Quick Service

User Guide

MicroSale POS Systems
Version 10
May 2020

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About MicroSale

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

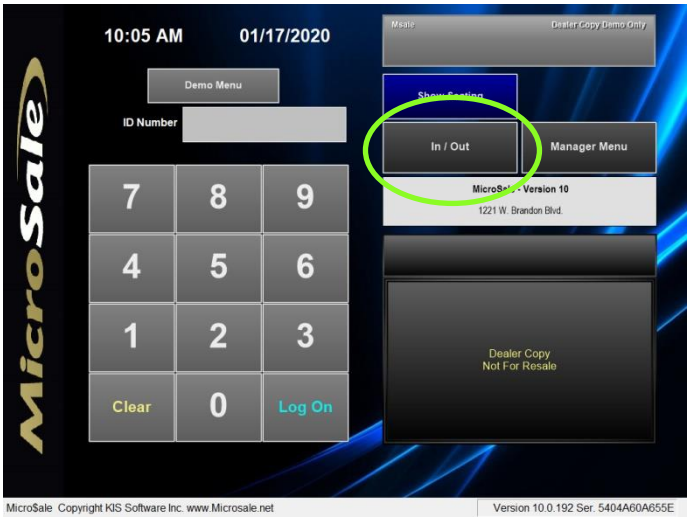
When reading this document, your system should now fully be setup and operational. Your MicroSale representative has set up the software to best meet the needs of your establishment. However, with thousands of settings within the system, tweaks can be made at any time if you would like aspects of the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

Time Clock

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

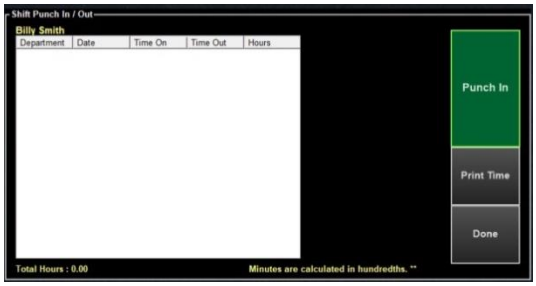
Clocking In/Out

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

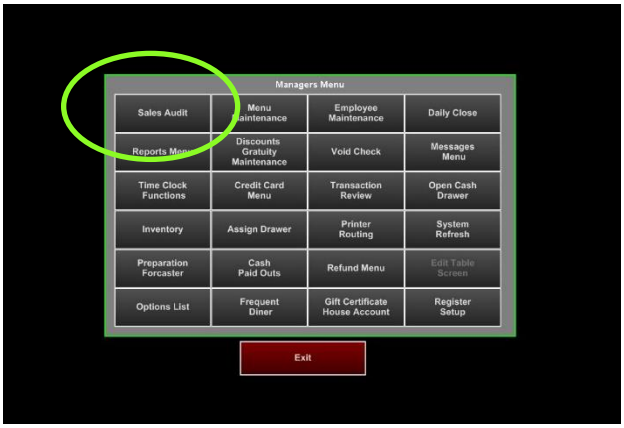
Select “Print Time” to print the details on an attached receipt printer.

Assigning a Cash Drawer to a Specific Cashier

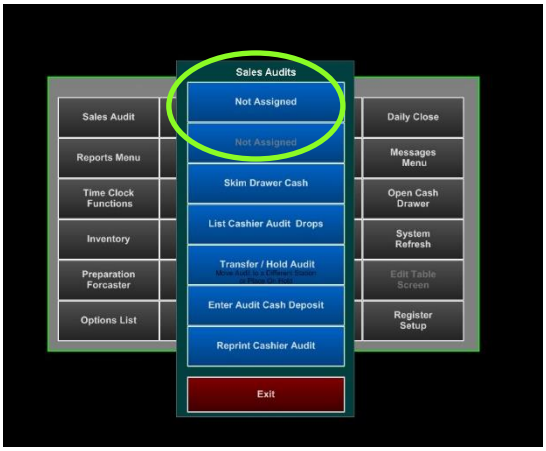
1. From the MicroSale ID Screen, press **Manager Menu** button

2. Enter your manager number or swipe your card. Press **OK**. Make sure the cursor is in the open field under Enter ID Number.

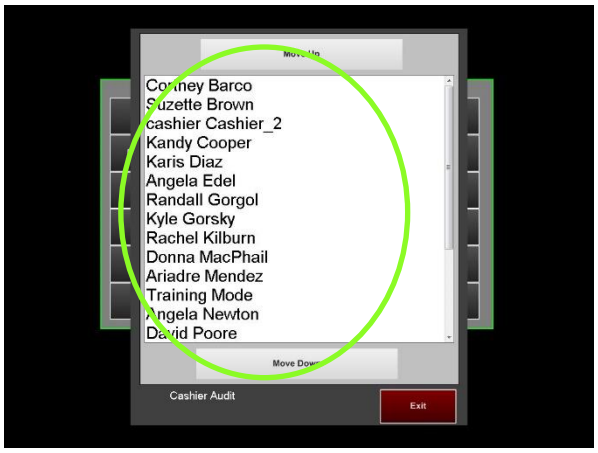
3. From the Managers Menu screen, press **Sales Audit** button



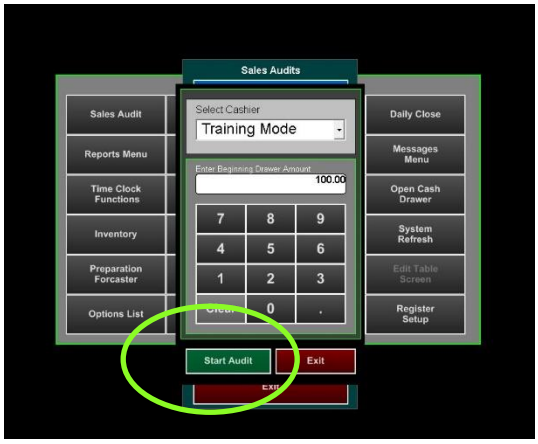
4. From the Sales Audit menu, press **Not Assigned**



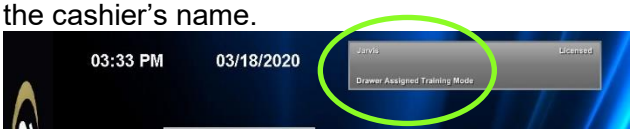
5. Select the **cashier's name** that will be using this register as this will be the assigned Access number to be used for this terminal



6. After manually counting the drawer to verify the starting amount, enter the **Beginning Drawer Amount** and press **Start Audit** button



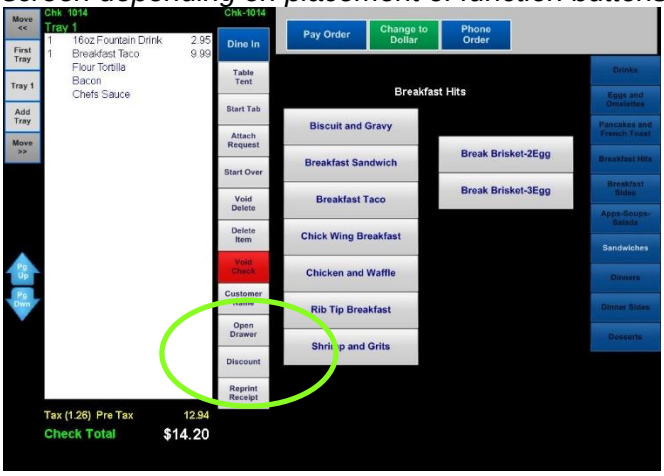
7. From the MicroSale ID Screen, in the top right corner, you will see the register is assigned to the cashier's name.



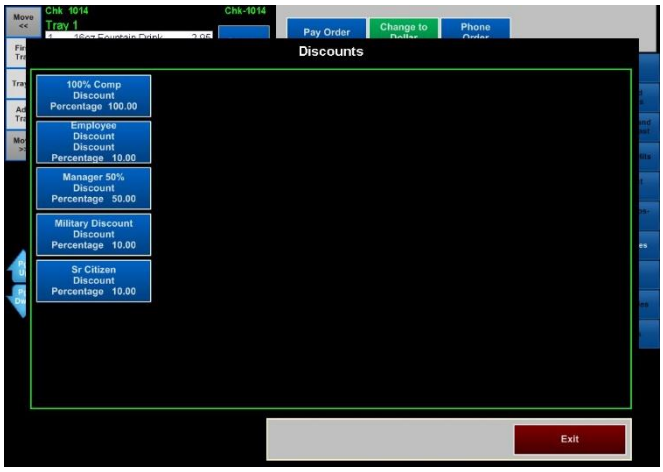
Applying a Discount to an Order

1. Ring up all items on the check and then press **Discount** function button

This button may have a different placement on your screen depending on placement of function buttons.



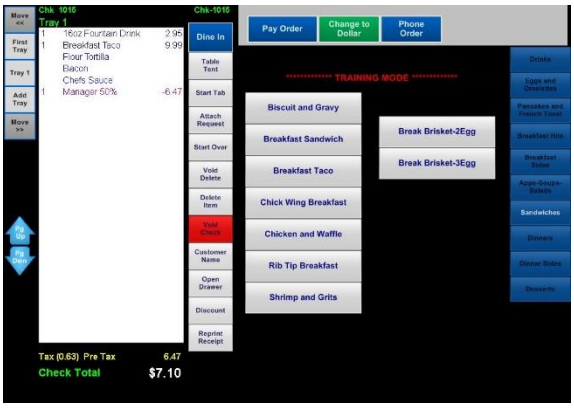
2. Choose the desired discount to be applied to the order. Only eligible discounts will appear on the discount screen.



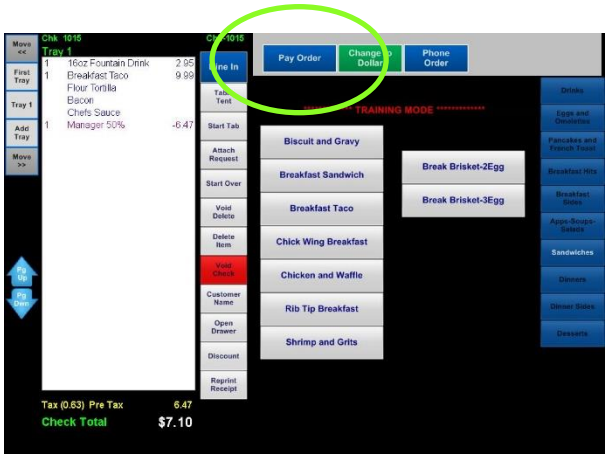
3. Press **Yes** to proceed to enter a manager's number for approval. The manager approval question is based off of the access level setup for the discount.

4. A manager will need to enter his/her number in order to apply the discount if the discount requires manager level access. Press **OK** after entering the number

5. The discount will appear on the virtual check in purple. *If the wrong discount was applied, highlight the discount and press **Void Delete*** button



6. After the discount is applied, press **Pay Order** button**,** if you are finished with the order.



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)

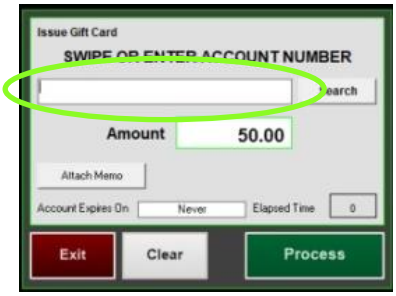
3. The gift card amount will be added to the virtual check. Proceed by selecting **Pay Order**

   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



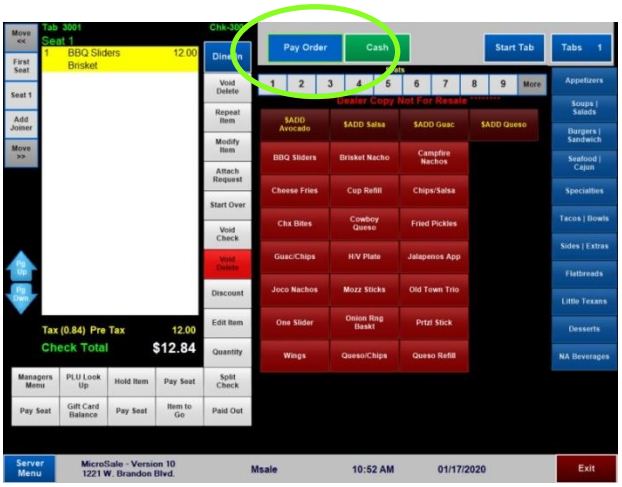
6. After you see data in the account field, select **Process**

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

Redeeming a Gift Card

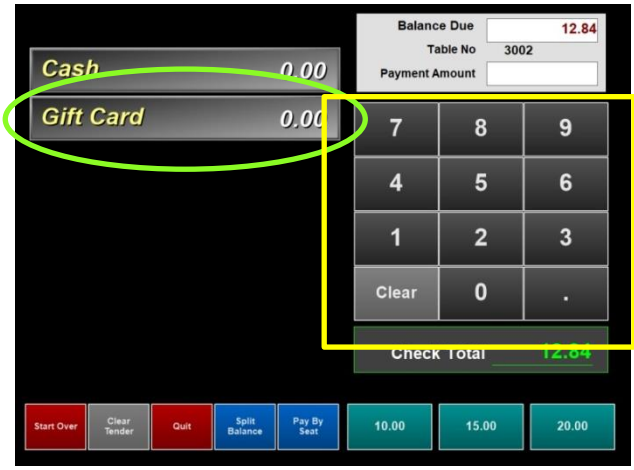
1. Once the order is completed, Select **Pay Order**

   or select Print Check followed by **Close Order**, depending on your register settings

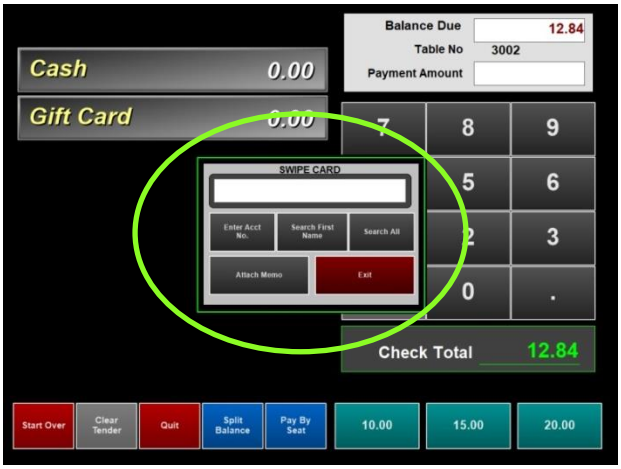


2. On the payment screen, select **Gift Card**

   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)

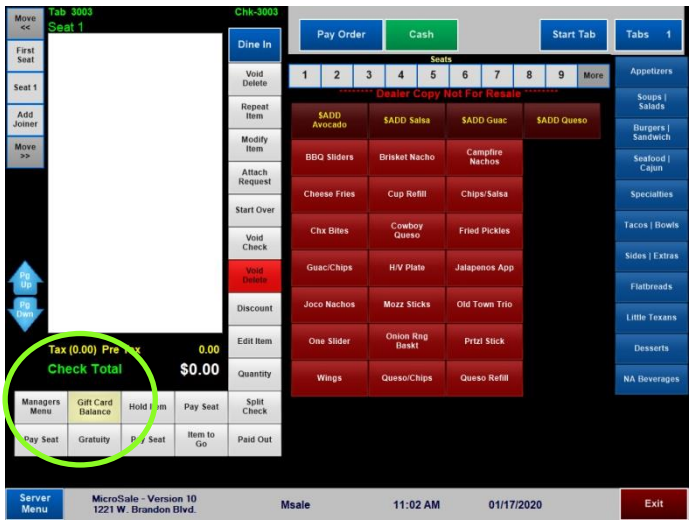
Manually entering the gift card number:

1. Select **Enter Acct No.**
2. Select **OK**.

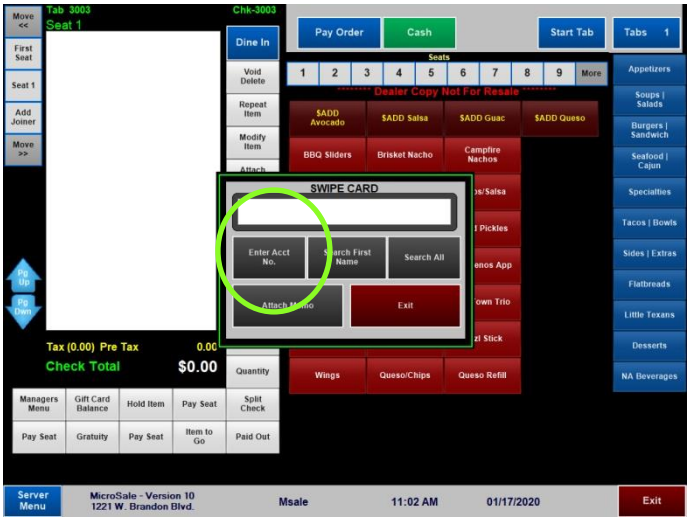
If the gift card already has an account balance, it will appear on screen and allow you to choose the account

Checking a Gift Card Balance

1. Select **Gift Card Balance**.
   This function button may have a different placement on your screen



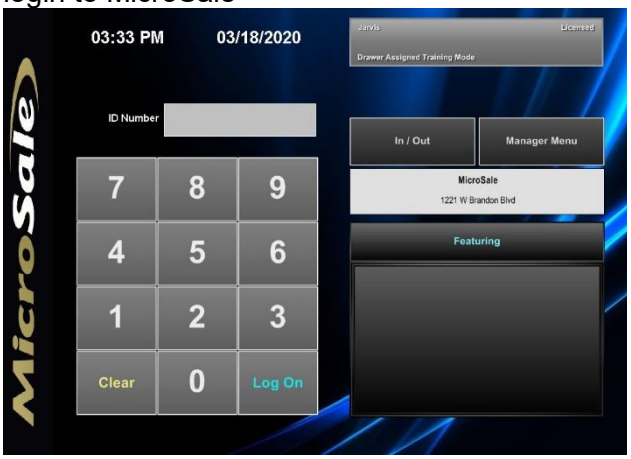
2. Swipe the gift card. If the card does not read, you can select **Enter Acct No.** and enter the gift card number when prompted.



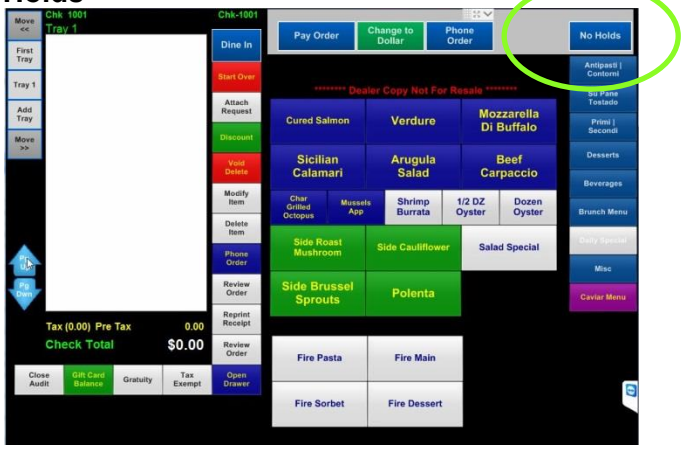
3. The balance will appear on the screen. After selecting **OK**, it will give you the option to print the balance for the customer

Using Holds/Tab function

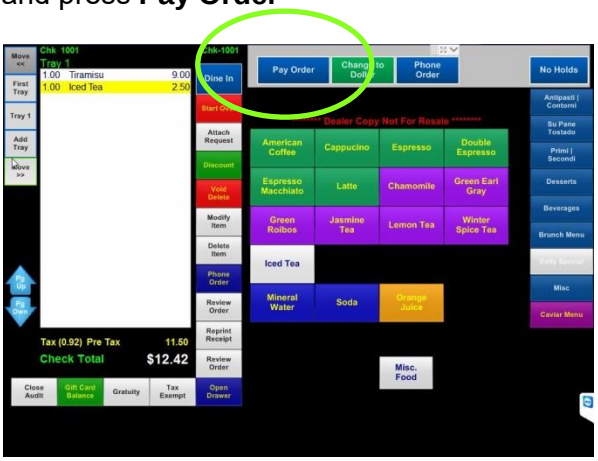
1. From the MicroSale ID Screen, after you have assigned your drawer, use your ID to login to MicroSale



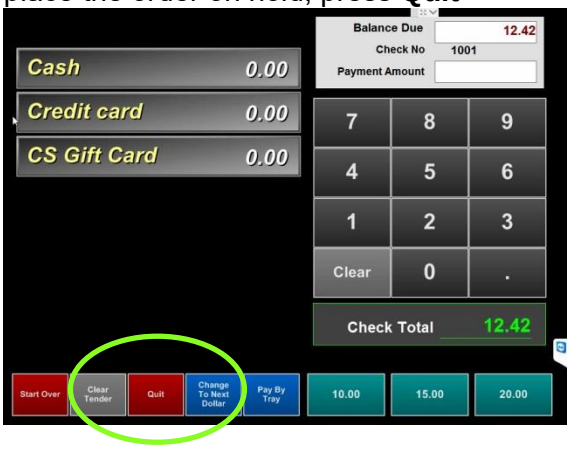
2. Once in the Order Screen, you will see the option enabled at the top right stating **'No Holds'**



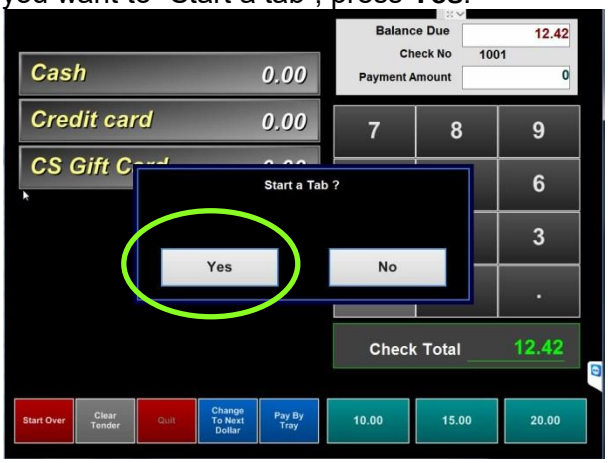
3. Ring in your menu items for the current order, and press **Pay Order**



4. Once on the Tender Screen, if you need to place the order on hold, press **Quit**

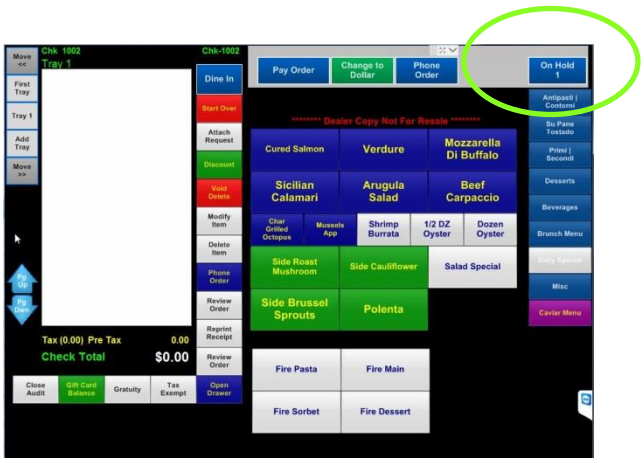


5. Once **Quit** is pressed, you will be asked if you want to "Start a tab", press **Yes**.

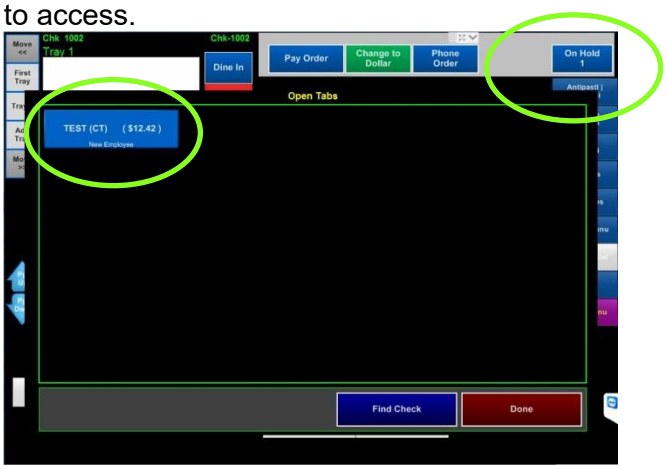


6. Once you have selecting to Start the Tab, you will need to **Enter the "Tab Name"** and press **Done**

7. Once you are back on the ID screen, you will noticed the No Holds now shows your check that you just put On Hold with the # of Holds



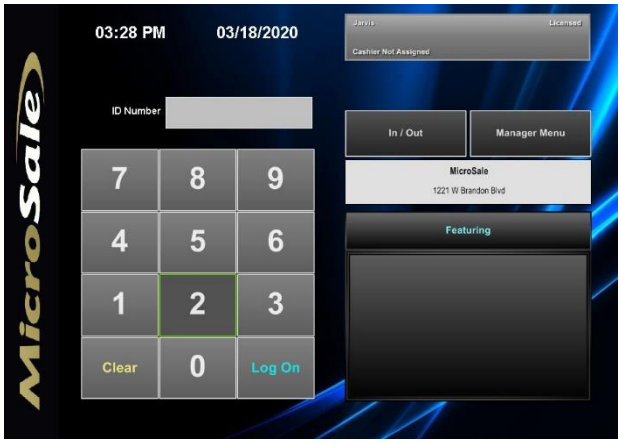
8. Press the **On Hold** button to access the checks that have been put On Hold. Once the checks have appeared, select the check you would like to access.



9. Once you are back on the Order Screen, you will be able to add to the check or tender the check. If you add items and need the check to remain open Press **Done**, to close the check Press **Close Check**

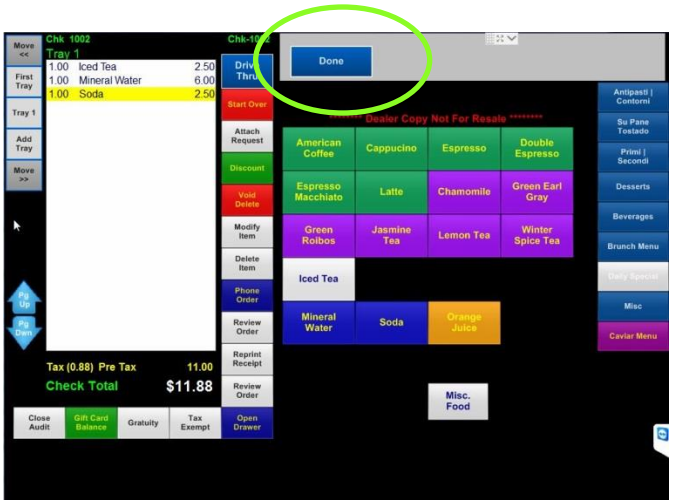
Using Drive Thru configuration

1. From the MicroSale ID Screen, after you have assigned your drawer, use your ID to login to MicroSale

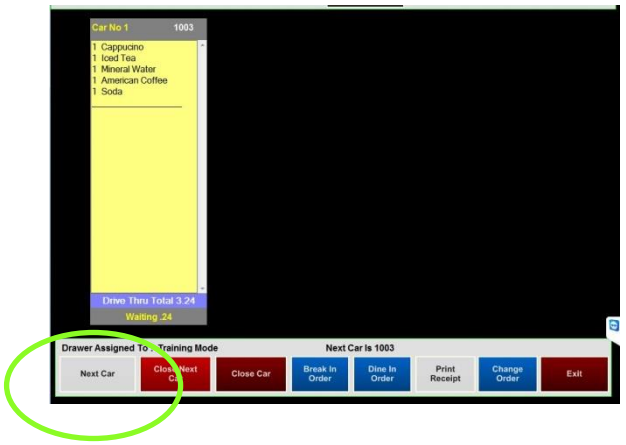


2. On the Drive Thru screen, press **Next Car** to start taking the order

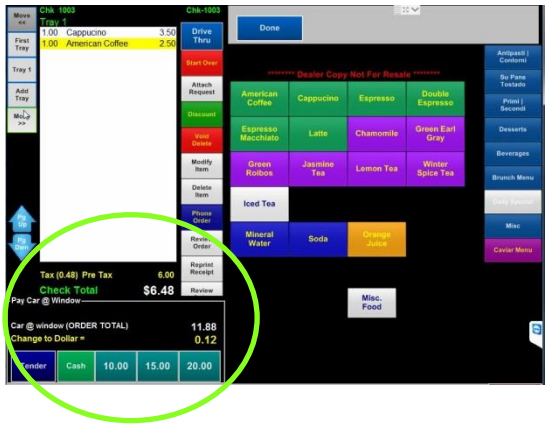
3. On the Order Screen, ring in the menu items and press **Done** when you are complete.



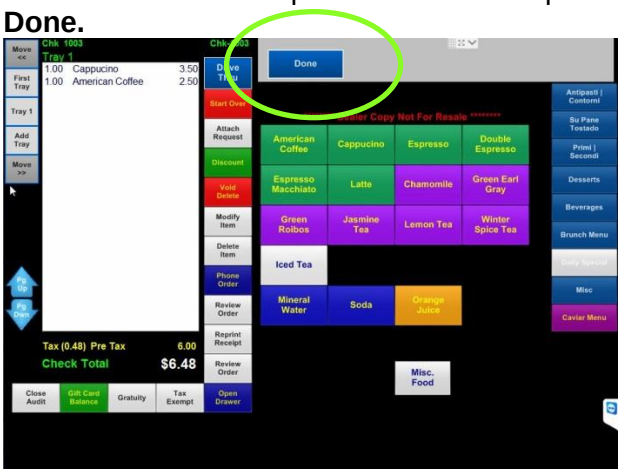
4. On the Drive Thru screen, you can take another car order, press **Next Car** or tender out the current car by selecting the car or press **Close Car** and select the car after.



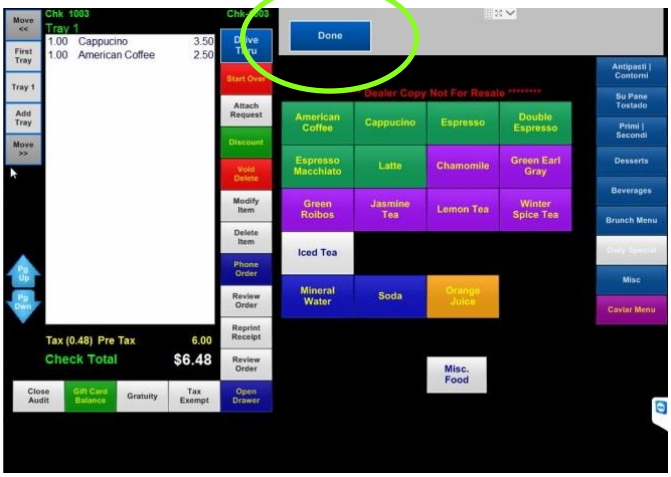
5. If you are in the middle of an order, and you need to pay out the car at the window, use the feature **Pay @ Window** underneath Virtual Check



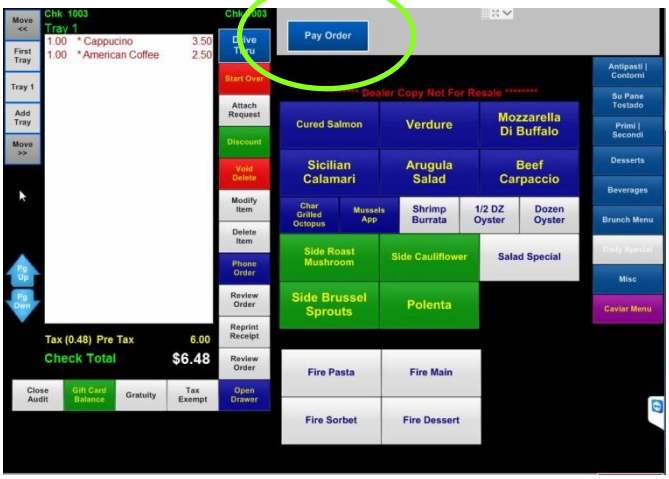
6. Once the car at the window is tendered, you will be returned to the order screen to continue with current car. Complete the order and press **Done.**



7. Once the car at the window is tendered, you will be returned to the order screen to continue with current car. Complete the order and press **Done.**



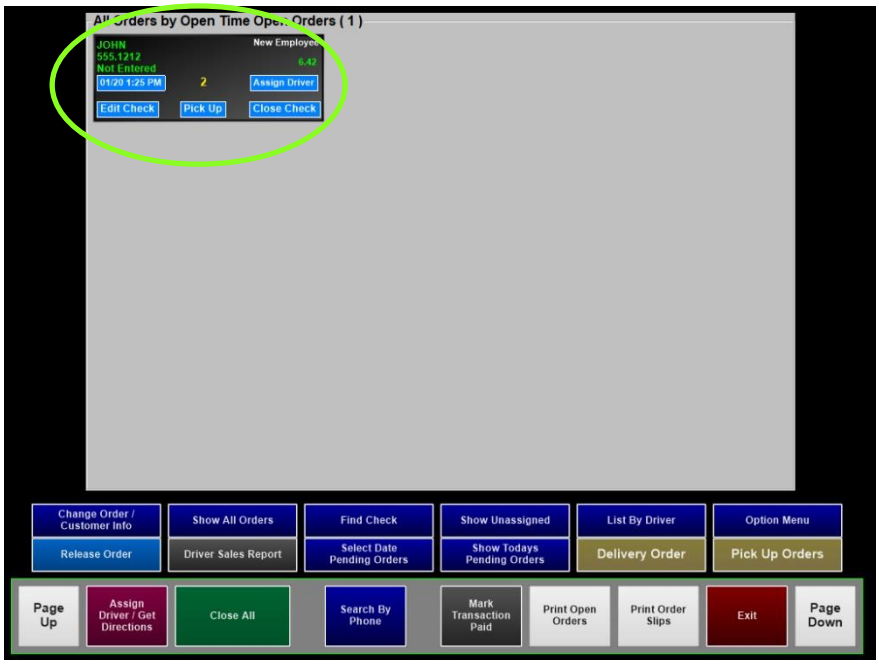
8. On the Order Screen, once your order is complete, you want to press the **Pay Order** button.



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

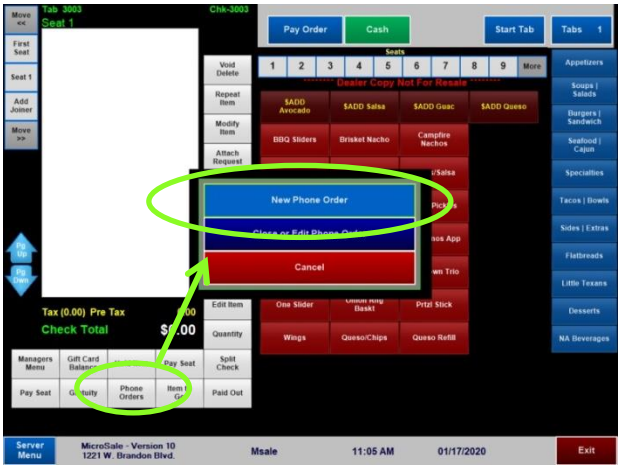
To close the order, select **Close Check**. You will be placed on the order screen to add to the order and/or verify the order. Select Close Check on the order screen when ready to close the order.

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)



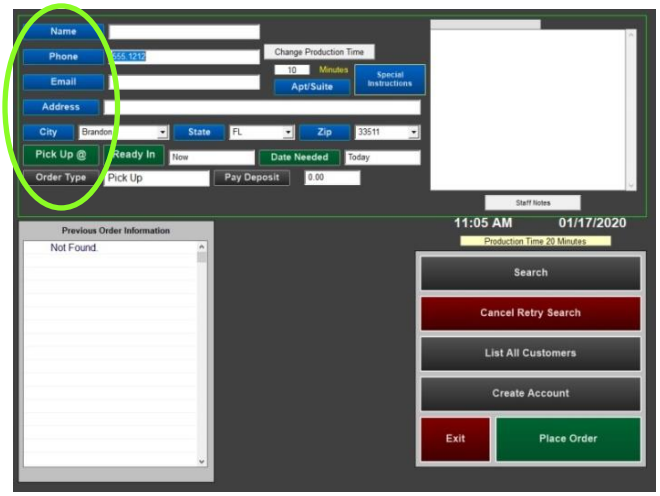
2. Enter the customer's phone number and then select **Done**

   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

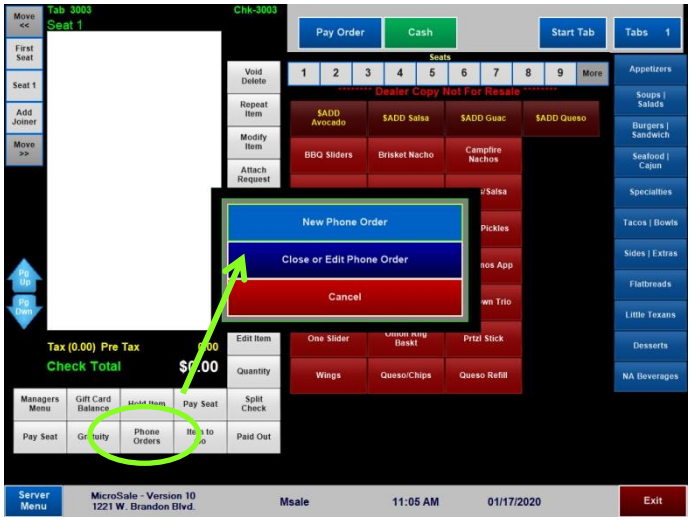
   If the customer has ordered before, this screen will show the full previous order and date the order was placed (under Previous Order Information). You'll have the option to choose one or multiple items to reorder



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)

Retrieving a Phone Order to Pay or Edit

1 From the order screen, Select **Phone Orders** followed by **Close or Edit Phone Order**



2 All active orders are shown on individual buttons

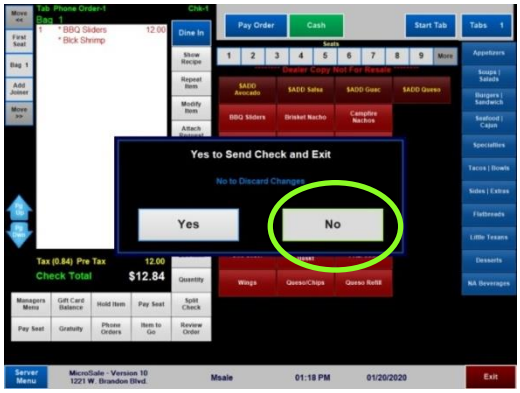
The name and number are displayed on the top left of each order. If you are ready to close the check, touch **Close Check** on the bottom right of an order. If the customer calls back and would like to add to the order, select **Edit Check**.

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

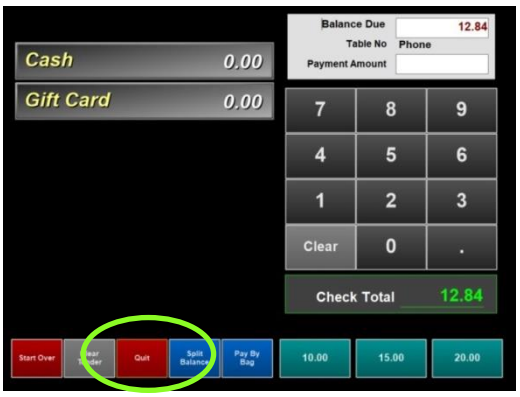
If you have selected Close Check in error, select **Exit** on the order screen and then select **No** when prompted. You will be exited back to the ID screen and the order will remain active.



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.

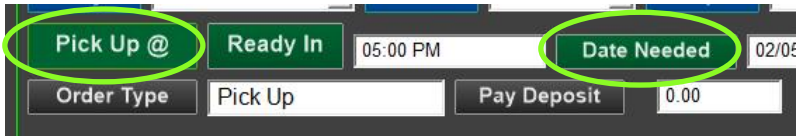


Preorders (pending orders)

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

To have preorders automatically send to the kitchen:

- Managers Menu > Register Setup > Terminal Configuration > Register Options > Phone Orders > **Auto Release Pending Orders** > Save

Change Production Time (across all terminals):

Changing the default 20 minute production time (when the kitchen receives the ticket prior to pick up)

- Managers Menu > Register Setup > Terminal Configuration > Register Options > Phone Orders > Additional Options > change the number of minutes next to **“Minimum Amount of Minutes Required to Produce Order”** > Finished > Save

Getting the kitchen ready for Preorders

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

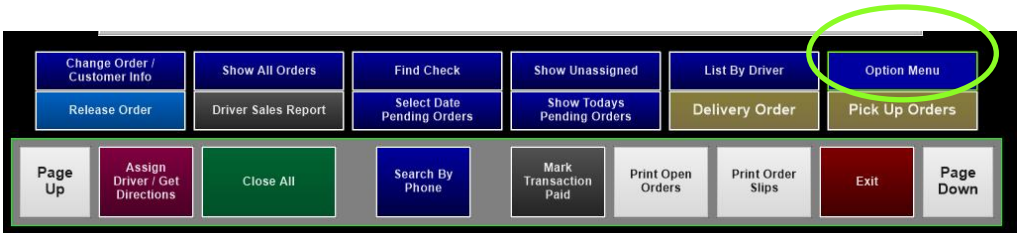
1. If a pending order is going to be picked up earlier than the original time, touch "***Release Order***" and then touch the appropriate phone order to send to the kitchen

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

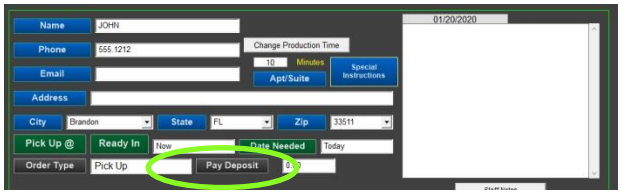
Adding a deposit on a phone order (credit card payment)

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

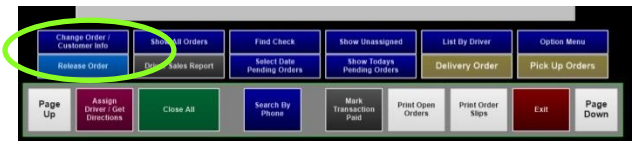
   For credit card, touch/select anywhere in the *Credit Card* row

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**

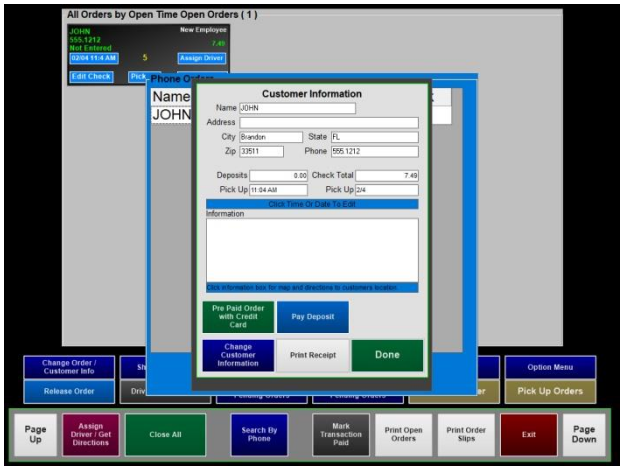
Adding a deposit after the order is placed

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**



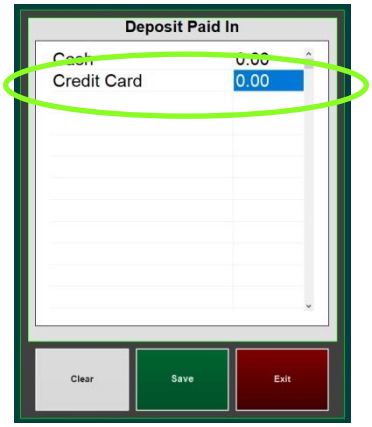
4. *A window opens;* choose the appropriate phone order (selecting/touching anywhere in the row)

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



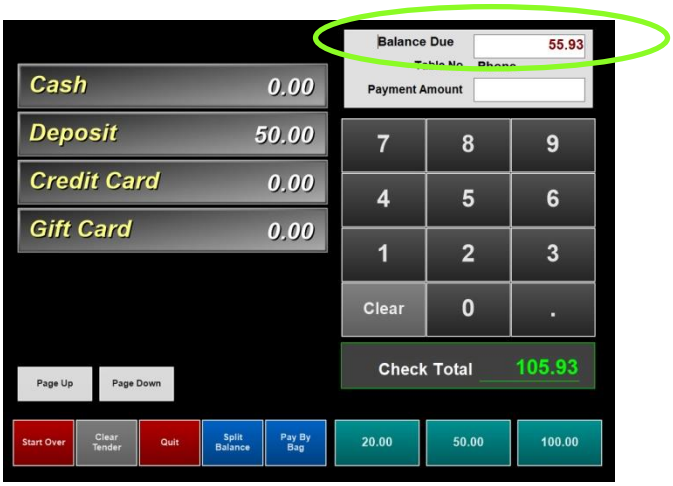
7. Enter the payment amount and use the decimal to finalize the amount before selecting **Done**
8. After you select **Done** on the Deposit Paid In screen, it leads to you to the EMV payment screen. Confirm the deposit amount by selecting **Done.**
9. You can insert the card (if available) or manually 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)

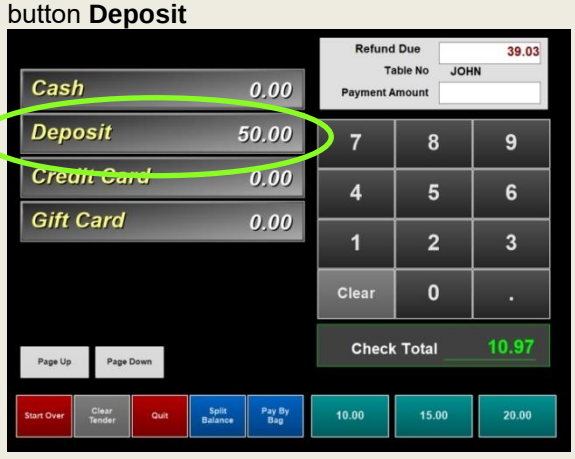


⚠

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**

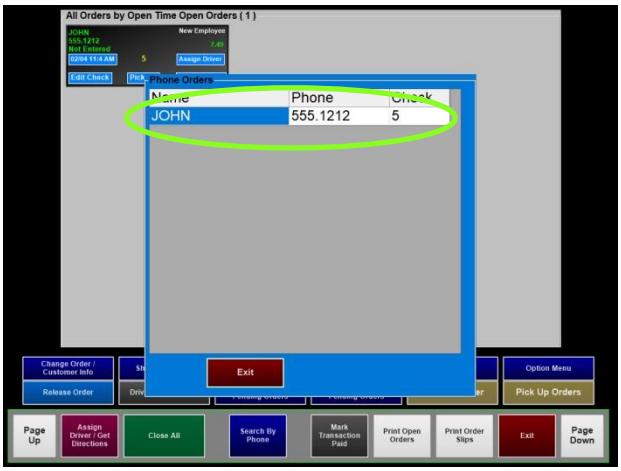


2. *It will prompt the refund amount*. Select **Accept Amount** after the money is taken from the drawer

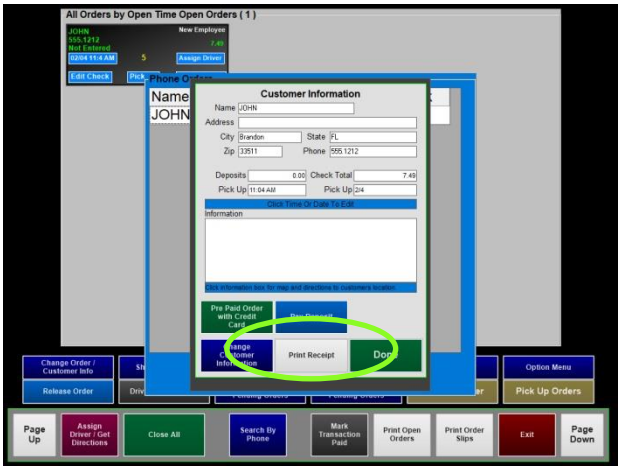
Printing the customer receipt without closing the order

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)



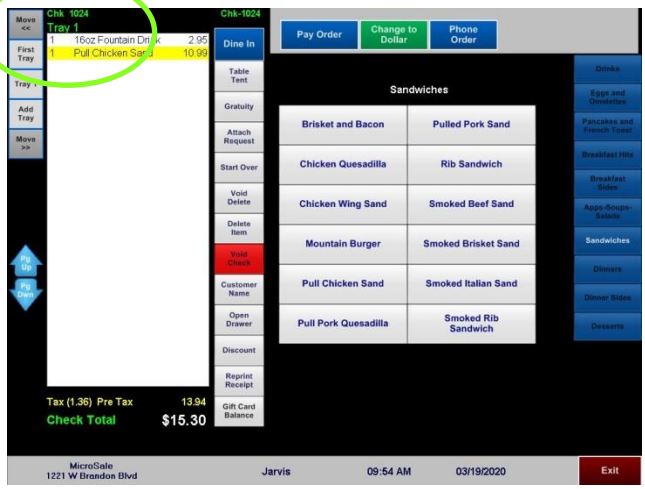
5. On the Customer Information window, select **Print Receipt**



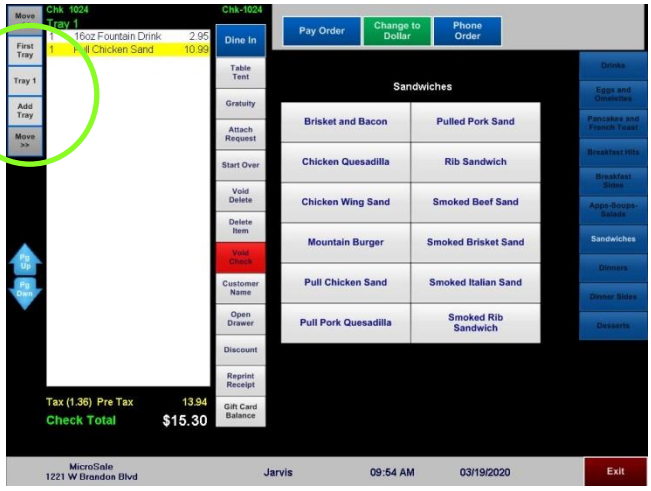
Using “Trays” to separate multiple orders on one ticket

Trays are generally only used in two scenarios; phone orders and drive-thru. Pay by tray allows orders to be separated but purchased together or purchased by “Tray” (*also known as a separate ticket*).

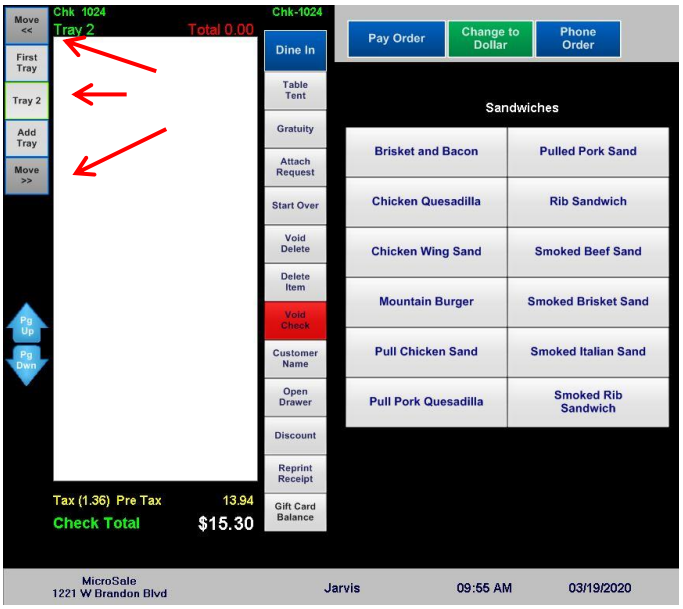
1. Enter the first order normally *(automatically shows as Tray 1 – you can see this label above the virtual check)*



2. When the second person orders, press the **right pointer hand** button or press the **Add Tray** button



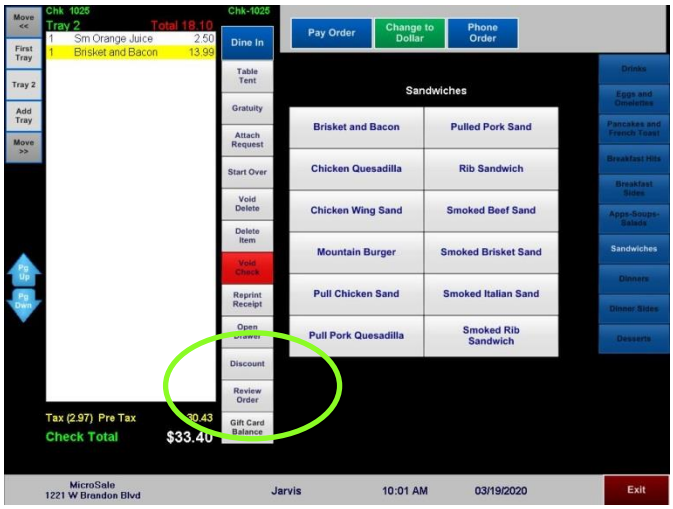
3. Enter the orders on separate trays until completed. Toggle between the orders if necessary by pressing the **pointer hand** buttons or by selecting the **"Tray #"** button



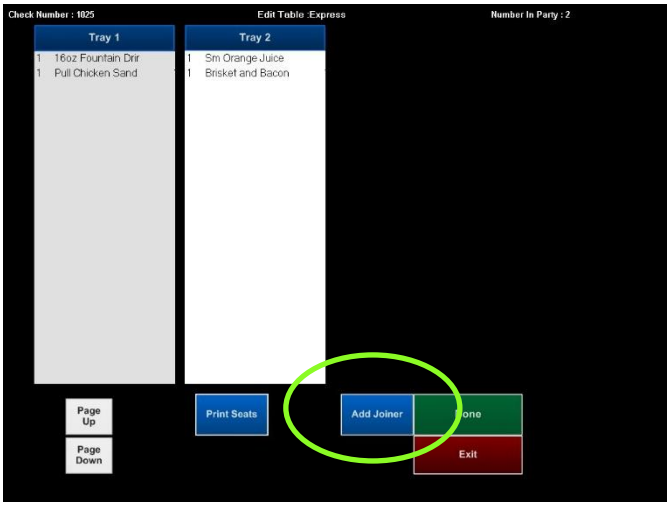
Separating one ticket into multiple trays

If a guest does not mention up front that the order needs to be on multiple trays, or tickets, you can separate the items by pressing the **Review Order** button

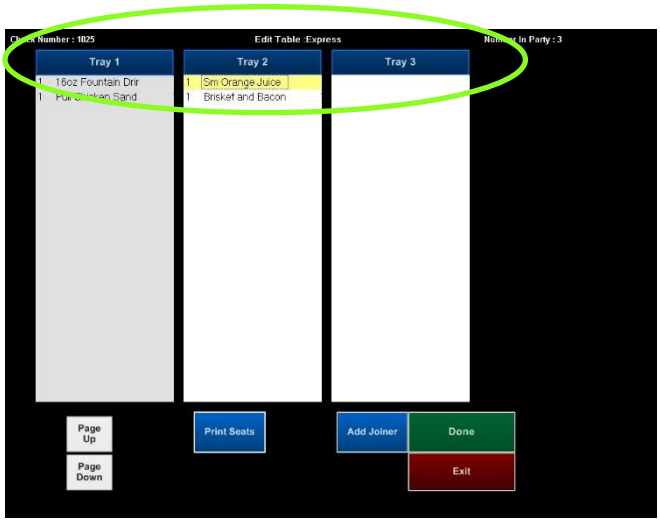
1. After you are finished taking the order, press the **Review Order** button



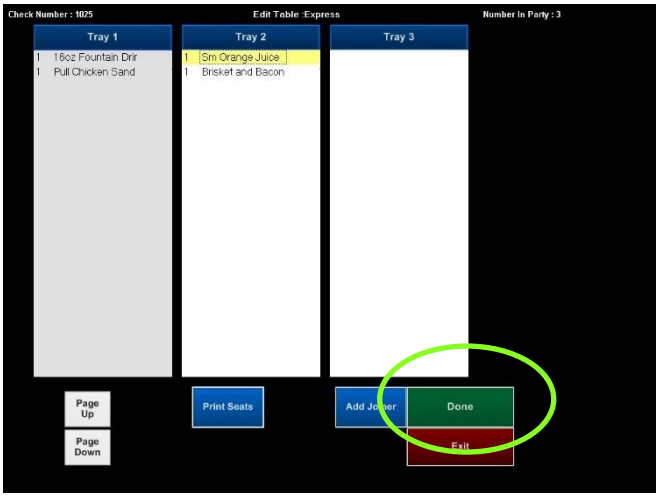
2. Press the **Add Joiner** button to add as many trays as needed for the order



3. Highlight an item, or multiple items, and touch the white area under the correct tray to move the highlighted item(s) to a different tray

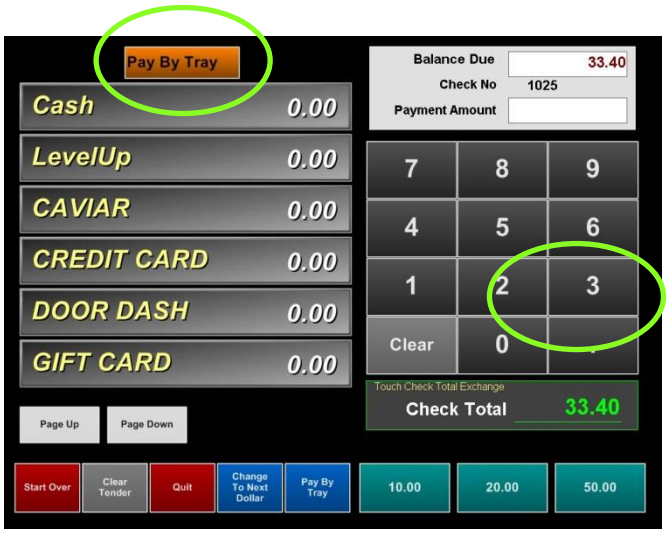


4. Press **Done** when you have completed the trays

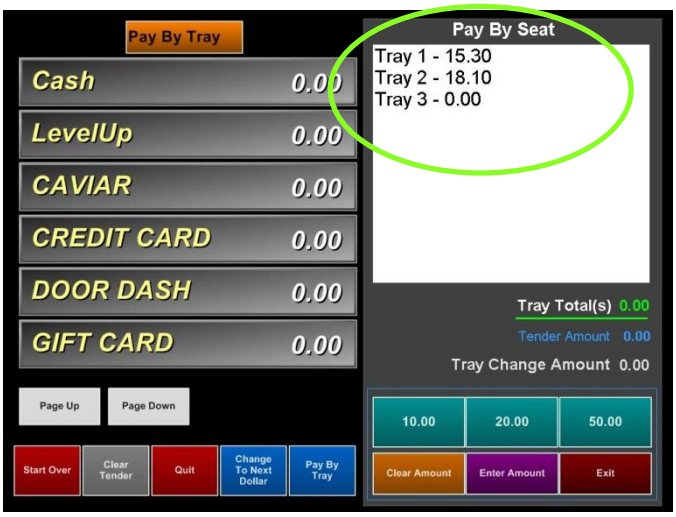


Accepting payment for separate trays

1. Press the **Pay by Tray** button on the payment screen

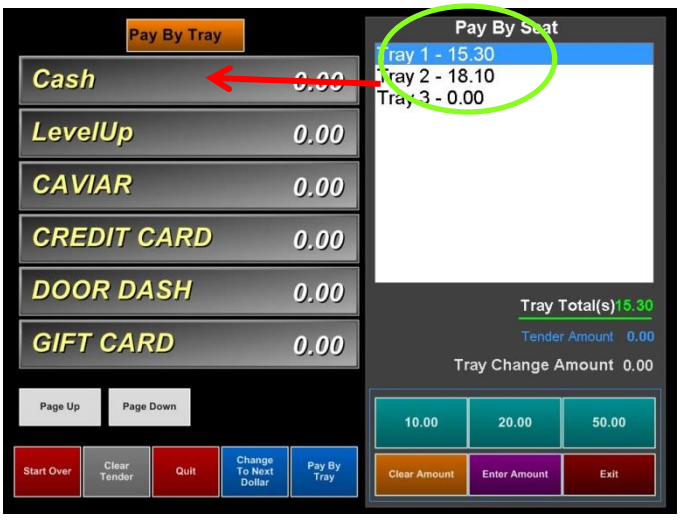


2. The payment screen will show all tray totals on the right. *Keep the receipt as a reference if needed*



Once "Pay by Tray" is pressed the cash drawer will open. DO NOT CLOSE THE DRAWER until all payments has been accepted.

3. Highlight a tray and use the appropriate tender type to close the tray

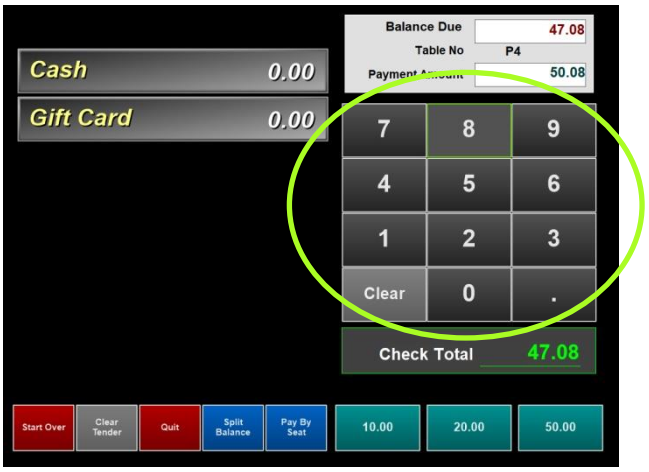


4. Once the tray has been paid, it is removed from the list. Continue the previous process until all trays have been closed.

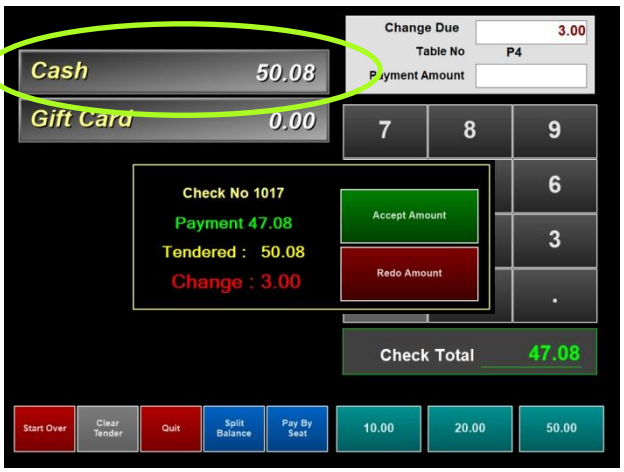
Accepting Payments (Pay Order)

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**

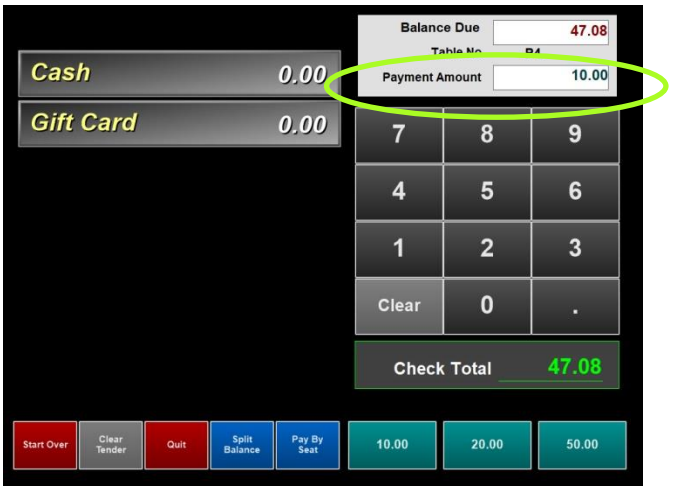


Paying with Exact Cash or No change is needed

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

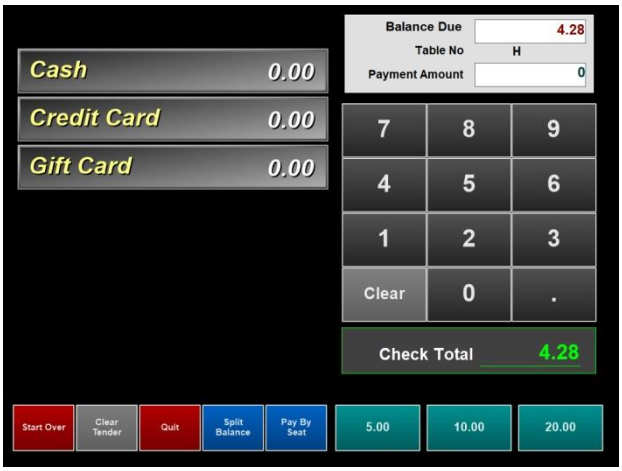
1. Use the keypad and type in the amount of cash that will be contributed to the check total
2. Verify the amount by looking at the **Payment Amount.** If this is incorrect, select Clear Tender or Start Over (buttons located on bottom of screen) and try again



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 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

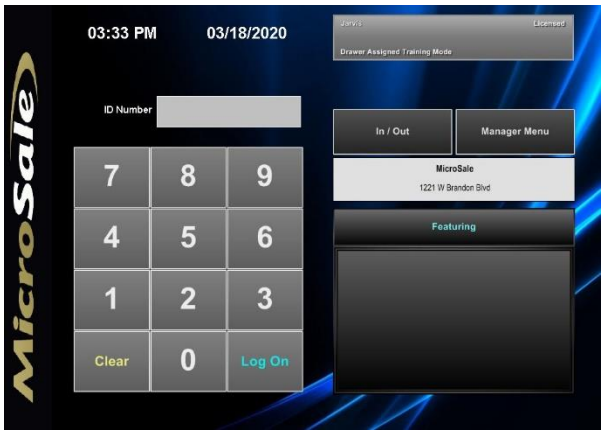
4 Follow the messages on the device. It will prompt you when to remove the card.

The transaction is now complete

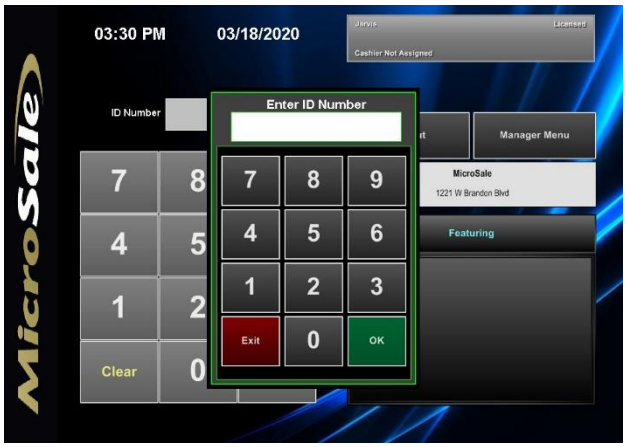
Skimming a cash drawer of excess cash

Skimming a cash drawer is necessary if there is an excess amount of cash in the drawer. This feature allows money to be taken out of the drawer while still being tracked in the system.

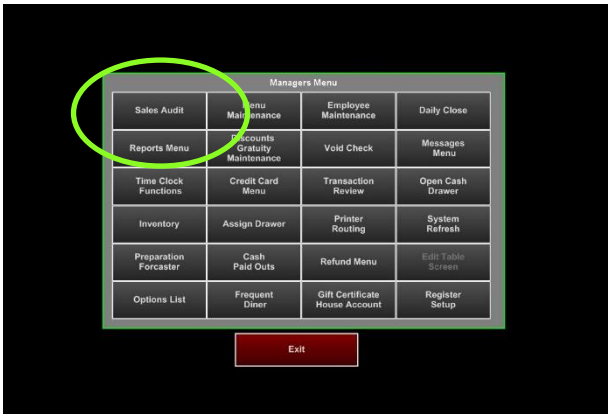
1. From the ID screen, press the **Manager Menu** button



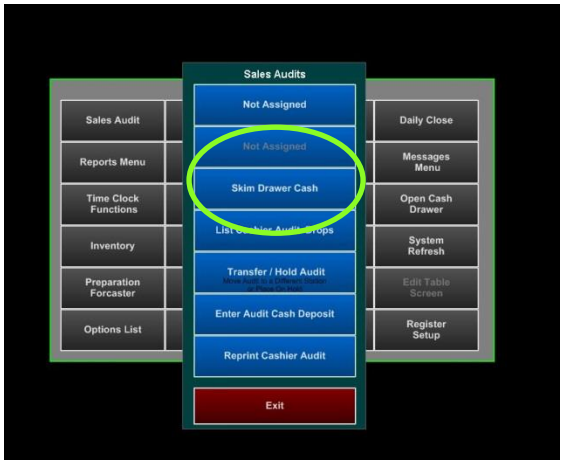
2. Enter the manager ID or swipe their manager card and press **OK**



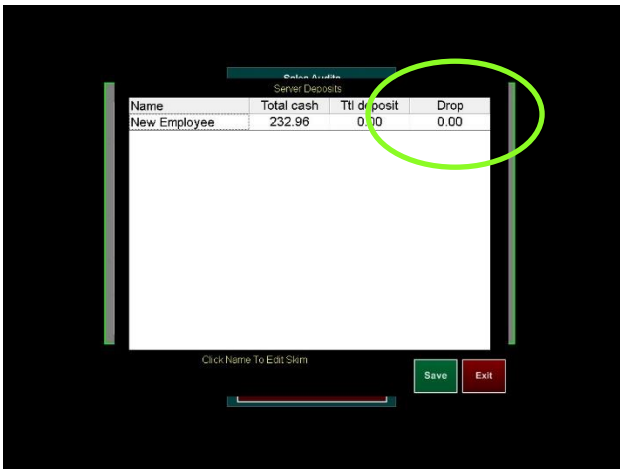
3. From the Managers Menu screen, press the **Sales Audit** button



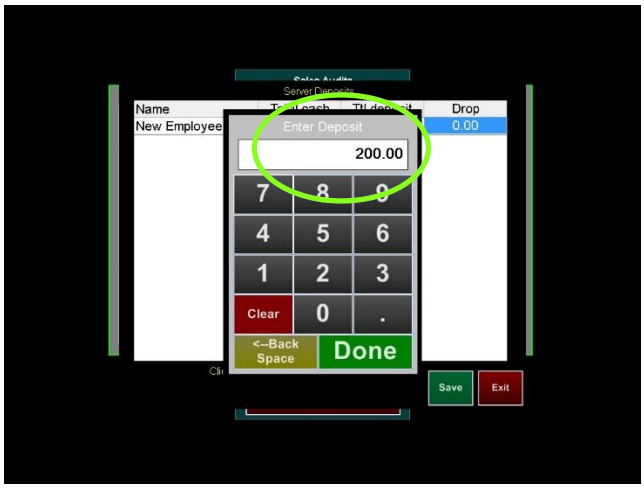
4. Press the **Skim Drawer Cash** button



5. Press the **0.00's** under drop to the right of the cashier's name



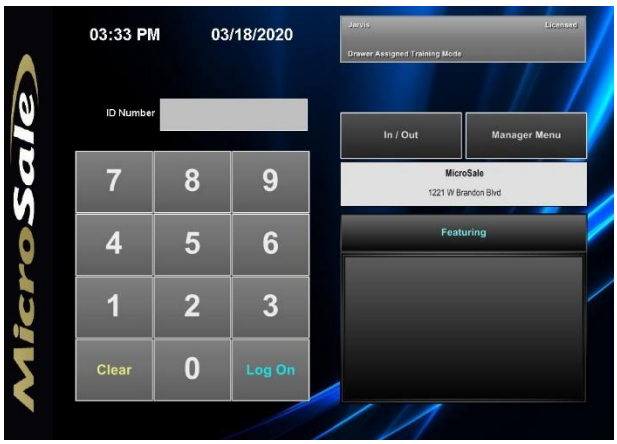
6. Enter the skim dollar amount and press **Done**



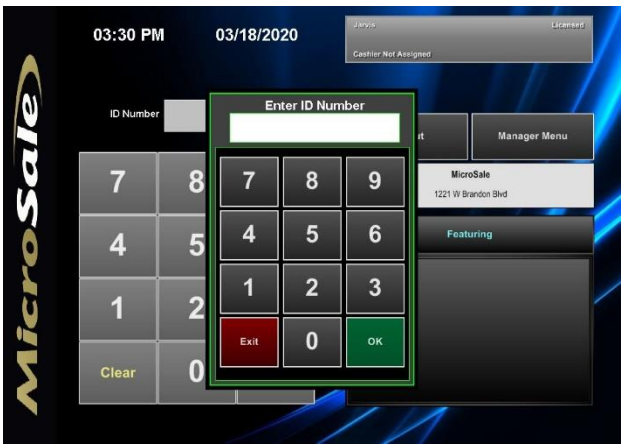
7. Verify the skim dollar amount and press **Save** – Skim cannot exceed the amount in the drawer. Paperclip cash and printed skim slip and place in the safe. *If the skim is not saved, it will not be recorded.*

Closing a cash drawer assignment

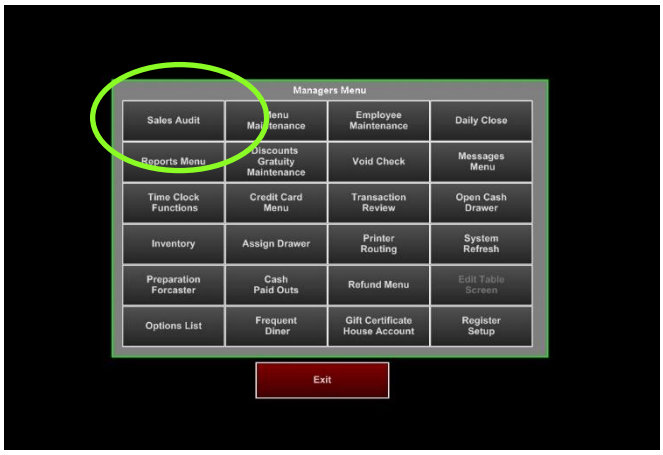
1. From the ID Screen, press the **Manager Menu** button



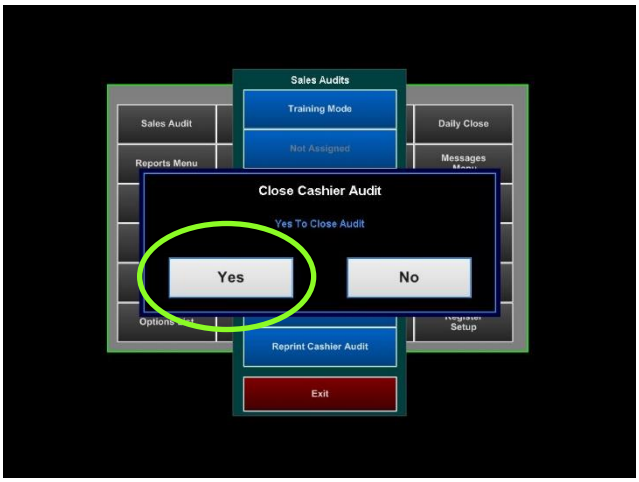
2. Enter the manager ID or swipe their manager card and press **OK**



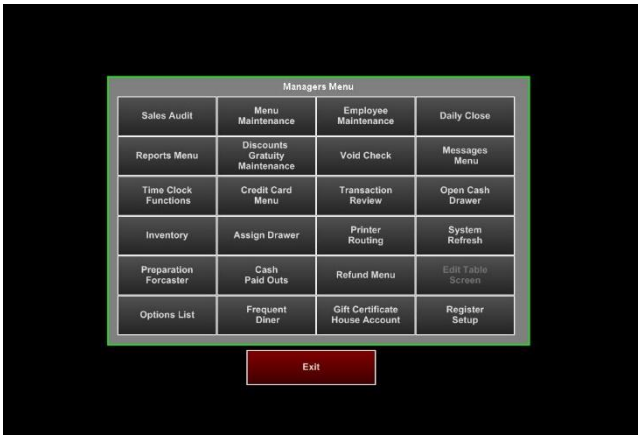
3. From the Managers Menu screen, press the **Sales Audit** button



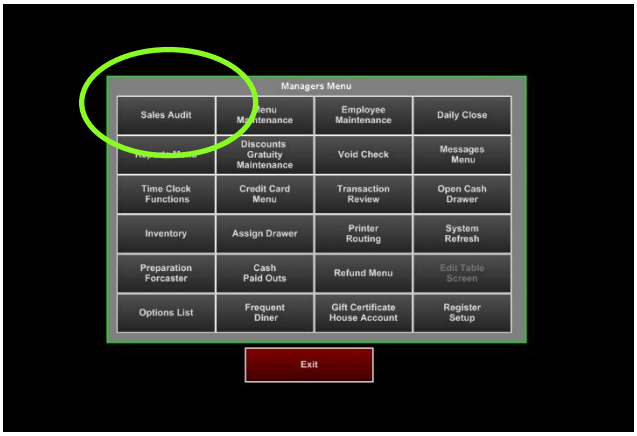
4. Press the **cashier's name** and press **Yes** to close the audit



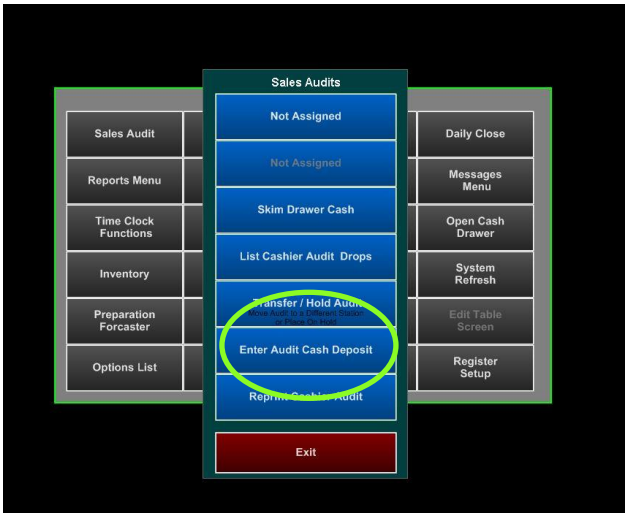
5. Count the cash drawer down to starting cash amount. Count remaining cash amount for deposit.



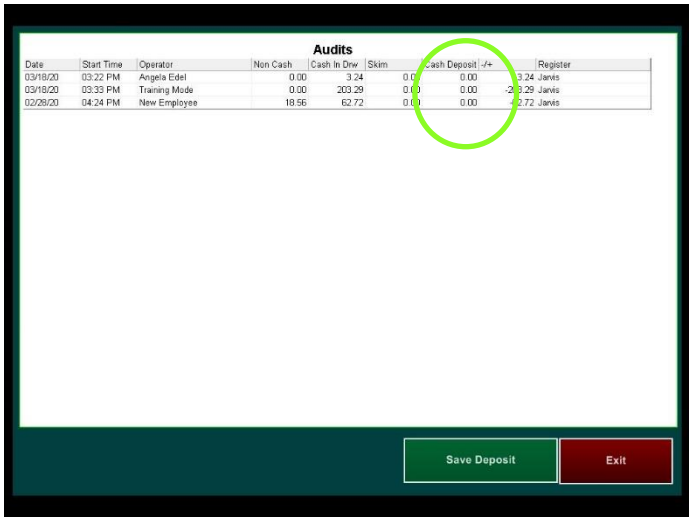
6. Press the **Sales Audit** button



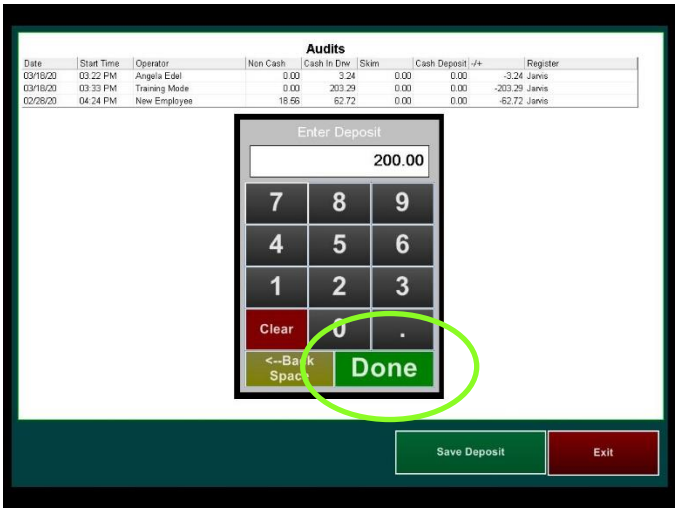
7. Press the **Enter Audit Cash Deposit** button



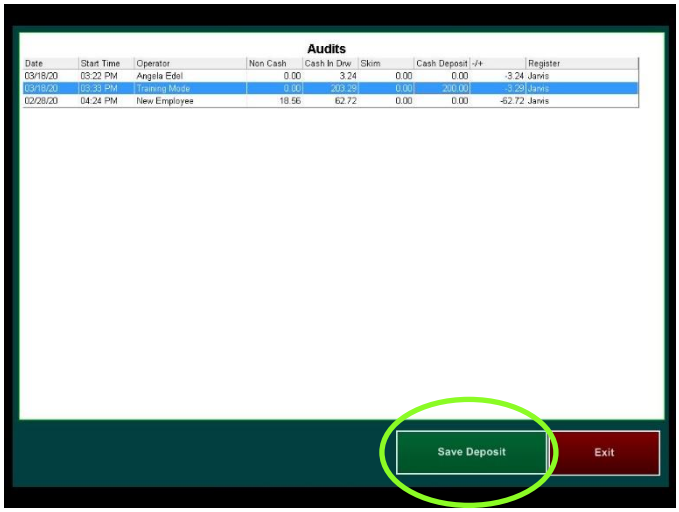
8. Press the **0.00s** of the cash deposit line for the appropriate cashier.



9. Enter the deposit dollar amount and press **Done**



10. Review the deposit dollar amount and press the **Save Deposit** button



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

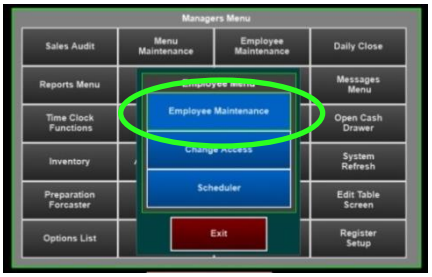
MicroSale utilizes Access Levels for security in the software to prevent unauthorized employees from performing certain functions or accessing information. **A total of 10 levels are coded in the system from 0-9.**
An access level is assigned to an **Access Level Name**. You may change any access level,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

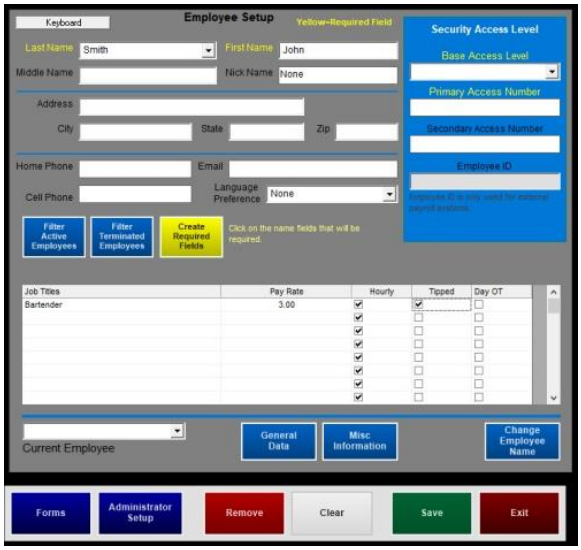
1. From the Manager Menu, Select **Employee Maintenance**
2. On the submenu, Select **Employee Maintenance**



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.



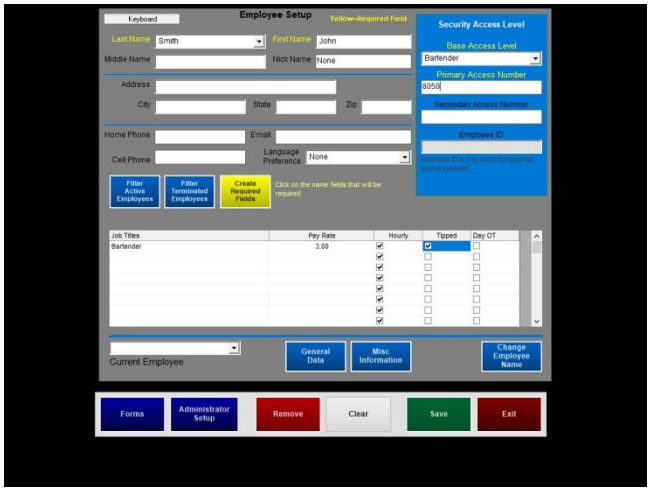
5. Select the dropdown and select the base access level of this employee. Put the highest access this employee is allowed to have. For example, if the employee is both a bartender and manager, select **Manager** as the base.

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.

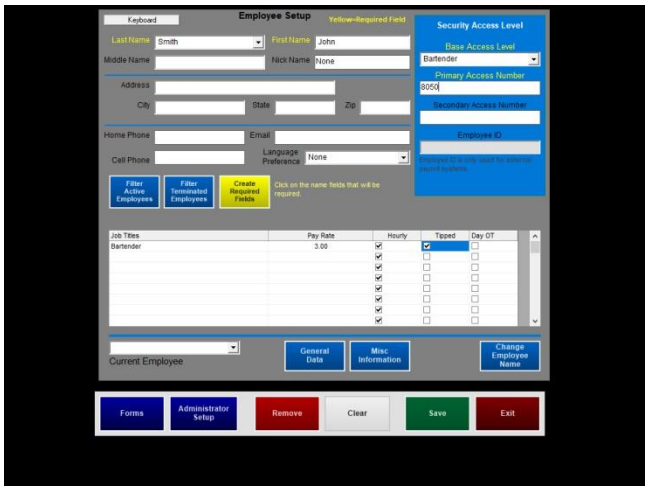
6. Type in the employee's number to access the system- this will be used to log into the order screen and for clocking in/out.

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? –cashiers or anyone who handles sales in the system will require an audit
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:

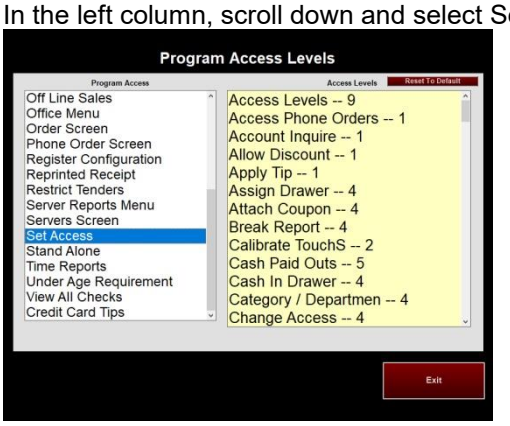
- Managers Menu > Register Setup > Terminal Configuration > Misc Options (tool bar) > tick the checkbox **Employee Access by job code** > Finished > Save > Exit

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

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

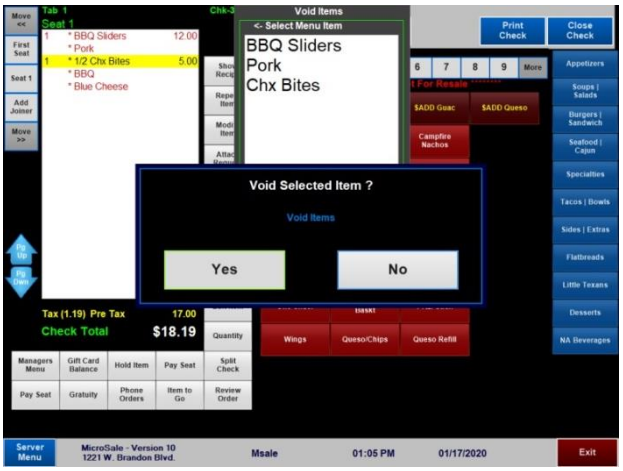
1. Select **Void Check** from the Managers Menu
2. Select the proper check number
   Review the ticket to make sure you have the selected the correct check
3. Select **Void Check**
4. Choose the appropriate **reason** or type in a reason using the button labeled **Keyboard**
5. Select **Yes** to print 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 cashier's name and the manager who approved the void.

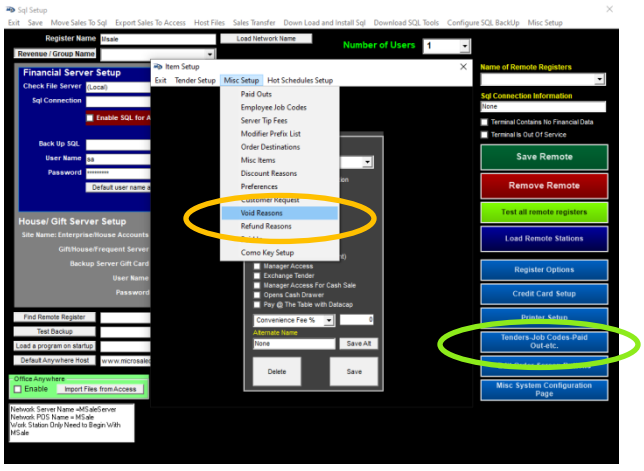
If you void all items off the check, the open check will automatically close and appear as a voided check on the Managers Menu.

Adding custom void reasons

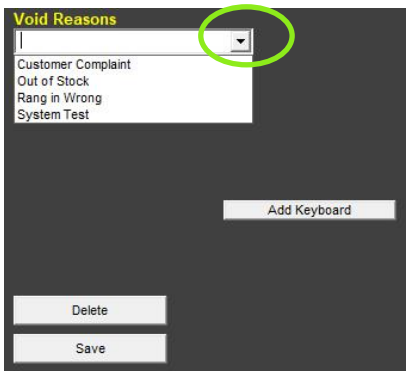
MicroSale includes preset void reasons and a keyboard for manual entry.

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**

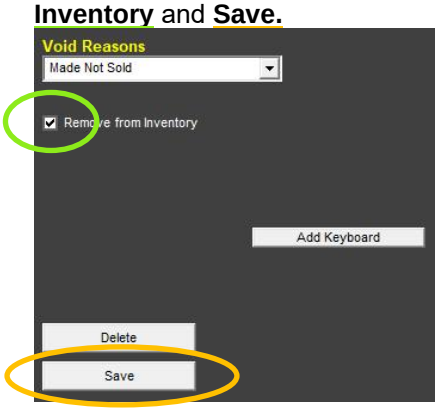


1 From the Void Reasons window, select the **dropdown** to see your preset void reasons



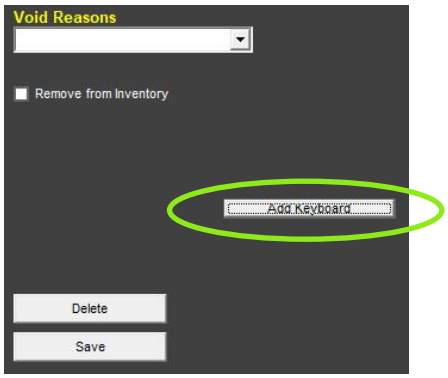
By default, voids place menu items back into your inventory (or product mix), assuming the menu item was not prepared.

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.

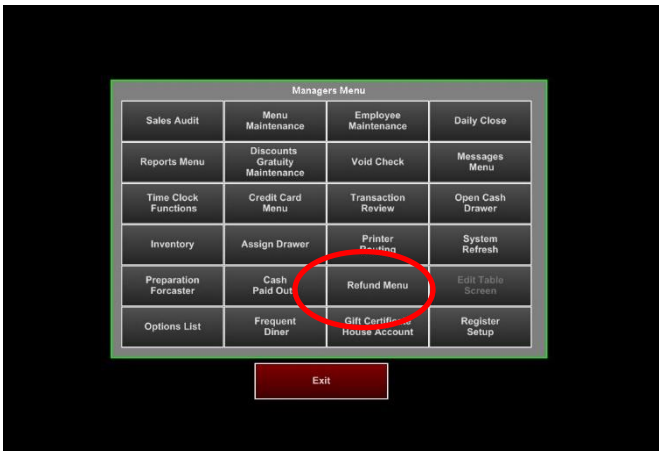
Issuing a Refund

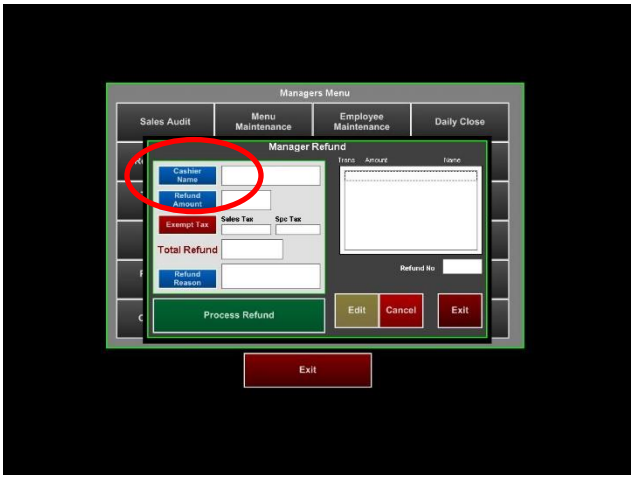
Refunds should be used when the payment needs to be returned to the guest after the food has been prepared and paid for. Refunds are not tied to orders or tickets. The refund will be issued referencing a receipt so that the order can be verified and the refund amount confirmed.

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 screen, press the **Refund Menu** button

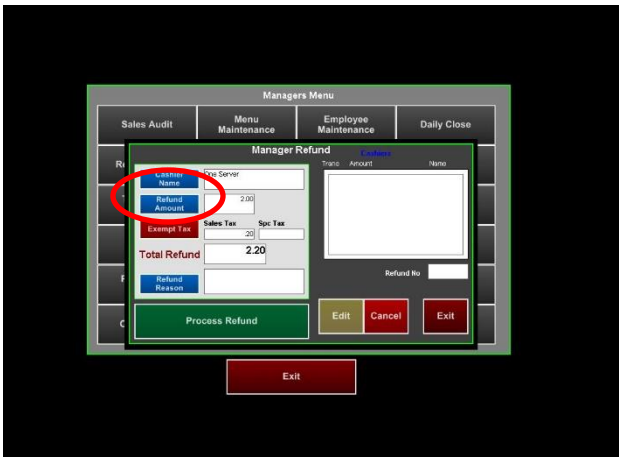
2. Press the **Cashier Name or Manager Name** button – it will automatically insert the cashier's name assigned to this register or you can choose the manager

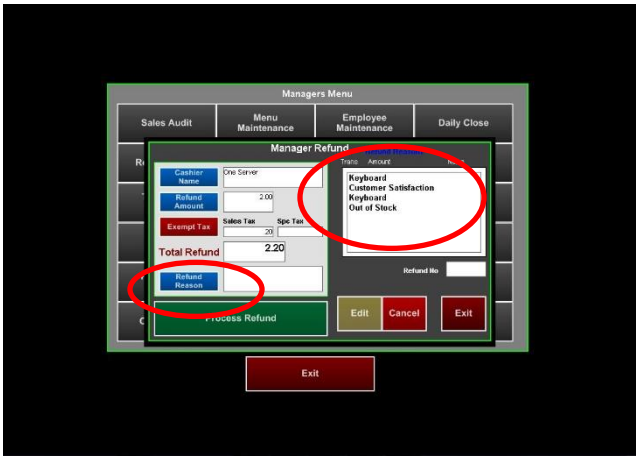




3. Press the **Refund Amount** button and enter the total of the items being refunded, excluding tax – the tax amount will fill in automatically

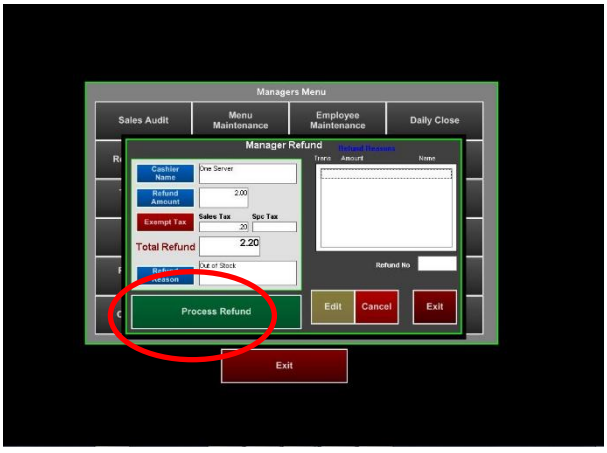
4. Press the **Refund Reason** button and choose the appropriate reason from the list on the right or use the **Keyboard** to enter a reason not listed.

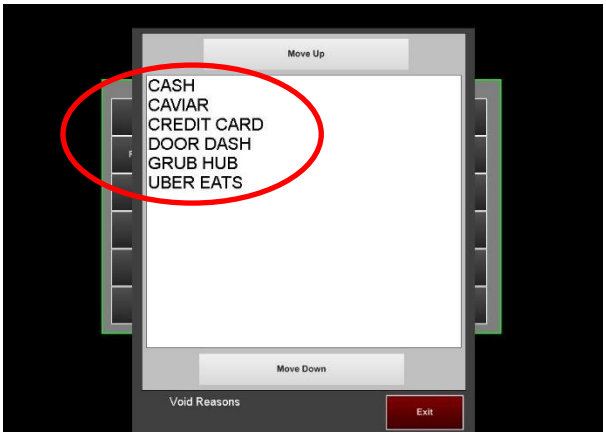




5. Press the **Process Refund** button

6. Select the preferred method of payment for the refund

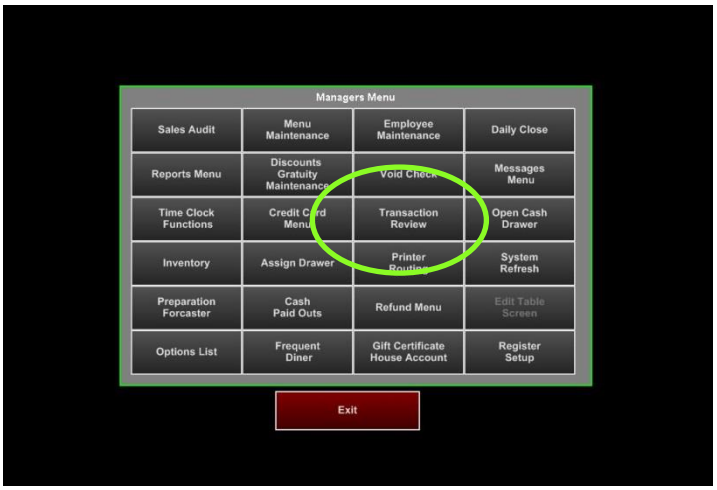




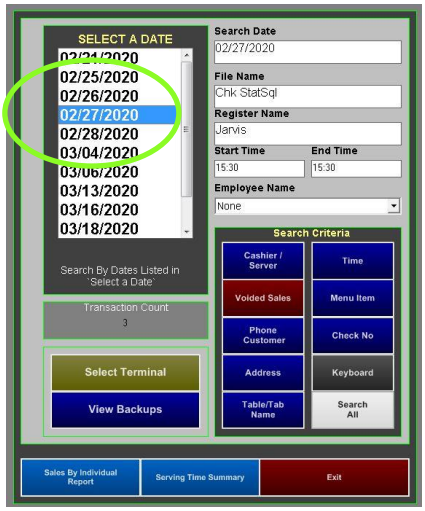
Reviewing Individual Transactions

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

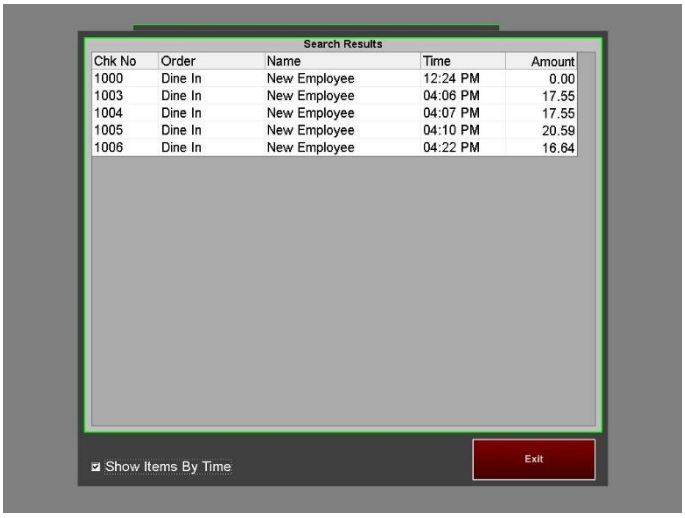
1. From the Manager Menu screen, press the **Transaction Review** button



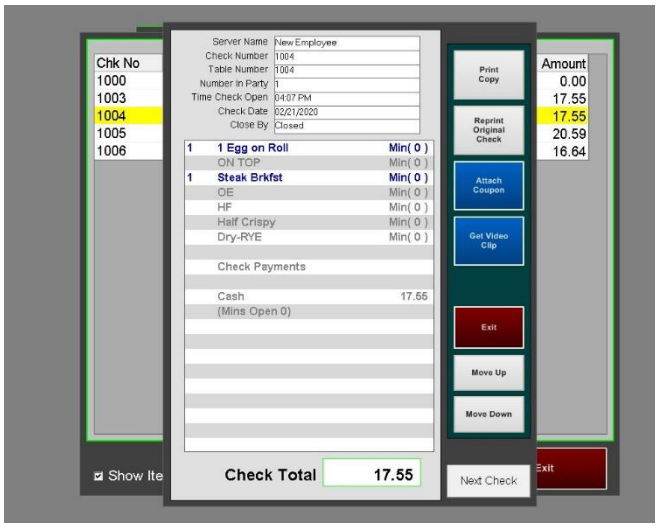
2. Select your Date first. Once your date is highlighted, you can use the search criteria method of your choosing to find the check you are looking for



3. After choosing your search criteria the checks will be displayed matching the criteria and you will click on the check that you would like to view.



4. After you are done viewing the check, you can **print a copy**, attach a coupon for the customer to use on another visit, **view a video clip** (if using integrated cameras), toggle to the next check using the **"Next Check"** button

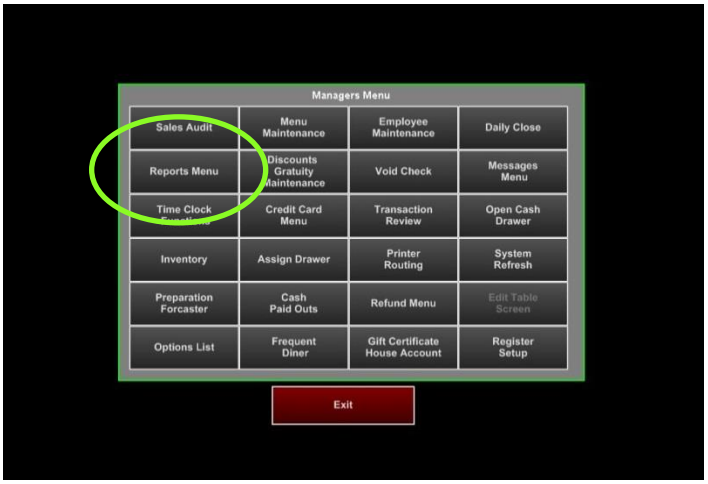


Show Items by Time

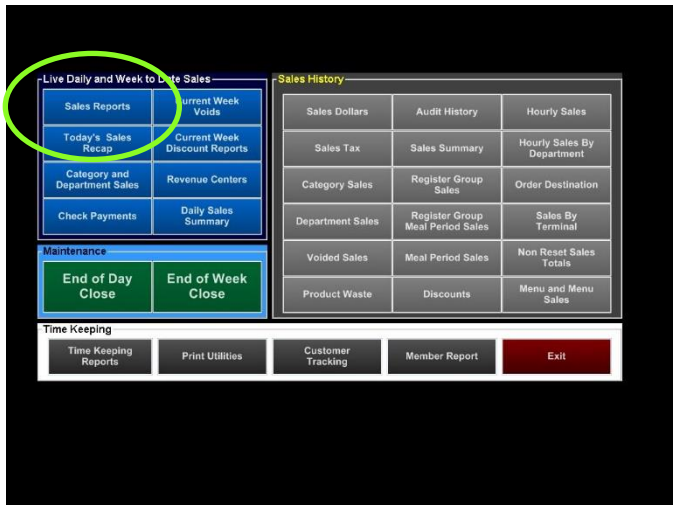
Show Items by Time only affects Full Service. When the option is checked, the transaction detail shows the minutes at which each item was rang in; the time starts when the check is opened; ex: Onion Rings (5 mins).

Viewing Live Sales with the Dashboard

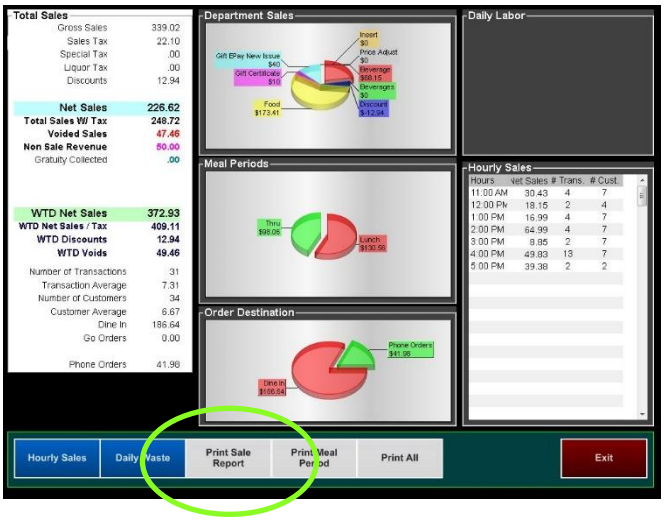
1. From the Managers Menu screen, Press the **Reports Menu** button



2. From the Reports Menu screen, Press the **Sales Reports** button, if you wish to view live sales for the current time.

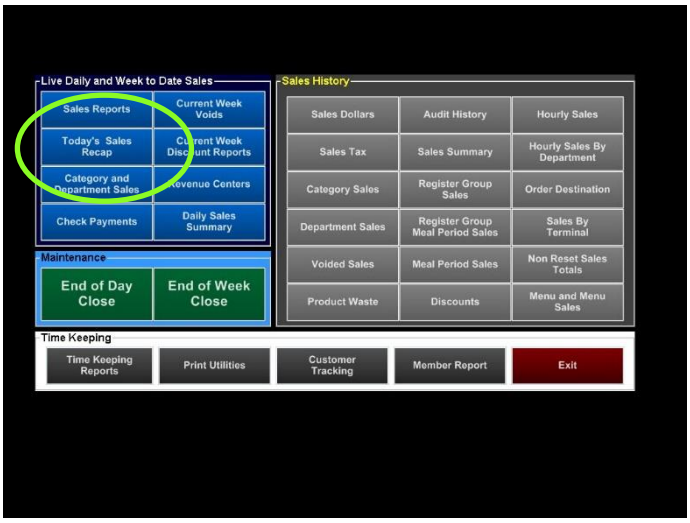


3. View the sales information. If you need to print the information, press the **Print Sales Report** button

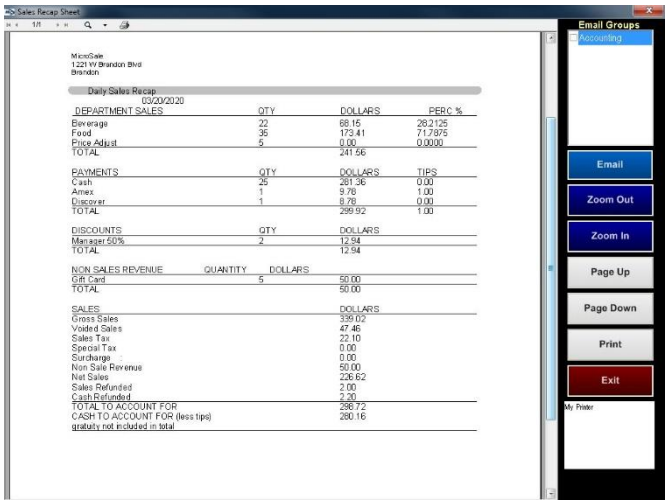


Viewing Live Sales on a PDF

1. From the Reports Menu screen, Press the **Today's Sales Recap** button**,** to view live sales as well as Cash to Account for the current time



Based on your register option setting, **"Send Reports to Report Printer"** under Printing/Cash Drawer options, you will either see this report on the screen as a PDF or it will print to the receipt printer



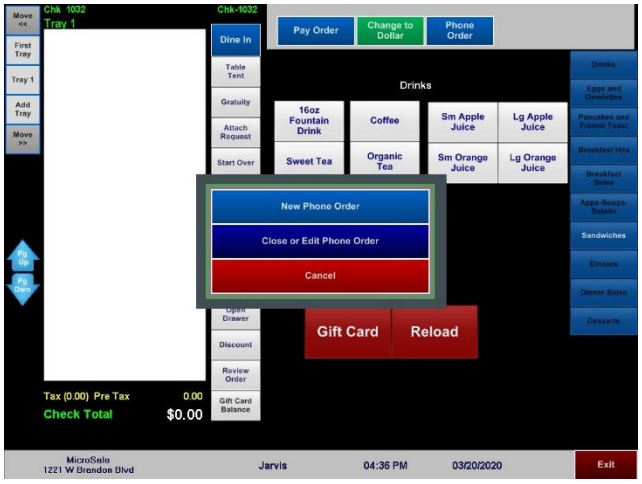
Checking for Open Phone Orders before Running the Close Out

If there are items in the phone order list you will need to consider them carefully. In most cases the order will be a call- in order that was not picked up, or perhaps an online order that was picked up but not properly closed.

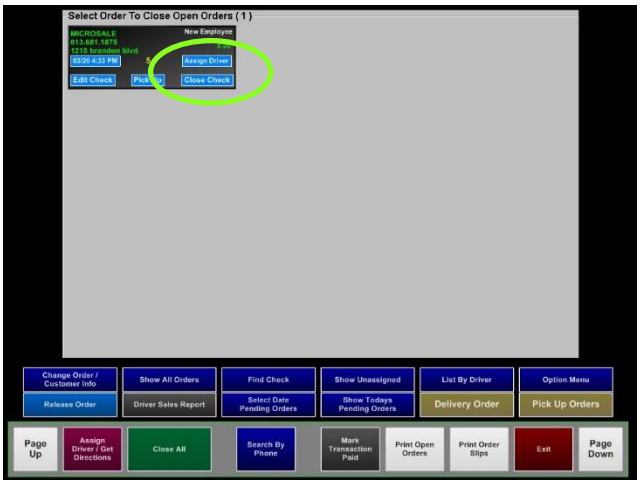
There is the possibility that the order has been entered for a future date. ***Orders for future dates will appear in red. Future orders can also be culled from the list by pressing the “”List Pick Up Only” button.*** Once you have determined which orders need to be closed press “List All” to return you to the full list.

If the order needs to be closed and the customer did not show up to claim the order, the order will need to be comped.

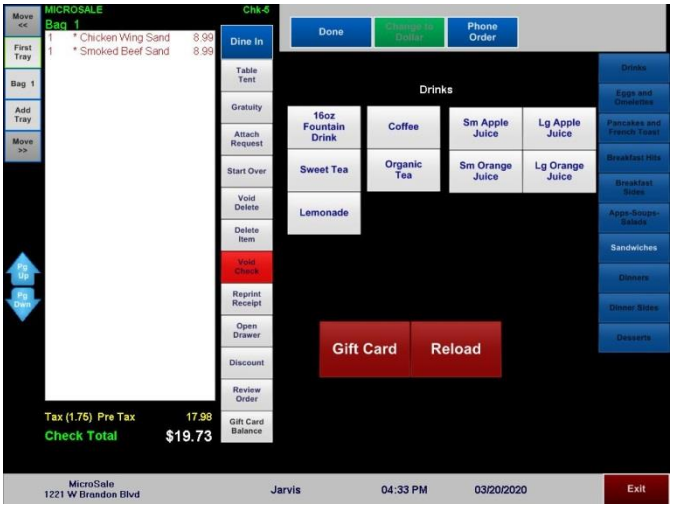
1. Pull up the phone order screen by pressing the **Phone Order** button**,** then the **Close Or Edit Phone Order** button



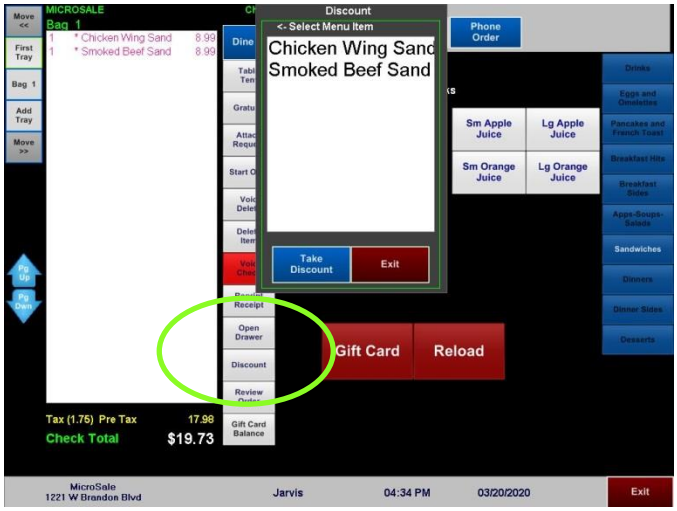
2. Click on the **Close Check** button on the phone order that you wish to Comp and Close.



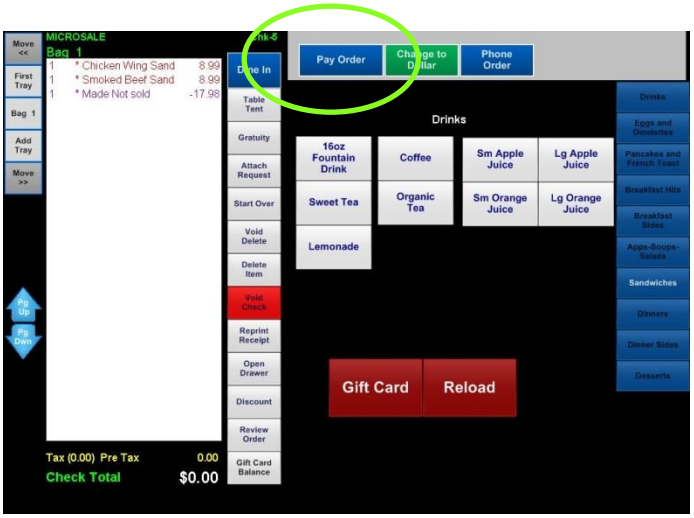
3. Review the check to ensure that it should be comped.



4. Discount the Item(s) to a zero balance.



5. Press the **Pay Order** button and the check will close out



The check needs to be comped instead of voided since the food has been made. A discount will take the items out of inventory while a void will put the food back in inventory.

Every day required procedures

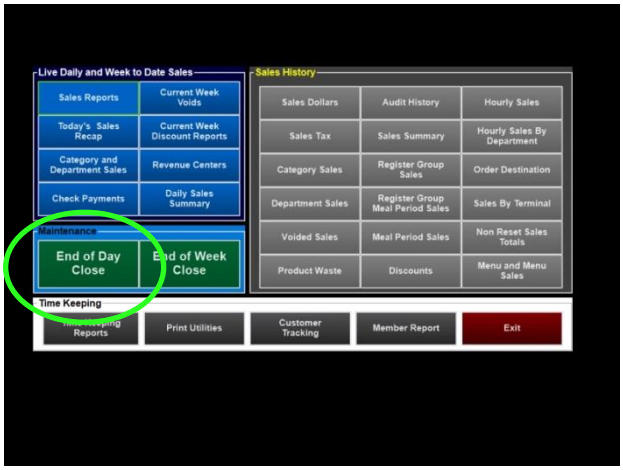
The Closeout must be performed every day. The closeout can be performed manually or automatically. To set up your system to close automatically, follow the follow next section, “Close Out Optional Settings”. The instructions below are for manually closing the day. You can also close the system manually 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.*

Before Running the Closeout:

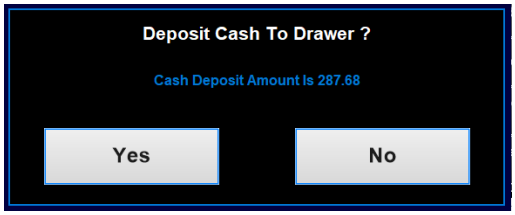
1. Make sure all audits are closed
    a. **Verifying All Audits are closed;**
        i. Log into the Managers Menu
        ii. Select **Sales Audit** button at the top, left side
        iii. Select the name of the Cashier
        iv. If there are open orders on this audit, you must close them prior to closing the audit
        v. Select **Yes** to the prompt stating:
        “*Close Cashier Audit – Yes To Close Audit | Yes or No*”
        The audit report prints automatically
        Repeat steps or each terminal
2. **Make sure all of your terminals (workstations) in the restaurant are powered on and on the ID screen of MicroSale**

Running the Daily Close / Batch Settlement and/or Weekly Closeout

1. Select **End of Day Close**



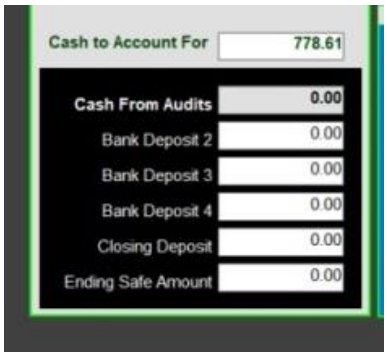
2. Confirm the physical cash on hand matches (or closely matches) the **Cash from Audits** amount.



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.

Processing Offline Charges

MicroSale has the ability to accept credit cards when the internet is down only if you are using NETePay. There is an option inside of the Datacap software called, "Store and Forward"

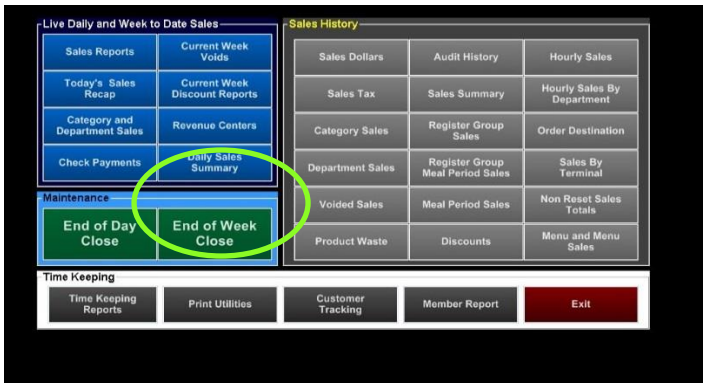
End of Week

The End of Week (EOW) needs to be performed after the Daily Close on the last day of your restaurant's week. Please verify when your week ends before performing this task. Before the start of the new week, check to ensure the EOW was performed the night before.

Steps to Run an End of Week (EOW)

1. From the Managers Menu screen, select the **Reports Menu** button.

2. Select the **End of Week Close** button



3. The system will automatically show the weekly summary report to be printed. Press **Exit** or **Email** if you wish to be emailed out.

Opening Procedures

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

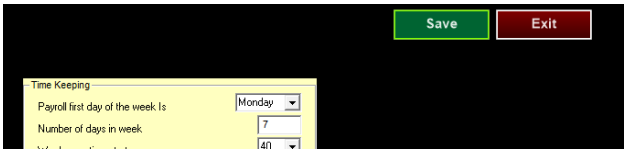
If you need to manually run the weekly close out for any reason, select End of Week Close on the Reports Menu. The end of day close must be completed before you close the week. The system will automatically show the weekly summary report to be printed. Exit.

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**

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.

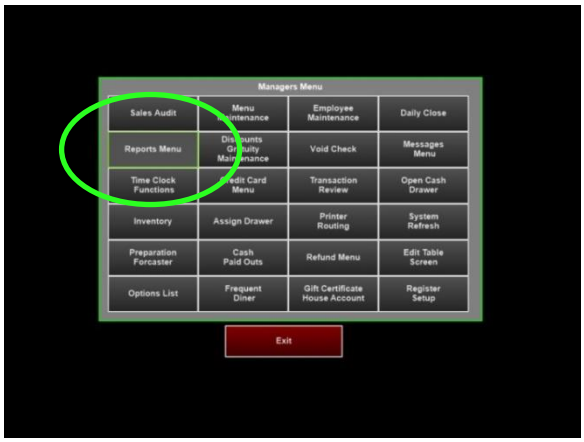
- Managers Menu > Reports Menu > **Time Keeping Reports**

Running Reports

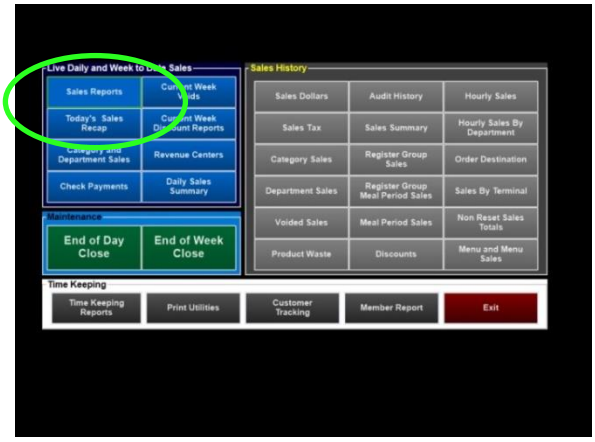
Live Sales Reports

Viewing Live Sales with the Dashboard

4. From the Managers Menu, select **Reports Menu**



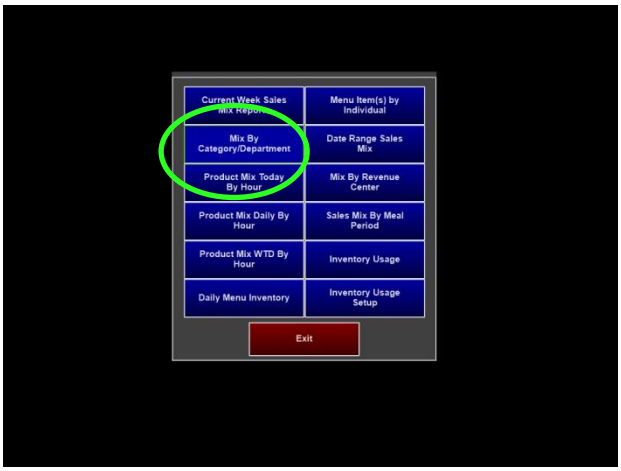
5. Select **Sales Reports**



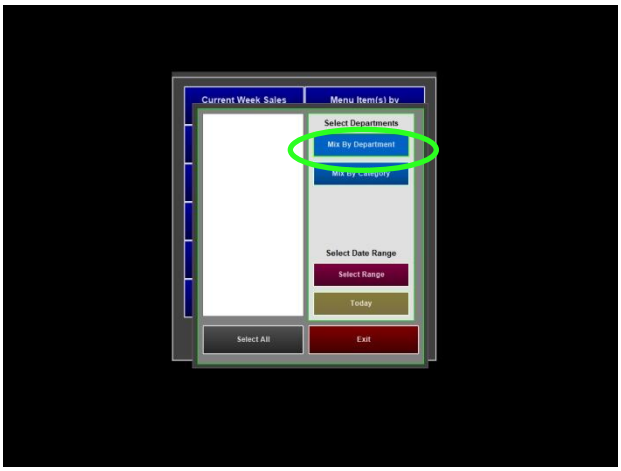
6. View the sales information. If you need to print the information, Select **Print Sales Report**

Running a product mix report

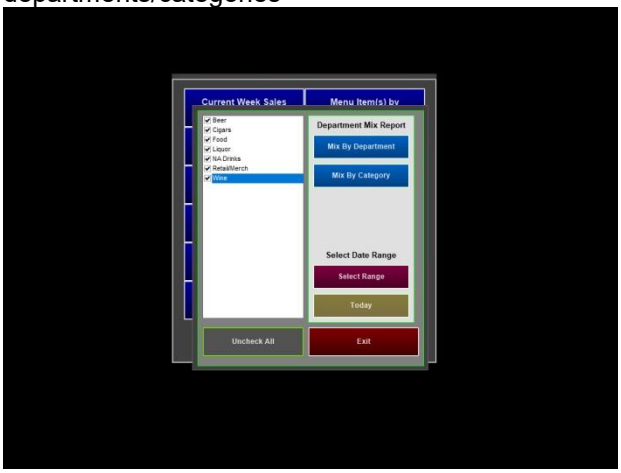
1. Select **Reports Menu**
2. Select **Menu and Menu Sales (lower right of Reports Menu)**
3. Select **Mix By Category/Department**



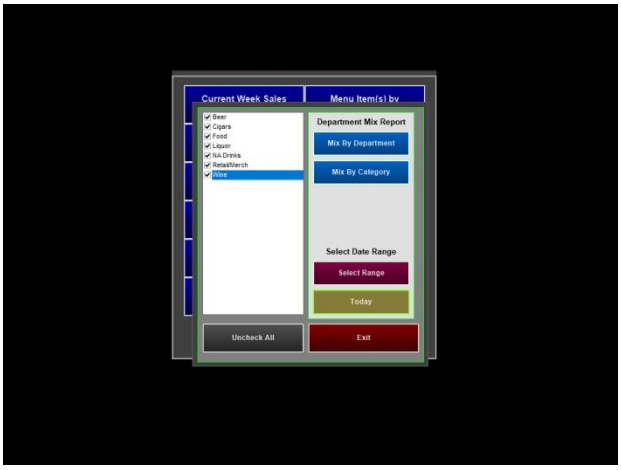
4. Select **Mix By Department** or **Mix By Category**



5. Choose **Select All** or individual departments/categories



6. Choose **Today** or Select Range



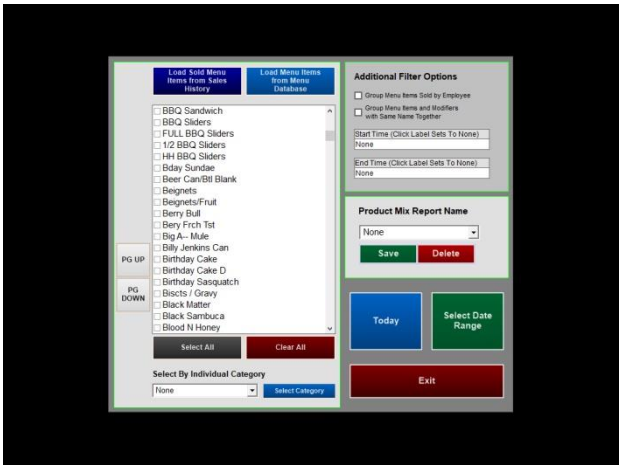
7. The report will print (if using a receipt printer) or be available on screen (if using an office printer or virtual printer)

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:

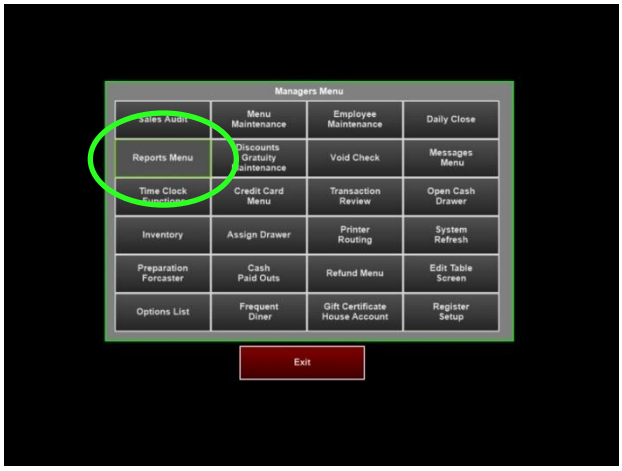
To view the product mix report based on a particular time frame, select a **Start Time** and **End Time**

Running your most important end of day reports

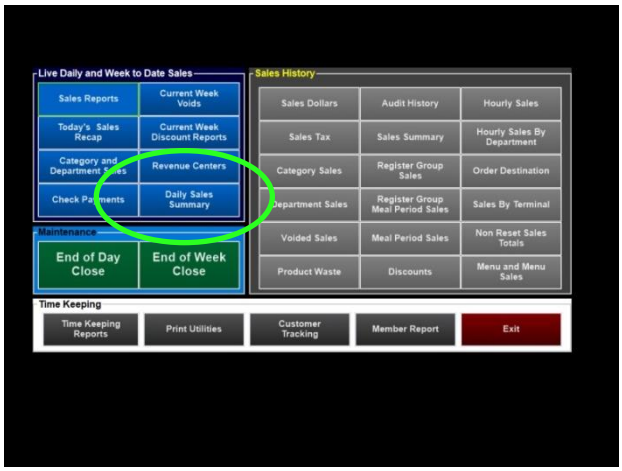
The Daily Sale Summary and the Balance Sheet will be emailed automatically after the closeout runs. To view the reports through MicroSale, follow these steps.

Daily Sales Summary

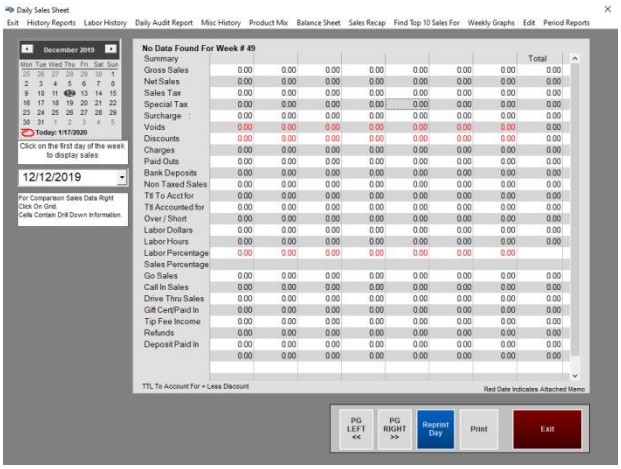
1 Select **Reports Menu**



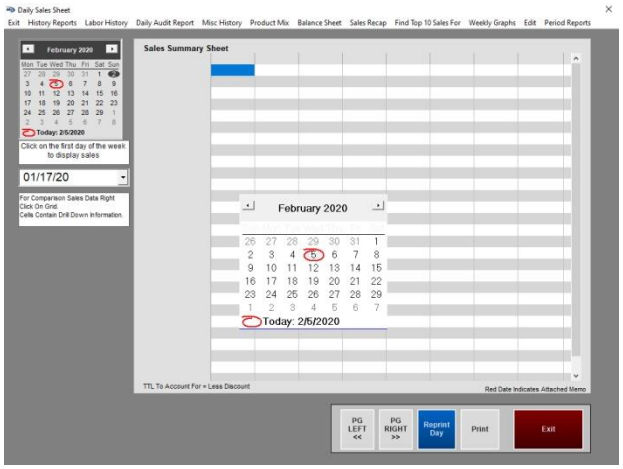
2 Select **Daily Sales Summary**



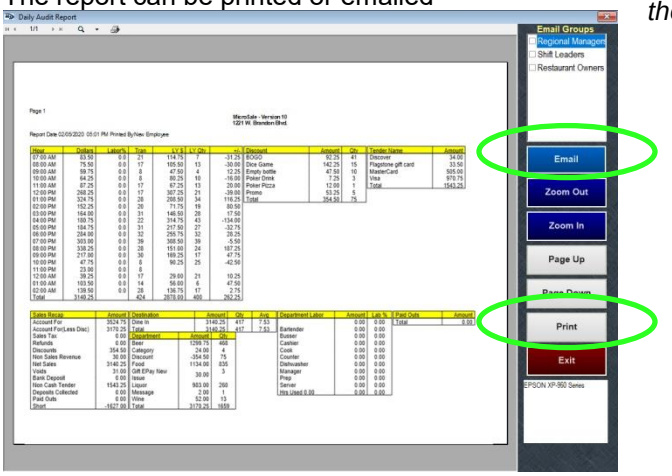
3 The Daily Sales Summary screen provides a snapshot of your week as well as additional reports on the tool bar.



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



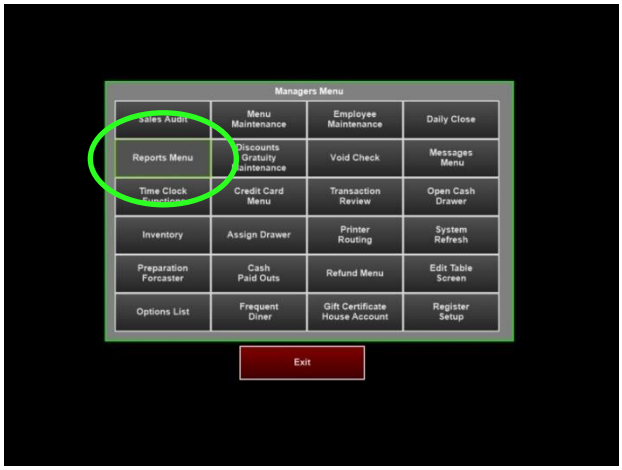
5 The report can be printed or emailed



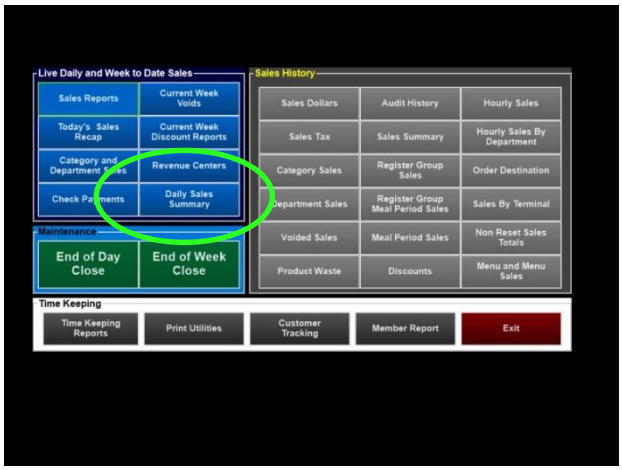
*To reprint the report that is printed immediately following the closeout, select **Reprint Day***

Balance Sheet

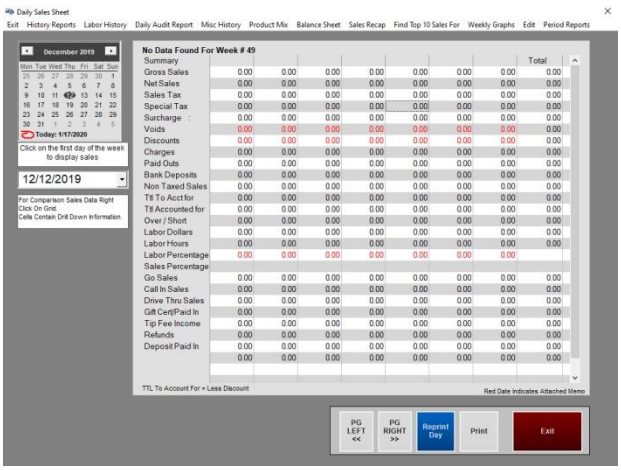
1 Select **Reports Menu**



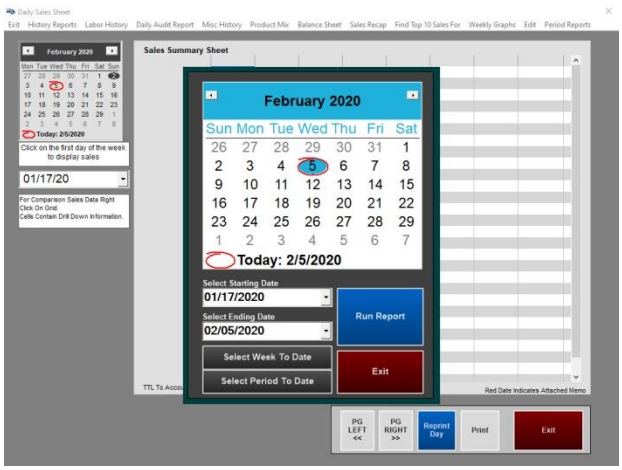
2 Select **Daily Sales Summary**



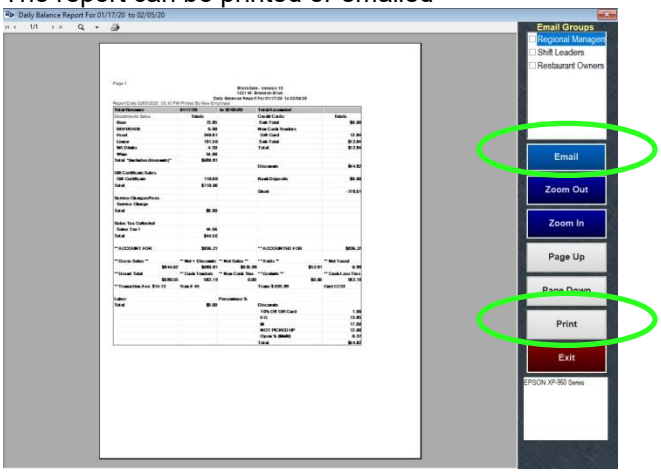
3 The Daily Sales Summary screen provides a snapshot of your week as well as additional reports on the tool bar.



4 To view your closeout information, Select **Balance Sheet** and choose a date or date range.



5 The report can be printed or emailed



- 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

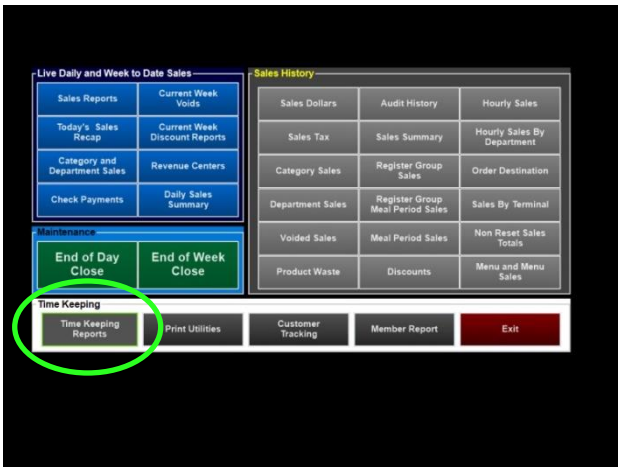
Printing a Weekly Sales Report

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

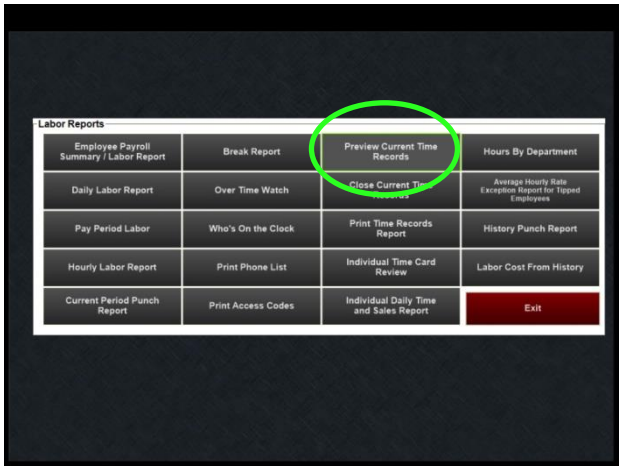
Labor (Employee Time Keeping)

Running a labor report

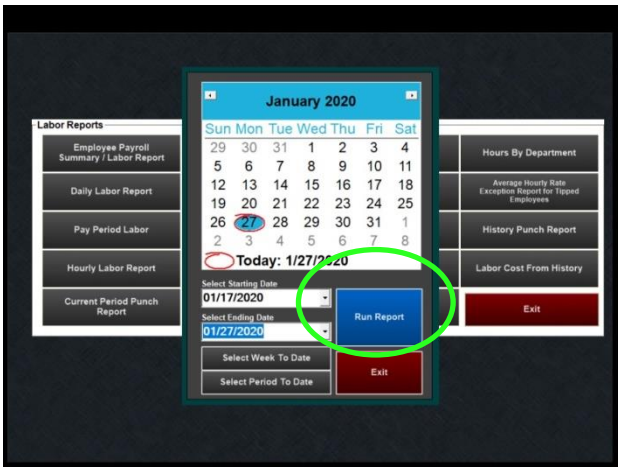
1. From the Reports Menu, Select **Time Keeping Reports**



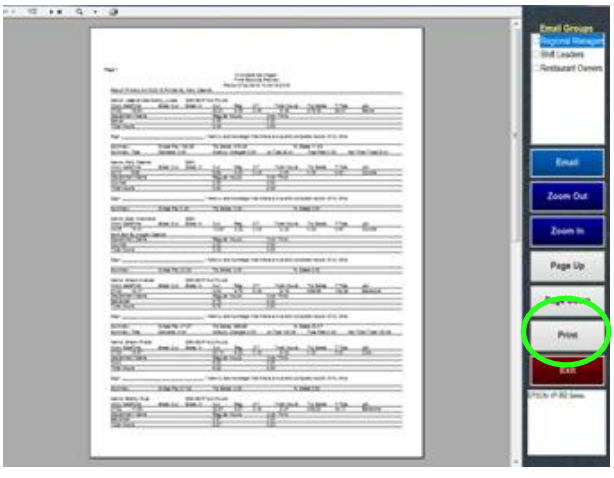
2. Select **Review Time Records**



3. Choose the dates to preview and select **Run Report**

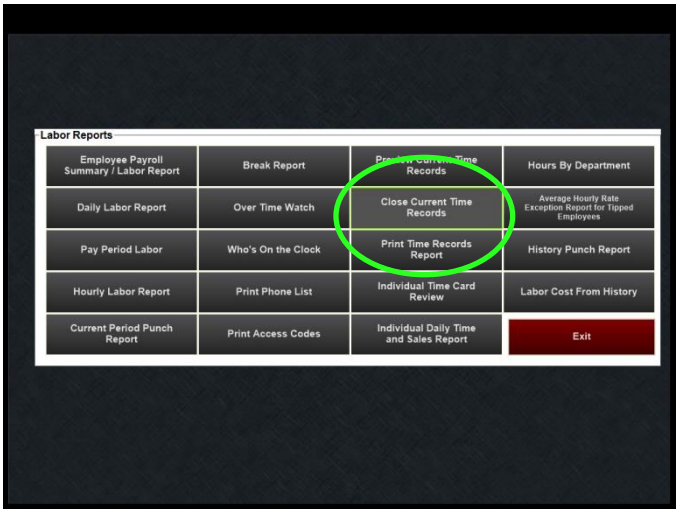


4. Preview the report and print if necessary

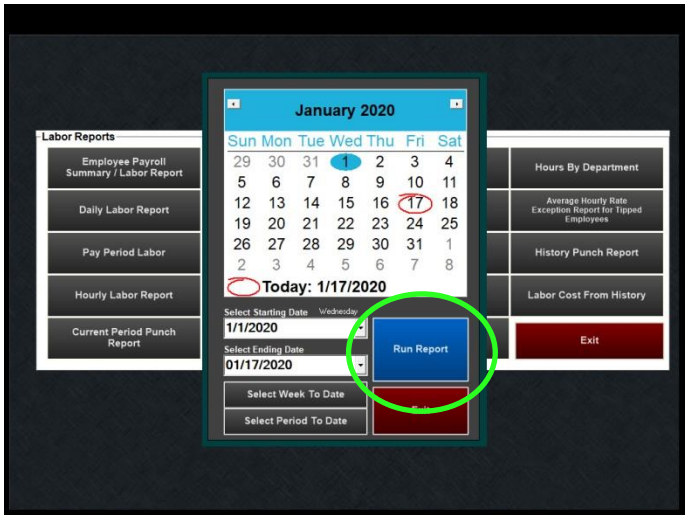


Closing a Labor period

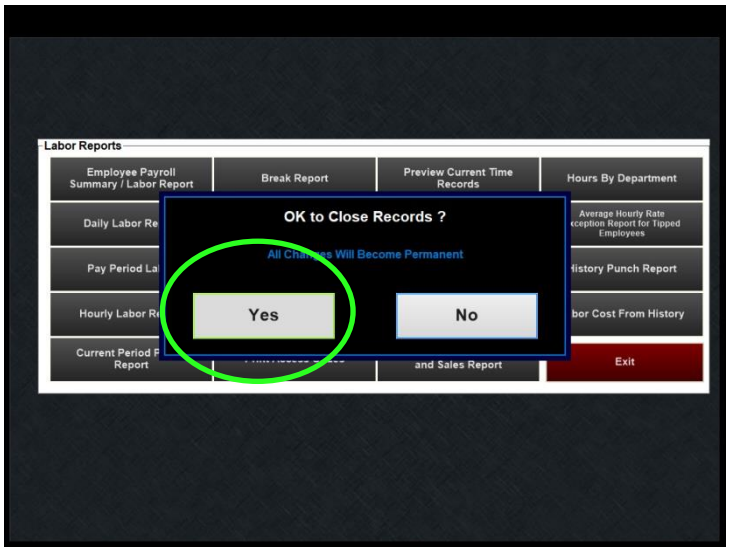
1. From the Time Keeping Reports screen, choose **Close Time Records**



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.

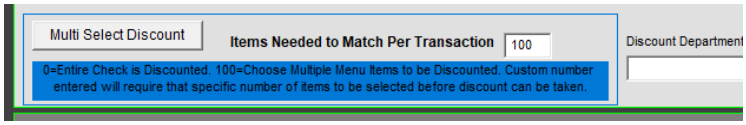
1. Type in a descriptive name such as **Open %** (this name is going to be replaced with a discount reason on the guest check)
2. Select the dropdown next to Type and choose Open Percentage
3. Keep the Amount blank (the open percentage will prompt you to enter in a percentage at the time the discount 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

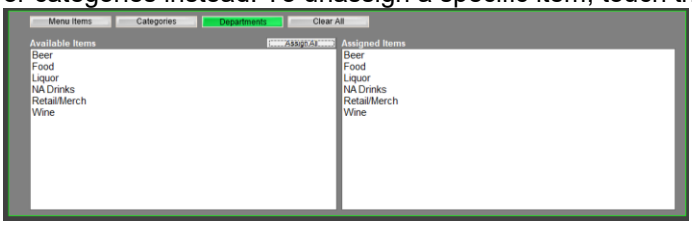
1. Type in the name “Military 10%” or another name of your choosing – this name will appear on the guest check
2. Set the type to Discount Percentage
3. Set the amount to 10 (or another amount)
4. Set the access to Manager or another access level of your choice
5. Use the category of Discount
6. Save

Set Percentage off selected items

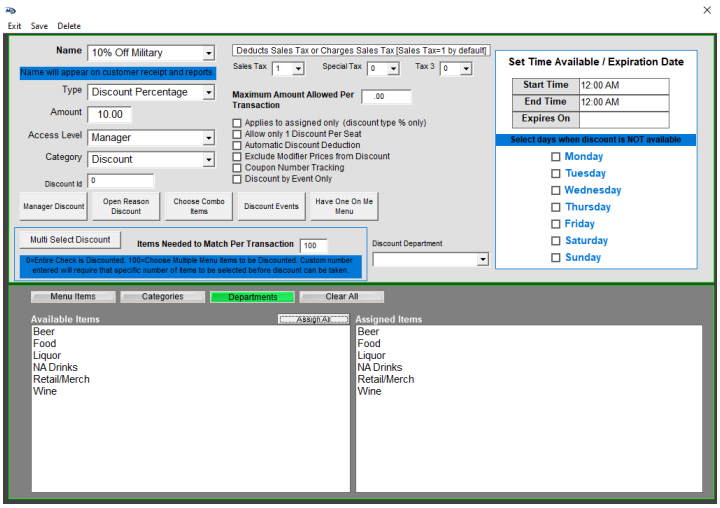
1. Type in the name “Military 10%” or another name of your choosing – this name will appear on the guest check
2. Set the type to Discount Percentage
3. Set the amount to 10 (or another amount)
4. Set the access to Manager or another access level of your choice
5. Use the category of Discount
6. To only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

$ 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

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

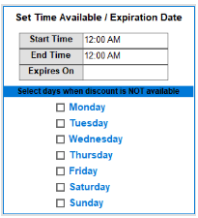
Discount Availability

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

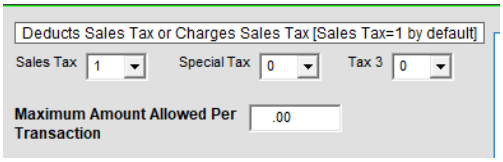


Discount Criteria

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)

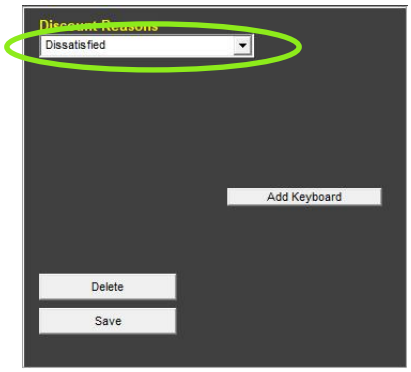
An Open Discount by default prompts a keyboard to manually type in a reason for the discount. You can add additional open discount reasons if desired. *These discount reasons are only used for the Discount Types of Open Percentage and Open Amount.*

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

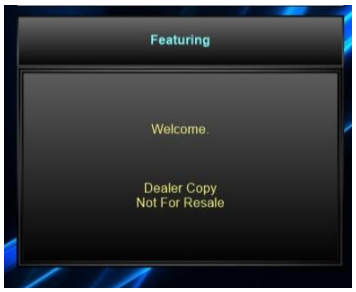
   Discount Reasons deploy automatically to all terminals.

Messages and Communications with Staff

Communicating reminders and daily specials for staff

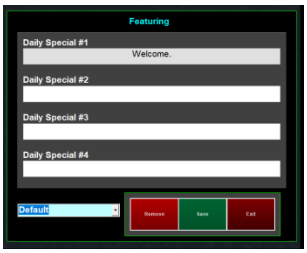
The ID screen can show a default message or change daily in the ‘featuring box’

- Managers Menu > Messages Menu > **Daily Specials**



Using the same message or reminder every day

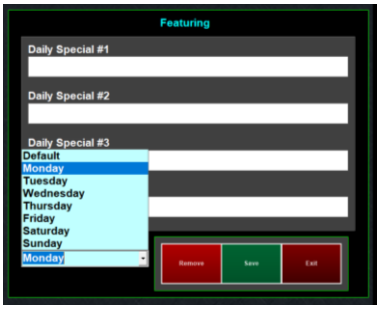
1. To change out the text, “Featuring”, simply type over the text
2. To use the same message every day, use the option **Default** after typing in your message



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)



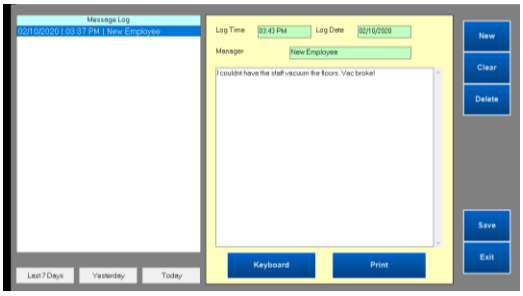
3. Select **Save** when completed
4. Redo steps 1-3 and resave with a different day of the week.

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**

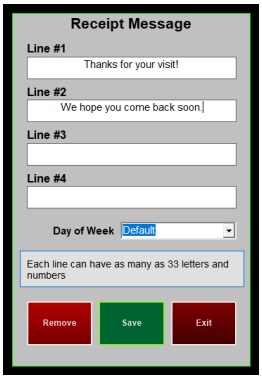
1. Select **New** or select **Keyboard** to start a new message
2. Type in the message
3. **Save**



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**

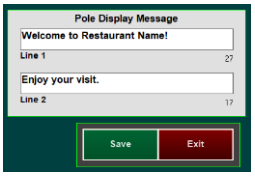
1. Type in a message. If you have a long message, carry over the text to the next line.
2. To use the same message every day, use the option **Default** after typing in your message
3. **Save** when completed

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



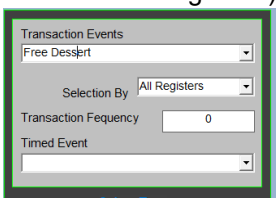
Adding random messages and coupons

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