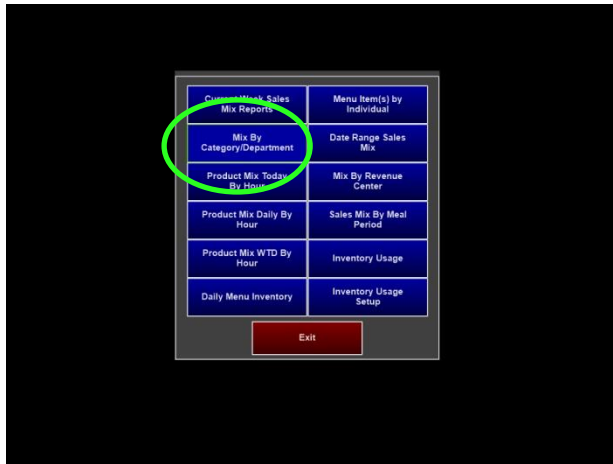
5 Choose **Select All** or individual departments/categories   6 Choose **Today** or Select Range
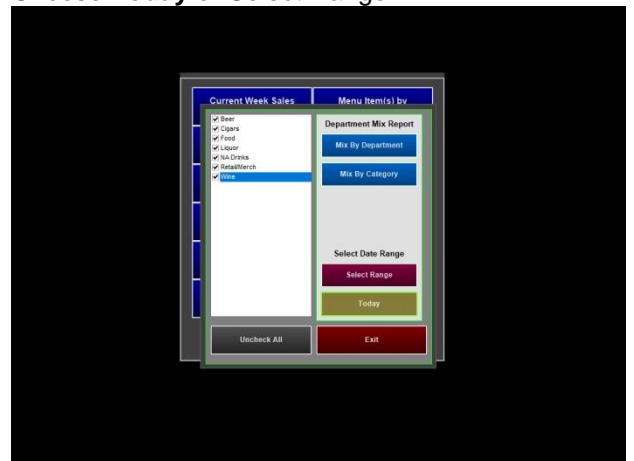
7 The report will print (if using a receipt printer) or be available on screen (if using an office printer or virtual printer)

Creating a custom Product Mix

The Menu Item(s) by Individual Report is a customized product mix report that shows sales of menu items based on the current day or closed sales data. You can filter sales in order to populate specific data as well as save your custom report to use at a later time.
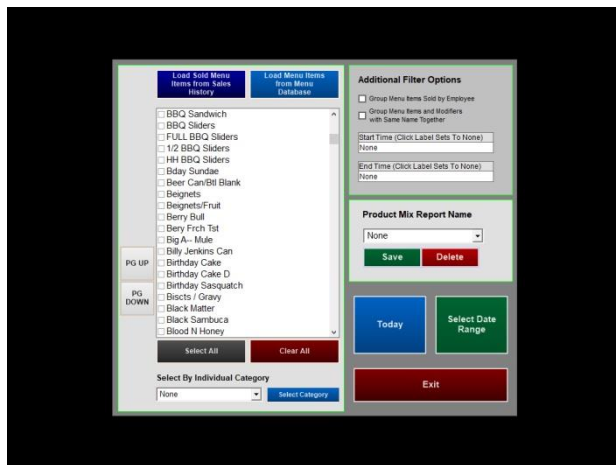
1　Select **Reports Menu**
2　Select **Menu and Menu Sales** *(bottom right of Reports Menu)*
3　Select **Menu Item(s) by Individual**

Menu Item(s) by Individual Screen

> **Before filtering data, decide if you want to load data based on the menu item database or the menu items from sales history. Loading by Sales History provides better insight on what has actually been sold, if your menu uses shift levels (such as sm, medium, large), loading from Sales History will tell you exactly how many of each size item you sold.**

4　Select **Load Sold Menu Items from Sales History**

You may see duplicate items in the list when you select Menu Items from Sales History. The duplicates are modifiers saved in multiple modifier groups. Select all of the duplicates to view how many modifiers were sold.

5　Choose which items you want to view on the report;
    a.　Choose **Select All** to choose all menu items
    b.　Select individual items by ticking next to items in the list or
    c.　Select items by category (using the dropdown under "Select By Individual Category > click on **Select Category**)

6　After the desired items are selected, you can select **Today** or **Select Date Range** to run the report

---

Saving your custom product mix

To save the product mix report (so that you don't have to redo your filters), type in a Product Mix Report Name and **Save.** (to retrieve the saved report, select the report name from the dropdown and run the report for today or a date range)

Separating the product mix by employee who sold the item:

To view the product mix report separated by each employee who rang the items, tick the checkbox, **Group Menu Items Sold by Employee.** This option is ideal for server contests to see who rang in the most of a particular menu item

Counting menu items and modifiers as one item:

To view the product mix report with the menu items and modifiers with the same name together as one single item (example; you may have Coke as a menu item and Coke as a modifier), tick the checkbox, **Group Menu Items and Modifiers with Same Name Together**

View product mix by time or date range:

To view the product mix report based on a particular time frame, select a **Start Time** and **End Time**
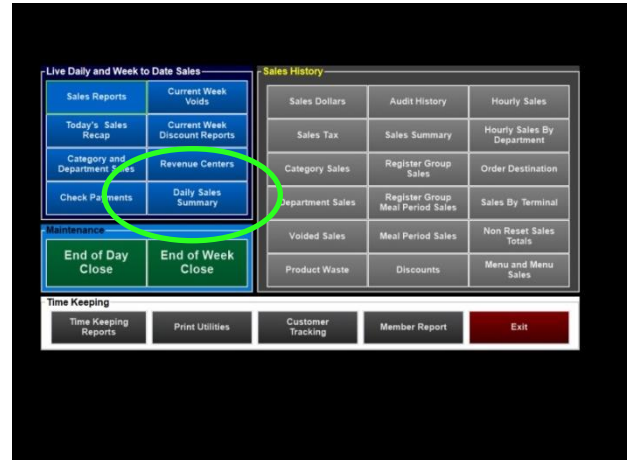
Running your most important end of day reports

The Daily Sale Summary and the Balance Sheet will be emailed automatically after the closeout runs. To view the reports through MicroSale, follow these steps.
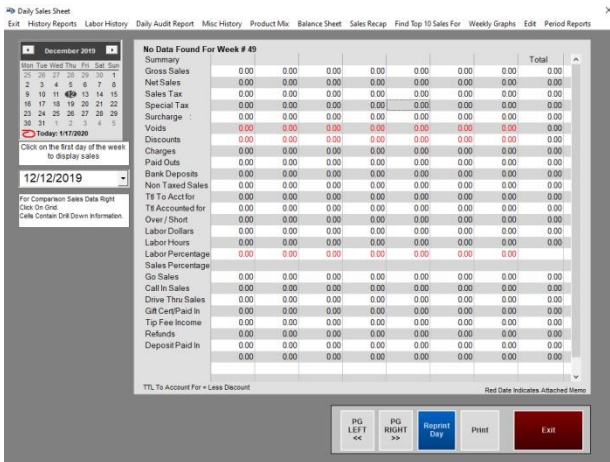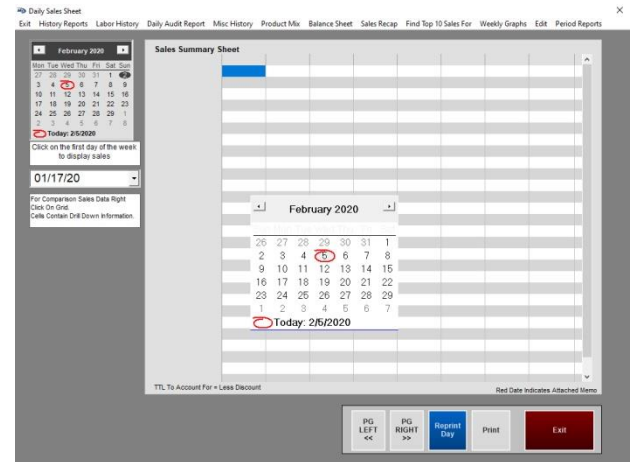
Daily Sales Summary

1 Select **Reports Menu**

2 Select **Daily Sales Summary**

3 The Daily Sales Summary screen provides a snapshot of your week as well as additional reports on the tool bar.
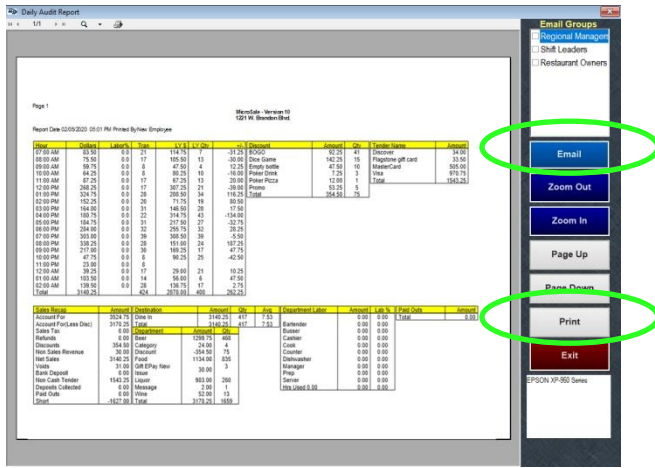

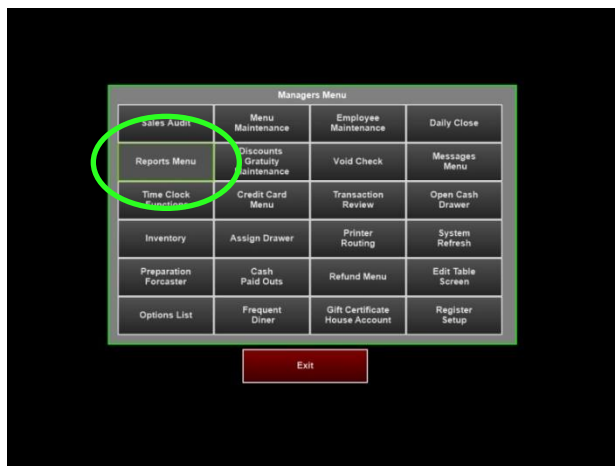**4** To view your closeout information, Select **Daily Audit Report** and choose a date

5 The report can be printed or emailed

*To reprint the report that is printed immediately following the closeout, select **Reprint Day***

Balance Sheet

1 Select **Reports Menu**

3 The Daily Sales Summary screen provides a snapshot of your week as well as additional reports on the tool bar.
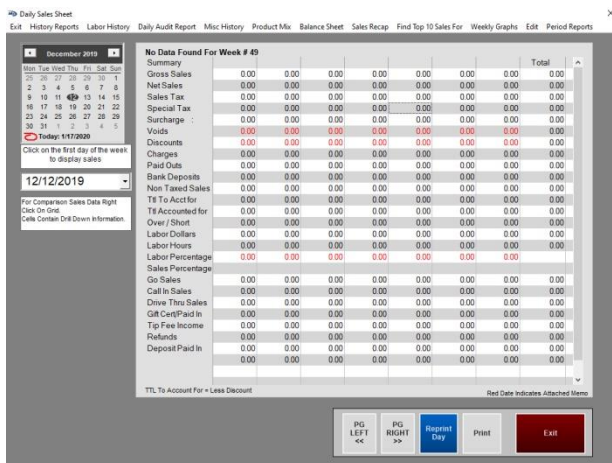
5 The report can be printed or emailed

2 Select **Daily Sales Summary**
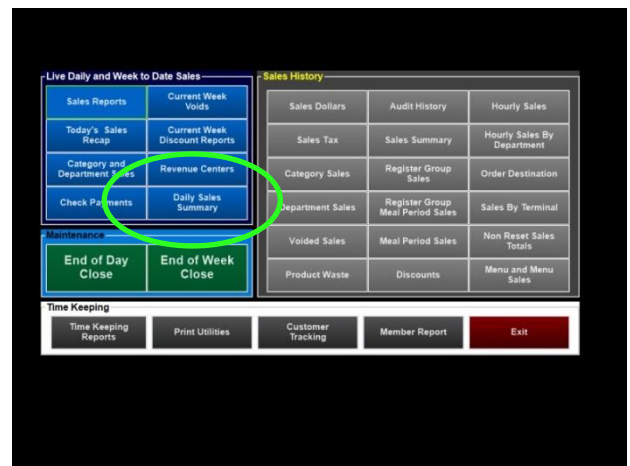
4 To view your closeout information, Select **Balance Sheet** and choose a date or date range.
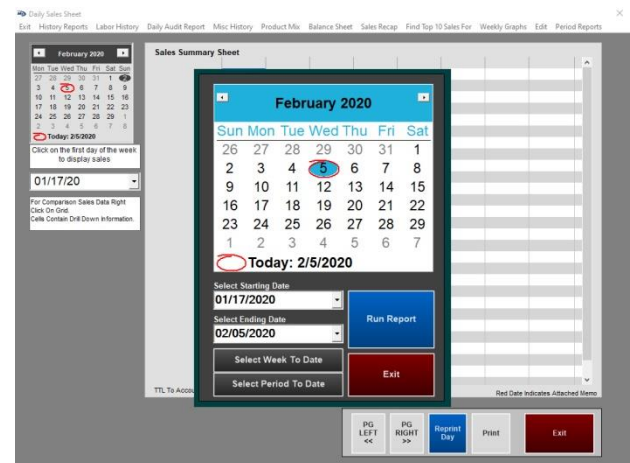
- Non-taxed sales can be found on the Balance Sheet

- Gift card sales show as non-sales revenue

- Redeemed gift cards and house accounts show as a tender type
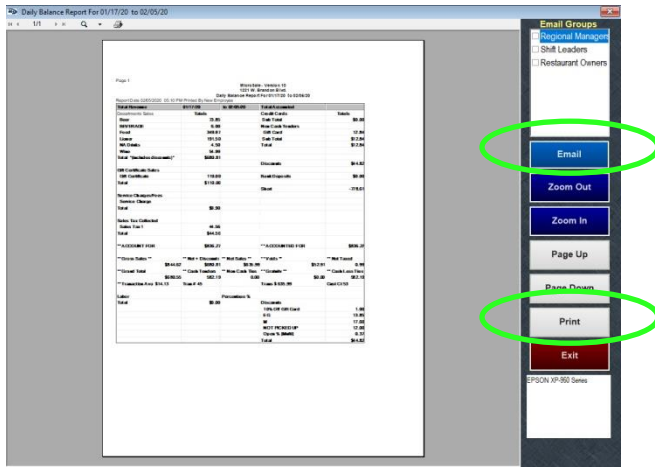
Printing a Weekly Sales Report

1   Select **Reports Menu**
2   Select **Daily Sales Summary**
3   Select a start **Date**
4   Select **Print**

Labor (Employee Time Keeping)

Running a labor report

1   From the Reports Menu, Select **Time Keeping Reports**

2   Select **Review Time Records**
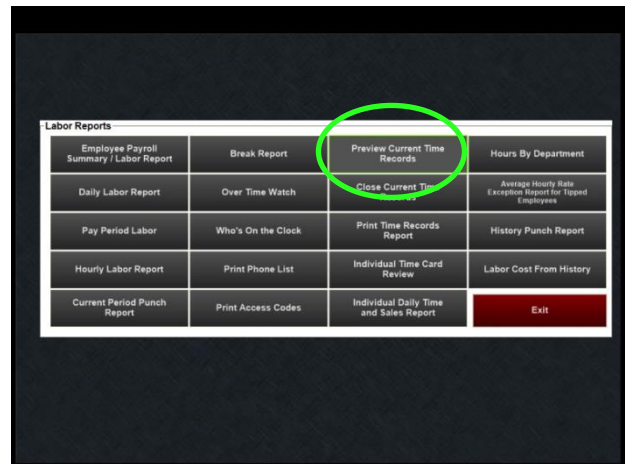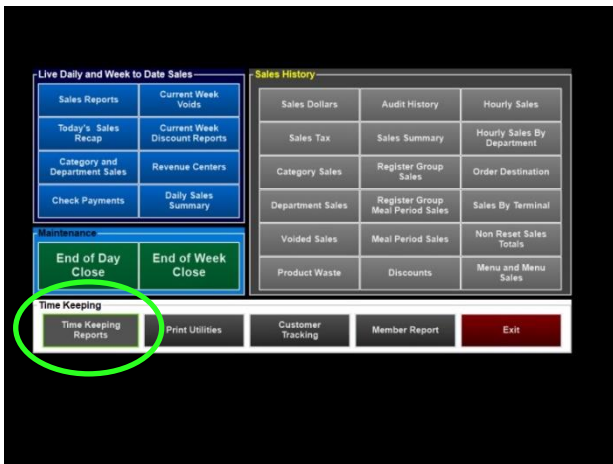
3 Choose the dates to preview and select **Run Report**
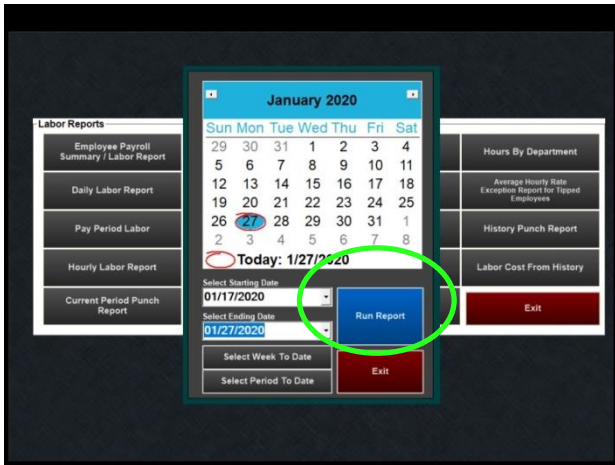
4 Preview the report and print if necessary
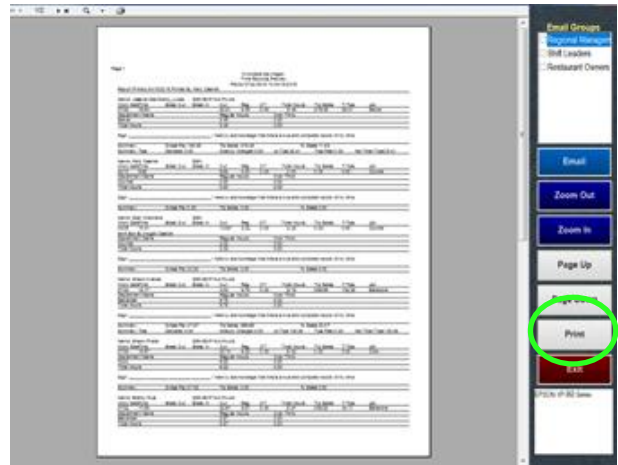
Closing a Labor period

1 From the Time Keeping Reports screen, choose **Close Time Records**
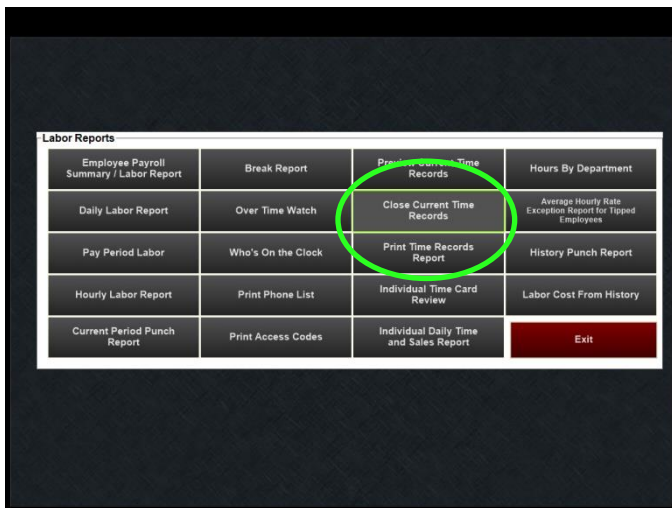
2 Choose the dates of the labor period and Select **Run Report**
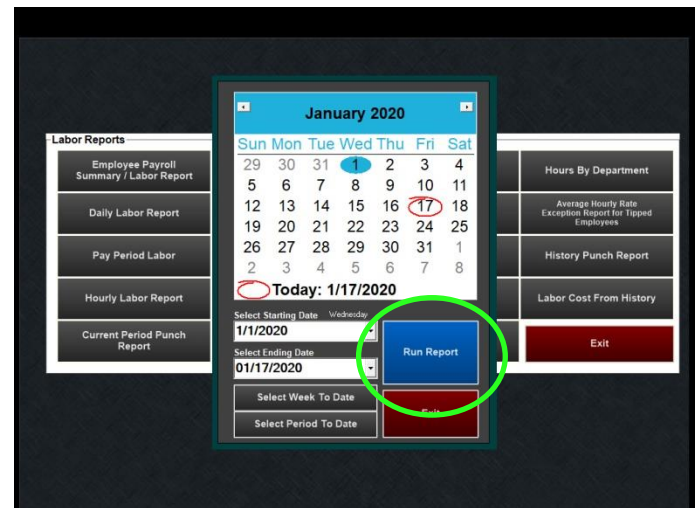
3 Select **Yes** to close records
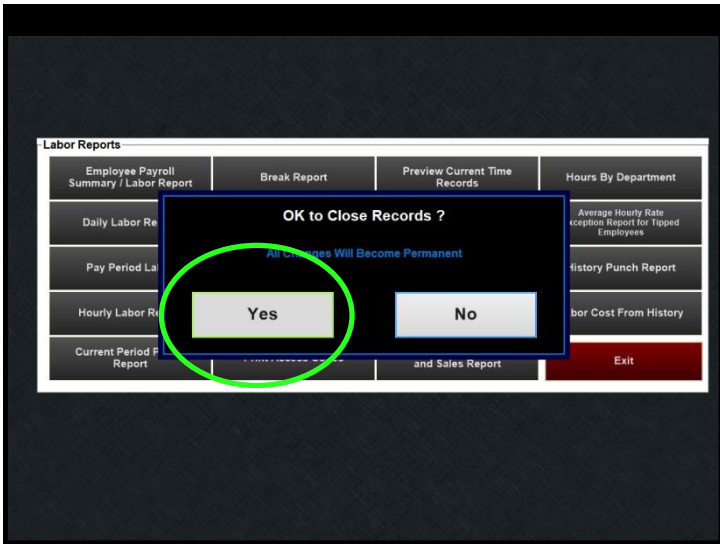
4 The labor period is now closed. Choose to **print** the report or **Exit**

If your system is set to automatically run a close out, you can also set the payroll to close automatically:

- Managers Menu > Register Setup > Terminal Configuration > Register Options > Time Keeping > tick the option next to **Auto Close Time Records** > Save > Exit

The time records will close out every week with the weekly closeout. If you do payroll every two weeks, you will need to run the payroll report manually to verify your employees' records.

Setting up basic discounts

You can configure individual discounts that can be accessible by employee or manager only. Discounts can be based on percentages or amounts on the entire check, single items or multiple items. This section will cover the basic types of discounts. For a full setup guide on discounts, please go to: https://microsale.zendesk.com/hc/en-us/articles/115004431048-Discounts

📍 Managers Menu > **Discounts, Gratuity Maintenance**

Types of Discounts

1 Dollar Amount Discounts

2 Percentage Discounts

3 Open Discounts

ⓘ "Amount" in the Discount Type means it is for a fixed dollar amount. "Percentage" in the Discount Type means it is for a percentage off the check or items (depending on the Items Needed to Match per Transaction). Open means you will be prompted to enter in an amount/percentage as well as a reason for the discount.

Dollar Amount Discounts

A *dollar amount* discount is applied to the entire check. This type of discount requires the least amount of setup; you can keep everything on the screen as the default other than the circled area.

Open Dollar Amount off the entire check

1 Type in a descriptive name such as **Open $** (this name is going to be replaced with a discount reason on the guest check)

2 Set the type to **Open Amount**

3 Keep the Amount blank (the open amount will prompt you to enter in a dollar amount at the time the discount is taken)

4 Set the Access Level to **Manager** or another access that should be able to apply the discount

5 Set the category to **Discount** or **Coupon** (depending on where you would like this discount to show on reports)

6 **Save**

Set Dollar Amount off the entire check

1 Type in a descriptive name such as **$2 OFF**

2 Set the type to **Discount Amount**

3 Set the amount to the **dollar amount** that needs to be discounted off the check

4 Set the Access Level to **Manager** or another access that should be able to apply the discount

5 Set the category to **Discount** or **Coupon** (depending on where you would like this discount to show on reports)

6 **Save**

7 Exit

Percentage Discounts

A *percentage* discount can be applied to the entire check, multiple items or a single item.

Open Percentage off the entire check

An Open Percentage discount will allow you to discount a check by any percentage amount on the total check. When you touch this discount name on the order screen, it will prompt a keypad to type in the desired percent.

1 Type in a descriptive name such as **Open %** (this name is going to be replaced with a discount reason on the guest check)

2 Select the dropdown next to Type and choose Open Percentage

3 Keep the Amount blank (the open percentage will prompt you to enter in a percentage at the time the discount is taken)

4 Set the Access Level to **Manager** or another access that should be able to apply the discount

5 Choose the category of Discount

6 Save.

Set Percentage off the entire check

1 Type in the name "Military 10%" or another name of your choosing – this name will appear on the guest check

2 Set the type to Discount Percentage

3 Set the amount to 10 (or another amount)

4 Set the access to Manager or another access level of your choice

5 Use the category of Discount

6 Save

Set Percentage off selected items

1 Type in the name "Military 10%" or another name of your choosing – this name will appear on the guest check

2 Set the type to Discount Percentage

3 Set the amount to 10 (or another amount)

4 Set the access to Manager or another access level of your choice

5 Use the category of Discount

6 To only apply the discount to a select number of menu items on a check, select the option Multi Select Discount (it will auto insert 100 in the Items Needed to Match Per Transaction area) . If you only one to allow the discount on 1 item, replace the **100** with a **1**

7 If this discount can apply to any menu item, select Departments and then Assign All. You can choose menu items or categories instead. To unassign a specific item, touch the item under the Assigned Items box.

Full Setup

Common Discounts (samples)

10% off Entire Check

1. Type in the name "Military 10%" or another name of your choosing – this name will appear on the guest check
2. Set the type to Discount Percentage
3. Set the amount to 10
4. Set the access to Manager or another access level of your choice
5. Use the category of Discount
6. Save

Take 100% off of One Single Item
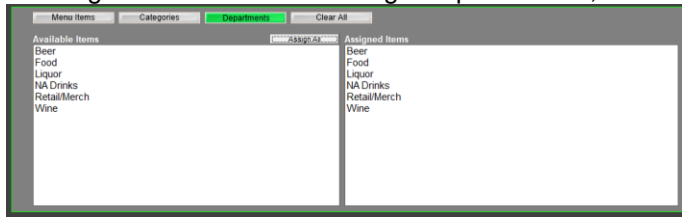
1. Type in the name "Manager Meal" or another name of your choosing
2. Set the type to Discount Percentage
3. Set the amount to 100
4. Set the access to Manager or another access level of your choice
5. Use the category of Discount
6. Select the button "Menu Items" – "Assign All" or specific items of your choosing
7. Select Items Needed to Match Per Transaction to 1
8. Save

$ Off Check

1. Type in a descriptive name such as $2 OFF
2. Set the type to Discount Amount
3. Set the amount to the dollar amount that needs to be discounted off the check
4. Set the Access Level to "Manager" or another access that should be able to apply the discount
5. Set the category to Discount or Coupon (depending on where you would like this discount to show on reports)
6. Save

Discount Availability

Discounts can be available based on a certain time, day(s), or date. When the discount is unavailable, it will not be accessible on the screen for staff to use.

By default, a discount is always available. With the Start Time and End Time at 12:00 AM, the discount is always on.

Making the discount only available during certain times or days

1 Touch the Start Time and End Time if the discount should only be available within a certain time frame

2 Tick the checkbox next to days when the discount is **not** available

Discount Criteria

You can set rules to only allow up to a certain discount amount off of a check as well as only allow the discount to be applied to assigned items.

For example, you may have a 20% off discount with a maximum amount of $8 off the check. Or, you may only allow 20% off the check for a $50.00 check or higher.

1 Depending on your discount type, this area is listed as Maximum Amount Allowed Per Transaction or Minimum Check Amount (when using the Discount Type of "Minimum")

2 If you need to set a maximum amount allowed for the check, type in the amount and save your discount. .00 means there is no max on the discount.

# Adding custom discount reasons (for Open Discounts)

An Open Discount by default prompts a keyboard to manually type in a reason for the discount. You can add additional open discount reasons if desired. *These discount reasons are only used for the Discount Types of Open Percentage and Open Amount.*

Adding additional discount reasons (an attached keyboard is required):

- 📍 Managers Menu > Register Setup > Terminal Configuration > **Tenders-Job Codes-Paid Out-etc.** > Misc Setup > **Discount Reasons**

1 From the Discount Reasons window, type in a Discount Reason.

   The Discount Reasons are used for Open Discount Types only.
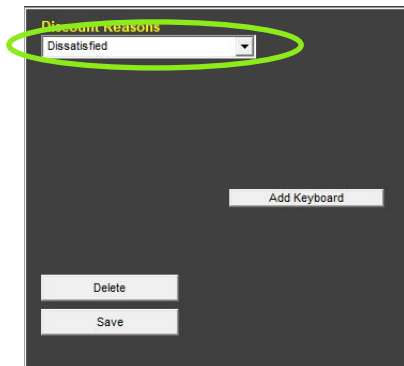
2 Select **Save** after each reason is entered.

   Open Discount Reasons automatically populate the keyboard button, so you do not need to add a keyboard to the list.

3 Exit the screen when completed

   Discount Reasons deploy automatically to all terminals.

Miscellaneous

Common Q&A

Start a table
On the Server Screen, select the button "Start Table", if this is not available then the register option to "Turn off table name/number" is checked.

Edit items, modify items, change items
Modify Items -> Allows you to use the "Optional Modifiers" for the menu item, which is setup in Menu Items and Pricing.
Edit Items -> Allows you to access all of the Modifiers to change not just the Optional ones.
Change Items -> Allows you to change the Menu Item but keep the same modifiers.

Use the tax and tax exempt keys
Tax Exempt -> Highlighting a single item and Selecting the "Tax Exempt", will exempt just the single item. No items highlighted and Selecting the "Tax Exempt", will exempt the whole order

Edit Employee's Time
Manager Menu -> Time Clock Functions -> Select Employee -> Select the field that needs edited and then change information -> Save Changes when finished.

Edit tips
Manager Menu -> Time Clock Functions -> Edit Tips -> Select Employee -> Select field that needs edited and then change information -> Save.

Stop servers from closing other server checks
Servers should not be able to view other servers' checks. Make sure the system access for View All Checks is not set at 1. Manager Menu -> Register Setup -> System Access Configuration -> Access Levels Area (Yellow Area) -> Scroll down to "View All Checks" Set to "2" for bartenders or higher to have this functionality.

Entering tips after or before clocking out
Credit cards tips are automatically recorded, Cash Tips need the register option in Full Service called "Cash Tips are declared on Audit Close" enabled.

What does 'send/stay' do?
Under Full Service in register options, make sure "Send/Stay is always on" is ticked. Send/Stay is used to send items to remote printer but stay on the order screen.

On the receipt, can I change "Additional Tip" to say " Tip " ?
Manager Menu -> Register Setup -> Setup/Configuration -> Misc Utilities -> Print Alias -> Enter "Tip" in the open area next to "Additional Tip" and Save.

How to add up a "to go" item to a dine-in table and not charge tax?
Use the "Tax Exempt" button on the menu items that are tax exempt. *Check will breakdown Taxed Sales and Tax Exempt Sales totals on receipt.*

Requiring Drinks on a Check

Are your servers forgetting to add drinks or certain items on checks? This setting will prevent servers from sending food to the kitchen until 1 required category item is on the check per table cover (number in party)

Setting required items on a check

📍 Managers Menu > Menu Maintenance > **Menu Category**

1 Select the category that should be required - in the Category Name dropdown (such as beverages)
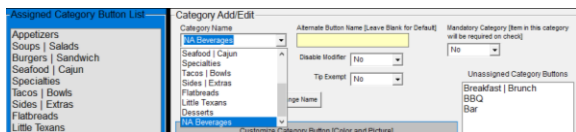
2 Choose **Yes** or **Combo** under "Mandatory Category" - use **Combo** if the server can use a combination of categories (you may have multiple drink categories such as beverages, beer, wine, etc., that may all count as drinks). *Subcategories assigned to the mandatory categories are counted in the main category.*
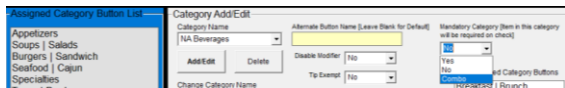

3 Select the **Add/Edit** button under the Category Name
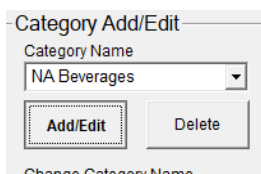
4 Continue until finished; **Exit** when completed (changes save automatically)

> ⚠️
> **Make sure you have Water or another no-charge drink item assigned in the mandatory category. Guests may choose to order water or choose to not have a drink with their meal.**

Using Required Drinks:

1 The number of required drinks is based on the number in the party (when you start a table and you choose the number of guests)

2 Before any item can be sent to the kitchen (or pay order in Express order), you must have as many drinks on the check as the number in party. If the requirement is not satisfied, it will remind you to enter the items
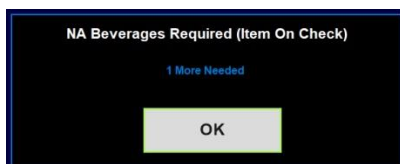

3 Select **OK** and ring in the required items

4 You can now send your check to the kitchen or pay the order

88

Suspend Check

This function uses a specialty file and must be added outside of the MicroSale program (using the Functions.ini file). When Suspend Check is enabled, the button appears in the lower right corner of the Server Menu. Suspend Check was designed for a predominately college bar where patrons frequently have declined credit cards or forget to pay tabs. The user can suspend the check which holds the tab open in MicroSale to be paid for a future date. To *unsuspend* a check, the user must use the "Recall Suspend" function button on the order screen. The function can only be used by an employee with an open audit. When the user recalls the suspended order, the check now belongs to that specific employee's audit.

[WARNING: YOU CANNOT USE SUSPEND CHECK IF THE RESTAURANT USES PAY AT THE TABLE **]**
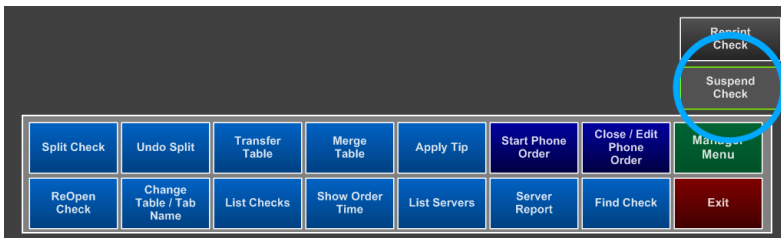
Suspend Check Setup

Editing the Functions.INI File:

1   To use the Functions.ini file, retrieve the Functions.ini file from the INI Files List; *C: > Program Files > Micro$ale > INI Files List*

2   Copy the Functions.INI file and paste it into the INI Files folder (The INI Files List folder is archived data, the INI Files folder is active data used for the program)

3   Open The Functions.INI file and search for "Suspend Order". Type in Yes (Suspend Order=Yes). If line is not in the functions.INI, you must type the line, Suspend Order=Yes, under the [Full Service] header section of the INI file. Functionality is triggered based on the sections of the file. Save when completed.

4   You **MUST** put Recall Suspended on a function in order to retrieve suspended orders. Please follow the "Adding the Function Button" instruction below.

Adding the Recall Suspended function
   📍   Managers Menu > Register Setup > Terminal Configuration > Edit Order Screen Buttons > Add **Recall Suspended** to a button and Save

Using Suspend Check

1   On the Server Menu, select **Suspend Check**

2   Select the appropriate check when prompted
   a.   **The check will be exempted from the current day's sales. The check will not be accounted for until a user recalls the suspended check**

3   To recall a suspended check, go to the order screen (an employee MUST have an audit open to recall a suspended check)

4   When prompted, choose the appropriate check. **The employee who recalled the check is now responsible for the check**.

5   Close the check with the appropriate payment method

6   The sale of the check will be accounted in the current day's records

# Communicating reminders and daily specials for staff

The ID screen can show a default message or change daily in the 'featuring box'

📍 Managers Menu > Messages Menu > **Daily Specials**
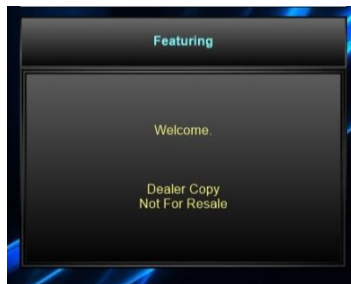

Using the same message or reminder every day

1 To change out the text, "Featuring", simply type over the text

2 To use the same message every day, use the option **Default** after typing in your message
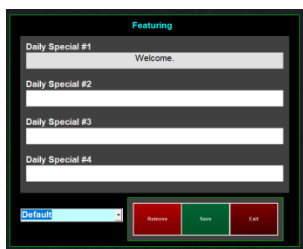
3 Select **Save** when completed

4 To change the message or special based on day,

Changing the message or reminder based on day

1 To change out the text, "Featuring", simply type over the text; the day of the week will automatically insert in front of "Featuring" or the replacement text.

2 To change the message or reminder based on the day of the week, use the dropdown and select the appropriate day after typing in your message (or daily special)
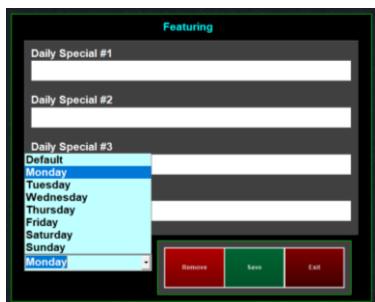

3 Select **Save** when completed

4 Redo steps 1-3 and resave with a different day of the week.

Private message or event log for management

The Daily Event Log is used to store private messages or record certain events for the manager for the following business day. The event log stores up to 7 days of messages. This is useful to log specific events to keep all management in-the-know. For example, if a manager needs to communicate that the side-work for a team member could not be done due to the vacuum breaking.

📍 Managers Menu > Messages Menu > **Daily Event Log**

1 Select **New** or select **Keyboard** to start a new message
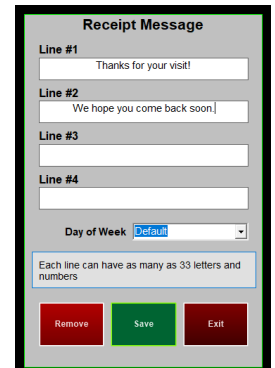
2 Type in the message

3 **Save**
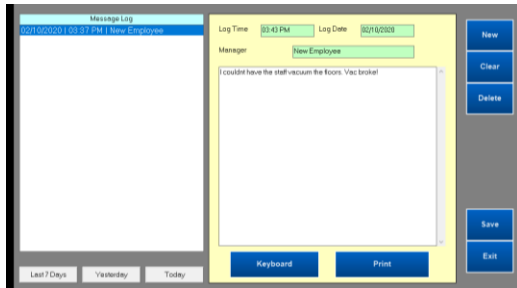
4 When the message is saved, it is added to the left **Message Log** box

Adding receipt messages (adds to the customer receipt)

Customer receipt messages can print up to 4 lines of information on the bottom of the receipt. Different messages can be programmed for each day of the week and the message that prints will change at midnight. If a message is not programmed for a specific day, the default message will print. Leave all lines blank to disable the printed message.
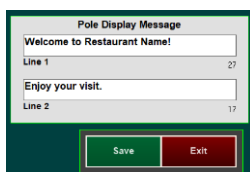
📍 Managers Menu > Messages Menu > **Receipt Messages**

1 Type in a message. If you have a long message, carry over the text to the next line.

2 To use the same message every day, use the option **Default** after typing in your message

3 **Save** when completed

Adding a message to the pole display

Two lines of text can be added to display a message on the pole display (a pole display is a two-line screen used for verifying the check total)

📍 Managers Menu > Messages Menu > **Pole Display Message**

1 Type in the message

2 Select **Save** when completed

Adding random messages and coupons

This feature is used to place messages and or coupons at the bottom of a receipt based on a specific number of transactions. This feature uses the event called, **"Have One On Me".**
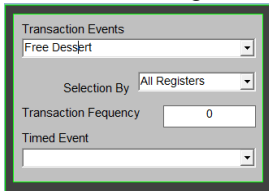
⦿ Managers Menu > Messages Menu > **Random Messages/Coupons**

In this example, we want a Free Dessert to be printed for every 40th customer.

1 Setup the Have One On Me message/discount first
    a. In "Discount Maintenance" click on the button labeled "Have One on Me Menu". 2. In the "Name" field, type in the name for the coupon or message. 3. In the field labeled "Access Level', select the access level required to use this coupon/message. 4. Type the coupons message into the field labeled "Coupon Description". This is the coupon message that will display on the customer receipt. 5. Type in a barcode number into the "Link Code number" if you would like a barcode for the coupon/message to print on the customer receipt. 6. Touch "Save" when done.

1 Type in the name of your random message or coupon, such as Free Dessert under **Transaction Events**

2 Choose how you want to count the frequency of the transactions (do you want this message to print based on the number of transactions for the entire restaurant (All Registers) or do you want the message to appear on the *Nth* time for each register?)

    a. If you want different coupons printed randomly, simply set up multiple messages/ coupons and check the appropriate boxes
    b. Printing a Survey on the bottom of the receipt is another way to use the Random Message.

Pop Up Messages

⦿ Managers Menu > Messages Menu > **Pop Up Messages**

You can create a message designed to pop up at the start or end of the order. Examples at the start of an order may be "Smile" or "Tell customers about specials". The appropriate day of the week can be selected for this message to display. If you leave the day of week set as Default, it will cause the pop up message every day of the week.

Adding a message to the credit card receipts

This option allows for a credit card slip message to print on the credit card receipts. The set up procedure is exactly the same as Receipt Messages, with the exception of choosing a day of the week. The message can be up to four lines, with 33 letters and numbers per line.

⦿ Managers Menu > Messages Menu > **Credit Card Receipt**

1 Type in a message. If you have a long message, carry over the text to the next line.
2 To use the same message every day, use the option **Default** after typing in your message
3 **Save** when completed

Wait List

MicroSale has a built-in *Customer Wait List* which works great at a hostess station to efficiently seat guests during peak hours. To text customers when their table is ready, you can activate the SMS texting service by contacting your MicroSale representative. *A subscription fee apples.*

Enabling the Wait List

The wait list option is by individual terminal. You will need to enable this option on each terminal that needs to use this feature.

- 📍 Register Setup > Terminal Configuration > Register Options > Full Service > Additional Options > tick the checkbox **Enable Customer Wait List** > Finished With Section > Save

- ☑ **Default confirmation text:** "Text from *Restaurant Name.* Your estimated wait time is *X* minutes."
- ☑ **Default table ready text:** "Text from *Restaurant Name.* Your Table is Ready."
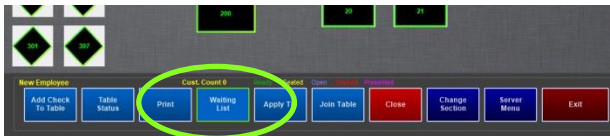
Customizing confirmation and table ready texts:

- 📍 Register Setup > Terminal Configuration > Misc. Configuration Page > Misc Utilities > **Text Message Setup**
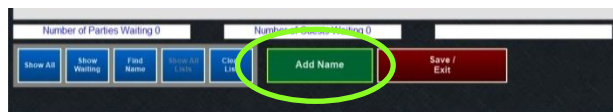
Using the Wait List

1 Select **Show Seating** (from the ID screen)
2 Select **Waiting List**

3 Select **Add Name**

4 You'll be first prompted to **enter the number in party**, followed by the customer's name
5 Select the seating preference or **First** for first available
Enter the **minutes** for the quote time.
Once you begin to seat parties, the estimated quote time will appear in the lower corner of the screen (based on the time a party is entered to the time the party is seated)
6 Enter the cell number with the area code when prompted. On your side, you'll receive a confirmation that the text has been sent or you'll receive a failure message (if the number is invalid). The customer will immediately receive a text message. Ask the customer to view their phone to ensure the text has sent.

Customer receives the following message with the restaurant name and the wait time quoted by the host.

Text From M$ Cafe.
Estimated Wait Is 25 Mins

7 When the table is ready, touch the yellow box under **Send Text**

8 Select **Yes** to send the "table is ready" text.

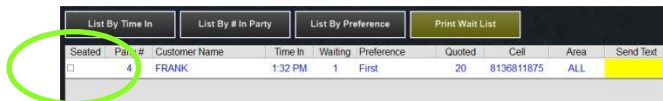You will receive a "Success – Confirmed" message

The customer will receive a text alerting them that their table is ready:

Text From M$ Cafe.
Your Table Is Ready

If the customer does not respond, a second text can be sent by touching the **Send Text** box. The box will now show the time the first text was sent.

9 Touch the checkbox next to seated, when the customer is at the host station and ready to be sat

10 You'll be prompted to choose a table on the table layout. Select the appropriate table. *Confirm the number in party when prompted.*

Reservations

This feature allows table reservations to be placed and stored within MicroSale up to one year in advance. It also allows an order and deposit to be placed at the time of the reservation.

Enabling Reservations

The Reservations option is by individual terminal. You will need to enable this option on each terminal that needs to use this feature.

- 📍 Register Setup > Terminal Configuration > Register Options > Misc Options (on toolbar) > tick the checkbox **Turn on reservations** > Finished > Save

- 📍 To enable preorders to be placed with a reservation, tick the option, **Enable Reservation Orders**. If a deposit is required for the reservation, **Deposit Required Reservations** will need to be ticked as well. *The preorder will send to the kitchen 20 minutes before the reservation (or your customized production time).*

Using Reservations

1 Select **Reservations** (from the ID Screen)
2 Choose the appropriate date for the reservation using the **calendar**. *The date populates in the blue guest information area*

3 Touch in each box to add guest information. You'll be prompted to enter the information using an onscreen keyboard. **Save** when completed.

ⓘ **More information on Guest Information**

The email address is used to send an automated confirmation notice regarding their reservation, through MicroSale

The phone number is not used in MicroSale. It is only added in case you need to contact the customer directly

4 After the guest information is saved, it will be added to the reservation list. Use the calendar to view the reservations by day.

Reserving an entire section

You can also reserve an entire section of your restaurant using **Reserve Section**. This will block out an entire section (sections of your table layout; you may have a "Dining Room", "Patio", "Party Room", etc).

Canceling a Reservation

On the reservations screen, find the reservation that needs to be canceled. Touch anywhere in that row (time, guests, name, etc). You should see the reservation details in the top blue box when selected. Select **Cancel Reservation**. Confirm the cancellation when prompted.

Accessing Reservations with Phone Preorders

To access a reservation order and transfer to a server in the dining room, touch the order (except the name) and select a server.

If additional items are to be added to the order, they may be added at this time. The reservation order becomes a tab for the assigned server.