Version 6.1.16

SoftTouch

HOSPITALITY MANAGEMENT SYSTEM

Backoffice Manual

Table of Contents

Part I

BackOffice Introduction

Part 1 BackOffice Introduction

SoftTouch BackOffice is a powerful, easy-to-use tool that employs intuitive controls to customize your environment. This is where you set up all of your preferences for your SoftTouch Hospitality System.

Part II

Login to BackOffice

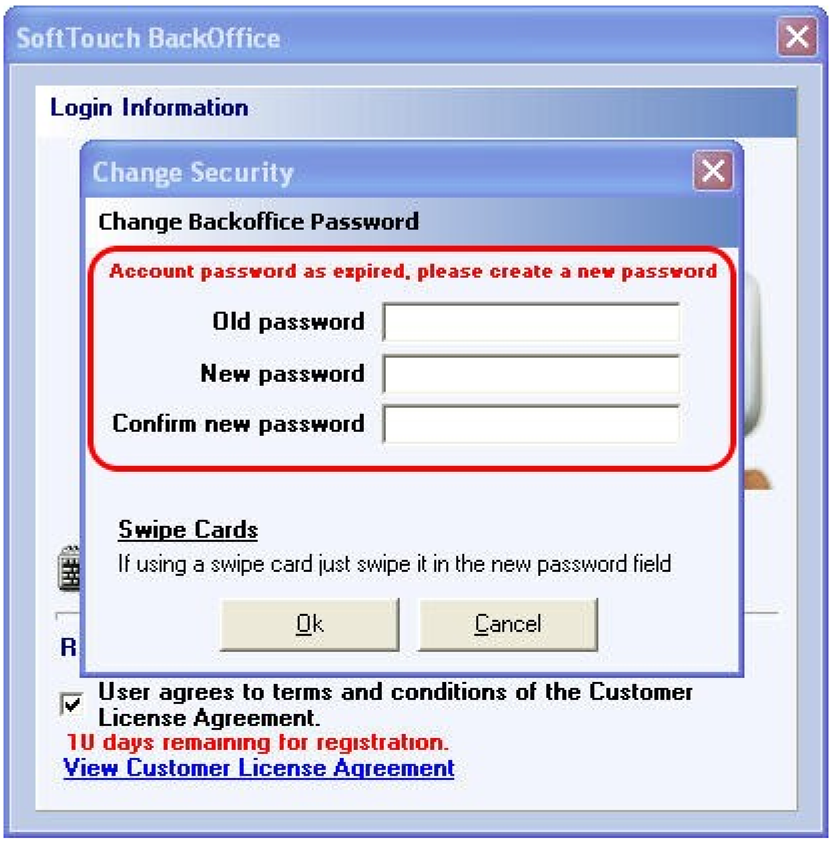
Part 2 Login to BackOffice

1. When you first log into the **SoftTouch BackOffice** on a new installation you will be required to type in this username and password:

username: softtouchadmin
password: itsprivate2

2. On the new screen (as shown below) you must put in your old password (itsprivate2) and then enter a new password.

The new password must be at least eight characters in length and must contain both numeric and alphabetic characters.



***Note:** Your username will continue to be softtouchadmin.

3. Make sure you remember what you type in for your new password. Upon signing into **BackOffice**, if you mistype your password more than three times you will be locked out of **BackOffice** for half an hour.

Part III

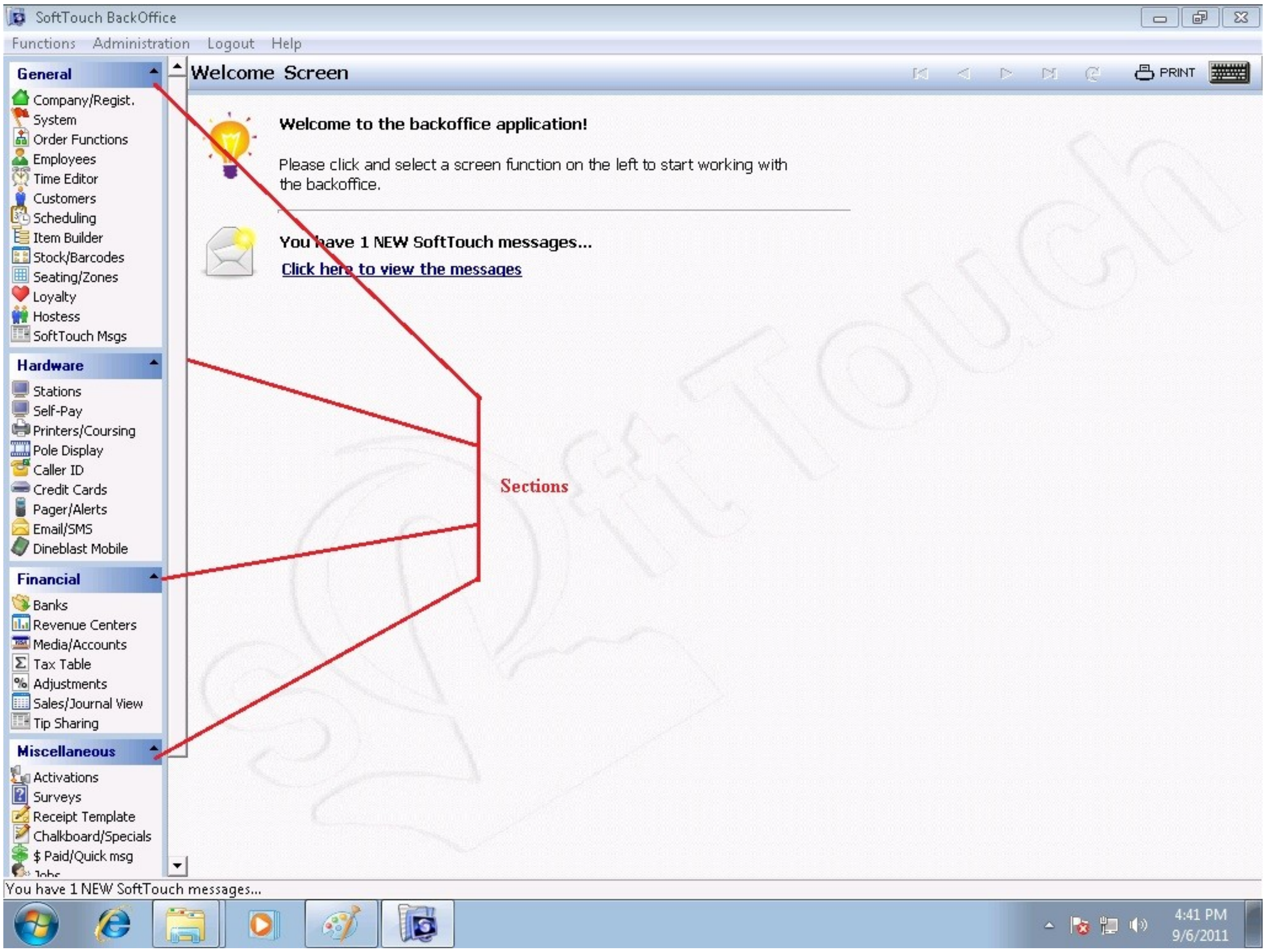
BackOffice Manual Guidelines

Part 3 BackOffice Manual Guidelines

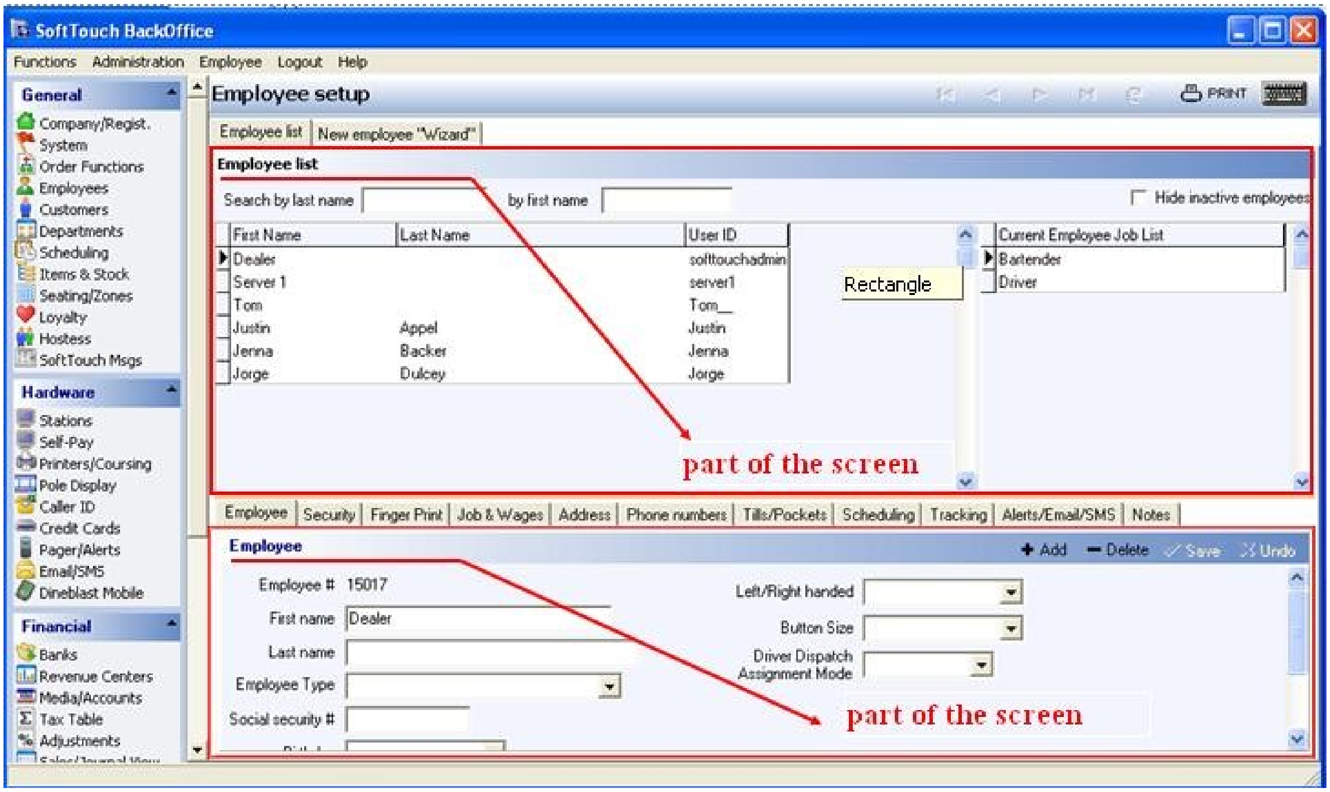
MENU GUIDE

1. A path you need to follow in order to get to certain function settings is marked with the info bubble  image at the top of the page.

2. Function names are grouped by sections on the left. See image:



3. Function settings are sometimes divided into two or more parts of the screen. There will always be a header name for every part of the screen.



There are two headers on the main page in the Employees applet. At top of the screen, the header reads **Employee list**. In this section you can expect to view a listing of all employees that have been added to and saved into the system.
At the bottom of the screen, the header reads **Employee**. This is where you will enter information about the Employee you have highlighted at the top section of the screen. Notice that above the header Employee, there are tabs labeled Employee, Security, Finger Print, Jobs & Wages, etc. These are screens where you can add information about an employee, although not all fields are mandatory. Each field of each screen will be explained in detail as we get to each screen.

***Note:** Always pay attention to the header names as we will refer to them often.

Part IV

General Section

Part 4 General Section

The **General** section.

The General section contains the following:

1. Company/Registration

2. System

3. Order Functions

4. Employees

5. Time Editor

6. Customers

7. Scheduling

8. Item Builder

9. Stock/Barcodes

10. Seating/Zones

11. Loyalty

12. Hostess

13. SoftTouch Messages

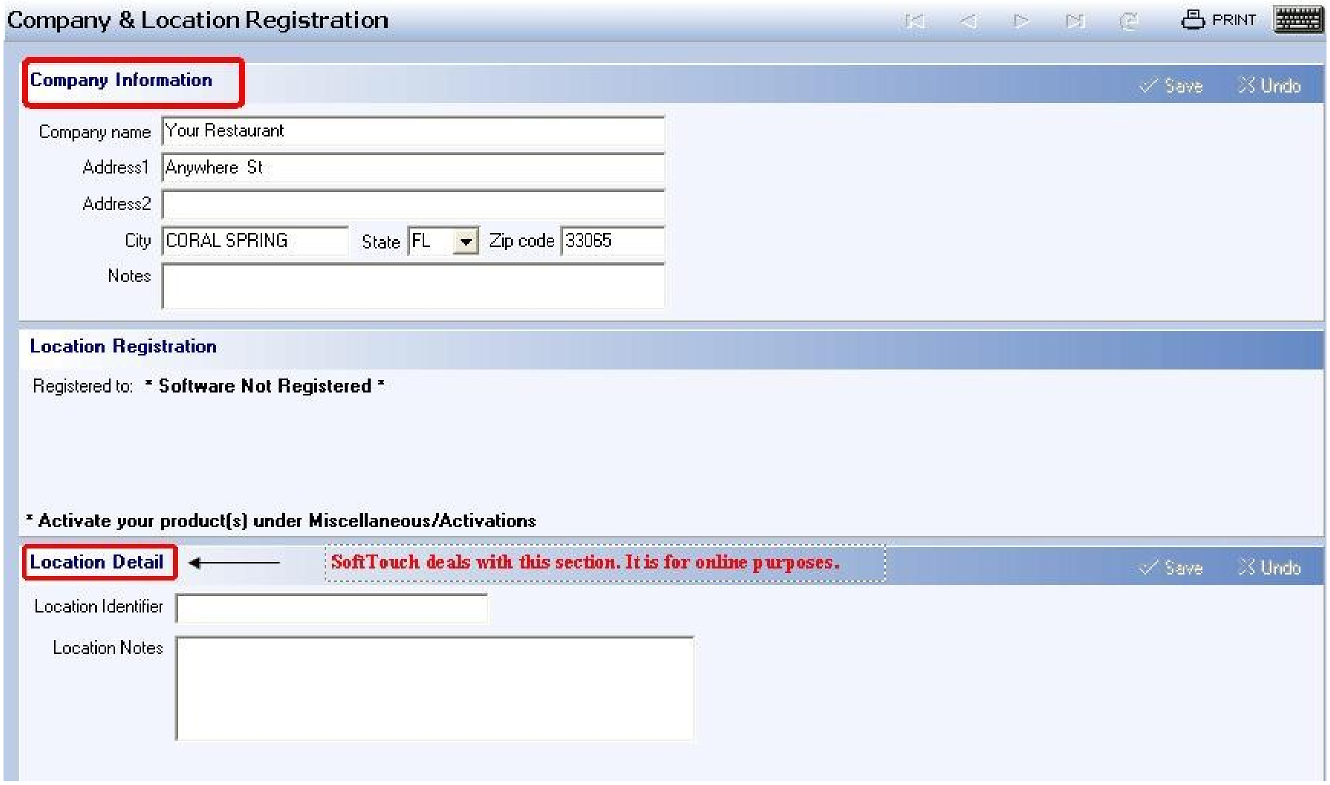
Part V

Company/Registration

Part 5 Company/Registration

Under the **General** section click on **Company/Regist.** applet.

Company/Registration



Enter your company information in the **Company information** part of the screen.

If you make a mistake you can undo it by pressing the 

button.
Press the 

button when you are done.

Part VI

System

Part 6 System

Under the **General** section click on **System**.

System

System Setup contains the following tabs:

1. General

2. Rounding

3. Tips

4. Gratuity

5. Future Orders

6. Hours & Wages

7. Intranet

8. Custom Programs

9. Function Buttons

10. Customer Search

11. Z

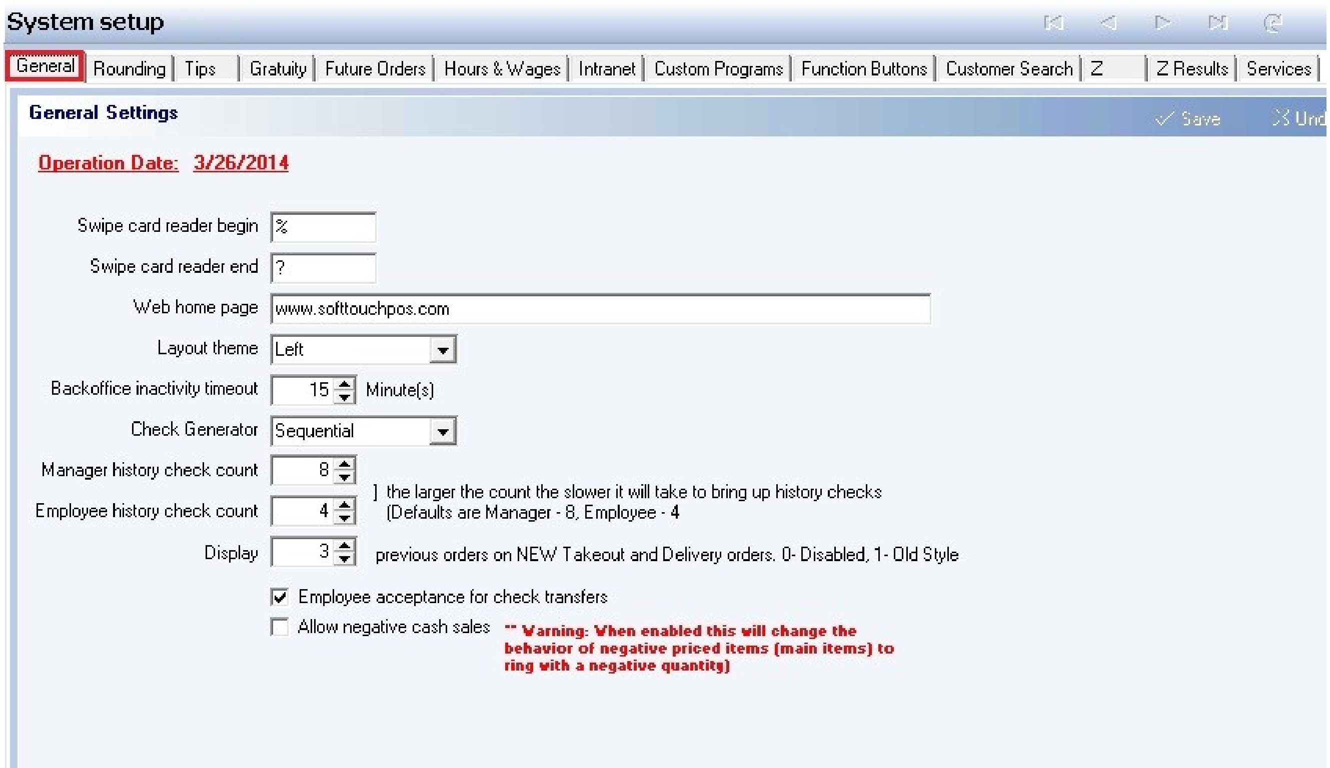
12. Z Results

13. Services

6.1 General Tab

Under the **General** section click on **System**. Select the **General** tab.

General



- General Settings -

Operation Date	This will display your current operation date. All transactions will be recorded as sales on current operation date.
Swipe card reader begin	Pertains to Employee Swipe Cards which are used for logging into the front end. Enter the symbol that appears before the actual card number. (Example: if the data on the card looks like this: %12345? then the % is the begin symbol, 12345 is the card number, and the ? is the end symbol.)
Swipe card reader end	Pertains to Employee Swipe Cards which are used for logging into the front end. Enter the symbol that appears after the actual card number. (Example: if the data on the card looks like this: %12345? then the % is the begin symbol, 12345 is the card number, and the ? is the end symbol.)

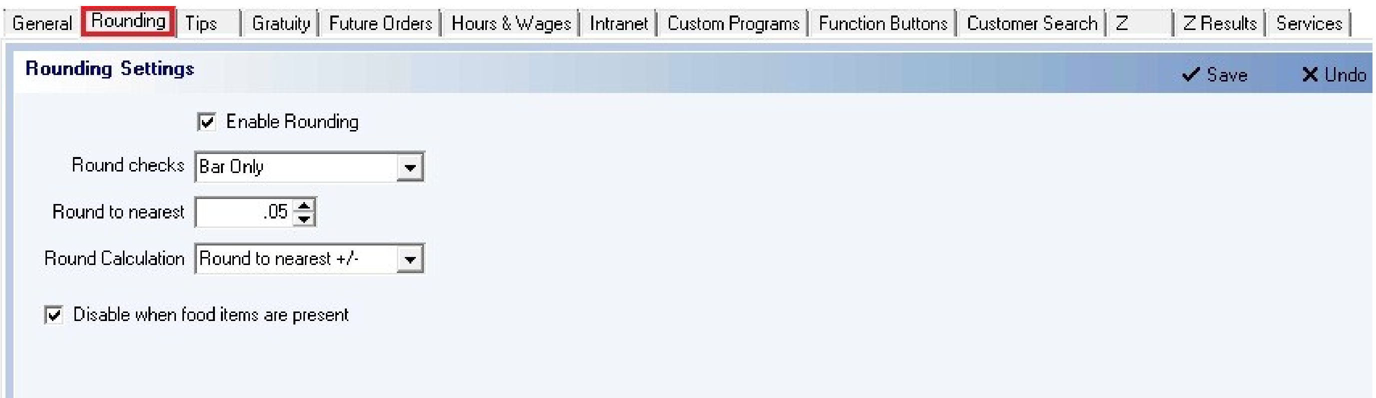
Web Home Page	The default address of a web page that is displayed in the Internet Browser when you go to System > Web/Internet in SoftTouch.
Layout Theme	You can choose to have your Mode buttons on the left or the right side of the screen.
Backoffice inactivity timeout	This field will determine how long Backoffice will stay open when there is no activity before you must enter your User ID and Password. You can set this for 1 to 15 minutes. 15 minutes is the maximum amount of time Backoffice can be inactive before you will be logged out.
Check Generator	Sequential: generates check numbers in order, so checks would start say at 100 and the next check would be 101 Random: generates check numbers at random, so first check could be 201102 and the next check could be 526611 ***NOTE:** When using random check numbers, you will get a six digit order # (check #).
Manager history check count	This is where you can set the number of checks previously rung up that will display and become accessible when a manager hits the History button.
Employee history check count	This is where you can set the number of checks previously rung up that will display and become accessible when an employee hits the History button.
Display ____ previous orders on NEW Takeout and Delivery orders	Use the arrows to specify the number of previous orders you would like shown on new takeout and delivery orders. Entering 0 disables this feature.
Employee acceptance for check transfers	This will require the employee that a check is being transferred to accept the transferred check before they become responsible for it. If a server transfers a check to another server, the second server has to accept it or the first server will remain responsible for that check.

Allow negative cash sales	This dictates whether the site will allow a negative cash sale.

6.2 Rounding Tab

Under the **General** section click on **System**. Select the **Rounding** Tab.

Rounding



Enable Rounding	Turns on the Rounding feature.
Round Checks	Bar Only: will only use rounding for the bar mode. Bar and Dining:will only use rounding for the dining and bar modes. All Modes: Will use rounding in all modes you have enabled, including delivery, drive-thru, and counter mode.
Round to nearest	The number for rounding that you can set. This is measured in increments of $.05 cents and you can round up to $1.00.
Round Calculation	Round to the nearest +/- : a check is adjusted in increments depending on what the penny is closer to. **Example**: if the check was $5.46 and you had the rounding set to five cents it would then adjust to $5.45. If the check was $5.48 the check would adjust to $5.50. Round UP only: the check will always be adjusted to an additive increment. **Example**: If the check was $5.41 it would be rounded to $5.45 if you had the rounding set to $0.05.

Disable when food items are present	When you have a check open that only has liquor items on it, the rounding will be enabled. If this option is checked on, once a food item is placed on the check, the rounding will be disabled.

- Bar Rounding Setup for VAT (Value Added Tax) -

If you are using Value Added Tax for your Bar, you will need to setup Bar Rounding so that you will not have to deal with pennies or change altogether. Rounding is needed to work in conjunction with VAT because there are certain situations where the tax has to be rounded and it may cause a bill that you would like to be $12.00 even end up being $12.01.

If you have VAT only for liquor and the VAT only applies to the Bar, choose **Bar Only** in the **Round checks** drop down box. If you have VAT available for all types of checks, choose **All Checks.**

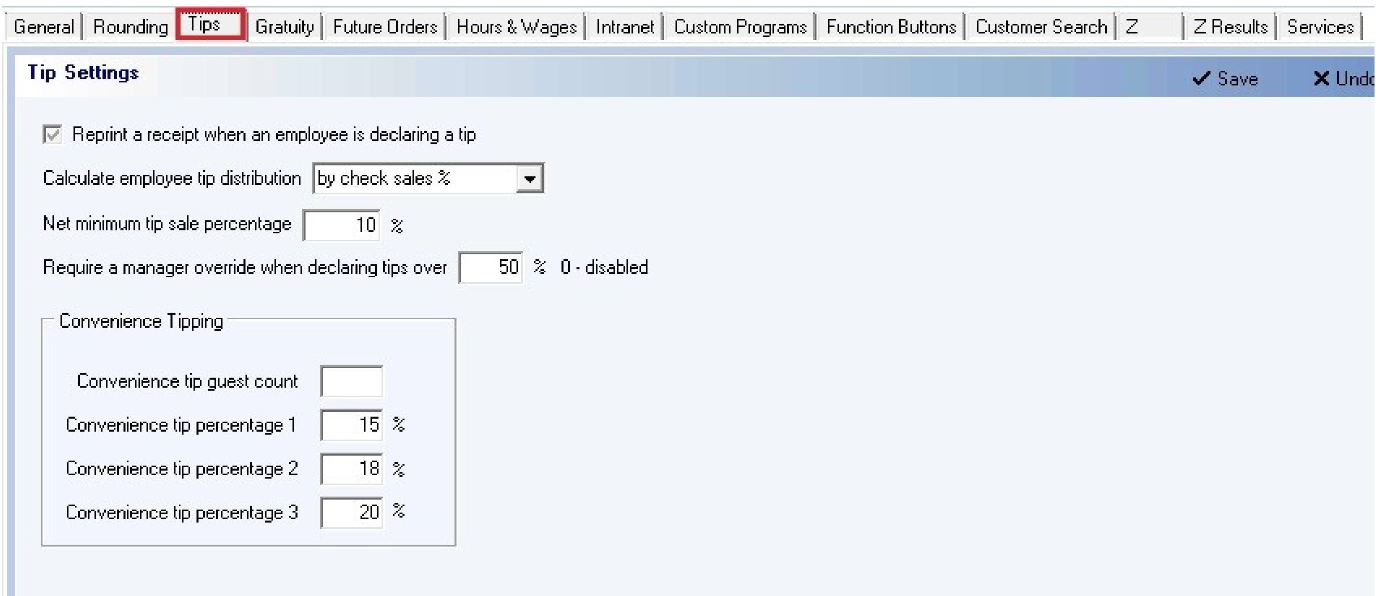
For the **Round to nearest** option, what you put here depends on what type of change you may or may not want to deal with. If you have some items with VAT that are priced at $3.50 (not an even dollar amount) then you should put $0.50 in the **Round to nearest** box. If all of your items are supposed to be an even dollar amount (ex. $4.00 or $5.00), then you can put $1.00 in the **Round to nearest box.**

***Note:** You should not round by large amounts if you are NOT using VAT.

6.3 Tips Tab

Under the **General** section click on **System**. Select the **Tips** Tab.

Tips



Reprint receipt on tip entry	This option box will allow you to print a receipt after a tip is entered. Usually tips are added at the end of a shift so a site may not want to waste the paper. If management feels it is best practice for them to verify the amount of tip entered into the system verses what the guest wrote on the check, this option will allow the reprint of the check with tip entered into the system printed on it.
Calculate employee tip distribution	If you select ***"by check sales %"*** from the drop down list, in the scenario where more than one employee rings sales on a check, the portion of the tip each employee gets will be in direct relation to the portion of total sales that employee rung onto the check. For example, if a bartender rings $20 in liquor and a server rings $80 in food on the same check, where a $20 tip was left, the bartender would get $4 (20% of the tip amount) while the server would get $16 (80% of the tip amount). If you select ***"by check owner"*** the person who started the check (in the case where 2 bartenders are ringing on the same check) or the person who the check was transferred to (in the case where a server takes over a check for a bartender) will receive 100% of the tip.

Net minimum tip sale percentage	The government requires that a tipped employee declare a certain percentage of their sales as tips. This is simply a calculation that will print on the server report showing the percent they should be declaring and whether or not the tips declared by this employee are more or less than what they are required to declare. For example, if an employee rang $1,000.00 in sales and they only had $90.00 in credit card tips, if 10% were filling in this field, the report would reflect that they should declare a minimum of $10.00 as their cash tips. **Keep in mind, the government requires all employees to enter in 100% of all cash tips.**
Require a manager override when declaring tips over	This field allows you to enter the percentage of the sale, where when an employee enters a tip on a check and the tip is greater than the percentage set in this field, it will require a manager override. For example, if an employee has a $100 check and enters a tip of $50.00 or more, a manager will need to approve the action. This cuts down on employees mistakenly entering the wrong amount (the tip was $20.00, not $50.00 and they entered the wrong amount by accident). The employee can then correct the error before it is finalized and requires manager intervention.
Convenience tip guest count	If the number of guests meets or exceeds the number you enter here convenience tip amounts will be shown on the receipt. For this to show up or not show up on the receipt, you must add or remove the corresponding tags from the receipt template (see below and/or **Administration->Template Screen**).
Convenience tip percentage 1	Enter the first suggested tip amount you want to display on customer receipts. For this to show up or not show up on the receipt, you must add or remove the corresponding tags from the receipt template (see below and/or **Administration->Template Screen**).
Convenience tip percentage 2	Enter the second suggested tip amount you want to display on customer receipts. For this to show up or not show up on the receipt, you must add or remove the corresponding tags from the receipt template (see below and/or **Administration->Template Screen**).

Convenience tip percentage 3	Enter the third suggested tip amount you want to display on customer receipts. For this to show up or not show up on the receipt, you must add or remove the corresponding tags from the receipt template (see below and/or **Administration->Template Screen**).

- Convenience Tipping Receipt Template -

In order for convenience tip percents and amounts to display on the receipt, you must change the receipt template. Refer to **Administration->Template Screen** at any time to for more details.

Step 1. Go to **Administration->Template Screen** (from the gray toolbar at the top of BackOffice).

Step 2. Select the "Receipt" template from the list.

Step 3. Insert the following tagging where you want it to appear.

```
<c>
<ifconveniencetipguestcount+>
Convenience Tipping<cr>
<conveniencetippercent1>%=<conveniencetipamount1>
<conveniencetippercent2>%=<conveniencetipamount2>
<conveniencetippercent3>%=<conveniencetipamount3><cr>
<endif>
<cr>
</c>
```

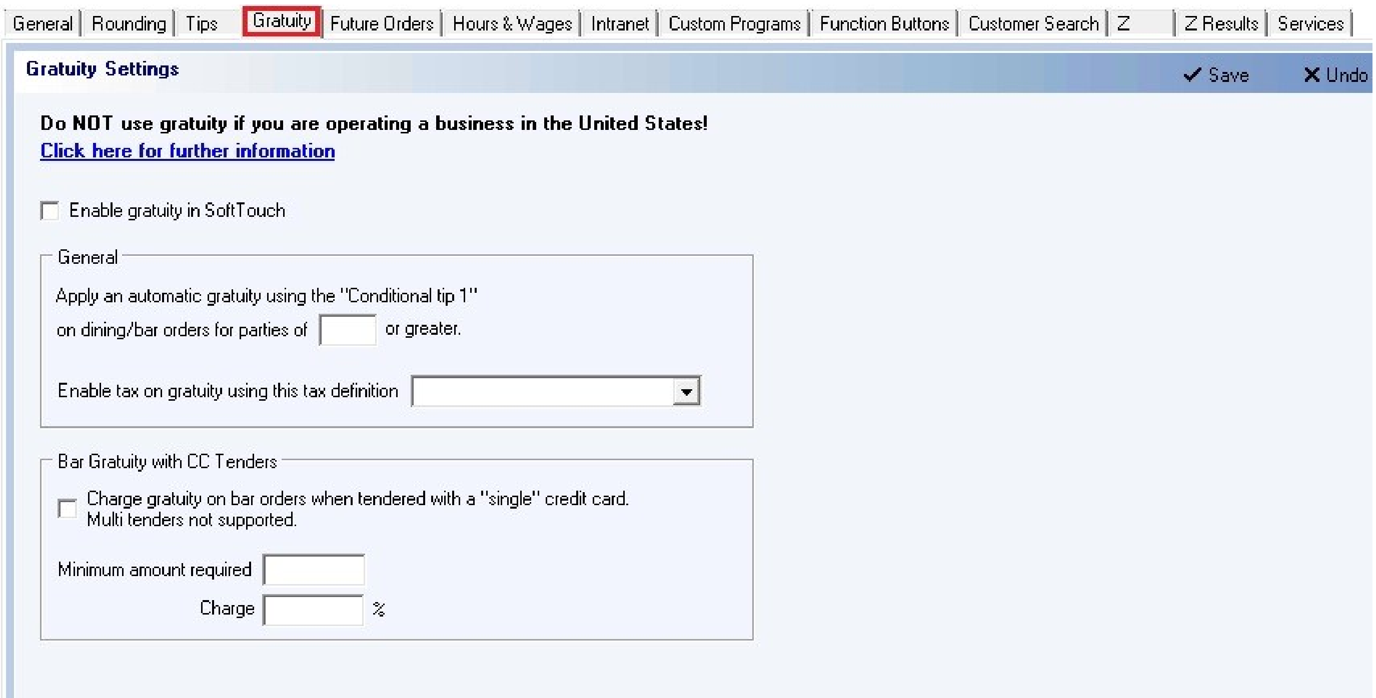
Step 4. If you want convenience tipping to show on all receipts (and not just checks that meet the Convenience tip guest count), remove <ifconveniencetipguestcount+> and <endif>.

Step 5. There are also tags that allow you to show the totals with the convenience tips added. Refer to **Administration->Template Screen**.

6.4 Gratuity Tab

Under the **General** section click on **System**. Select the **Gratuity** Tab.

Gratuity



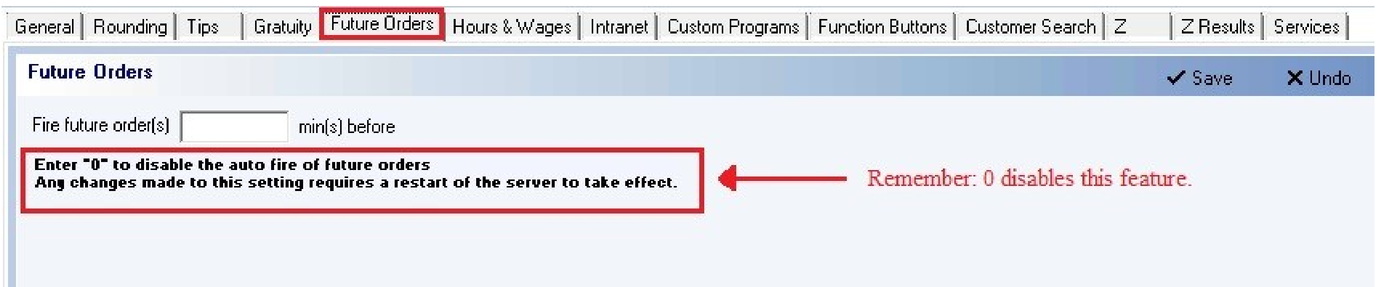
Enable gratuity in SoftTouch	When enabled there will be a button in cashout mode in **SoftTouch** that allows gratuity to be added to the check. If operating in the United States, this should be left disabled.
Apply an automatic gratuity using the "Conditional tip 1" on dining/bar orders for parties of ____ or greater	If enabled, gratuity can automatically be applied to tables with the number of guests (or more) you specify here. The amount charged for gratuity is taken from the value you entered under the **Tips** tab for **Convenience tip percentage 1** (see **System->Tips**).
Enable tax on gratuity using this tax definition	If enabled, gratuity set up to automatically be applied to a check can also be taxed. Use the drop-down to select the appropriate tax. For taxes to show up here, you must create them under **Tax Table**.

Charge gratuity on bar orders when tendered with a "single" credit card	Enabling this option will add gratuity on the check for bar orders. If operating in the United States, this should be left disabled.
Minimum amount required	If enabled, you can set checks over a certain dollar amount to have gratuity applied. If you wish to add it to all checks, put .01 in this field.
Charge	If enabled, specify the percent that will be charged as gratuity.

6.5 Future Orders Tab

Under the **General** section click on **System**. Select the **Future Orders** tab.

Future Orders



Fire future order (s)	Enables you to fire a future order at a set time before the order is due automatically (without the manager having to manually fire it in the morning). ***Note**: Keep in mind that if you enter 0 (zero) it will disable this feature. **Example**: If you have entered 60 minutes in this field, and someone calls and says they want an order for the next day at 6:00 pm, the system will fire the order to the kitchen automatically for you at 5:00 pm that day (which is 60 minutes before it's due). ***Note:** You can change the send time on the fly as you're placing a future order if desired. ***Note**: You must restart the server computer for changes made here to take effect.

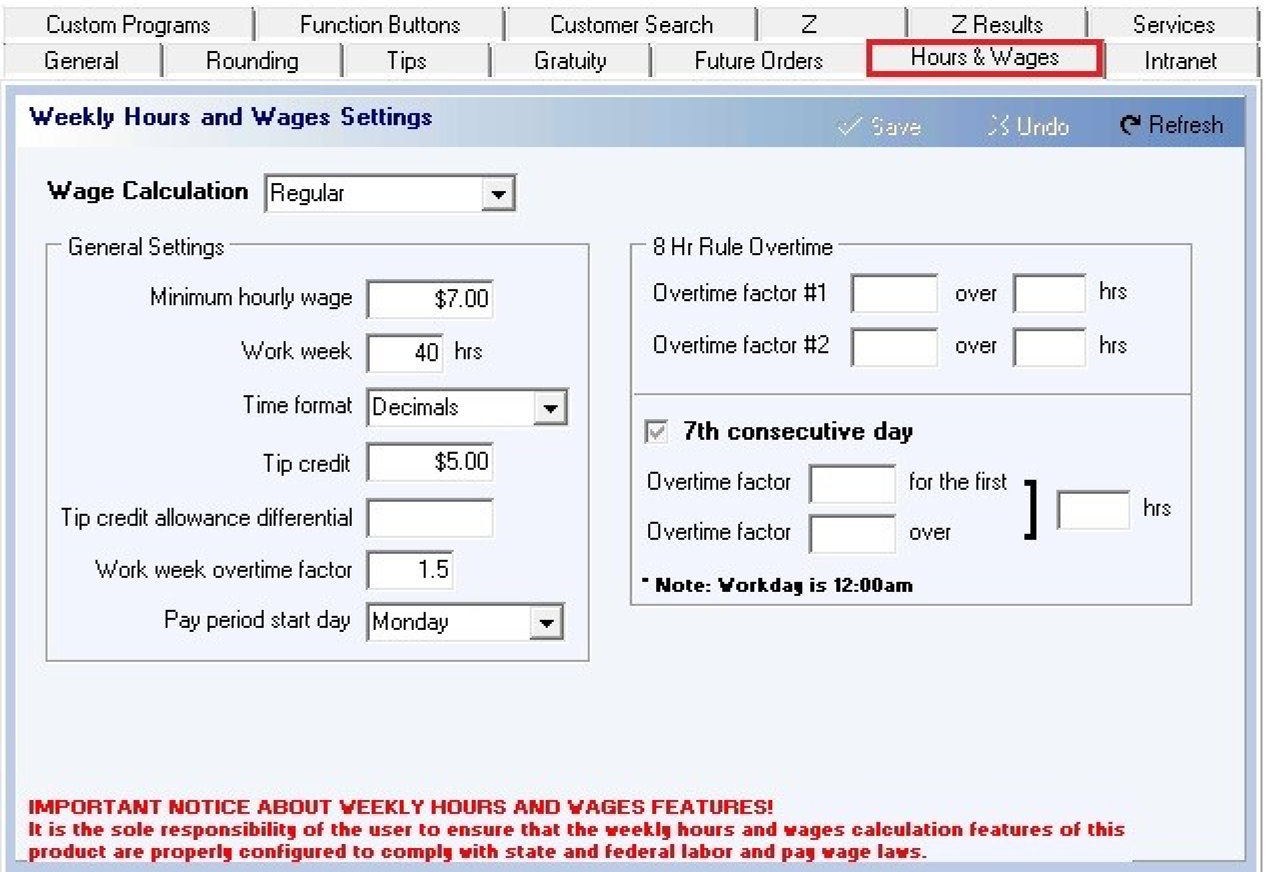
****ANY CHANGES MADE WILL REQUIRE A REBOOT OF THE SERVER FOR THE CHANGES TO TAKE EFFECT.**

6.6 Hours & Wages Tab

Under the **General** section click on **System**. Select the **Hours & Wages** tab.

Hours & Wages

****Warning**: This section is still to be filled out by the accountant. This is just an explanation of what each section is for.**



Wage Calculation	You can choose between Regular and 8 Hour.
Minimum Hourly Wage	Enter the minimum wage for your state here.
Work Week	Enter the number of hours in a standard work week. Employees who surpass this amount of hours in a work week will receive overtime pay.

Time Format	Choose minutes or decimals from the drop-down box. This changes how the hours are displayed on the Hours and Wages report. If an employee has worked 7 hours and 45 minutes and you select the minutes option, their time will show as 7:45. If an employee has worked 7 hours and 45 minutes and you select the decimal option, their time will show as 7.75. NOTE: When running the **Employee Attendance Report** from **BackOffice**, you will get the option to run this report in minutes or decimals. The restaurant owner should be made aware of this. In the event they select a different option than the one set here, the system will appear to produce different numbers when the numbers are actually accurate.
Tip Credit	This field is for tipped employees whose regular salary is below minimum wage. This value is used in calculating overtime wages for tipped employees. Speak with your state labor department or visit the Department of Labor's website for information regarding the proper figure to enter in this field: http://www.dol.gov/whd/state/tipped.htm. ***Note:** You must also put a check mark in the "Apply Tip Credit" box that is found in the Employee area of BackOffice when setting up the job and wage information for a specific employee. Do this for every employee who is paid below minimum wage for their regular salary.
Tip credit allowance differential	Tip Credit Allowance Differential: Some states do not permit a tip credit unless the average wage of the employee (including the employee wage and tips received) exceed the applicable minimum wage by a fixed amount. Enter the fixed amount here. **Example**: If the state requires that the employee average wage must exceed the applicable minimum wage by $0.50 in order to qualify for tip deduction, then enter $0.50 in this field. ***Note**: If a tipped employee's direct wage plus tips does not equal the minimum wage for the time worked, then the employer is typically required to make up the difference. A warning will be displayed on the Hours & Wages report for employees who are making below the minimum wage.
Work week overtime factor	Enter the overtime factor here. **Example:** If employees get time and a half for overtime pay, then enter 1.5. If they get double time, enter 2.0.

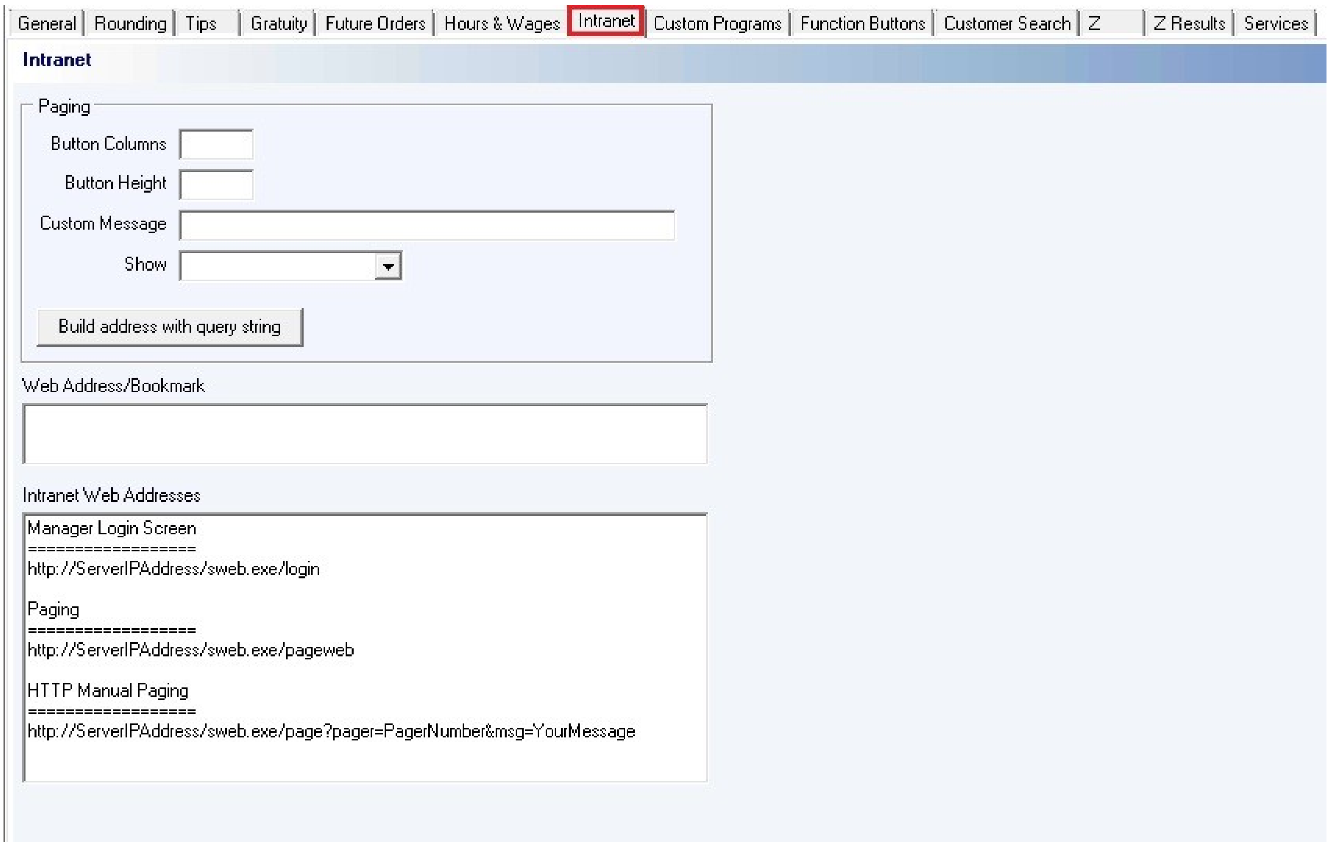
Pay period start day	Select the day of the week that starts your pay period. **Example**: If you select Monday, regular hours and overtime wages are calculated from Monday through Sunday and start again on Monday.
8 Hr Rule Overtime	Use this section if an employee should be paid overtime for working more than a certain number of hours in a day. For "___ over ___ hrs," the first blank field should contain the overtime factor/multiplier and the second blank field should contain the number of hours after which that multiplier begins to take effect. Overtime factor #1 and Overtime factor #2 allow two sets to be entered. **Example:** If employees get time and a half for working over 8 hours and double time for working over 12 hours, enter "1.5 over 8 hrs" for Overtime factor #1 and "2 over 12 hours" for Overtime factor #2. ***Warning**: The above is an example; you must check your state's requirements.
7th consecutive day	Use this section if an employee should be paid overtime for working seven consecutive days. For "___ for the first ___ hrs," the first blank field should contain the overtime factor/multiplier and the second blank should contain the number of hours (after the seventh day) for which the employee should receive that multiplied rate. For "___ over," the blank field should contain a second overtime factor/multiplier that goes into effect after the number of hours you entered previously has already passed. **Example:** If employees get time and a half for the first 8 hours after seven consecutive days and double time for anything past that first 8 hours, enter "1.5 for the first 8 hours" and "2 over." ***Warning**: The above is an example; you must check your state's requirements.

6.7 Intranet Tab

Under the **General** section click on **System**. Select the **Intranet** tab.

Intranet Settings

The Intranet is used in conjunction with the Paging/Alert system. It has the ability to send custom messages to servers' pagers. It can also show you any active or past alerts. The options you see here are for customizing the way the intranet page is formatted.



Button Columns	Choose the number of columns you want to appear. ***Note**: Each button on the intranet page will correspond to an employee’s name, so if you have a large number of employees, then you may want more columns so that they can all fit on screen.
Button Height	Enter a number to define the height of the buttons.
Custom Message	Enter a message that will be pre-filled by default. This should be the most common message you would need to page someone for. (Ex: See me in the office!)

Show	With this drop down box you can choose whether you want all server's who are clocked in to show up, or to show everyone who's clocked in. ***Note**: employees must have a pager assigned to show up.
Build address with query string button	Make all of your settings choices and then click this button to create the Web Address. ***Note**: You can copy and paste this address into a web browser. This creates a web page with a field where you can type a message and a list of employees currently clocked in.
Web Address/Bookmark	If you filled in the above fields and pushed the **Build address with query string** button, the Web Address will appear here.
Intranet Web Addresses	You can use the URLs in this section to display different aspects of the Intranet pages. Be sure to change where it says "ServerIPAddress" to your server's IP address. **Example:** If you server's IP address is 192.168.68.101, then the web address for the Manager Login Screen would be: http://192.168.68.101/sweb.exe/login. **Example of what it would look like:** Manager Login Screen: Main Intranet Login URL. Replace "ServerIPAddress" with your IP. ================== http://ServerIPAddress/sweb.exe/login Paging: Main paging screen. Replace "ServerIPAddress" with your IP. ================== http://ServerIPAddress/sweb.exe/pageweb HTTP Manual Paging: Used for paging someone directly by typing this URL into a browser. Replace "ServerIPAddress" with your IP; replace "PagerNumber" with the pager number of the employee you want to page; and replace "YourMessage" with the text you want to appear on the server's pager. ================== http://ServerIPAddress/sweb.exe/page?pager=PagerNumber&msg=YourMessage

***Note: Instructions on using the Intranet Page in the web browser:**

If you type a message into the field at the top, you can then click on a server's name to send a custom message to their pager. A pager system must be installed and enabled and the server must be assigned a pager for this to work properly.

For Instructions on setting up a pager system go to **Hardware Section->Pager Alerts->Activations**.

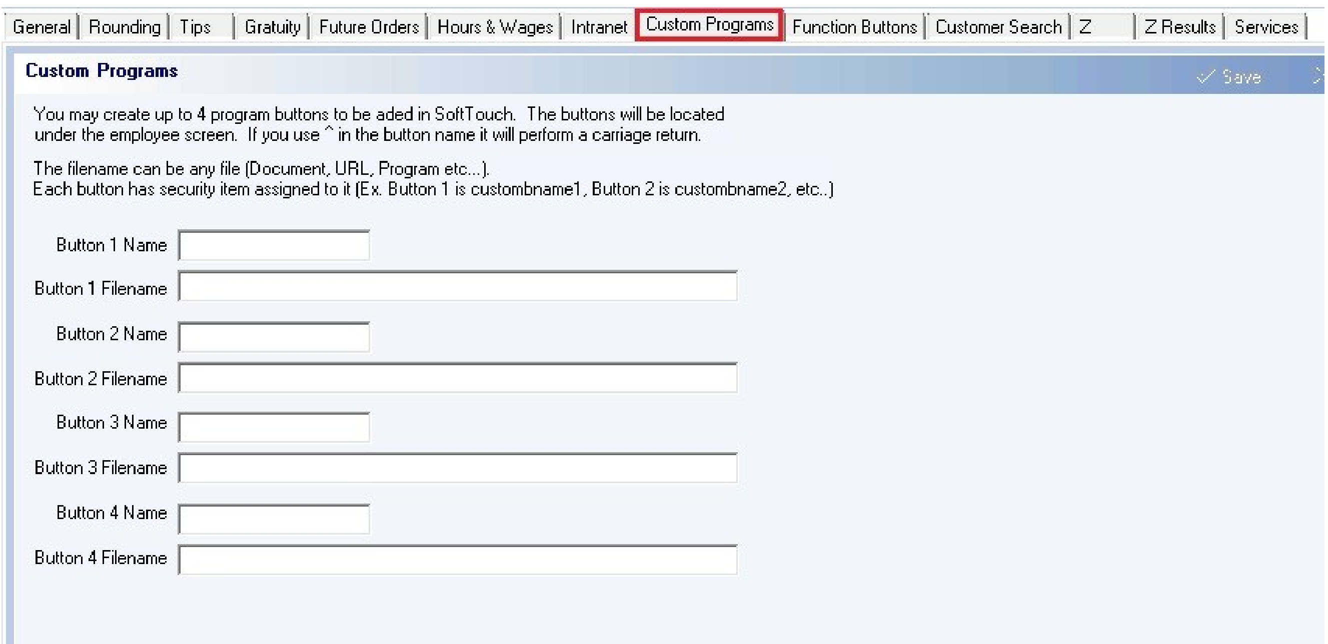
6.8 Custom Programs

Under the **General** section click on **System**. Select the **Custom Programs** tab.

Custom Programs

The Custom Programs feature allows you to add up to 4 buttons in SoftTouch, which can be accessed by going into the Employee section and pressing the Custom Programs icon.

For example, if you want a button that will pull up Notepad, you would put Notepad (or any desired descriptor) in the Button 1 Name field. You would put C:\Windows\notepad.exe in the Button 1 Filename, where C:\Windows is the path that the notepad.exe file resides. Be aware that you will need to give the permission "custombname1" to any security group that wishes to use this button (see **Miscellaneous->Security**).

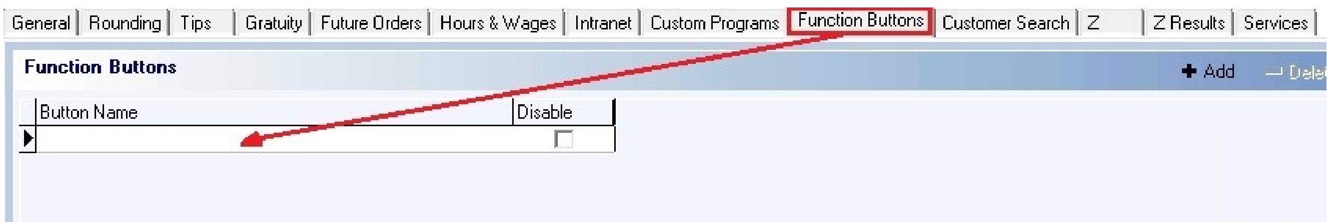


6.9 Function Buttons Tab

Under the **General** section click on **System**. Select the **Function Buttons** tab.

Function Buttons

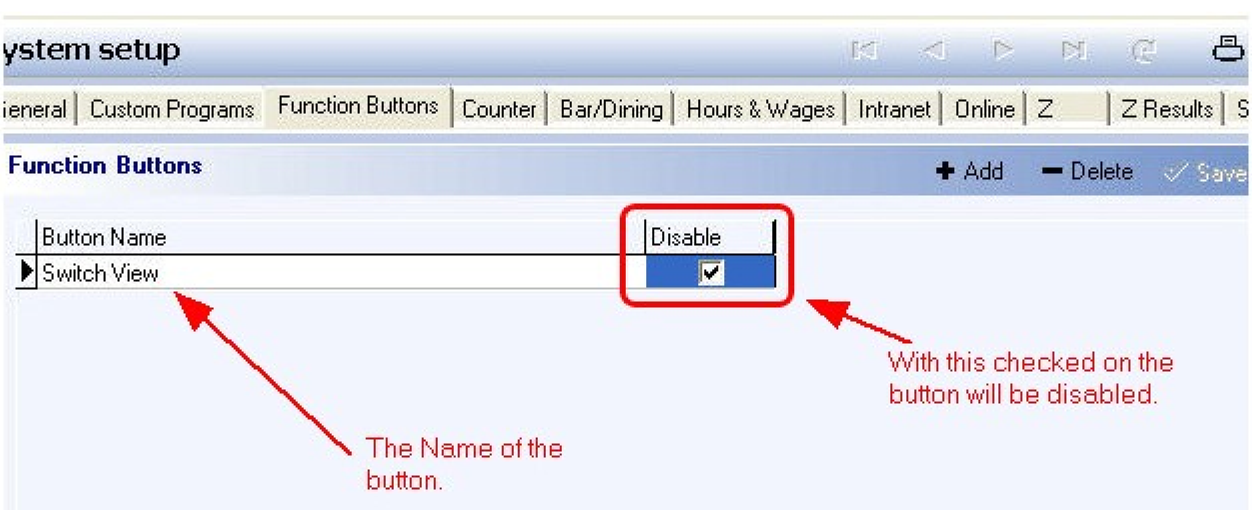
In this section you can disable any buttons from the POS system that will not be used in the restaurant. By adding them here and checking the **Disable** option, the button will not be visible inside of **SoftTouch**. Make sure the name is typed in exactly the same as it is in the POS system and the **Disable** box is checked for this to work.



Example:

Let's say you have no need of the Switch View button in the POS system.

In **BackOffice**, from the **System** applet, under the **Function Buttons** tab, type in the name Switch View and check on the **Disable** option box:



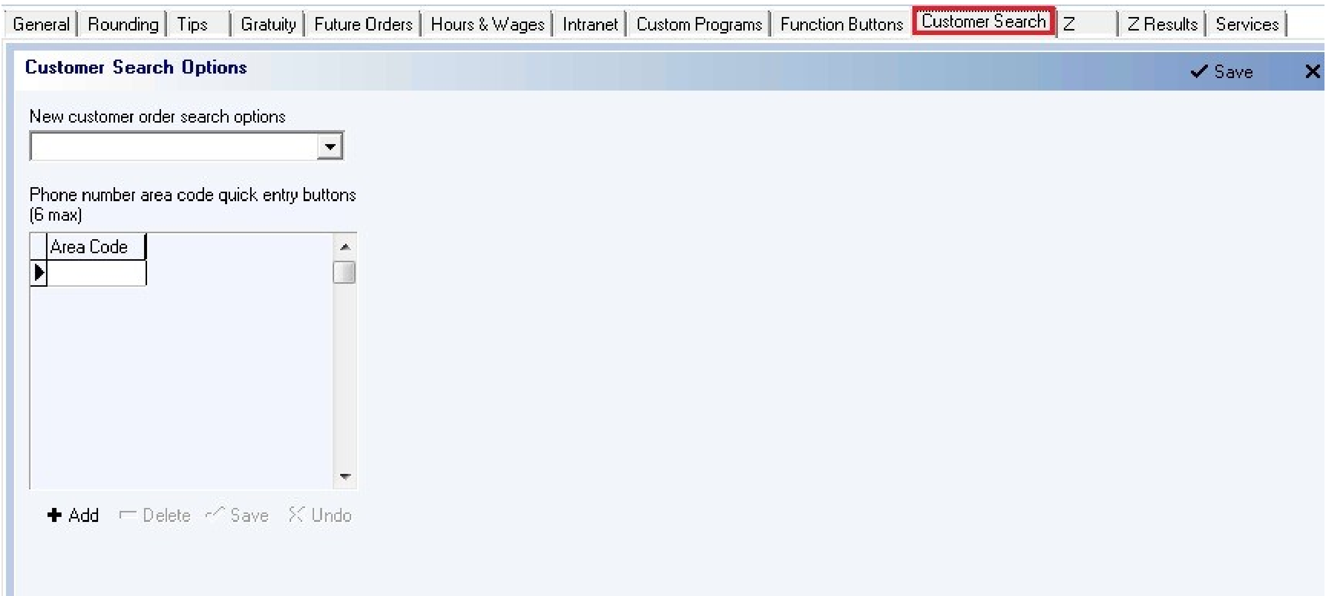
Now when you log into the POS system the Switch View button is no longer visible within the POS system:

If you have the Switch View button in the list and you would like to be able to see it again, uncheck the Disable option or delete the whole entry with the − Delete option. If you would like to add another button to be disabled click the ✚ Add option.

6.10 Customer Search Tab

Under the **General** section click on **System**. Select the **Customer Search** tab.

Customer Search



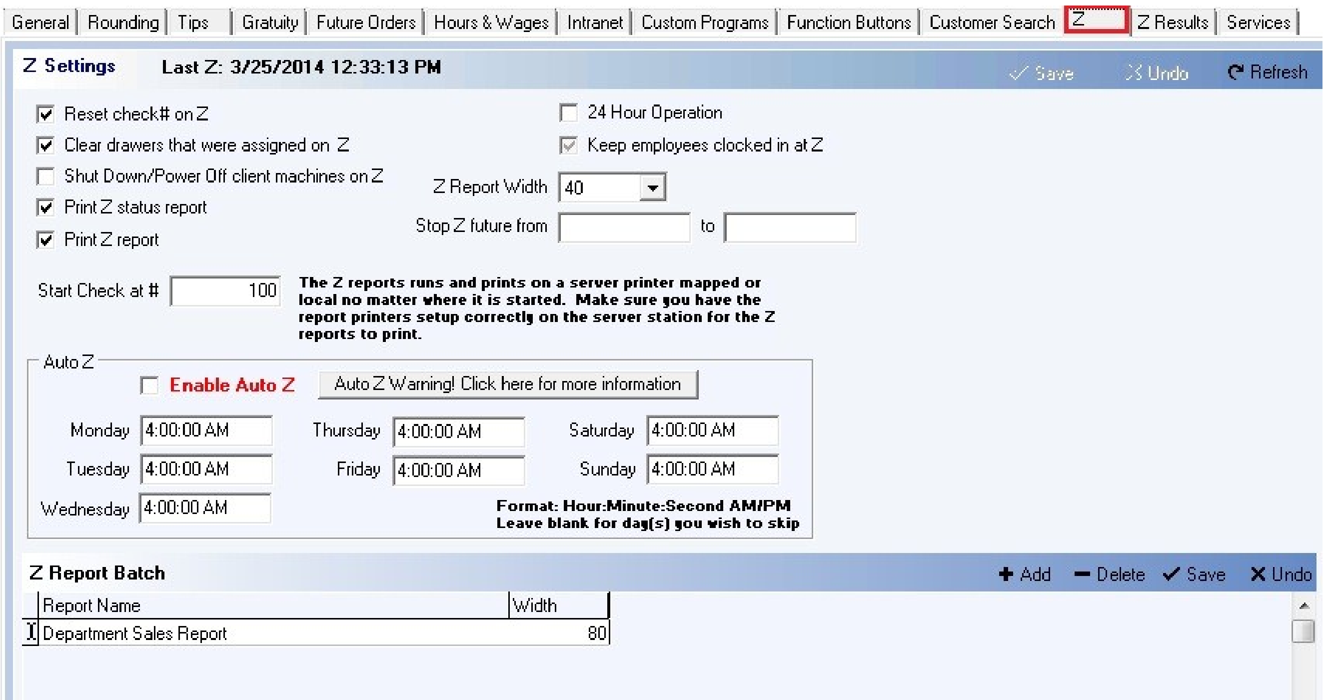
New customer order search options	When you do a delivery or takeout order, the first thing the system does is search for an existing customer by the phone number. When the phone number is not found in the list you then search for the customer by the last name. The following options let you choose in which manner the last name will be handled: **Search Last Name, Confirmation:** Searches by phone number first; if the phone number is not found in the system, you will be prompted to search by last name. If the last name is not found, a confirmation dialog box will come up asking if you are sure you would like to add a new customer with that last name. **Search Last Name, No Confirmation:** Searches by phone number first; if the phone number is not found in the system, you will be prompted to search by last name. If the last name is not found, the system will immediately begin creating a new customer record with that last name. **No Last Name, Confirmation:** Searches by phone number first; if the phone number is not found in the system, you will not be prompted to search for a last name. You will be given a confirmation dialog box asking if you would like to add a new customer to the database. **Example:** A person calls and their number does not show up in the system. The system will ask you if you would like to add the person without searching for the last name first. **No Last Name, No Confirmation:** Searches by phone number; if the phone number is not found in the database, the system will immediately begin creating a new customer record.
Phone number area code quick entry buttons (6 max)	You can put up to six area codes that are common to your region in this section. These will then appear as buttons on the phone number entry dialog in SoftTouch that you can touch for faster phone number entry into the system.

6.11 Z Tab

Under the **General** section click on **System**. Select the **Z** tab.

Z Settings

Here you specify your Z settings and preferences.



Reset check # on Z	If this option is checked, the check numbers will get reset back to the starting check number. (default is 100).
Clear drawers that were assigned on Z	If this option is checked, during the Z operation all the employee assignable drawers will be unassigned. ***Note:** Only the self-assignable drawers will be cleared. The drawers that are in the "assigned" section on the employee will not be unassigned. This will be explained in further detail in the employee section of this manual.
Shut Down/Power Off client machines on Z	If this option is checked, the client machines will be shut down during the Z process. The server computer will **not** be shut down. ****Warning****: Do **not** use this option if you have NetEpay or DialEpay software installed on one of the client machines, because that machine may be shut down before it has a chance to send out the batch.

Print Z status report	If this option is checked, the Z status report will print after the Z procedure. The Z status report will give you information informing you if your back up completed successfully, if the credit cards batched, etc.
Print Z report	If this option is checked, the Z report will print after the Z procedure.
24 Hour Operation	Check this option if your establishment never shuts down and runs 24 hours. If the 24 hour operation is checked, the checks do not get reset, drawers do not get cleared and employees do not get automatically clocked out at Z time. ***Note:** If Z is set to 24 hour operation server's open tips do not get cleared on Z, employees do not get clocked out and drawers as well as the checks numbers do not get reset. If the establishment is **not** set to 24 hour operation, clocked in employees are automatically clocked out on Z (if they have not been scheduled to work past the time of Z), server's open tips get cleared, drawers, and check numbers are reset. ****Warning****: You should not enable Auto Z if you are going to have 24hr operation on.
Keep employees clocked in at Z	Unless this boxed is checked, any employees still clocked in when you Z out will automatically be clocked out. Check this box if you want to keep them clocked in.
Z Report Width	Select the appropriate report width. If you are printing reports on the local receipt printer, select 40. If you are printing reports on a regular office printer, select 80.
Stop Z future from and **Stop Z future to**	This feature is designed to help prevent an accidental Z. If you enter, for example, 10:00 AM for "Stop Z future from" and 5:00 PM for "Stop Z future to" then you will not be able to run the Z between 10 AM and 5 PM if the Operation date will be set into the future. For example, if the Op date is 1-5-10 and the system date on the computer is also 1-5-10, then you will not be able to run the Z between 10 AM and 5 PM because the Op date will be set to 1-6-10, which is in the future.

Start Check at #	You can select the starting check number. The default is 100.
Enable Auto Z	If checked, the system will Z automatically at the specified days and times. ****Warning****: Do not have this checked on if you are going to use the 24hr operation option.
Time Fields listing Monday-Sunday	Enter the times at which you would like the system to Z out in the blank fields next to the days of the week. In the picture above's example the restaurant chose to have the Auto Z run every night at 4 AM. This is a good time because if the restaurant closes say at 2 AM, it gives the Managers time to input data into the system before a Z occurs.

- Z Report Batch -

The Z report batch allows you to tie some additional reports that will get printed along with your Z report.

Step 1. Click the Add button.

Step 2. Under Report Name column, from the drop-down menu select the report you wish to tie to the Z.

Step 3. Under the Width column, specify the report width. If you select 80, the report will print on your 80 column printer.

Step 4. Repeat the above steps if you wish to automatically print more reports when the system performs a Z.

6.12 Z Results Tab

Under the **General** section click on **System**. Select the **Z Results** tab.

Auto Z Results

Allows you to view the last Z results. It is the same as what gets printed during the Z.

6.13 Services Tab

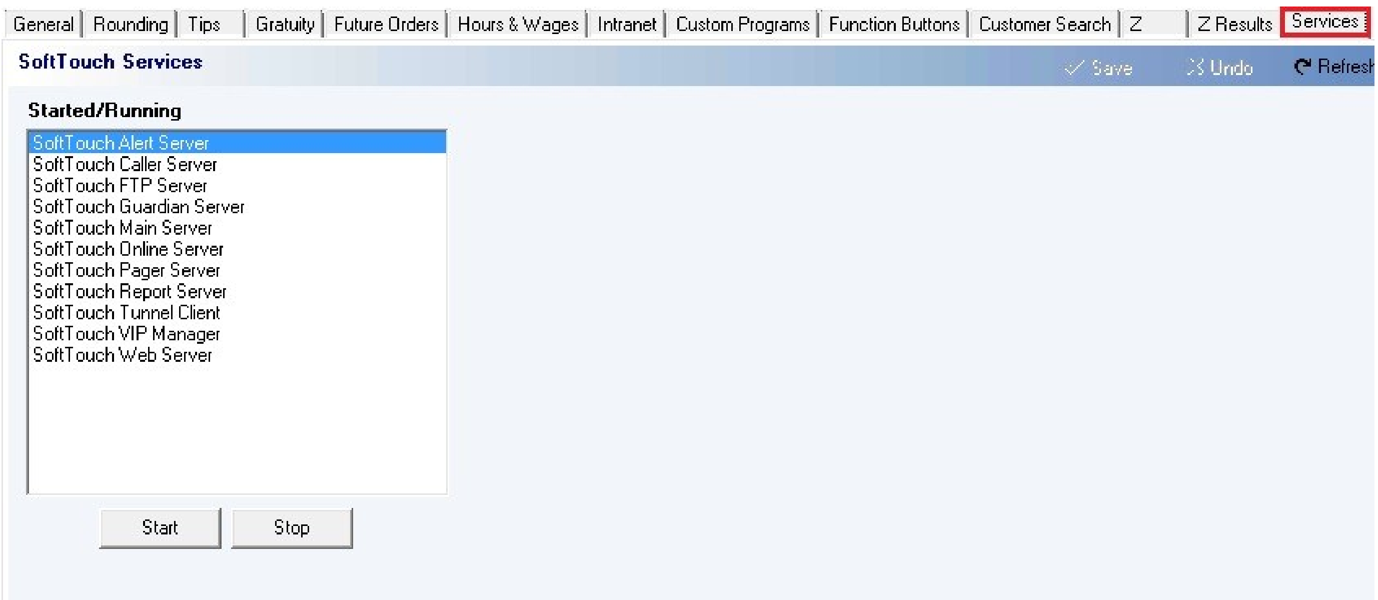
Under the **General** section click on **System**. Select the **Services** tab.

SoftTouch Services

Allows you to stop or start any **SoftTouch** services.

If you need to restart a particular service, say your reports seem to be freezing, you would just highlight the **SoftTouch** Report Server and click stop. As long as the Guardian Server is running, the report server will restart on its own.

***Note:** If you want to stop any of these services without having them restart, you will need to stop the SoftTouch Guardian Server service first and then work on the other services. When finished, restart the SoftTouch Guardian Server service. Starting the SoftTouch Guardian Server service will automatically start the rest of your services as well.



Part VII

Order Functions

Part 7 Order Functions

Under the **General** section click on **Order Functions**.

Order Functions

Order Functions contains the following tabs:

1. Counter

2. Bar/Dining

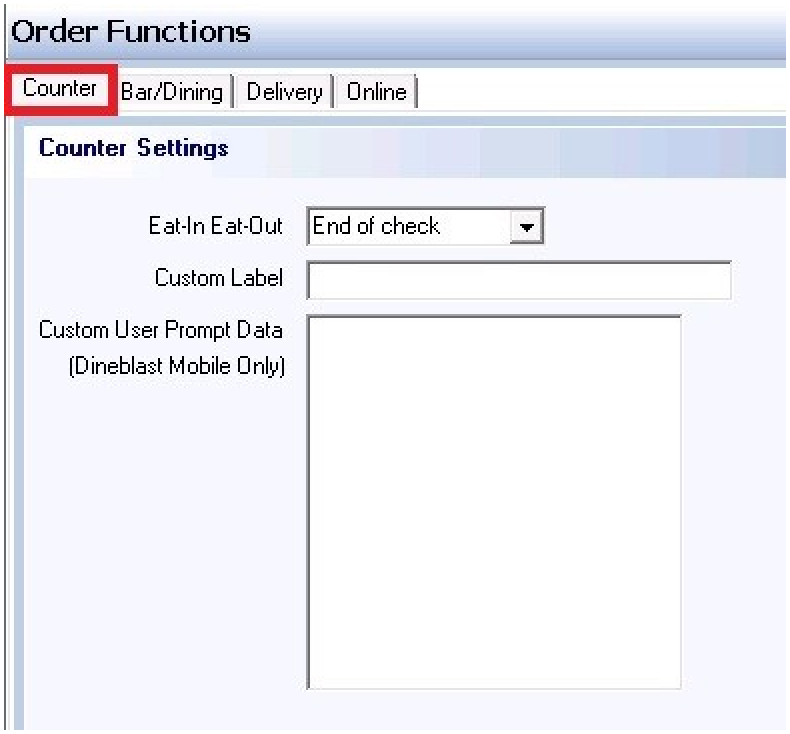
3. Delivery

4. Online

7.1 Counter

Under the **General** section click on **Order Functions**. Select the **Counter** tab.

Counter



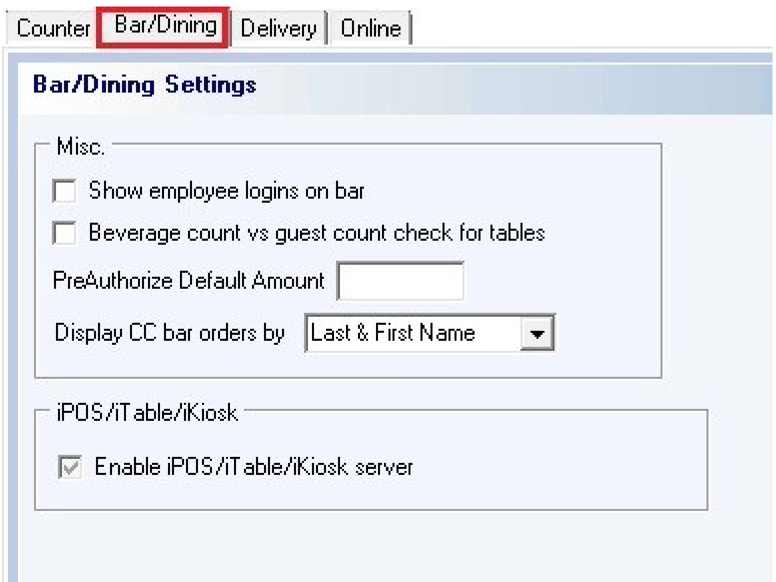
- Counter Settings -

Eat-In Eat-Out	You have the option to ask whether the order will be an eat in or to go order at the Start of check or End of check. You can make your selection from the drop down.
Custom Label	You can have a custom label pop up in counter mode when placing an order.
Custom User Prompt Data	For **SoftTouch** use only.

7.2 Bar/Dining

Under the **General** section click on **Order Functions**. Select the **Bar/Dining** tab.

Bar/Dining



- Misc Bar/Dining Settings -

Show employee logins on bar	With this option selected, all clocked in employees will have a button showing their name on the login's numeric keypad. This allows anyone to press the button and login without the need to swipe an ID card or enter a number. ***NOTE:** While this may afford a quick way to login, you eliminate all security as any employee can ring under any other employee's number. For the greatest speed and security, please look into our RFID solution.
Beverage count vs guest count for tables	With this option selected, an employee will be required to have one or more beverages rung up for each guest. ***NOTE:** If this option bit is used, it is suggested that you program a glass of water at a zero price for those guests who just want water and/or a No Beverage button for guests who are not ordering a beverage with their food.

PreAuthorize Default Amount	SoftTouch gives you the ability to pre-authorize a credit card to ensure that a client's credit card is good before they order and consume the food or beverage. You can set this for a small amount like $5.00 just to verify the card, or you can set it for a larger amount if the tabs at this restaurant or bar are for large amounts.
Display CC bar orders by	You can select to display CC bar orders by Last & First Name or by First & Last Name.

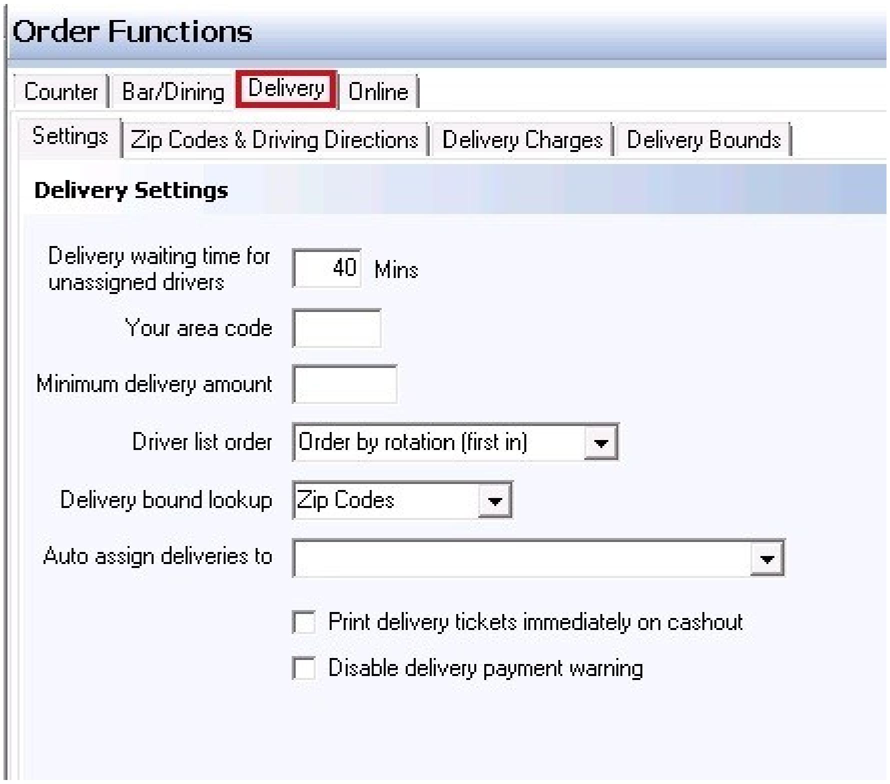
- iPOS/iTable/iKiosk Settings -

Enable iPOS/iTable/ iKiosk server	If you are using one or more of these devices, you must check this box.

7.3 Delivery

Under the **General** section click on **Order Functions**. Select the **Delivery** tab.

Delivery



Delivery contains the following tabs:

1. Settings

2. Zip Codes & Driving Directions

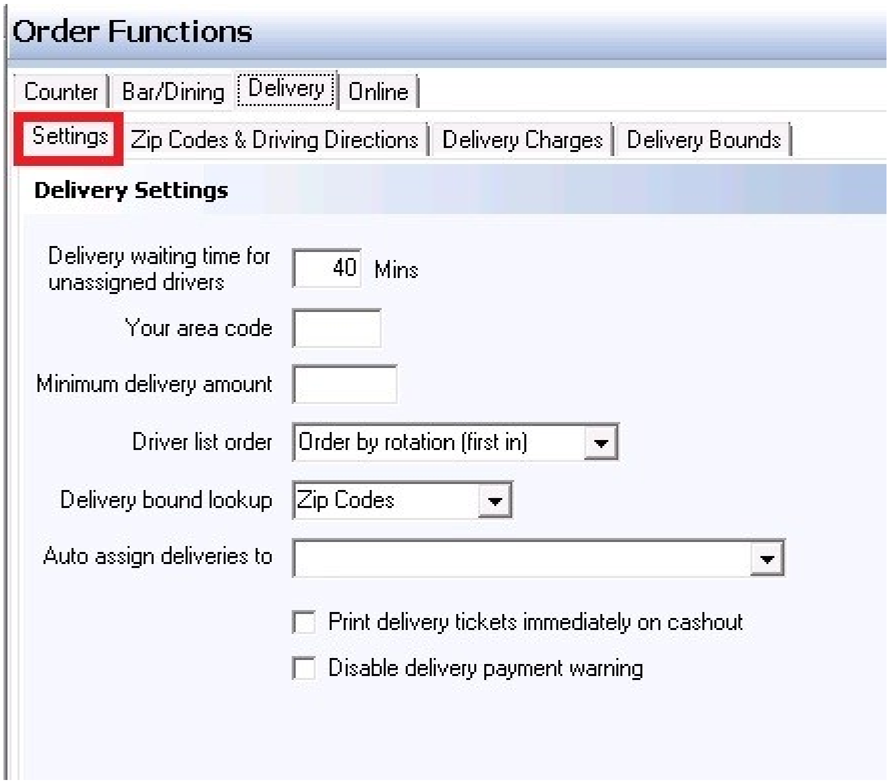
3. Delivery Charges

4. Delivery Bounds

7.3.1 Settings

Under the **General** section click on **Order Functions**. Select the **Delivery** tab and then the **Settings** tab.

Settings



- Delivery Settings -

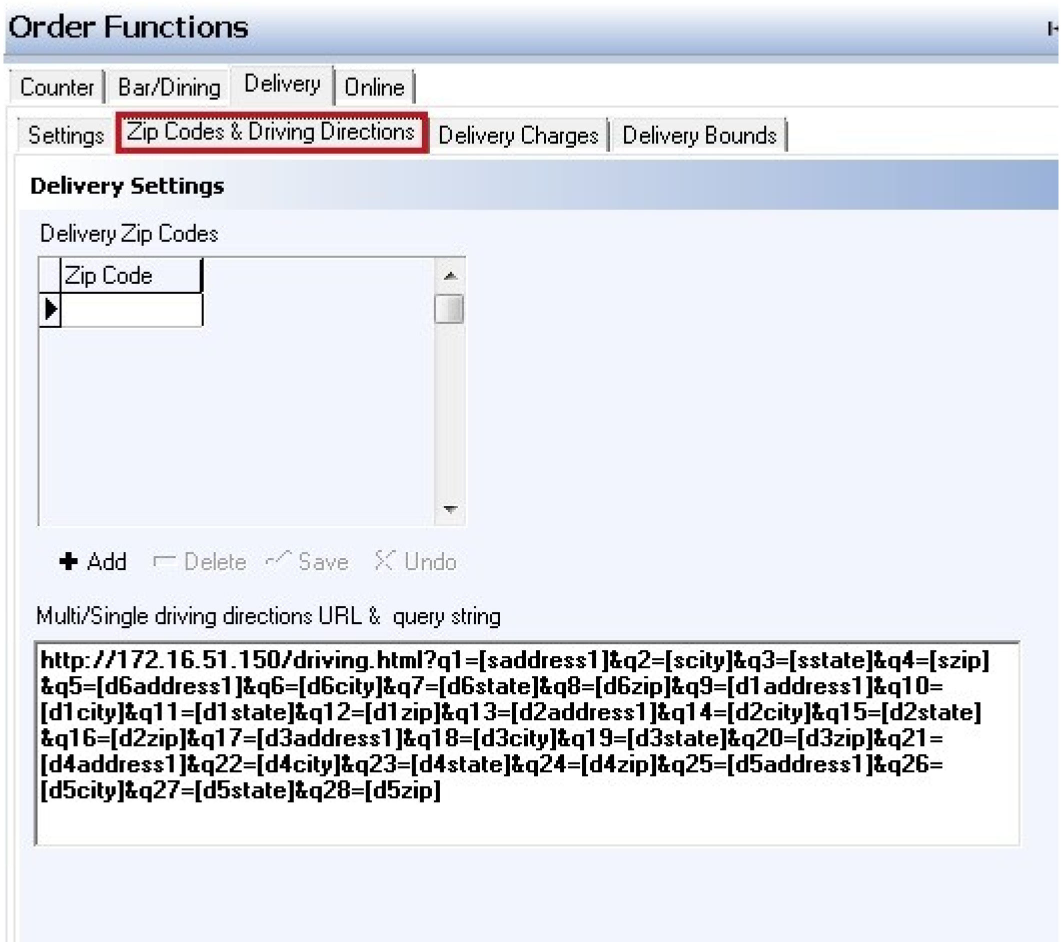
Delivery waiting time for unassigned drivers	If a delivery order has been placed and is not assigned to a driver in the amount of time specified in this field, the order will turn red, indicating that it should be assigned soon.
Your area code	Enter the area code of the restaurant in this field.
Minimum delivery amount	You can set a minimum order amount that must be satisfied before a delivery is allowed. If the order is not as much as the amount entered in this field, a warning will appear when the employee tries to send or accept payment. This warning indicates that the minimum was not met and gives the option to add additional items to build the check up to the proper amount or allow the sale anyway (in case the store is slow and they wish to deliver in spite of the minimum not being met).
Driver list order	You can have the driver list in delivery sort the drivers by user ID or by rotation (first in). Make your selection from the drop down.

Delivery bound look up	You can establish the area that the restaurant will deliver to by using zip codes or longitude/latitude. Although longitude/latitude will give you the most control over the delivery area, you will have to use google maps to plot each point, returning to the starting point to close the delivery area circumference.
Auto assign deliveries to	You can assign all deliveries to one person from the drop-down list here; otherwise deliveries can be assigned manually as orders are placed.
Print delivery tickets immediately on cash out	You have the option to print the check when the order taker places the order and cashes out the check or when the order is assigned to the driver. If you wish to print the check when the order taker places the order and cashes out the check, select this option.
Disable delivery payment warning	If you hit send when completing a delivery order, payment is not collected and it assumes that you will be collecting cash when you deliver the order. If you actually take cash (the customer pays cash in person for an order that should be delivered that night) you get a warning. If you wish to disable this warning, check this box.

7.3.2 Zip Code and Driving Directions

Under the **General** section click on **Order Functions**. Select the **Delivery** tab. Now select the **Zip Codes & Driving Directions** tab.

Delivery Zip Codes & Driving Directions

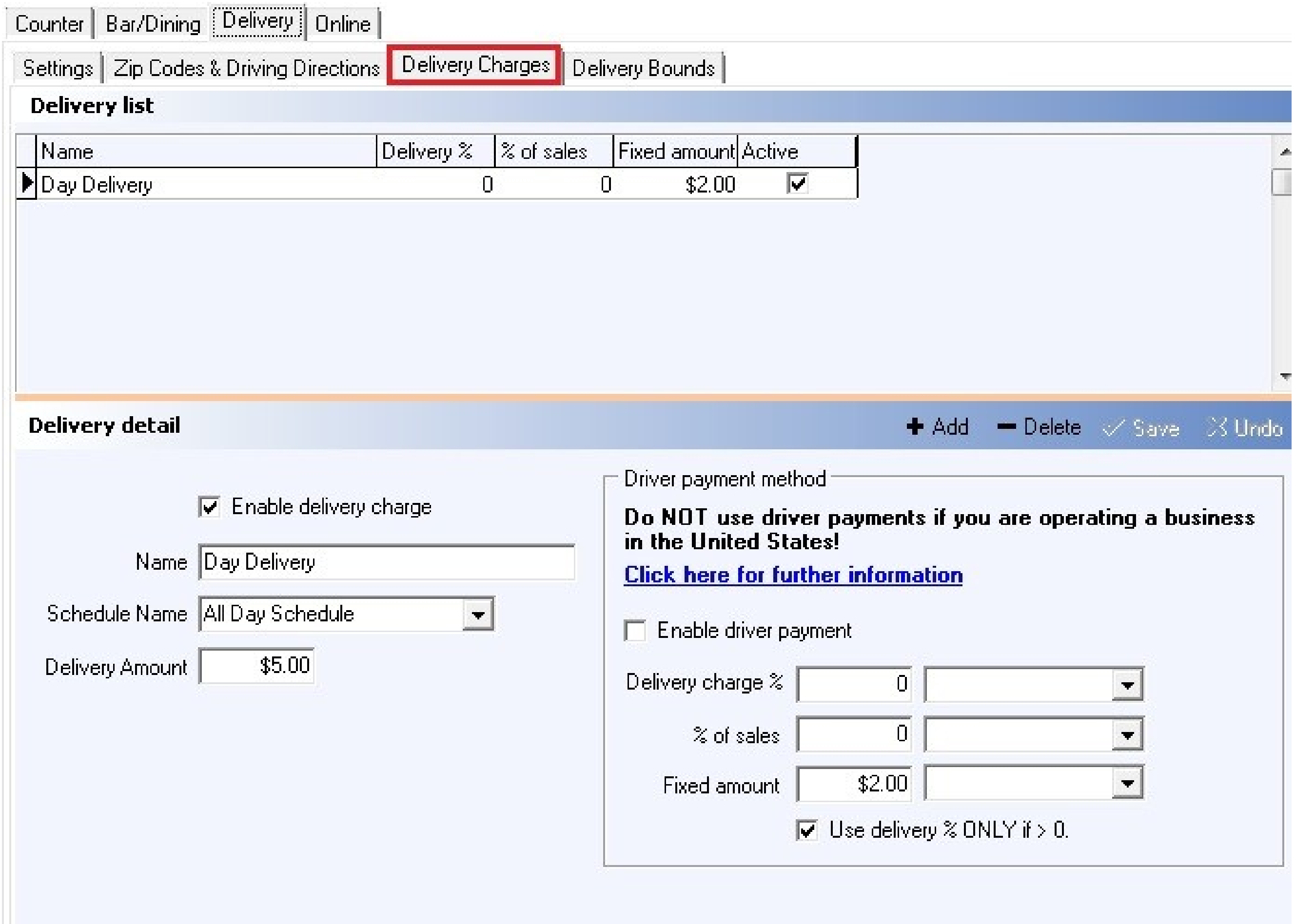


Enter all zip codes that you deliver to by pressing the Add button and entering in the zip code. After adding a zip code, press the Save button. Repeat procedure above for any additional zip codes.

7.3.3 Delivery Charges

Under the **General** section click on **Order Functions**. Select the **Delivery** tab. Now select the **Delivery Charges** tab.

Delivery Charges



- Delivery Charges Settings-

The top part of the screen displays all delivery charges configured. Press the **Add** button to add additional delivery charges. The bottom part of the screen is where you configure a new delivery charge.

Name	You can assign any name you wish for the delivery charge in this field.

Schedule Name	You can put a delivery charge on a schedule. For example, if you charge a $2.00 delivery charge during the day and a $3.00 delivery charge at night, you would set those schedules in the schedule applet of the General section in BackOffice (see System Schedules Tab) and then select the schedule that applies from this drop down list. If you only use one schedule at all times, you would select the All Day schedule from the drop down list.
Delivery amount	Enter the amount of the delivery charge in this field.
Enable Driver Payment	If you wish to pay the driver a percentage of the delivery charge, this box must be checked. If operating in the United States, this should be left disabled.
Delivery charge %	If you wish to pay the driver a percentage of the delivery charge, enter the percent of the delivery charge they will receive in this field. (If the delivery charge is $2.00 and the driver should get $1.00 of that, enter 50 in the % field.) From the drop down to the right of the percentage field you will need to select expense or wage. Select expense if the driver gets paid daily and select wage if the percent of the delivery charge that is given to the driver will be added to his hourly wage and paid in his pay check.
% of sales	If you wish to pay the driver a percentage of the sale amount rather than a percentage of the delivery charge, enter the percentage here. From the drop down to the right of the percentage field you will need to select expense or wage. Select expense if the driver gets paid daily and select wage if the percent of the delivery charge that is given to the driver will be added to his hourly wage and paid in his pay check.
Fixed amount	If you wish to pay your driver a fixed amount per delivery, enter the amount here. From the drop down to the right of the percentage field you will need to select expense or wage. Select expense if the driver gets paid daily and select wage if the percent of the delivery charge that is given to the driver will be added to his hourly wage and paid in his pay check.

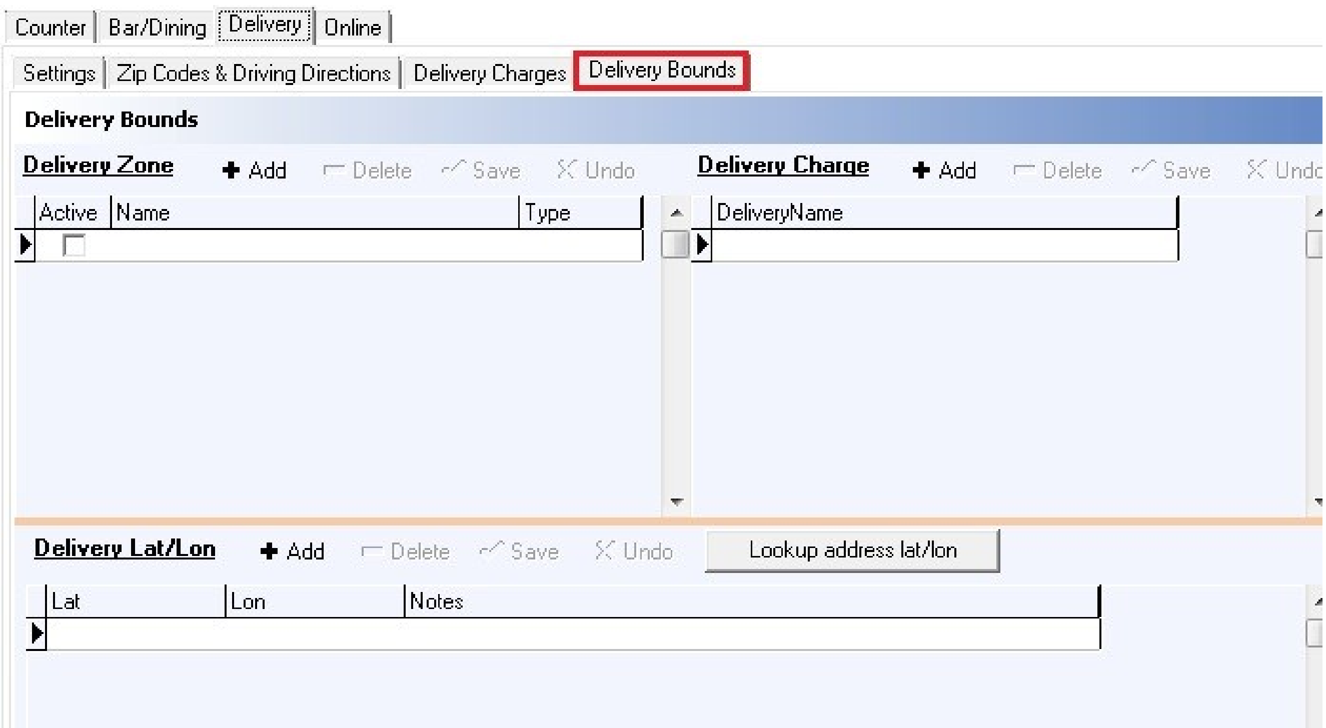
Use delivery % ONLY if > 0	

7.3.4 Delivery Bounds

Under the **General** section click on **Order Functions**. Select the **Delivery** tab. Now select the **Delivery Bounds** tab.

Delivery Bounds

If you use different delivery charges depending on the location to which you're delivering, or if you want to establish different zones that you do or do not deliver to, create different location boundaries and attach Delivery Charges to them here.



- Delivery Zone-

Use the **Add** button and click in the blank space below **Name** to type in a name for this delivery zone. You can create as many as needed.

Under **Type**, use the drop-down to select either IN or OUT. **IN** is a zone that you deliver to. **OUT** is a zone that you do not deliver to.

You can deactivate this zone by removing the check from Active.

***Note:** Whichever zone here has the arrow next to it is selected and will be edited when you make adjustments under **Delivery Charge** and **Delivery Lat/Lon**.

- Delivery Charge-

Use the **Add** button and click on the blank space under **DeliveryName** to activate the drop-down. From the drop-down, select the delivery charge you want to add to the selected delivery zone. You can add as many as needed.

You can set up additional delivery charges under the **Delivery Charges** tab.

***Note:** If you have set a Delivery Zone's **Type** to **OUT**, you do not need to attach any delivery charge.

- Delivery Lat/Lon-

This is where you define the actual perimeter/boundaries of the selected delivery zone.

Use the **Add** button and click in the blank under **Lat** to type in the latitude and click in the blank under **Lon** to type in the longitude. The zone will be defined by connecting the latitude/longitude points you have supplied (it includes everything within that perimeter). You must add a minimum of three latitude/longitude coordinates but can add as many as you need.

***Note:** If there is an area within this zone that you do not deliver to, set this area up as a separate delivery zone and set the **Type** to **OUT**.

The **Lookup address lat/lon** button brings up all addresses from your customer list (see **Customers->Customer List Tab**) and allows you to search within it for latitude/longitude coordinates.

You can also use Google Maps to determine the latitude and longitude of an address or physical location on a map. Go to https://support.google.com/maps/answer/18539?hl=en for more information on how this is done.

7.4 Online

Under the **General** section click on **Order Functions**. Select the **Online** tab.

Online

The online area is used by SoftTouch personnel only. If you have a customer interested in online ordering and how it can dramatically increase sales, please contact SoftTouch and they will expedite this service for your customer.

Part VIII

Employees

Part 8 Employees

Under the **General** section click on **Employees**.

Employees

Employee Setup contains the following settings:

1. Employee

2. Security

3. Finger Print

4. Job

5. Wage

6. Address

7. Phone Numbers

8. Tills/Pockets

9. Scheduling

10. Tracking

10. Alerts/Emails/SMS

11. Notes

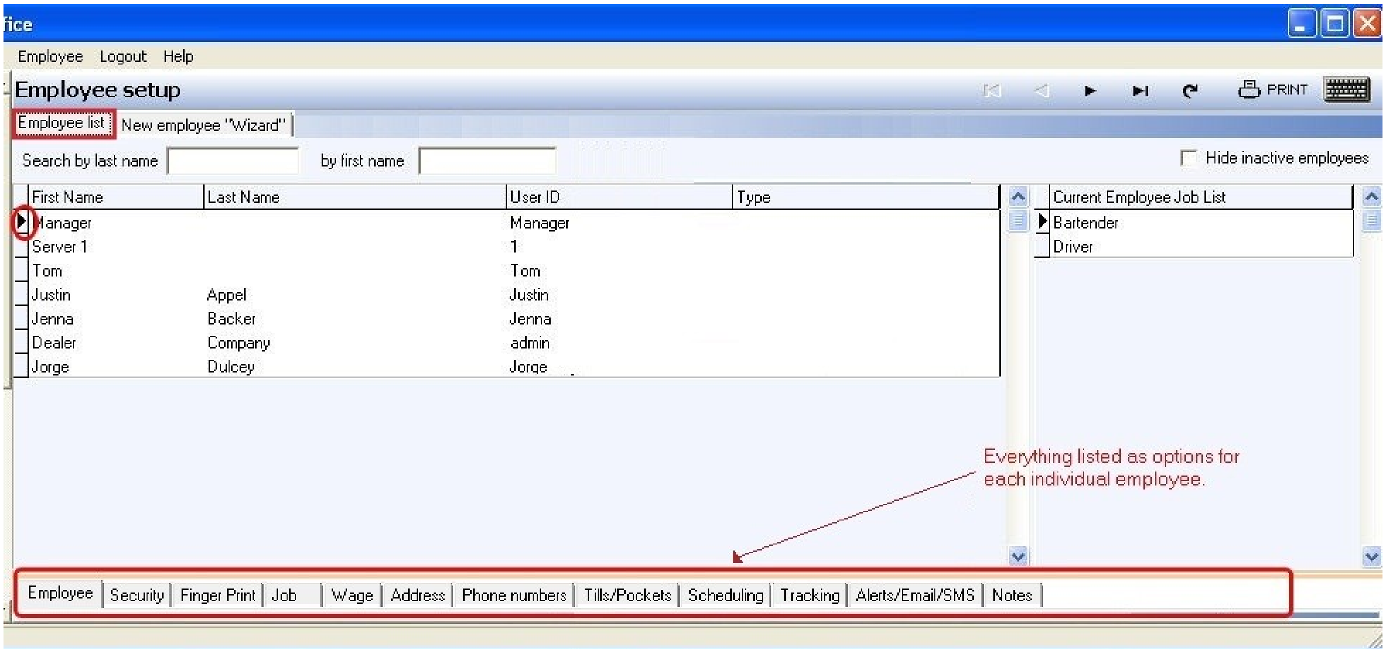
8.1 Employee List

Under the **General** section click on **Employees** and then the **Employee list** tab.

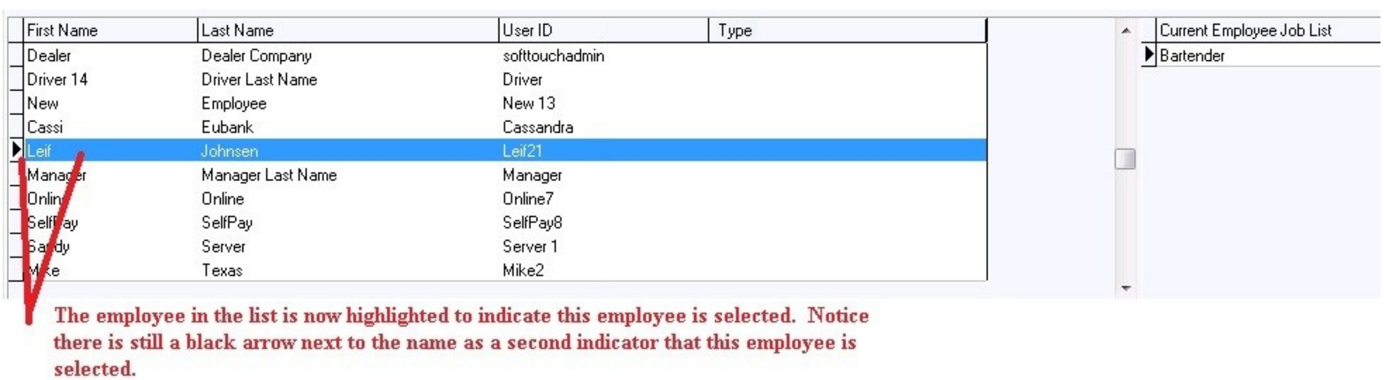
Employee List

All the employees that you add show up under the **Employee list** part of the screen.

By default, anything with just a black arrow next to it is what the highlighted employee is. Changes made will be made to this employee.

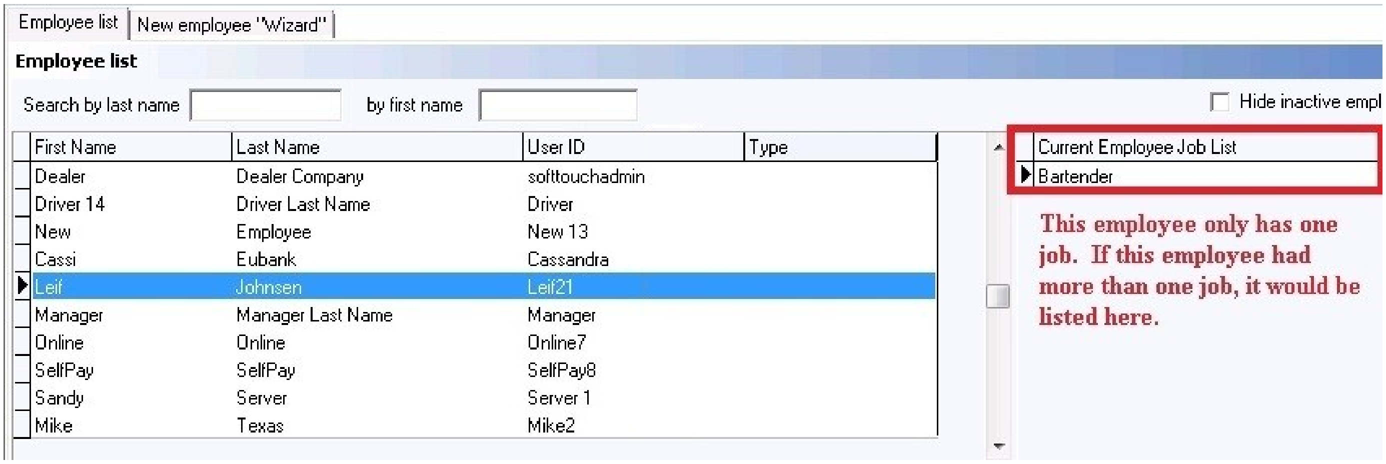


If you need to actually select a name, scroll through the list and click on the Employee you would like to edit; the employee will then be highlighted.



- Current Employee Job List -

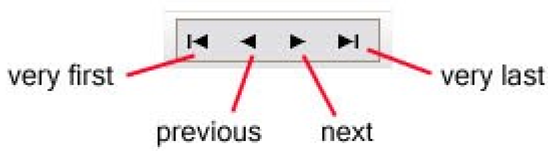
To the right of the employee list is the **Current Employee Job List**. This section lists the jobs assigned to the employee you have highlighted. Sometimes you will edit details of one specific job of the selected employee, so you will want to make sure to click on that specific job to select it. When a job is selected, it will have an arrow next to it and possibly be highlighted.



- Search for an Employee -

If your employee list has become too long to scroll through, you may search for an employee by their last or first name in the search fields.

 **Tip:** Another way to scroll through the employee list one by one if you are in the tabs section is by using the buttons in the top right corner of the screen near the X sign for exiting **SoftTouch BackOffice**. The name of the employee who is currently selected will be displayed on the top left.



- Hide All Inactive Employees -

If you have a long list of employees and do not want to see the employees that are no longer active check on the box **Hide inactive employees**.

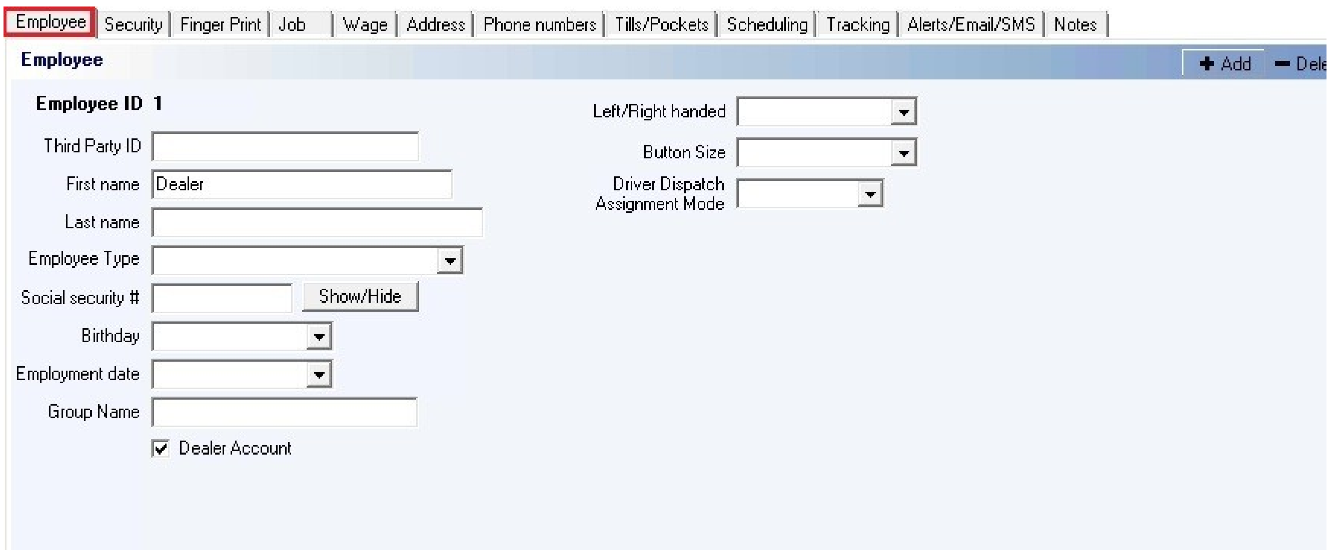
If you've already checked on the box to hide inactive employees and then mark another employee as inactive, pushing the refresh button  will hide that employee from **Employee list** immediately.

The option to activate or deactivate an employee is found under the **Security Tab**.

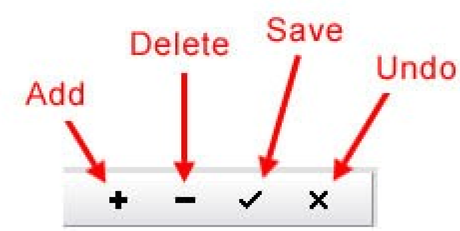
8.1.1 Employee Tab

Under the **General** section click on **Employees** and then the **Employee list** tab. Select the **Employee** tab.

Employee Tab



- Add an Employee -



Click the 

button and fill out the employee information.

- Add an Employee Options -

Third Party ID	If you need to create a different ID for this employee for any reason for your own use outside of SoftTouch, such as for exporting to payroll, it can be entered here.
First Name and Last Name	The First and Last Name of the employee must be filled out. ***Note:** This section is not optional to fill out.

Employee Type	You can leave this field blank or choose from the following options: **SoftTouch Employee**: When set to this, the employee will use the POS system for **SoftTouch**. **iTable Employee**: This is used in conjunction with the iTable solution. When a customer places an order it will show up in **SoftTouch** as the iTable employee placing the order. **Internet Employee**: This is used in conjunction with the internet option for placing an order for delivery / pick up. When a customer places an order it will show up in **SoftTouch** as the internet employee placing the order. **Self-Pay Employee**: This option would be used in conjunction with the Self-Pay machine where a customer cashes themselves out. When a customer cashes themselves out it will show up in **SoftTouch** as a Self-Pay Employee cashing out. **Dineblast Mobile Employee**:This is used in conjunction with Dineblast Mobile. ***Note**: This option is not available yet. **iKiosk Employee**:This is used in conjunction with the iKiosk solution. When a customer places an order it will show up in **SoftTouch** as the iKiosk employee placing the order. ***Note:** If you leave this field blank the default selection is a SoftTouch employee. This section is optional to fill out.
Social Security #	Enter your Employee's social security number here. You can choose to show or hide this information by clicking the **Show/Hide** button. ***Note:** The social security number will be displayed on the top of the Hours & Wages report encrypted and on the Employee Attendance Report in full. This section is optional to fill out.
Birthday	You can add the Employee's birthday information to this section. ***Note:** This section is optional to fill out.
Employment Date	You can input when the employee started at the restaurant. ***Note:** This section is optional to fill out.

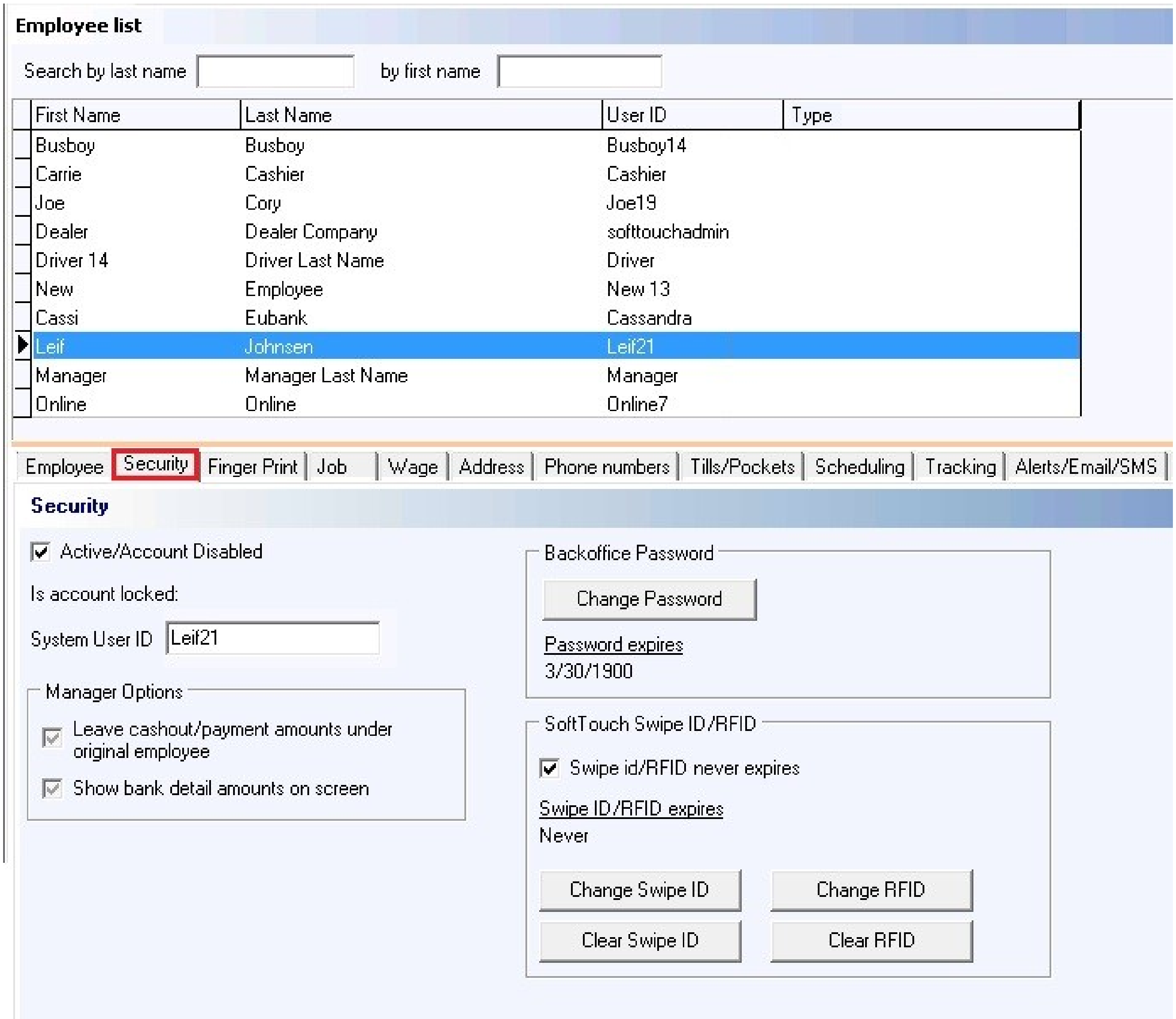
Group Name	This is where you can specify a group name. When you run the Hours and Wages report, you can also specify a group name in the parameters of the report so that only the people who have the same group name will show up on the report. **Example:** If you enter "server" here, you can then enter "server" in the hours and wages report to see only people who have "server" in the group name field.
Dealer Account	If you check this option it gives the Employee access to the system as if they are a Dealer. ****Warning:** The Dealer (and maybe the owner) should be the only ones with the Dealer access to the system. Any changes you make to a dealer account will bring up a prompt asking if it is okay to change the account information.
Left/Right Handed	You can change the side of the screen where you want the check to appear when ringing up orders by choosing from the Left/Right handed drop down list.
Button Size	You can choose if you want to display small or large buttons by making a selection from the Button Size drop down list.
Driver Dispatch Assignment Mode	Advanced**:** Gives the user the ability to assign other drivers to the delivery orders as well as themselves. Basic**:** Gives the user the ability to assign orders to themselves. ***Note:** If this area is left blank the person will be assigned the basic functions of the driver dispatch assignment mode.

Once you have entered the employee information, click the ✔ Save button.

8.1.2 Security Tab

Under the **General** section click on **Employees**. Select the **Security** tab.

Security



Step 1. Make sure the Active/Account Disabled box is checked on for an active employee.

> ***Note**: If the account is inactive, when you check on the Hide inactive employees box, the Employee's account will be hidden.

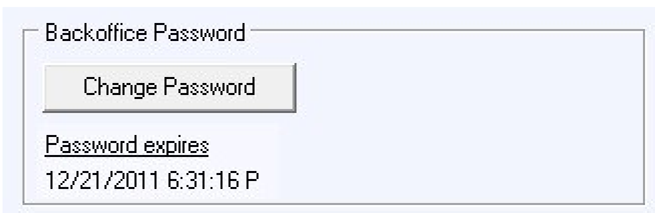
Step 2. Specify a System User ID for the employee.

> ***Note**: The **User ID** of an employee you specify here shows up on the guest checks. It is advisable to have a name placed within this section. This is also the **User ID** that is used when accessing **BackOffice**. If you do not want this employee to have access to **BackOffice**, do not use the **Change Password** button under the **BackOffice** section of this screen.

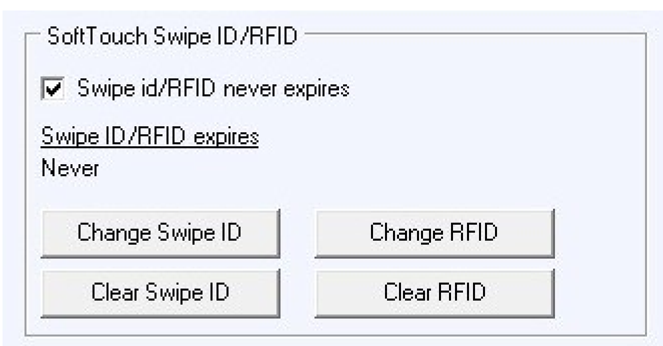
Step 3. Set a password for this Employee only if they should have access to **BackOffice**. Click on Change Password under the **BackOffice** section. A box such as below will pop up. Enter the employee's password in the box and click okay. The password must be at least 6 characters and one number.

> ***Note**: Remember to read the section in the box about Swipe Cards.

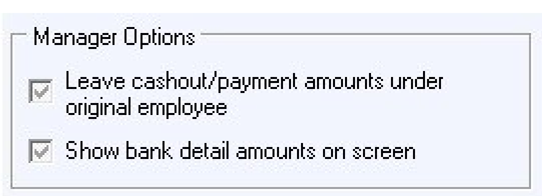
Step 4. The password will expire after 90 days. You will know when your password will expire by checking the Password Expires section.



Step 5. The **SoftTouch Swipe ID/RFID** section is where you will you assign the number or card the employees will use when ringing up orders, as well as additional **SoftTouch** options.



Step 6. Additional **SoftTouch** options can be adjusted in the **Manager Options** section.



- Security Option Explanations -

Swipe id/RFID never expires	If the box is checked, your swipe ID or RFID will not expire after 90 days.

Leave cashout/payment amounts under original employee	This option should only be enabled for managers. Here is why: Let's say the server needs a manager's help cashing out their order. There are two things to remember here: 1. When a server starts a check he/she is the owner of that check and is therefore responsible for the money 2. If the manager cashes out that check, they will have to physically hand over the money to the person who started the check because it will be reported under that employee's server report. So if this option is **not** checked, the cash-out amount will go under the manager's ID and not the server's ID. When a manager helps a server cash out their check, you want the server to still be responsible for the money and not the manager. Therefore, make sure that manager's always has the "Leave cash-out money under original employee" option checked. ***Note**: If a manager started the order and cashed out the order, the cashout amount will go under manager's ID even if this option is checked. That's fine, because the manager is the owner of that check and the manager cashed it out, so he is the one responsible for the money.
Show bank detail amounts on screen	This option lets an employee see the amount of money in each bank that displays in the Tills, Pockets & Store Management area of the Manager Screen in **SoftTouch**.
Change Swipe ID	Press this button, then enter the desired employee number or swipe an employee ID card if you are using cards.
Change RFID	***Note**: This must be done from a computer that has an RFID transmission box installed on it. Press this button, then wave the RFID bracelet over the RFID transmission box.
Clear Swipe ID	Press this button to remove this employee's swipe ID.
Clear RFID	Press this button to remove this employee's RFID.

8.1.3 Finger Print Tab

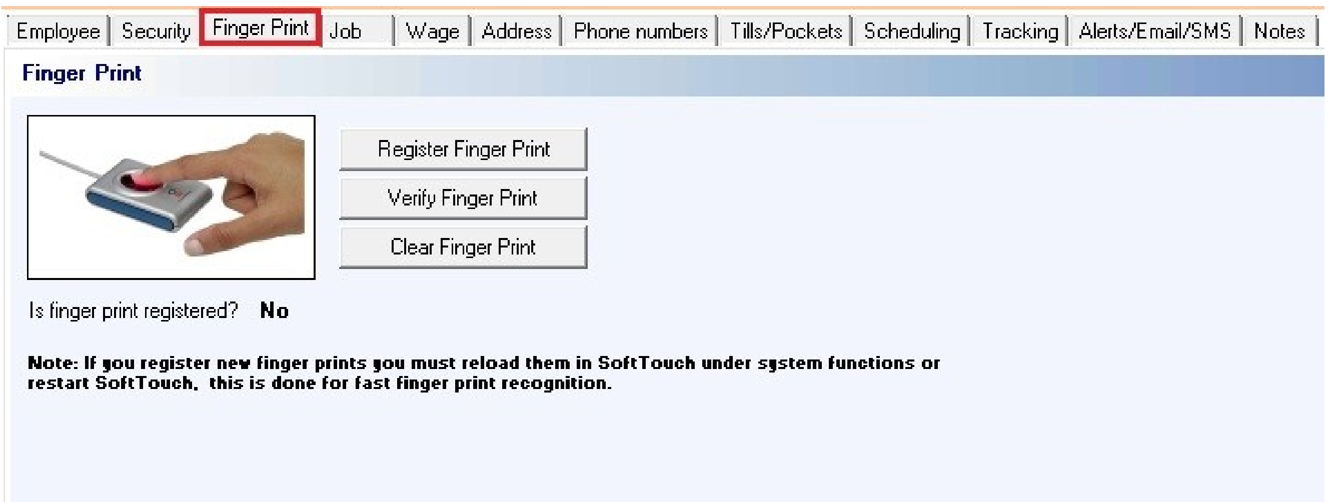
Under the **General** section click on **Employees** and then on the **Employee list** tab. Select the **Finger Print** tab.

Finger Print ID

To register the finger print for an employee press the **Register Finger Print** button. In the window that pops up, an employee will need to place his/her finger on the sensor 4 times in order to complete its registration. After this you might want to verify the finger print scan by pressing the **Verify Finger Print** button and having an employee place their finger on the sensor again. The finger print can be cleared by pressing the **Clear Finger Print** button.

You have now registered an employee's finger print.

Options on what you will use the fingerprint ID for are covered later in the manual under **Hardware->Stations->Hardware Devices->Fingerprint**.

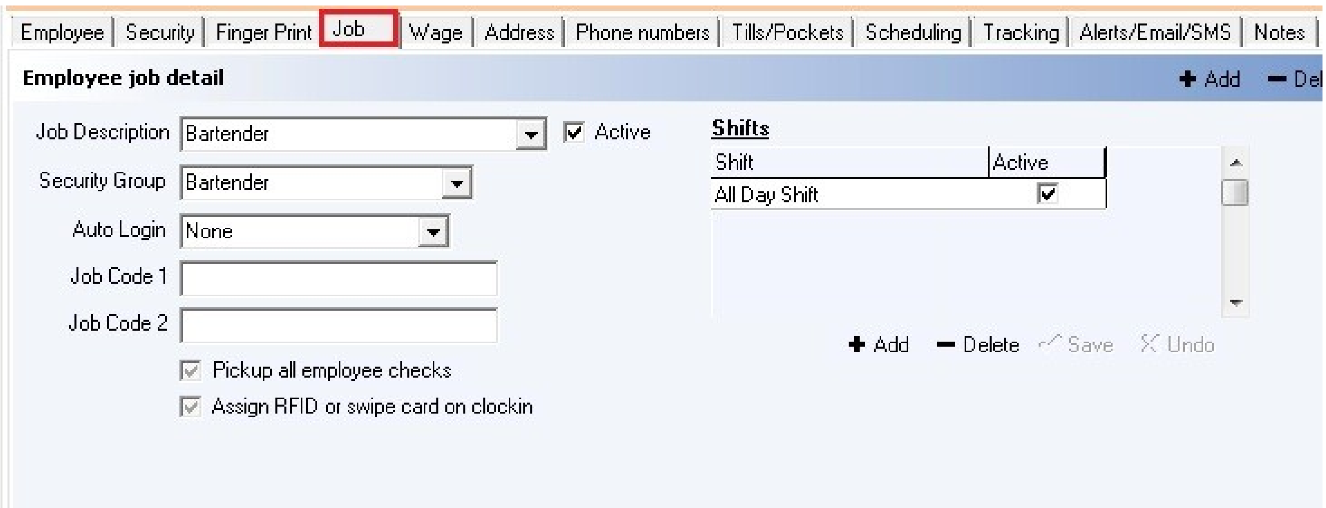


8.1.4 Job Tab

Under the **General** section click on **Employees** and then on the **Employee list** tab. Select the **Job** tab.

Employee Jobs

Here you assign either one job or multiple jobs to your employees.



- Assign Job Information -

First select an employee from the Employee list part of the screen, then click the Job Tab.

In the Employee job detail part of the screen click the + Add button and enter job information in the fields below.

Active	This box must be checked for the specified job to be active.
Job Description	Select a job for an employee from the drop-down menu ***Note:** What is listed in this section is what is created in the Jobs applet, which is covered in **Miscellaneous->Jobs**.
Security Group	Specify the security level for the job. We will talk about security later, but if you wish to learn more about this feature now go to **Miscellaneous->Security**.

Auto Login	If you select a mode from the drop-down field of this section, when an employee clocks in, swipes their card, or inputs their number into the POS system, they will always be taken to that mode. If the Auto Login is left at none, the employee will not be logged immediately into any mode. They will be brought to the chalkboard screen. ***Note**: A mode is Counter, Dining, Bar, etc.
Job Code 1	If you need to create a job code for this employee for any reason for your own use outside of SoftTouch, such as for exporting to payroll, it can be entered here.
Job Code 2	If you need to create a second job code for this employee for any reason for your own use outside of SoftTouch, it can be entered here.
Pickup all employee checks	Enable this for employees that should have access to other employees' checks. Managers, as well as cashiers that close checks for servers, are a couple of examples of jobs that should be able to pickup all employee checks. If the employee has more than one job, this option can be set differently for each job they work.
Assign RFID or swipe card on clockin	If you wish to assign a different swipe card or RFID bracelet each time this employee clocks in, check this option box. This is usually used for RFID bracelets that restaurant owners do not want their employees going home with. If the employee has more than one job, this option can be set differently for each job they work.
Shifts	Specify the shift(s) during which this job is applicable to the selected employee. Use the **Add** button below this section to designate more than one shift. Instead of deleting a shift that no longer applies, you can uncheck **Active** if that shift might apply again at a later date. For shifts to appear as choices here, they must first be created (see **Scheduling->Add Schedule**).

- Assigning Multiple Jobs -

You can do this for different job descriptions for each employee. For example, you might have servers that also work as bartenders or busers. Each employee can have an unlimited number of jobs.

The best way to accomplish this is to assign multiple jobs.

Step 1. Select/highlight the employee from the Employee list you want to add jobs to.

Step 2. Under Employee job detail, select a job description and fill in the rest of the above mentioned fields.

Step 3. Once complete, hit Save and then click Add.

Step 4. Select another job description and fill in the rest of the above mentioned fields.

Step 5. Add as many job descriptions as required for that employee, remembering to save each time.

Step 6. Repeat this process as needed for each employee.

***Note**: Pay for a particular job can be adjusted under the **Wage** tab, which is covered next in **Employees->Employee List->Wage**.

To make changes to a job you've previously created, first click/highlight that job under the **Current Employee Job List**.

You can deactivate a particular job for later re-activation without having to delete it. Do this by de-selecting the **Active** option. If you need to reactivate the job, put a check mark back in the **Active** option.

Click ✔ Save when you're done.

8.1.5 Wage Tab

Under the **General** section click on **Employees** and then on the **Employee list** tab. Select the **Wage** tab.

Employee Jobs

Here you assign either one job or multiple jobs to your employees.

- Assign Wage -

First select an employee from the Employee list part of the screen, select a job from the Current Employee Job List (if more than one have been assigned), and then click the Wage Tab.

Pay Type	Specify how the employee is being paid for this job (ex. hourly or weekly). **Hourly:** This is for any employee who is paid by the hour. **Overtime Exempt:** This is for any employee on a salary. Specify one week's pay in the Wage Amount field.
Wage Amount	Enter the amount the employee is being paid for this job. Whether this pay is given hourly or weekly depends on what you specified in the Pay Type field. You can choose to show or hide this information by clicking the **Show/Hide** button.
Apply tip credit	Enable this for employees who get paid below minimum wage (such as servers). The tip credit that was filled out in the Hours & Wages setup (see **System->Hours & Wages**) will then be applied in calculating that employee's overtime wage.

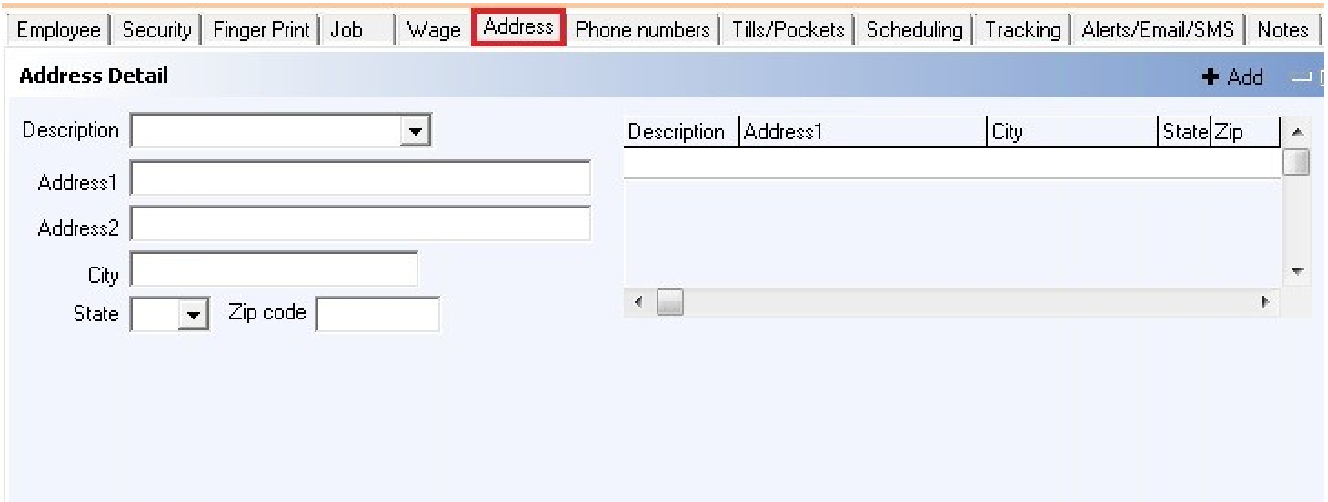
Click Save when you're done. You can set different wages for different jobs an employee might have.

8.1.6 Address Tab

Under the **General** section click on **Employees** and then on the **Employee list** tab. Select the **Addresses** tab.

Address

This section is optional to fill out. Multiple addresses can be listed here for any employee.



First select an employee from the **Employee list** part of the screen and click the Address Tab if you haven't already. Click the Add button and fill out the fields:

- Description
- Address1 and (optional) Address2
- City, State, and Zip Code

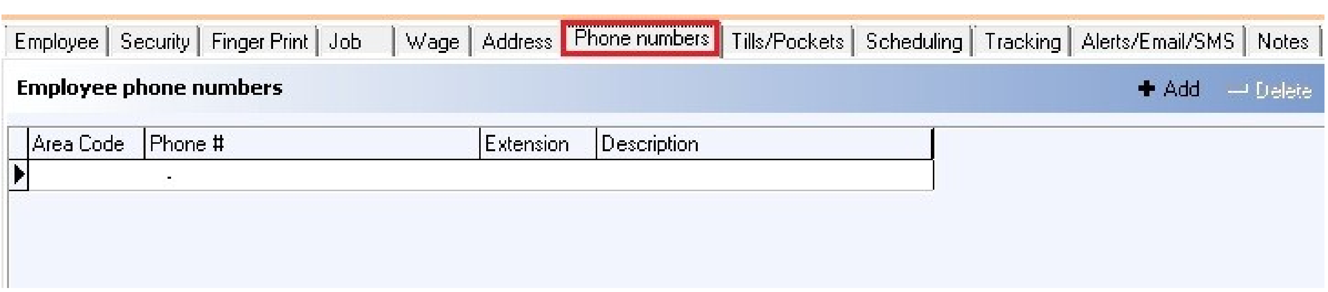
Click the ✓ Save button when you're finished and the Add button if you would like to add another address and repeat the steps listed.

8.1.7 Phone Numbers Tab

Under the **General** section click on **Employees** and then on the **Employee list** tab. Select the **Phone Numbers** tab.

Employee Phone Numbers

Here you can add employee phone numbers.



First select an employee from the **Employee list** part of the screen and click the Phone Numbers Tab if you haven't already. Click the Add button and fill out the fields:

- Area Code
- Phone #
- Extension (if any)
- Description

Click the Save button when you're finished and the Add button if you would like to add another phone number.

8.1.8 Tills/Pockets

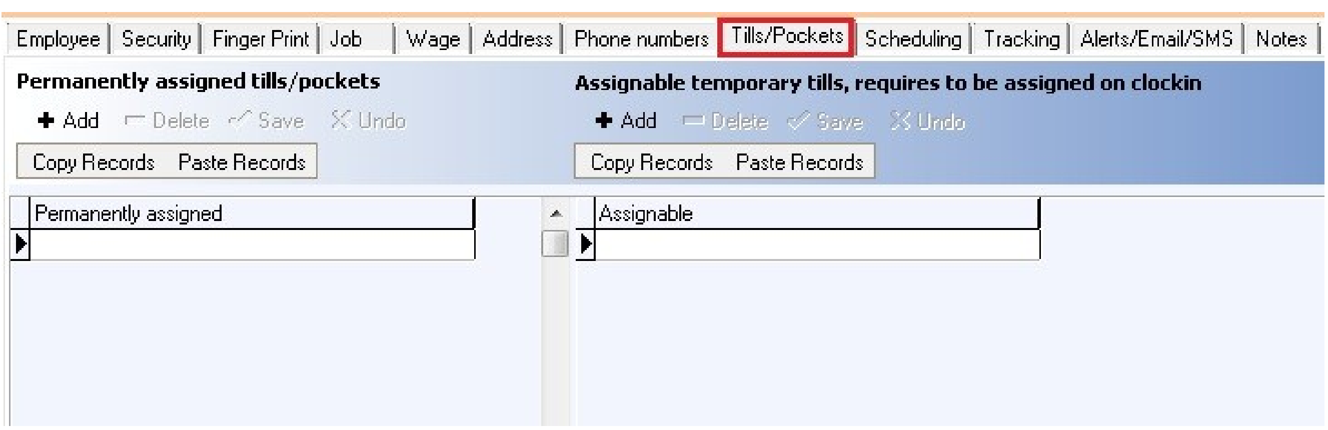
Under the **General** section click on **Employees** and then on the **Employee list** tab. Select the **Tills/Pockets** tab.

Employee Tills/Pockets

Here you can add any tills or pockets that an employee will work out of.

Assigned tills are used for employees that are banking themselves and will always use the same "pocket." In some cases, if there is only one till in a restaurant you can enter that as assigned to people that work that till so that you do not have to select the till they will be working from each day.

Assignable tills are for employees that will work out of different cash drawers. For example, a bartender may work the front bar, the back bar or the patio bar. You would want to add all three tills as assignable so they can select which drawer they will be working out of when they get to work and find out which area they will be working at.



- Add an Assignable Till -

To add an assignable till to an employee you must first create the drawer.

*__Note:__ If you wish to find out about this function now see under **Financial>Banks**.

First select an employee from the **Employee list** part of the screen and click the Tills/Pockets Tab if you haven't already.

Step 1. Click the Add button.

Step 2. Click in the blank white box under the header Assignable.

Step 3. Select the drawer that this employee will be working out of.

Step 4. Click the Save button.

Step 5. Repeat the steps above for each additional drawer this employee will use.

8.1.9 Scheduling Tab

Under the **General** section click on **Employees** and then on the **Employee list** tab. Click on the **Scheduling** tab.

Scheduling

This is where you can enable employee scheduling to be used with select employees.

Scheduling Enabled	Unless you have scheduling enabled, the before and after scheduling grace periods will not work. You must also have this box checked before this employee will show up in the list of employees you can schedule in the Employee Scheduling area (see **Scheduling->Employee Scheduling**). ***Note:** This is used in conjunction with the Employee Scheduling option located on the System Schedules tab under Scheduling.

Before _____ Mins.	This means that an employee will not be allowed to clock in earlier than the number of minutes specified here. **Example**: If "Before" is set to 5 min. an employee will be able to clock in 5 minutes earlier than their scheduled time, but not 20 minutes earlier.
After _____ Mins.	This means that an employee will not be allowed to clock in later than the number of minutes specified here. **Example**: If "After" is set to 15 min. an employee will be able to clock in 15 minutes later than their scheduled time, but not 20 or 30 minutes later.

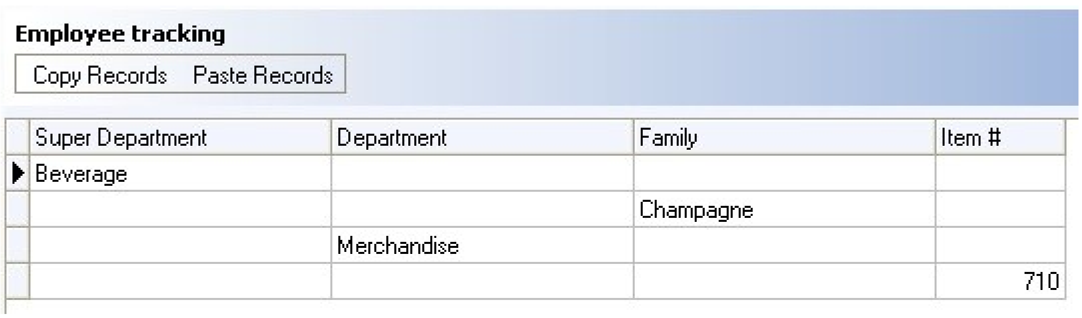
8.1.10 Tracking Tab

Under the **General** section click on **Employees** and then on the **Employee list** tab. Select the **Tracking** tab.

Tracking

You can track how many items are sold by a specific employee. This is called Employee Tracking. You can track items sold by Super Departments, Departments, Family or by the Item Number.

Some establishments use tracking to encourage employees to sell more items, offering them a reward to do so.



- Add Employee Tracking -

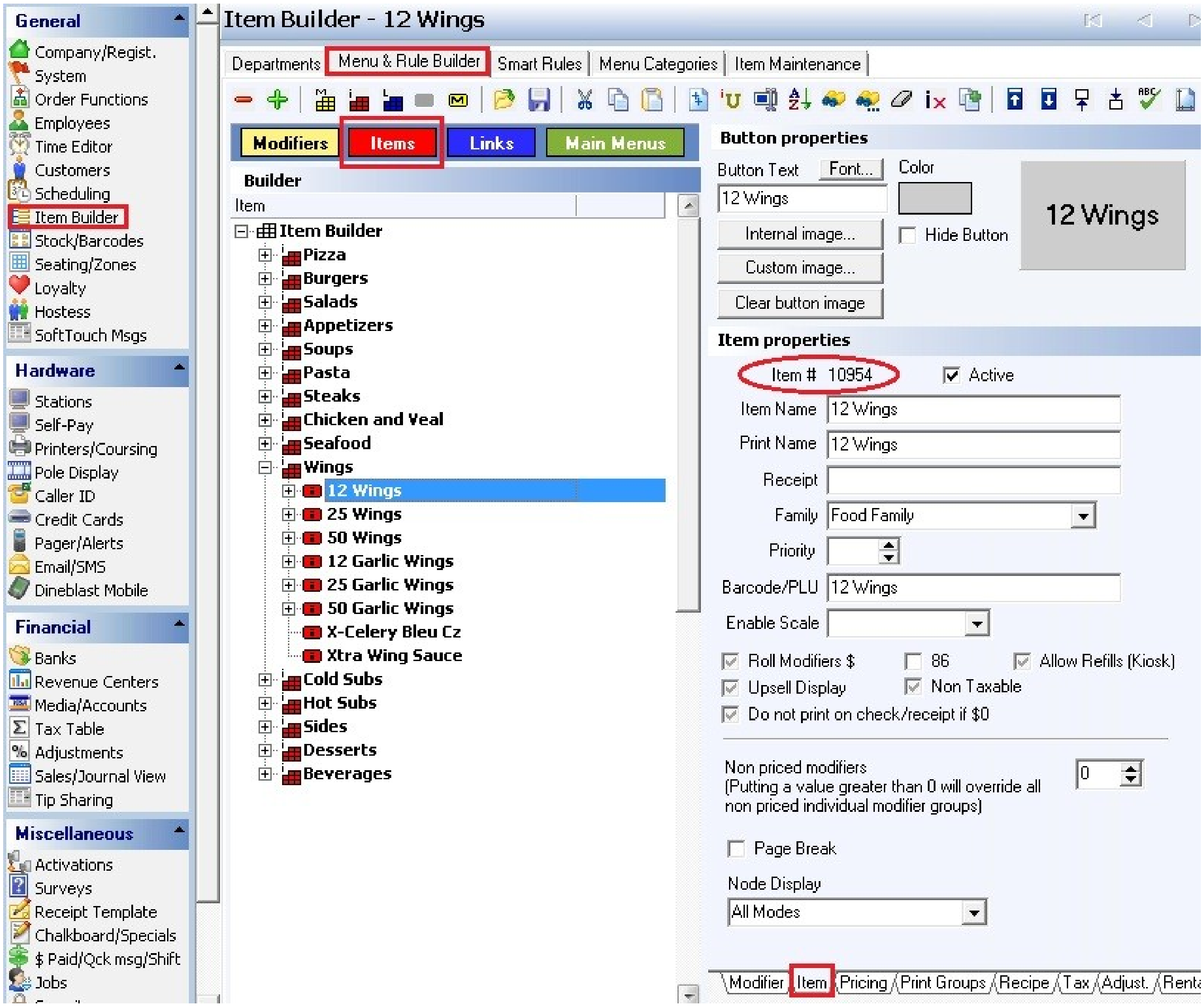
To set tracking for a certain employee, first select that employee from the **Employee list** part of the screen.

Under the **Employee tracking** part of the screen click the 

button. If you click twice in the box under Super Department, Department, or Family, you will then be able to activate a drop-down menu and choose what item's sales you wish to track. Or click twice in the box under Item # and type in the number of the item you wish to track.

- Find Out the Item Number -

To find out an item number go to **Item Builder** under General section, select the **Menu & Rule Builder** tab, click the red **Items** button, expand an item group and select a particular item. On the bottom right side of the screen, select the **Item** tab. The item number is displayed under **Item properties**.

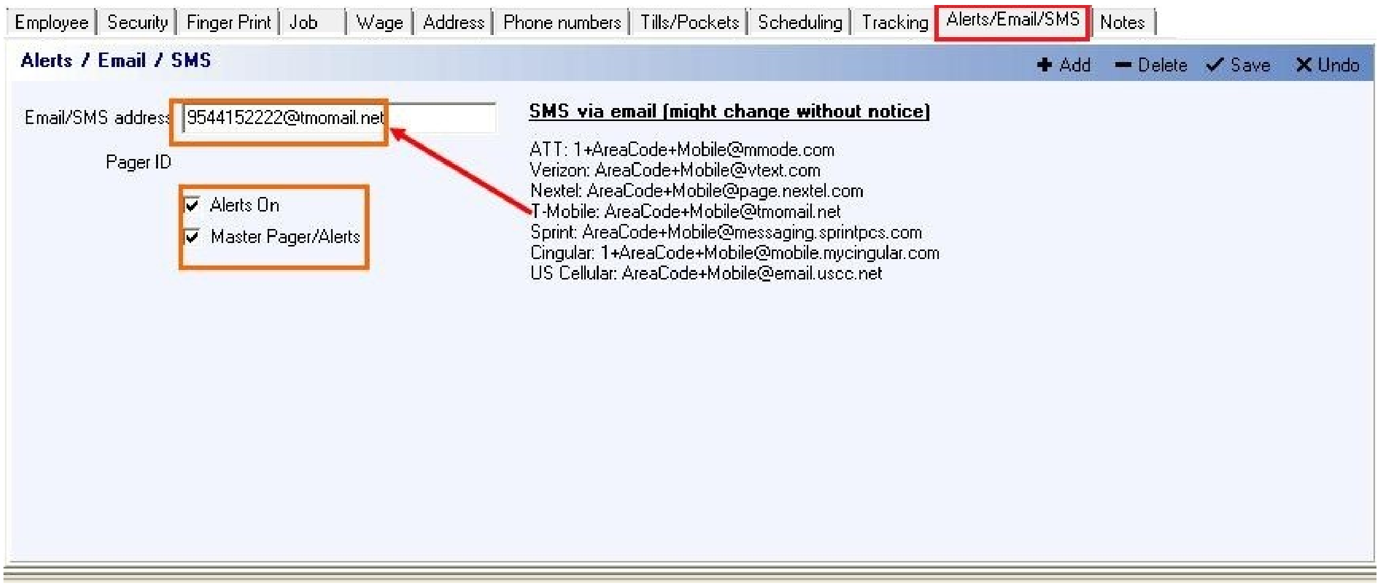

General
Company/Regist.
System
Order Functions
Employees
Time Editor
Customers
Scheduling
Item Builder
Stock/Barcodes
Seating/Zones
Loyalty
Hostess
SoftTouch Msgs
Hardware
Stations
Self-Pay
Printers/Coursing
Pole Display
Caller ID
Credit Cards
Pager/Alerts
Email/SMS
Dineblast Mobile
Financial
Banks
Revenue Centers
Media/Accounts
Tax Table
Adjustments
Sales/Journal View
Tip Sharing
Miscellaneous
Activations
Surveys
Receipt Template
Chalkboard/Specials
$ Paid/Qck msg/Shift
Jobs
Item Builder - 12 Wings
Departments
Menu & Rule Builder
Smart Rules
Menu Categories
Item Maintenance
Modifiers
Items
Links
Main Menus
Builder
Item
Item Builder
Pizza
Burgers
Salads
Appetizers
Soups
Pasta
Steaks
Chicken and Veal
Seafood
Wings
12 Wings
25 Wings
50 Wings
12 Garlic Wings
25 Garlic Wings
50 Garlic Wings
X-Celery Bleu Cz
Xtra Wing Sauce
Cold Subs
Hot Subs
Sides
Desserts
Beverages
Button properties
Button Text
Font...
Color
12 Wings
Internal image...
Hide Button
Custom image...
Clear button image
12 Wings
Item properties
Item # 10954
Active
Item Name
12 Wings
Print Name
12 Wings
Receipt
Family
Food Family
Priority
Barcode/PLU
12 Wings
Enable Scale
Roll Modifiers $
86
Allow Refills (Kiosk)
Upsell Display
Non Taxable
Do not print on check/receipt if $0
Non priced modifiers
(Putting a value greater than 0 will override all non priced individual modifier groups)
0
Page Break
Node Display
All Modes
Modifier
Item
Pricing
Print Groups
Recipe
Tax
Adjust.

8.1.11 Alerts/Email/SMS Tab

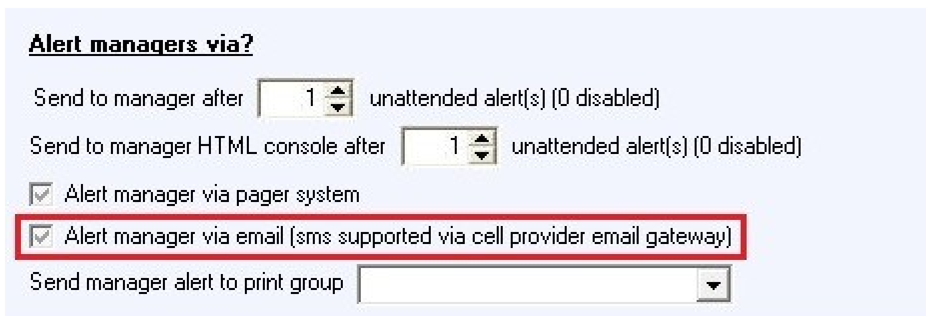
Under the **General** section click on **Employees** and then on the **Employee list** tab. Select the **Alerts/Email/SMS** tab.

Alerts/Email/SMS

In the image below, the SMS Via email section shows you how to properly format the phone number. This could change without notice.



****Warning**: There may be fees and/or charges applied by the cell phone company for texting.**

Email/SMS Address	This area is for setting up cellphones to act as pagers through an SMS message for alerts that are set (in the Pager/Alerts section) to be sent to managers via Email/SMS. To set up the Email/SMS you need to fill in the SMTP server information (see**Hardware Section->Email/SMS**). **1.** Enter the cellphone information. The cellphone number has to be in an email format that matches the provider within the SMS via email area. **Example:** 1234567890@messenging.sprintpcs.com or 1234567890@vtext.com **2.** Navigate to the Pager/Alerts section (see **Hardware->Pager/Alerts**) and enable the Pager/Alert system. Make sure some alerts are activated, such as the Labor Sales, by checking on the **Alert Active** box. Check on the **Alert manager via email** box.  ***Note:** It is possible to use the email/SMS settings even if you do not have the physical LRS paging system installed. **3.** Reboot the Server or restart the Pager and Alert services.
Pager ID	Shows the current pager number assigned to the employee.
Alerts On	If the box is checked on, this enables alerts for the employee. When the employee clocks in, they will be asked to assign a pager number. The pager will be unassigned when they clock out.
Master Pager/Alerts:	Enable this option for managers so they will receive alerts that are set to be sent to the manager via pager and/or email after a specified number of unattended alerts. (This number can be set on the **Destination** tab under **Hardware->Pager/Alerts->Alert List Tab**.)
SMS via Email (might change without notice)	This section helps you to configure emails and SMS messages to be sent to cell phones. The information here is subject to change based on cellular/wireless service providers.

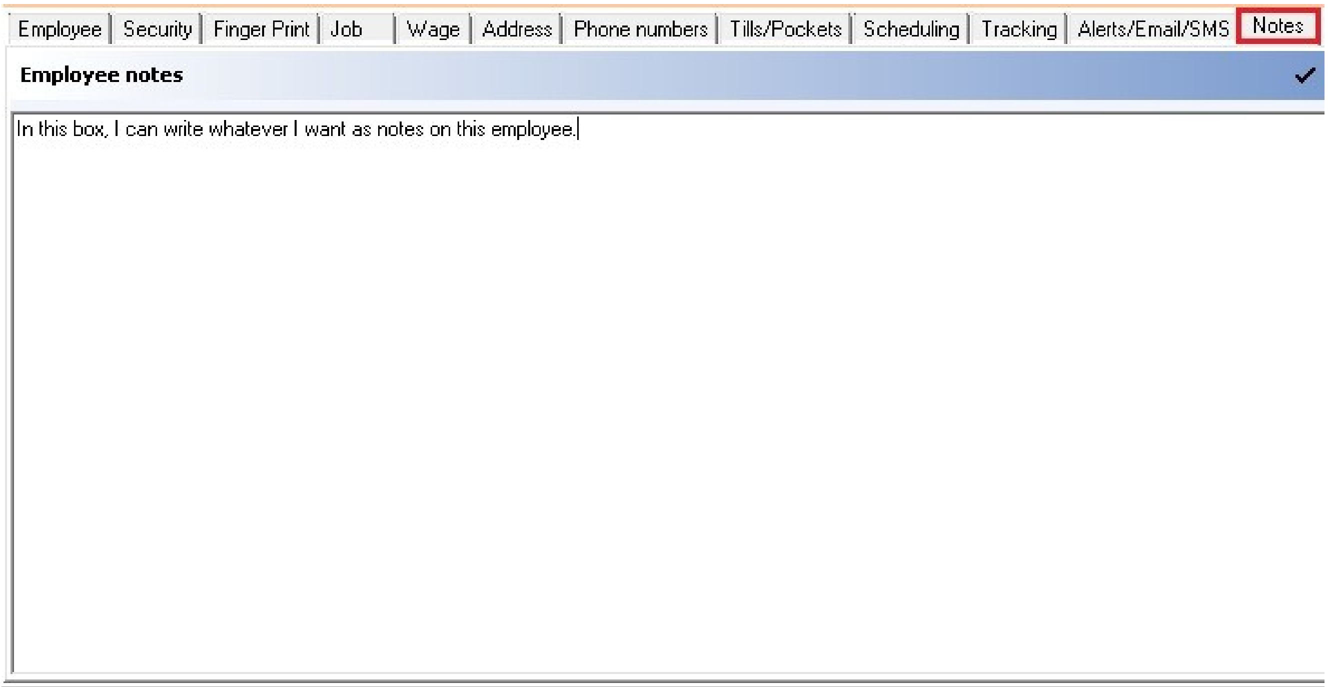
8.1.12 Notes Tab

done

Under the **General** section click on **Employees** and then on the **Employee list** tab. Select the **Notes** tab.

Notes

Here you may add notes regarding your employee.

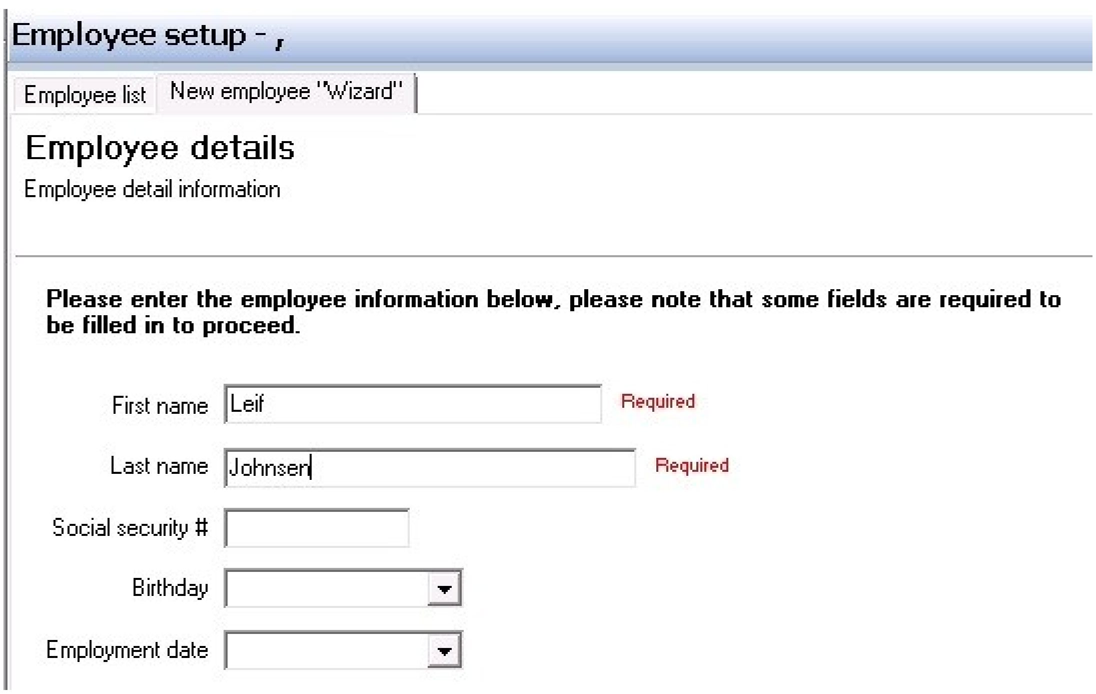


8.2 New employee Wizard

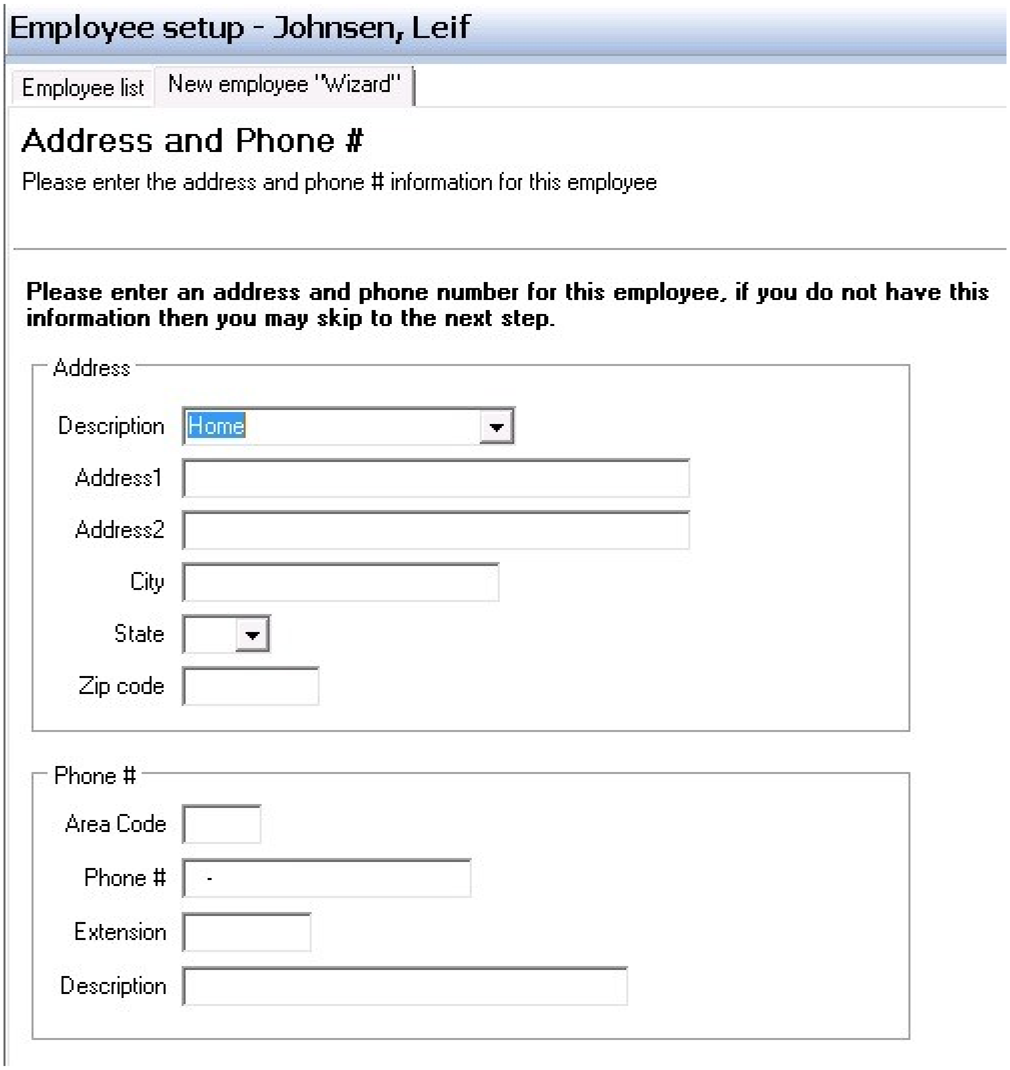
Under the **General** section click on **Employees** and then click on the **New employee "Wizard"** tab.

1. Press the **Click here to start adding a new employee** button.

2. You must enter the first and last name. All other fields are optional. Press the **Next** button at the bottom right of the screen when you are done.



3. All fields on the **Address and Phone #** screen are optional. Press the **Next** button at the bottom right of the screen when you are done.

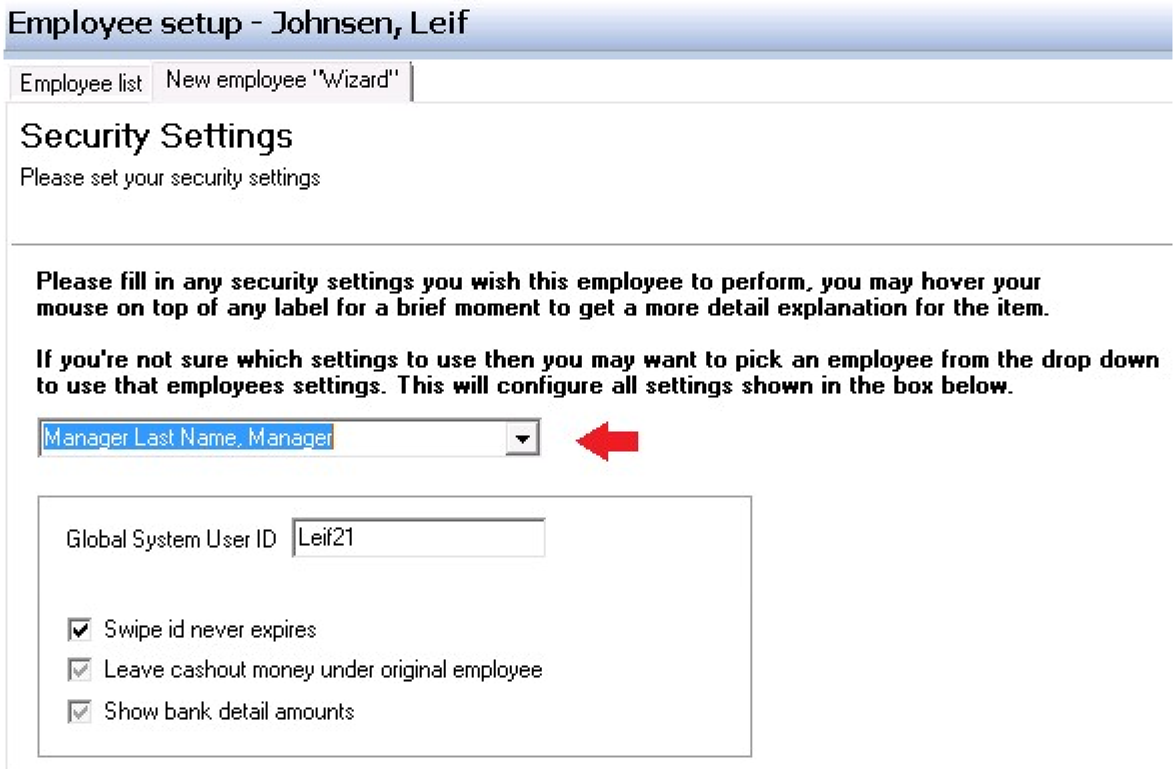


4. On the Security Settings screen, specify a System User ID for the employee.

 ***Note**: The **User ID** of an employee you specify here shows up on the guest checks. It is advisable to have a name placed within this section. This is also the **User ID** that is used when accessing **BackOffice**. If you do not want this employee to have access to **BackOffice**, do not use the **Change Password** button.

 By using the first drop-down list, you can select an employee that has the same security setting that you wish the newly added employee to have. Once you select a name from the drop down list you will get a message:
 "Are you sure you want to override the current security settings with security settings from the selected employee?"
 Click Yes if you wish to copy the security settings of the selected employee to you new employee.

 If you wish to manually configure the options shown, refer to the **Security Option Explanations** chart below to learn about each option.



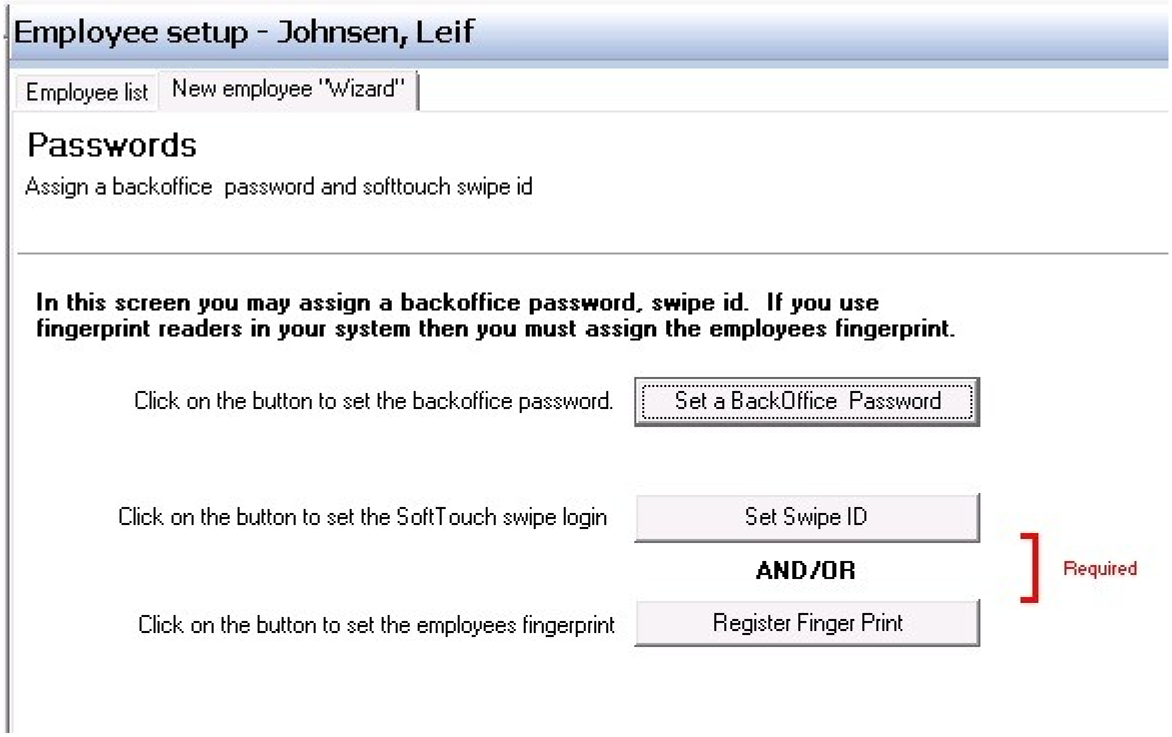
- Security Option Explanations -

Swipe ID never expires	If the box is checked, your swipe ID will not expire after 90 days.

Leave cashout money under original employee	This option should only be enabled for managers. Here is why: Let's say the server needs a manager's help cashing out their order. There are two things to remember here: 1. When a server starts a check he/she is the owner of that check and is therefore responsible for the money 2. If the manager cashes out that check, they will have to physically hand over the money to the person who started the check because it will be reported under that employee's server report. So if this option is **not** checked, the cash-out amount will go under the manager's ID and not the server's ID. When a manager helps a server cash out their check, you want the server to still be responsible for the money and not the manager. Therefore, make sure that managers always have the "Leave cash-out money under original employee" option checked. ***Note**:If a manager started the order and cashed out the order, the cash-out amount will go under manager's ID even if this option is checked. That's fine, because the manager is the owner of that check and the manager cashed it out, so he or she is the one responsible for the money.
Show bank detail amounts	This option lets an employee see the amount of money in each bank that displays in the Tills, Pockets & Store Management area of the Manager Screen in **SoftTouch**.

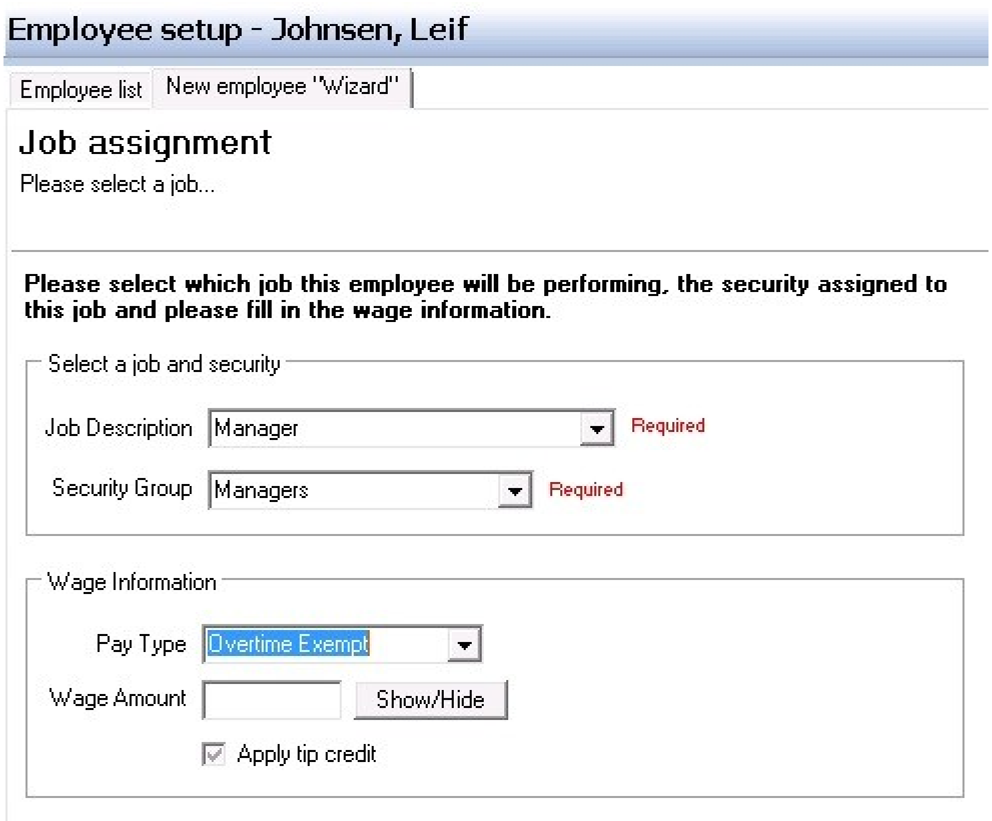
5. Clicking next will take you to the **Passwords** screen.

If this employee should have access to **BackOffice**, press the **Set a BackOffice Password** button and add password for this employee.
You ***must*** set a swipe ID or register a fingerprint for each employee. If you want the employees to use a swipe card or type in a number to access **SoftTouch**, press the **Set Swipe ID** button and either swipe the ID card or type in the number this employee will use. If you wish to register a fingerprint, you must first have a fingerprint reader installed on this computer. To register the fingerprint for an employee press the **Register Finger Print** button. In the window that pops up, an employee will need to place his/her finger on the sensor 4 times in order to complete its registration. After this you might want to verify the finger print scan by pressing the **Verify Finger Print** button and having an employee place their finger on the sensor again.



6. Click next. Fill in the fields below to set job, security and wage information. Please refer to the chart below the **Job assignment** screen for explanations of each option.

If this employee has more than one job, you would enter the first job here, then go back to the employee record, highlight it, select the **Job** and **Wage** tabs and enter the information for each additional job this employee works.



Job Description	Select a job for an employee from the drop-down menu ***Note:** What is listed in this drop-down is what was created in the Jobs applet (see **Miscellaneous->Jobs**).
Security Group	Specify the security level for the job. We will talk about security later, but if you wish to learn more about this feature now go to **Miscellaneous section->Security**.
Pay Type	Specify how the employee is paid (ex. hourly or weekly). **Hourly:** This is for any employee who is paid by the hour. **Overtime Exempt:** This is for any employee on a salary. Specify one week's pay in the wage amount field.
Wage Amount	Enter the amount the employee is paid. This is hourly or weekly depending on the **Pay Type** specified. You can choose to show or hide this information.

Apply tip credit	Enable this for employees who get paid below minimum wage (such as servers). The tip credit that was filled out in the Hours & Wages setup (see **System->Hours & Wages Tab**) will then be applied if the employee works overtime.

7. Click next. Depending on the type of employee being created, you may be taken to a screen allowing you to set up the employee's till. If not, skip ahead to step 8.

Under **Permanent or Assignable**, click one or the other depending on that employee's needs:

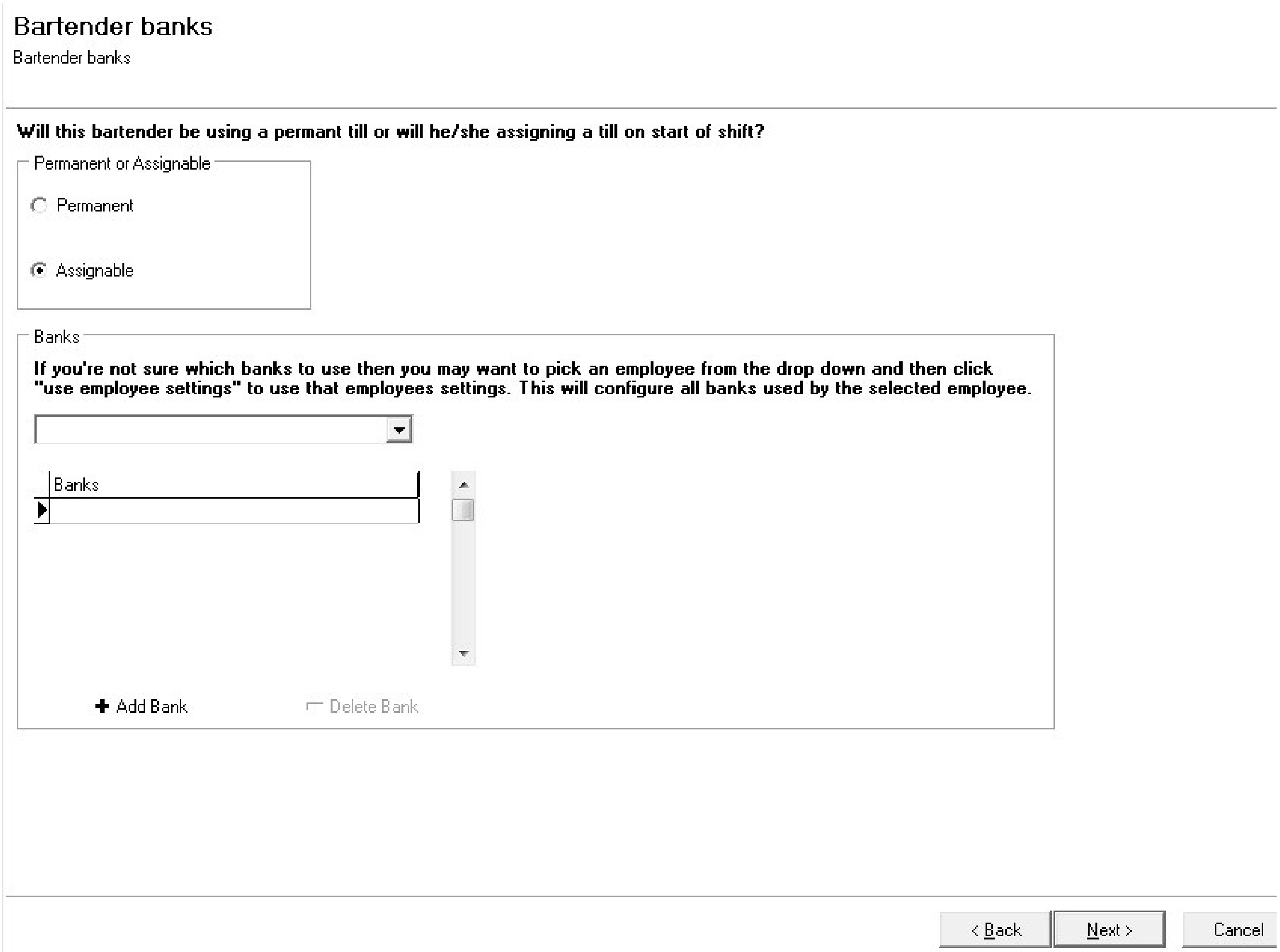
- **Permanent** tills are used for employees that are banking themselves and will always use the same "pocket." In some cases, if there is only one till in a restaurant you can enter that as assigned to people that work that till so that you do not have to select the till they will be working from each day.
- **Assignable** tills are for employees that will work out of different cash drawers. For example, a bartender may work the front bar, the back bar or the patio bar. You would want to add all three tills as assignable so they can select which drawer they will be working out of when they get to work and find out which area they will be working at.

To add an assignable till to an employee you must first create the drawer.

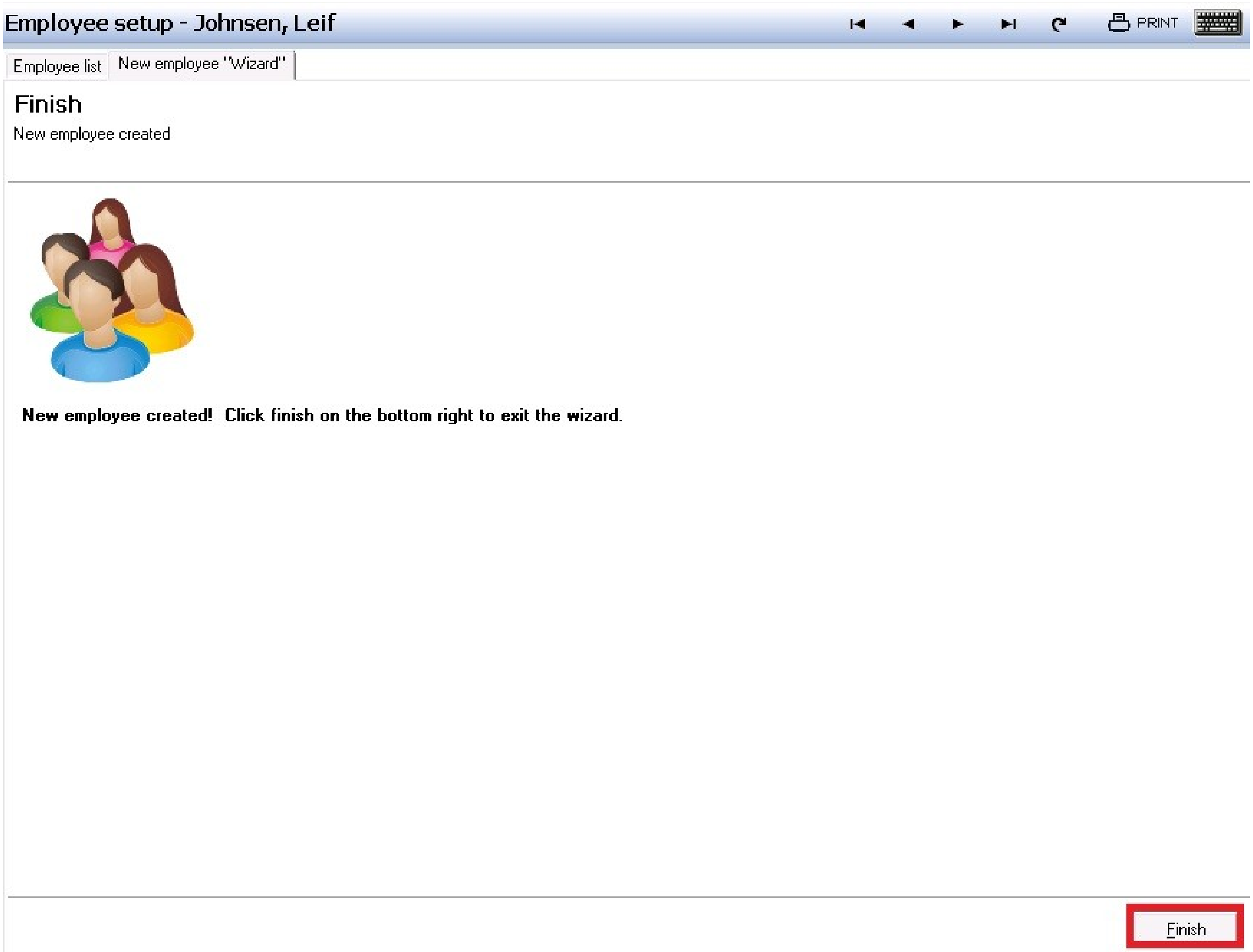
***Note:** If you wish to find out about this function now see under **Financial>Banks**.

The first drop-down list in the **Banks** section lets you copy another employee's till settings to this employee.

Clicking in the box under **Banks** (with the black arrow) allows you to use a drop-down list to select a till. If this employee will be using more than one till, use the ✚ Add Bank button and select additional tills as needed. Click next when you're ready to move on.



8. Press the **Finish** button at the bottom right corner of the screen.



Repeat this process for additional employees you wish to add.

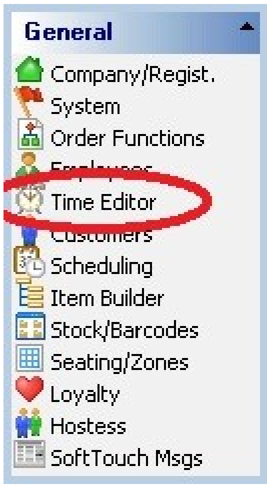
Part IX

Time Editor

Part 9 Time Editor

Under the **General** section click on **Time Editor**.

Time Editor



You can manage employee time punches in **BackOffice** through the Time Editor. From this applet you can modify a pay rate for a time punch record, edit a time clock entry, add an in and out time or add a break in and out time.

Employees get paid for breaks. If you add a break in and out, the employee will get paid for the time the employee was on break. If you add a time clock in and out, the employee will not get paid for the break.

Time Editor includes the following functions:

1. Get Time Clocks

2. Select/Unselect All

3. Adjust Pay Rate(s)

4. Edit Time Clock Entry

5. Delete Time Clock Entry

6. Add In/Out

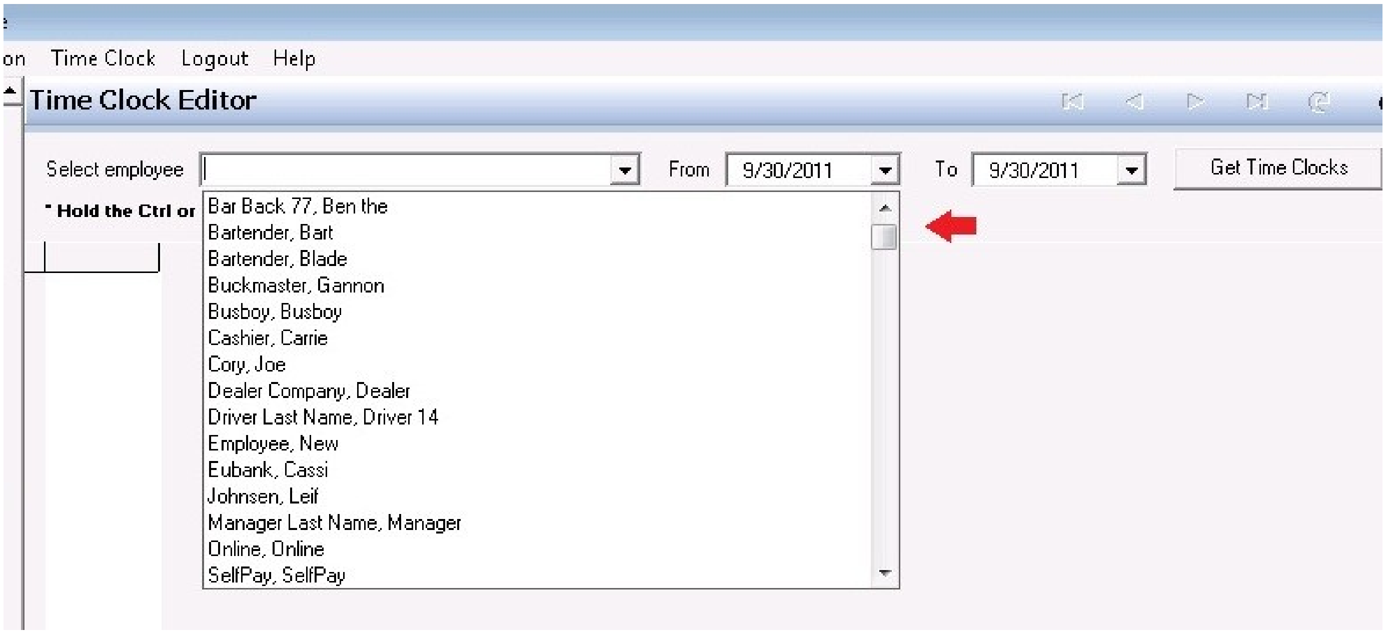
7. Add Break/In

9.1 Get Time Clocks

Under the **General** section click on **Time Editor**.

Get Employee Time Clock Entries

1. Select the employee whose time records you would like to view from the **Select employee** drop down list.



2. Use the **From** and **To** drop down calendars to select the date range for which you would like to pull up the selected employee's time clock records.

3. Press the **Get Time Clocks** button on the right side of the screen.

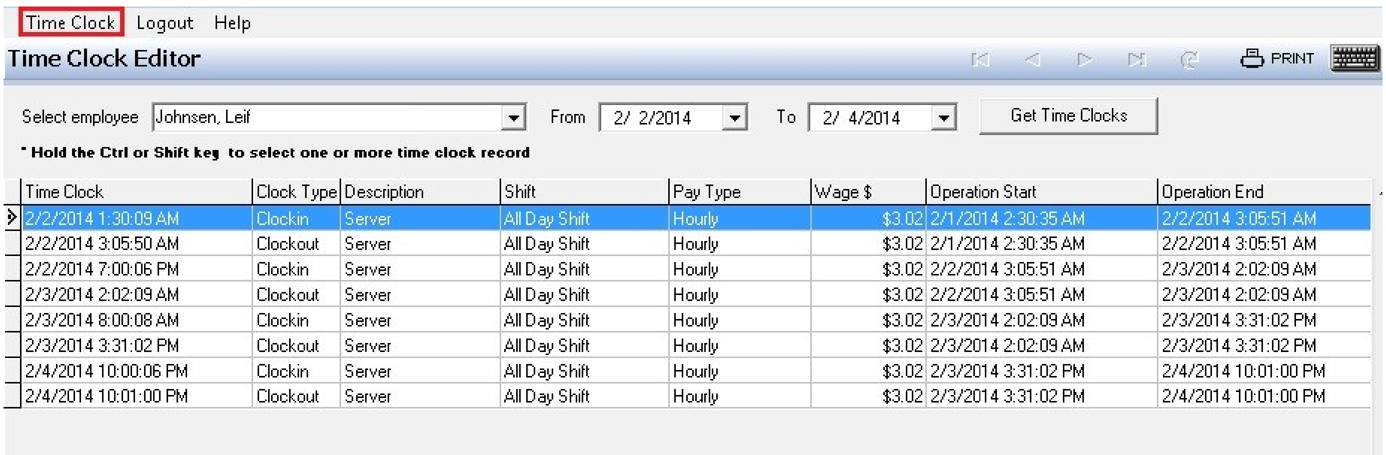
This will bring up a list of all time records for the specified employee during the specified date range.

9.2 Select/Unselect All

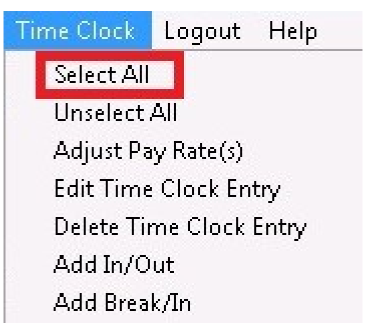
Under the **General** section click on **Time Editor**.

Select All Time Clock Entries

1. You may have more than one record if you select more than one day or if the employee has clocked out or clocked out on break. To select all records, press the **Time Clock** option at the top of the screen.



2. From the **Time Clock** option list, click **Select All**.

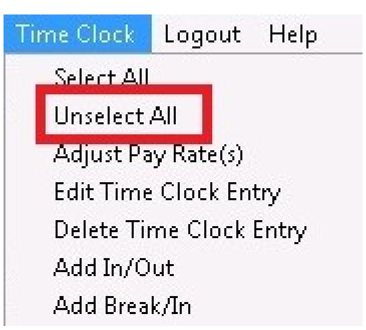


All time clock entries shown on this page should be highlighted, showing they are selected.

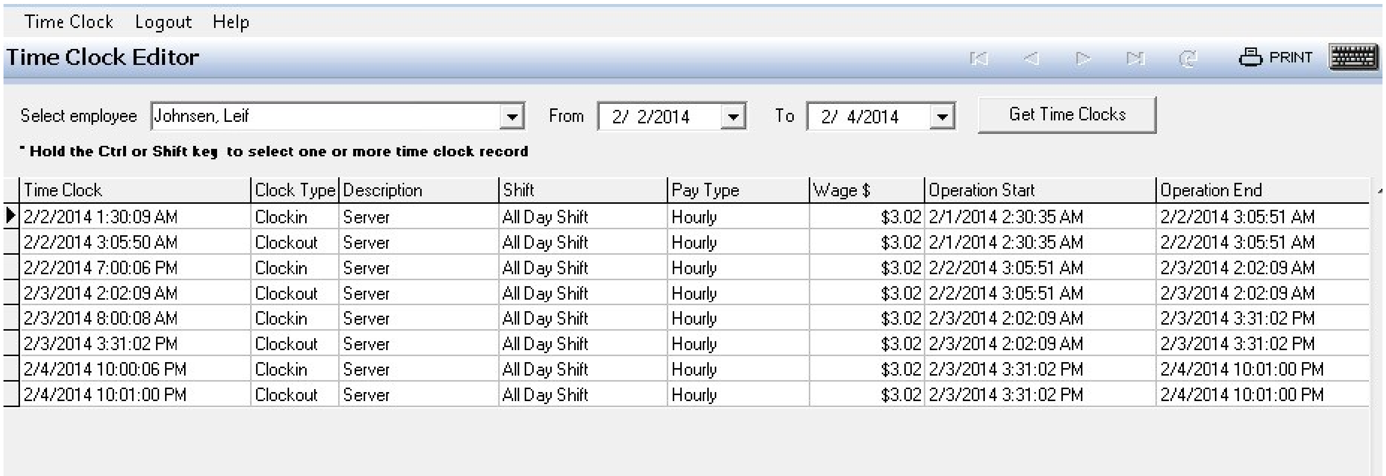
Unselect All Time Clock Entries

1. Press the **Time Clock** option at the top of the screen.

2. From the **Time Clock** option list, click **Unselect All**.



All highlighted entries will be unselected.



Time Clock	Clock Type	Description	Shift	Pay Type	Wage $	Operation Start	Operation End
2/2/2014 1:30:09 AM	Clockin	Server	All Day Shift	Hourly	$3.02	2/1/2014 2:30:35 AM	2/2/2014 3:05:51 AM
2/2/2014 3:05:50 AM	Clockout	Server	All Day Shift	Hourly	$3.02	2/1/2014 2:30:35 AM	2/2/2014 3:05:51 AM
2/2/2014 7:00:06 PM	Clockin	Server	All Day Shift	Hourly	$3.02	2/2/2014 3:05:51 AM	2/3/2014 2:02:09 AM
2/3/2014 2:02:09 AM	Clockout	Server	All Day Shift	Hourly	$3.02	2/2/2014 3:05:51 AM	2/3/2014 2:02:09 AM
2/3/2014 8:00:08 AM	Clockin	Server	All Day Shift	Hourly	$3.02	2/3/2014 2:02:09 AM	2/3/2014 3:31:02 PM
2/3/2014 3:31:02 PM	Clockout	Server	All Day Shift	Hourly	$3.02	2/3/2014 2:02:09 AM	2/3/2014 3:31:02 PM
2/4/2014 10:00:06 PM	Clockin	Server	All Day Shift	Hourly	$3.02	2/3/2014 3:31:02 PM	2/4/2014 10:01:00 PM
2/4/2014 10:01:00 PM	Clockout	Server	All Day Shift	Hourly	$3.02	2/3/2014 3:31:02 PM	2/4/2014 10:01:00 PM

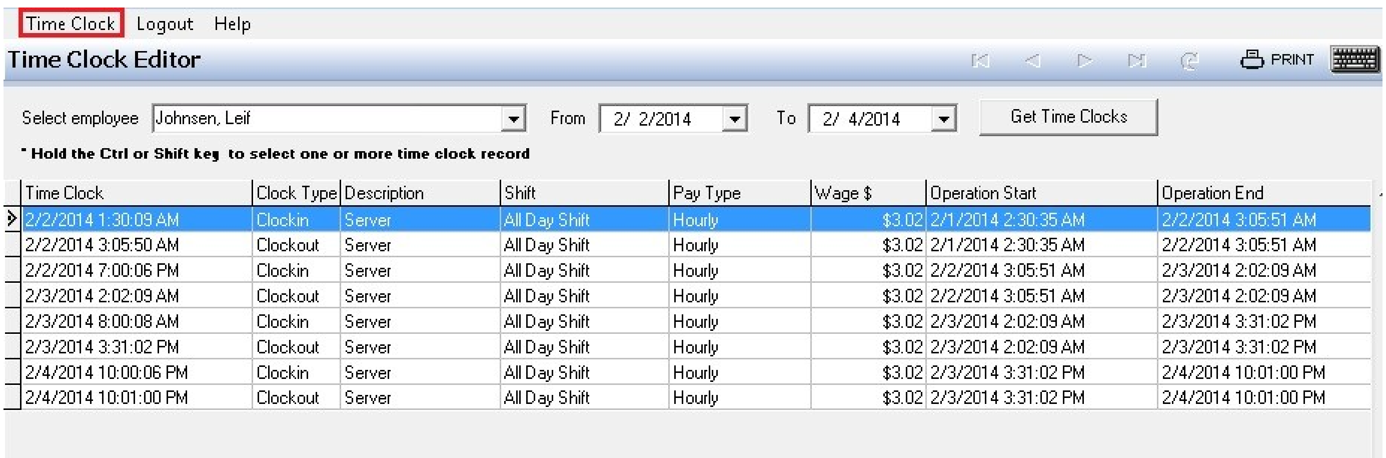
9.3 Adjust Pay Rate(s)

Under the **General** section click on **Time Editor**.

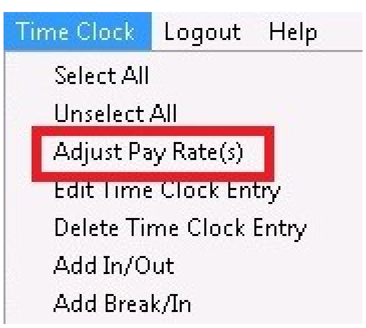
Adjust Pay Rates

1. Pull up the time records for the desired employee and date(s). Refer back to **Get Time Clocks** if you need help.

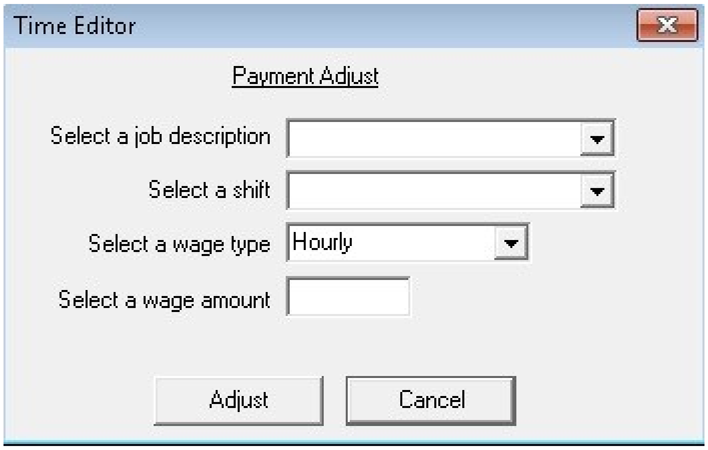
2. Click on the time record with the incorrect pay amount to highlight it. If you would like to make the same adjustment to multiple records at once, use ctrl or shift while clicking, or use **Select All** from the **Time Clock** drop-down. When the appropriate record(s) is/are selected, press the **Time Clock** option at the top of the screen.



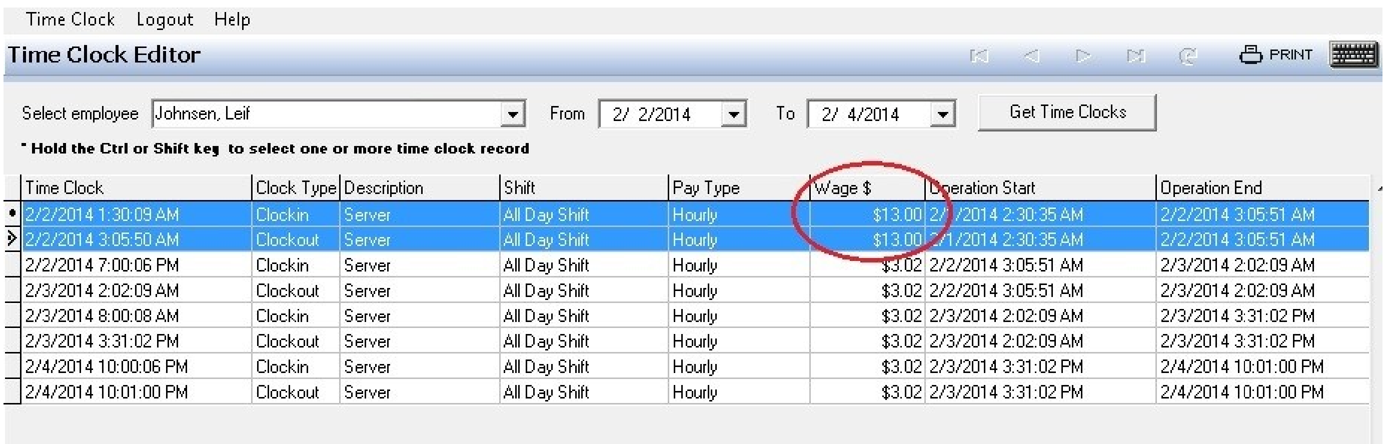
3. From the **Time Clock** option list, click **Adjust Pay Rate(s)**.



4. From the **Payment Adjust** screen, select the job they worked from the **Select a job description** drop down list; select whether the employee was being paid hourly or overtime exempt (salaried) from the **Select a wage type** drop down list; select the shift they worked from the **Select a shift** drop down list; and enter the wage amount in the **Select a wage amount** field. When all entries are complete, press the **Adjust** button at the bottom left side of the **Payment Adjust** dialog box.



You will notice the amount under the **Wage $** header for the highlighted records has changed to reflect your entry.



Repeat this step for all time clock entries that need to have the pay rate adjusted.

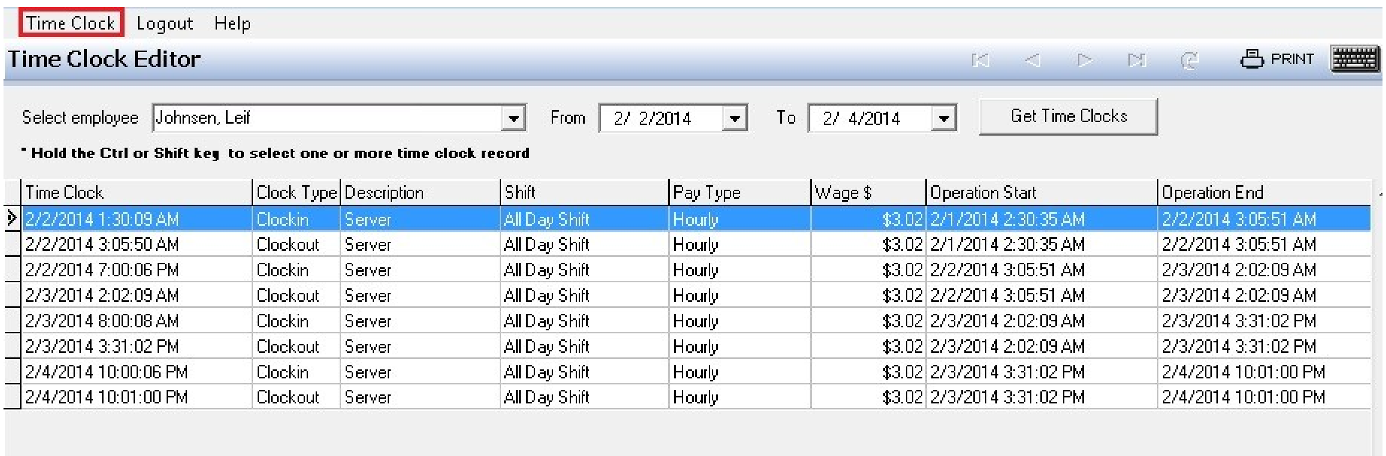
9.4 Edit Time Clock Entry

Under the **General** section click on **Time Editor**.

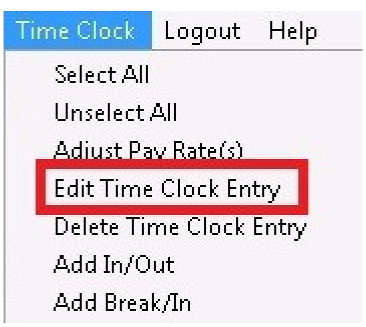
Edit Time Clock Entries

1. Pull up the time records for the desired employee and date(s). Refer back to **Get Time Clocks** if you need help.

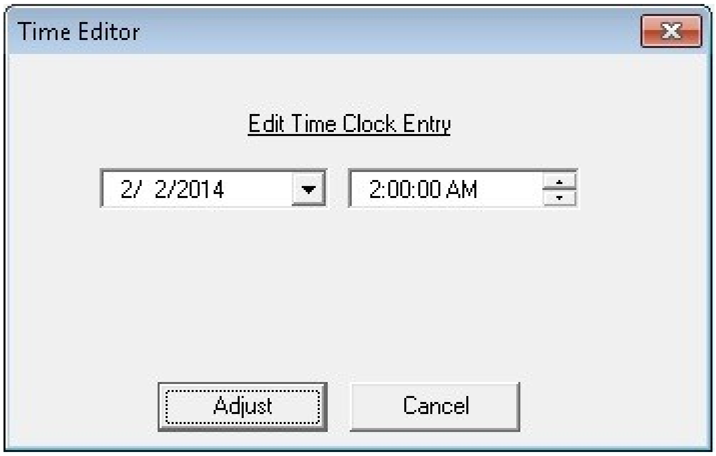
2. Click on the time record with the incorrect pay amount to highlight it. Press the **Time Clock** option at the top of the screen.



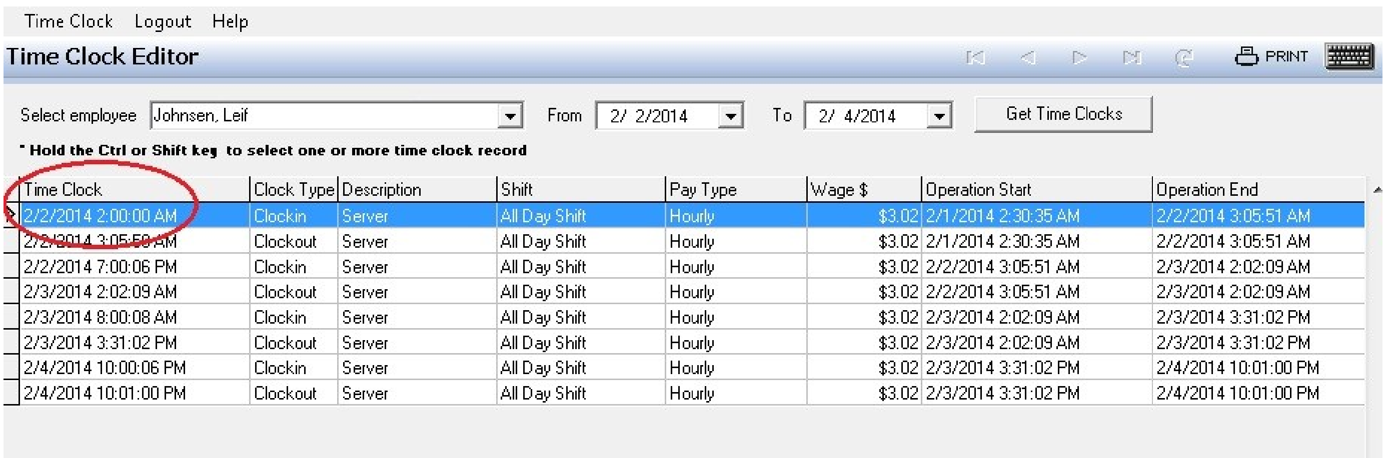
3. From the **Time Clock** option list, click **Edit Time Clock Entry.**



4. From the **Edit Time Clock Entry** screen, select the date from the drop down calendar (if applicable) and/or enter the correct time (if applicable). When all entries are complete, press the **Adjust** button at the bottom left side of the **Edit Time Clock Entry** dialog box.



5. You will notice the time under the **Time Clock** header has changed to reflect your entry.



Time Clock	Clock Type	Description	Shift	Pay Type	Wage $	Operation Start	Operation End
2/2/2014 2:00:00 AM	Clockin	Server	All Day Shift	Hourly	$3.02	2/1/2014 2:30:35 AM	2/2/2014 3:05:51 AM
2/2/2014 3:05:50 AM	Clockout	Server	All Day Shift	Hourly	$3.02	2/1/2014 2:30:35 AM	2/2/2014 3:05:51 AM
2/2/2014 7:00:06 PM	Clockin	Server	All Day Shift	Hourly	$3.02	2/2/2014 3:05:51 AM	2/3/2014 2:02:09 AM
2/3/2014 2:02:09 AM	Clockout	Server	All Day Shift	Hourly	$3.02	2/2/2014 3:05:51 AM	2/3/2014 2:02:09 AM
2/3/2014 8:00:08 AM	Clockin	Server	All Day Shift	Hourly	$3.02	2/3/2014 2:02:09 AM	2/3/2014 3:31:02 PM
2/3/2014 3:31:02 PM	Clockout	Server	All Day Shift	Hourly	$3.02	2/3/2014 2:02:09 AM	2/3/2014 3:31:02 PM
2/4/2014 10:00:06 PM	Clockin	Server	All Day Shift	Hourly	$3.02	2/3/2014 3:31:02 PM	2/4/2014 10:01:00 PM
2/4/2014 10:01:00 PM	Clockout	Server	All Day Shift	Hourly	$3.02	2/3/2014 3:31:02 PM	2/4/2014 10:01:00 PM

9.5 Delete Time Clock Entry

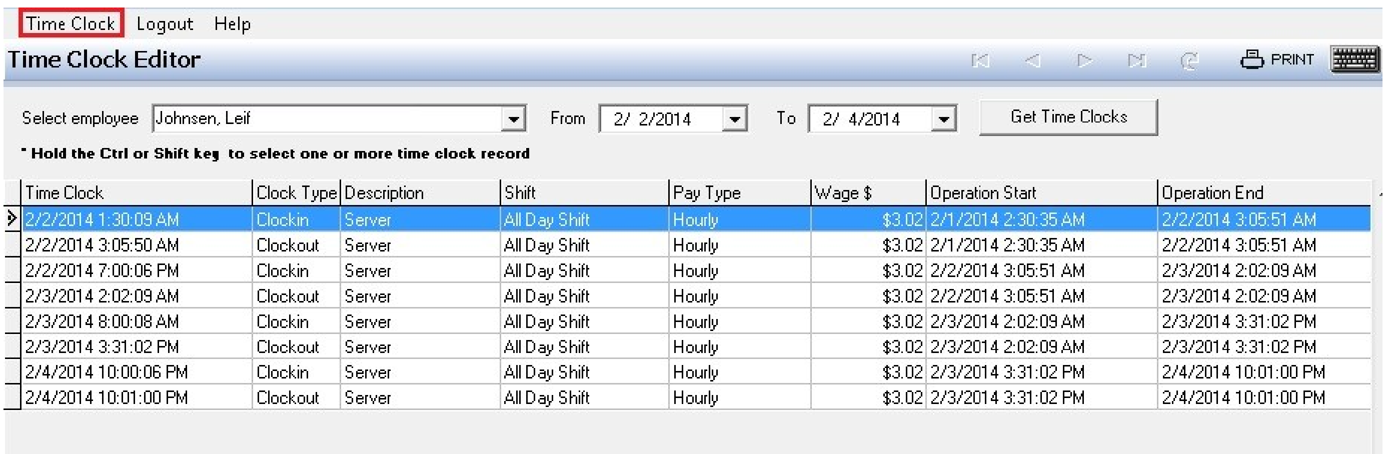
Under the **General** section click on **Time Editor**.

Delete Time Clock Entries

*****When you delete a time clock entry, you will be deleting both the in and the out time.**

1. Pull up the time records for the desired employee and date(s). Refer back to **Get Time Clocks** if you need help.

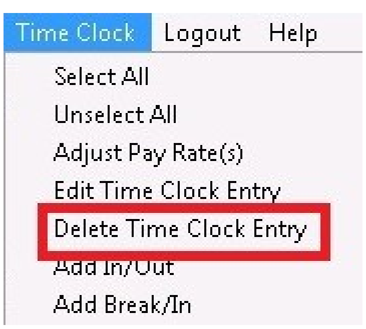
2. Click on /highlight the time record you would like to delete. If you would like to make the same adjustment to multiple records at once, use ctrl or shift while clicking, or use **Select All** from the **Time Clock** drop-down. When the appropriate record(s) is/are selected, press the **Time Clock** option at the top of the screen.



Time Clock	Clock Type	Description	Shift	Pay Type	Wage $	Operation Start	Operation End
2/2/2014 1:30:09 AM	Clockin	Server	All Day Shift	Hourly	$3.02	2/1/2014 2:30:35 AM	2/2/2014 3:05:51 AM
2/2/2014 3:05:50 AM	Clockout	Server	All Day Shift	Hourly	$3.02	2/1/2014 2:30:35 AM	2/2/2014 3:05:51 AM
2/2/2014 7:00:06 PM	Clockin	Server	All Day Shift	Hourly	$3.02	2/2/2014 3:05:51 AM	2/3/2014 2:02:09 AM
2/3/2014 2:02:09 AM	Clockout	Server	All Day Shift	Hourly	$3.02	2/2/2014 3:05:51 AM	2/3/2014 2:02:09 AM
2/3/2014 8:00:08 AM	Clockin	Server	All Day Shift	Hourly	$3.02	2/3/2014 2:02:09 AM	2/3/2014 3:31:02 PM
2/3/2014 3:31:02 PM	Clockout	Server	All Day Shift	Hourly	$3.02	2/3/2014 2:02:09 AM	2/3/2014 3:31:02 PM
2/4/2014 10:00:06 PM	Clockin	Server	All Day Shift	Hourly	$3.02	2/3/2014 3:31:02 PM	2/4/2014 10:01:00 PM
2/4/2014 10:01:00 PM	Clockout	Server	All Day Shift	Hourly	$3.02	2/3/2014 3:31:02 PM	2/4/2014 10:01:00 PM

3. From the **Time Clock** option list, click **Delete Time Clock Entry**.

***Note:** No confirmation dialog box follows this, so be sure you have selected the correct record(s) and that you really want to delete them.



Both the clock in and the clock out entry for that time record will be deleted.

9.6 Add In/Out

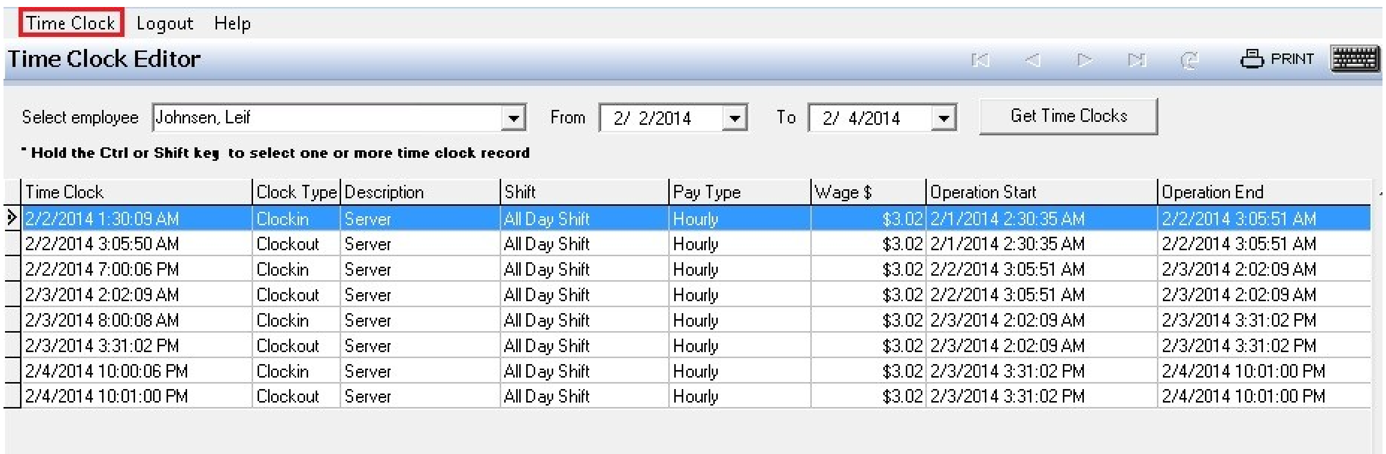
Under the **General** section click on **Time Editor**.

Add In/Out

Even if you are adding an in and an out time entry, it is a good idea to pull up any time records for the day you are adding the record for. This way you can verify that there are no other time clock entries and if they did work two shifts that all time records for that day are correct and you are not overlapping time records.

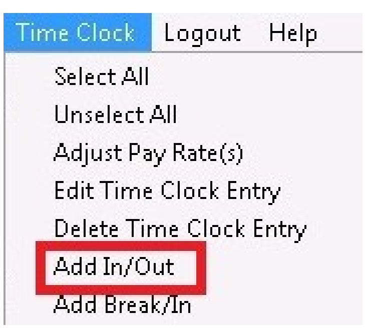
1. Pull up the time records for the desired employee and date(s). Refer back to **Get Time Clocks** if you need help.

2. Look at the existing time records for the date range you specified. Make sure your desired new time entry will not overlap. It does not matter if a record is highlighted or not.

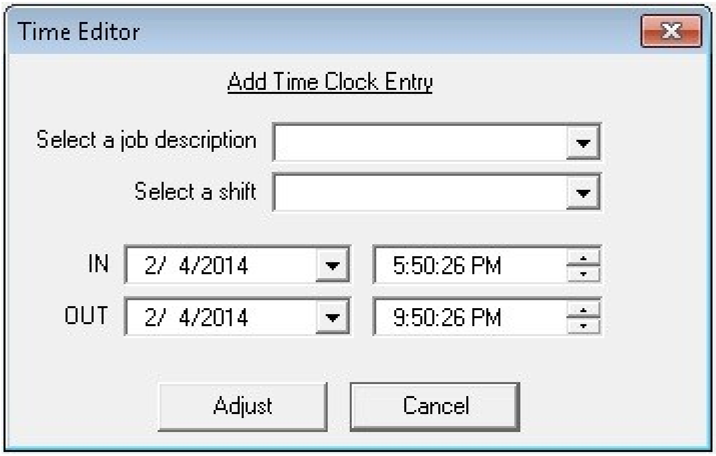


Time Clock	Clock Type	Description	Shift	Pay Type	Wage $	Operation Start	Operation End
2/2/2014 1:30:09 AM	Clockin	Server	All Day Shift	Hourly	$3.02	2/1/2014 2:30:35 AM	2/2/2014 3:05:51 AM
2/2/2014 3:05:50 AM	Clockout	Server	All Day Shift	Hourly	$3.02	2/1/2014 2:30:35 AM	2/2/2014 3:05:51 AM
2/2/2014 7:00:06 PM	Clockin	Server	All Day Shift	Hourly	$3.02	2/2/2014 3:05:51 AM	2/3/2014 2:02:09 AM
2/3/2014 2:02:09 AM	Clockout	Server	All Day Shift	Hourly	$3.02	2/2/2014 3:05:51 AM	2/3/2014 2:02:09 AM
2/3/2014 8:00:08 AM	Clockin	Server	All Day Shift	Hourly	$3.02	2/3/2014 2:02:09 AM	2/3/2014 3:31:02 PM
2/3/2014 3:31:02 PM	Clockout	Server	All Day Shift	Hourly	$3.02	2/3/2014 2:02:09 AM	2/3/2014 3:31:02 PM
2/4/2014 10:00:06 PM	Clockin	Server	All Day Shift	Hourly	$3.02	2/3/2014 3:31:02 PM	2/4/2014 10:01:00 PM
2/4/2014 10:01:00 PM	Clockout	Server	All Day Shift	Hourly	$3.02	2/3/2014 3:31:02 PM	2/4/2014 10:01:00 PM

3. From the **Time Clock** option list, click **Add In/Out.**



4. From the **Add Time Clock Entry** input screen, select the job description and shift, then enter the date and time that this employee should have clocked in and then enter the date and time this employee should have clocked out. Select a job description and/or shift if this employee has multiple jobs/shifts. Press the **Adjust** button when finished.



The information you just entered will now display on the screen.

9.7 Add Break/In

Under the **General** section click on **Time Editor**.

Add Break/In

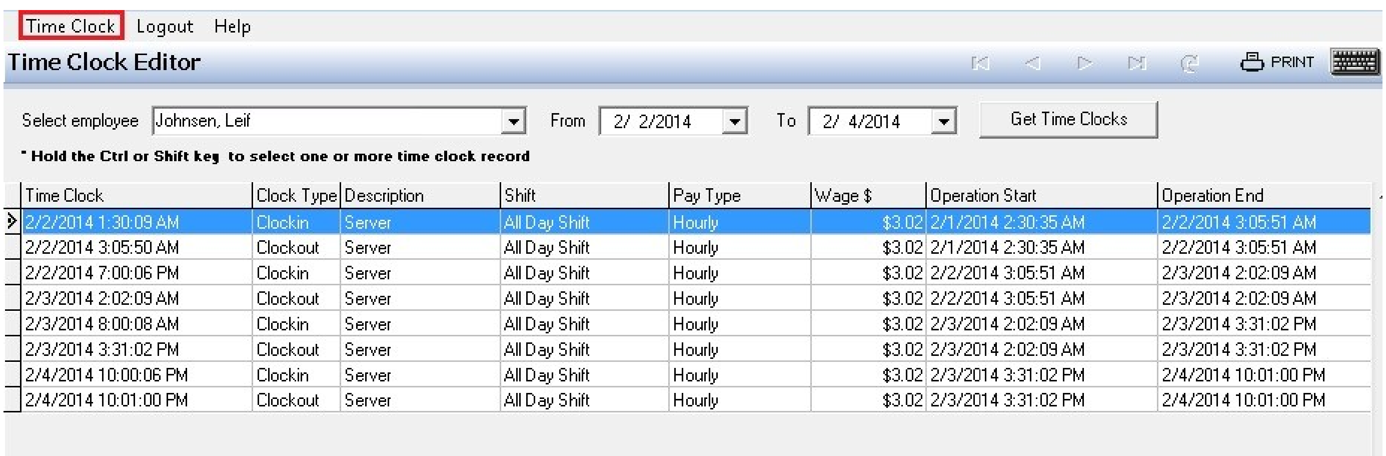
*****A BREAK IN AND OUT RECORD WILL PAY THE EMPLOYEE DURING THE BREAK TIME. IF YOU WISH TO RECORD AN UNPAID BREAK, USE THE ADD IN/OUT FUNCTION FROM TIME EDITOR.**

Even if you are adding a BREAK in and out time, it is a good idea to pull up any time records for the day you are adding the record for. This way you can verify that there are no other time clock entries and if they did work two shifts that all time records for that day are correct and you are not overlapping time records.

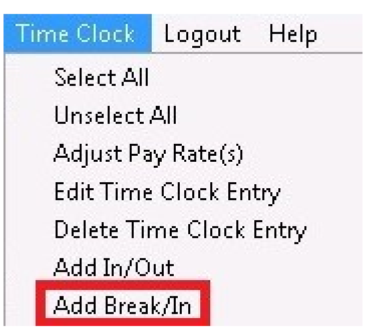
1. Pull up the time records for the desired employee and date(s). Refer back to **Get Time Clocks** if you need help.

2. Look at the existing time records for the date range you specified. Make sure your desired new time entry will not overlap.

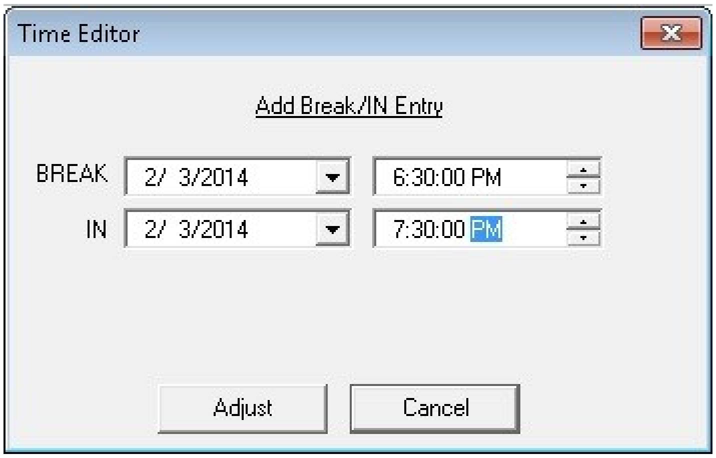
3. Click on the time record for which you would like to add a Break/In to highlight it. Press the **Time Clock** option at the top of the screen.



4. From the **Time Clock** option list, click **Add Break/In.**



5. From the **Add Break/IN Entry** input screen, enter the date and time that this employee should have started their break in the fields next to **BREAK** and then enter the date and time this employee should have ended their break in the fields next to **IN**. Press the **Adjust** button when finished.



The information you just entered will now display on screen.

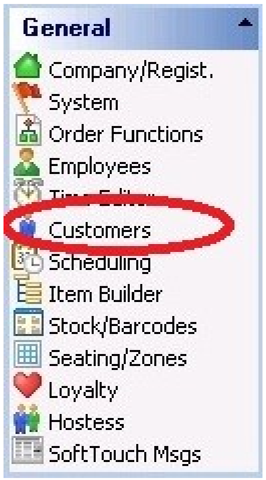
Part X

Customers

Part 10 Customers

Under the **General** section click on **Customers**.

Customers



Customer Setup contains the following settings:

1. Settings & Maintenance

2. Auto Completion

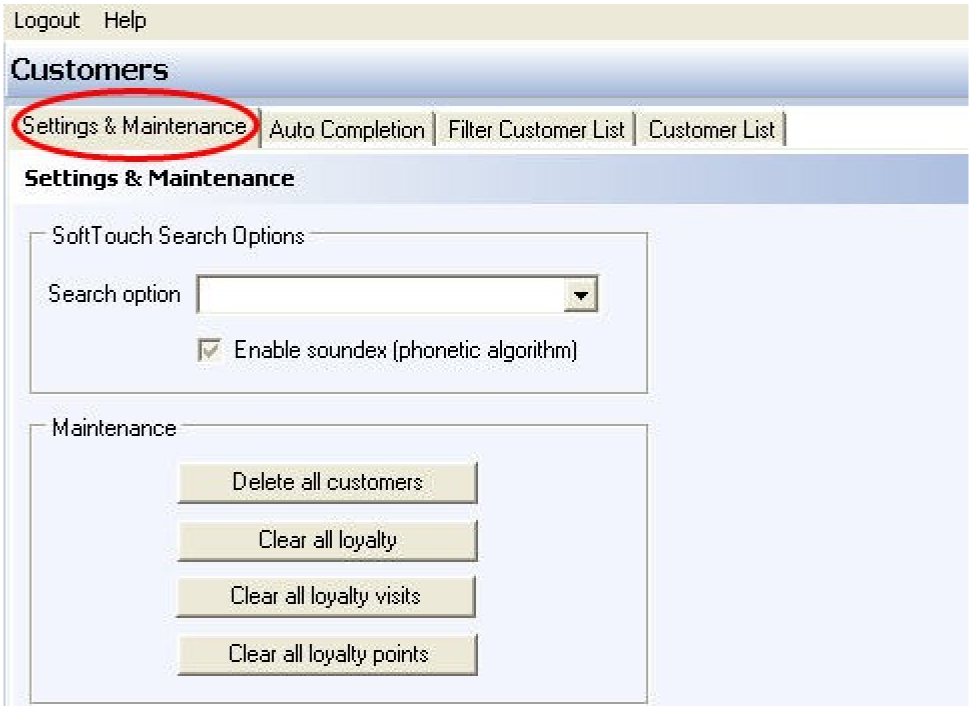
3. Filter Customer List

4. Customer List

10.1 Settings & Maintenance Tab

Under the **General** section click on **Customers**. Select the **Settings & Maintenance** tab.

Settings & Maintenance



- SoftTouch Search Options -

No wildcard search	The exact match will have to be entered when searching for a first and/or last name of a customer. **Example**: if you typed in **Smith** you would get all the listing of all the last names of **Smith**, but if you typed in only **Smi** you would be asked if you want to add a new customer with the last name of **Smi**.
Full wildcard search	When you type in a couple of letters to search by, all fields will be searched for words containing the letters. **Example**: If you typed in **SM** it would search for any name containing **SM**, such as **Sm**ithers, **Sm**all Town, A**sm**oth Valley, Del**sm**or Beach, etc. ***Note**: This searches across first name, last name, company, and address/city fields.

Partial wildcard search	When you type in a couple of letters to search for a word, it will only search the beginning of the words. **Example**: If you typed in **SM** it would search only the first part of the words for **SM**, such as **Sm**oke, **Sm**ith, **Sm**ithey. ***Note**: This searches across first name, last name, company, and address/city fields.
Enable soundex (phonetic algorithm)	If you meant to type a word one way but spelled it wrong and it sounds the same, the system will bring up a list of words that sound the same. **Example**: If you typed in **Smyth** but the person's name was really spelled **Smith** the computer would bring up a list containing both **Smyth** and **Smith** because they phonetically sound the same. ***Note**: This only searches across first name, last name, and company fields.

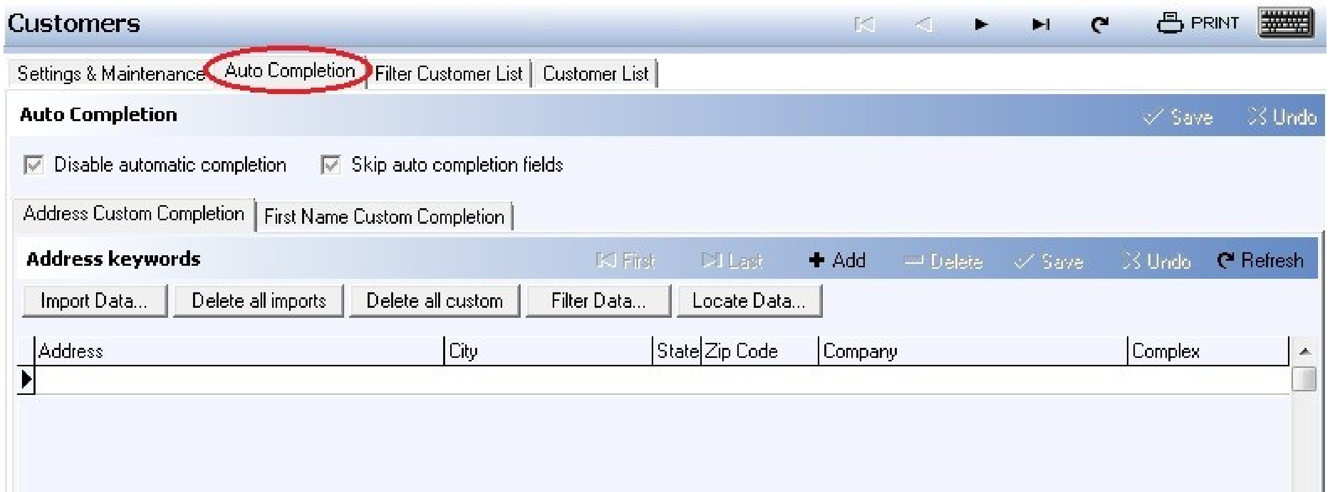
- Maintenance -

Delete all customers	Enables all customers listed in the Customer list to be deleted.
Clear all loyalty	Enables all loyalty history and loyalty history tied to customers to be deleted.
Clear all loyalty visits	Enables all loyalty visits and loyalty visits tied to customers to be deleted.
Clear all loyalty points	Enables all loyalty points history and loyalty points tied to customers to be deleted.

10.2 Auto Completion Tab

Under the **General** section click on **Customers**. Select the **Auto Completion** tab.

Auto Completion



The Disable automatic completion option allows you to turn off auto completion. If disabled, it will not matter what you have listed under the Address Custom Completion tab or the First Name Custom Completion tab.

Auto Completion explanation includes the following:

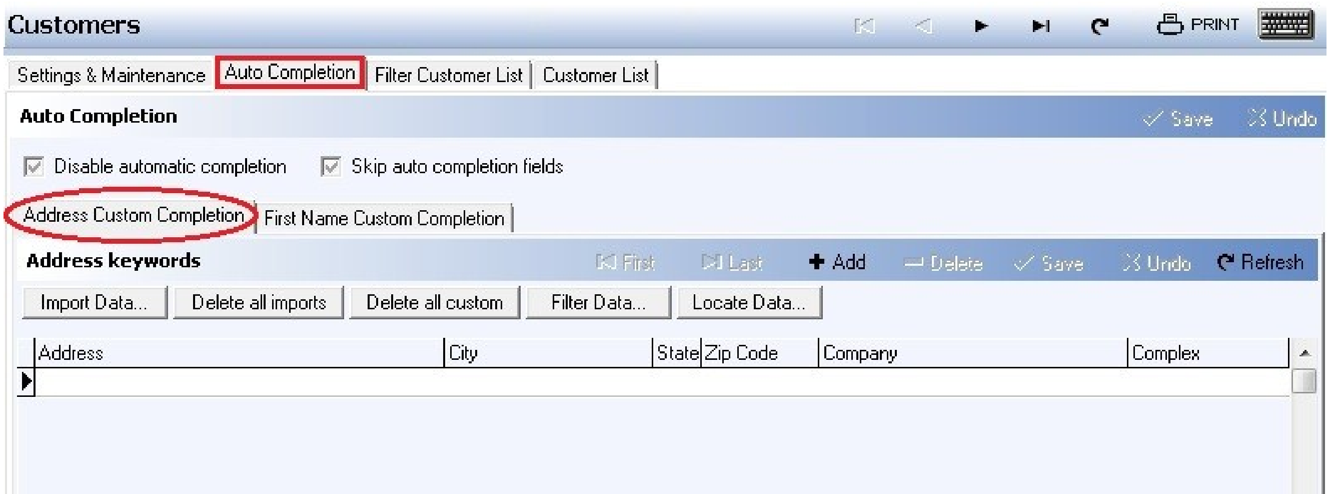
1. Address Custom Completion

2. First Name Custom Completion

10.2.1 Address Custom Completion Tab

Under the **General** section click on **Customers**. Select the **Auto Completion** tab. Select the **Address Custom Completion** tab.

Address Custom Completion



- Auto Completion -

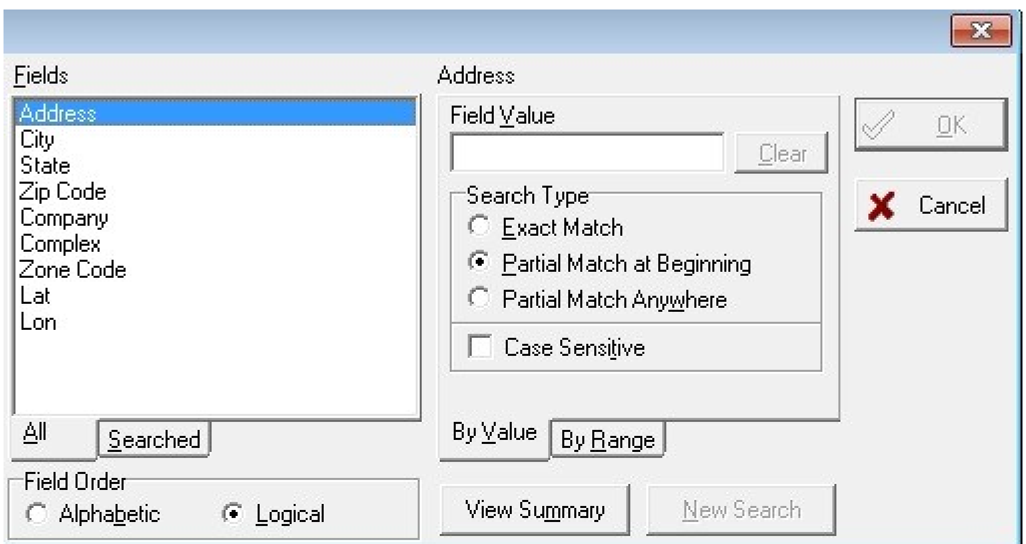
Disable automatic completion	Checking on this box will prevent it from automatically completing what you are typing if it matches information already in the system.
Skip auto completion fields	Checking on this box will prevent it from automatically completing fields other than the one you are typing in (such as city, state, and zip code if you are entering the address). ***Note:** This applies only to Address Custom Completion and not First Name Custom Completion, as First Name Custom Completion involves only one field (First Name).

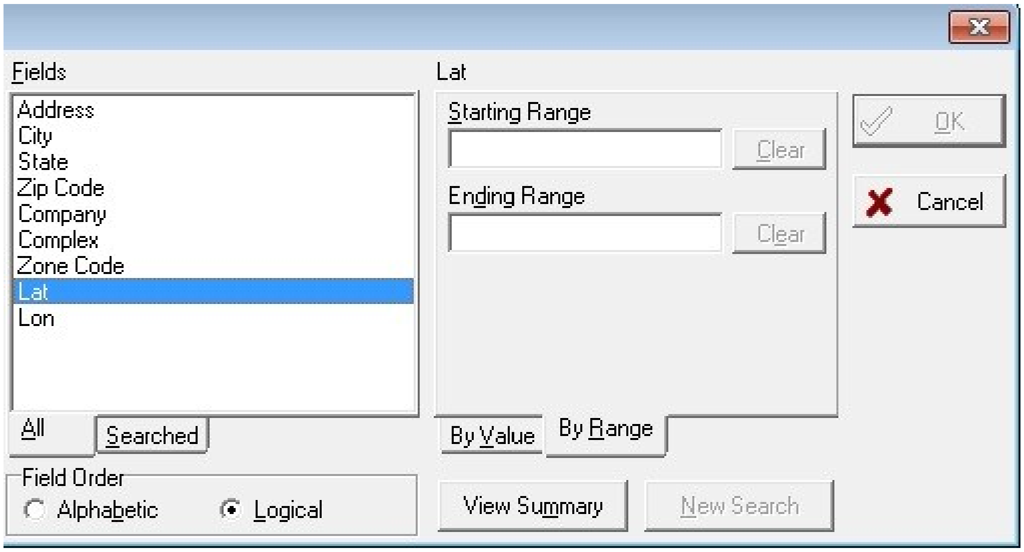
- Address Keywords -

Import Data	Enables you to import a listing of addresses from the zip codes software, if purchased, for delivery and take-out in the restaurant's area. ***Note**: You can call 954.531.0471 for the options/prices of addresses.

Delete all imports	If used, this will delete <u>all</u> imported data. ***Note**: This will not delete any custom data.
Delete all custom	You have the option of adding custom addresses to the address section (see below for more information). If you decide you would like to delete <u>only</u> the custom addresses you have plugged in, use this option. ***Note**: This will not delete any imported data.
Filter Data	This lets you list data by different parts of the addresses, alphabetically or logically. (See below for more detail.)
Locate Data	This enables you to search the data using different search criteria. (See below for more detail.)

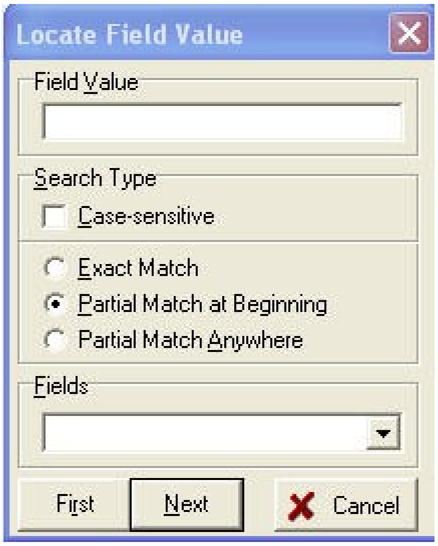
- Filter Data -





Fields	You have the option of selecting what field, listed within the All tab, you would like to search. ***Note**: The selection highlighted in blue is what will be searched. The Searched tab tells you what fields you have already searched.
By Value	The By Value tab is shown in the top screen above this chart. In this mode you type in what you are looking for in the Field Value section and select the Search Type you would like to use If you are in the search will search for values listed between the ranges you have specified.
By Range	The By Range tab is shown in the bottom screen above this chart. This mode enables a search for values listed between the Starting Range and Ending Range ranges you have specified.

Search Type	**Exact Match**: Searches for exactly what you have typed in. **Example**: If you type in **Smith** it will search only for **Smith**. **Partial Match at Beginning**: searches only for the letters/numbers you have typed at the beginning of the word **Example**: If you type in **123** it will search only for items beginning with **123** (it could find 12345 and 12321 but not 51234 or 11233). If you type in **sm** it will search only for items beginning with **sm** (it could find Smith but not Blacksmith). **Partial Match Anywhere**: Searches anywhere in the words/numbers for what you have typed in. **Example**: If you type in **123** or **sm** it will search for items that contain **123** or **sm** anywhere in the sequence (it could find 12345 and 54123; it could find Smith and Blacksmith).
Field Order	This option lets you search the database alphabetically or logically. **Alphabetically:** Arranges the searchable options in the Fields area in alphabetical order (Address, City, Company, etc.). **Logically:** Arranges the searchable options in the Fields area in a format that follows the order in which address components would normally appear (Address, City, State, Zip Code, etc.).
View Summary	Shows the search results in a separate window based on what you have told it to search for.
OK	Clicking **OK** will change the customer list you see on the Auto Completion screen to show only what you have input into the search fields. ***Note:** If you would like to see your entire address database again, make sure all search fields are blank (you can do this by using the**Clear** buttons or clicking on **New Search**). Then, with all input fields blank, click **OK**. This will bring up the entire address database in alphabetical order.
New Search	This will clear search criteria you've entered so you can start over fresh.



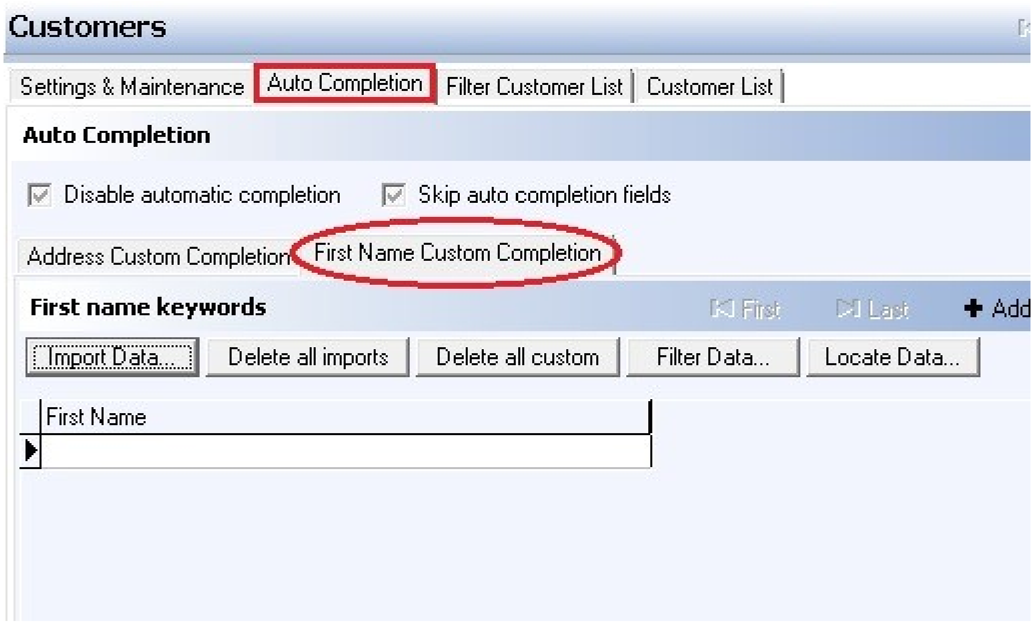
Field Value	This is where you type in the name, partial name, word, etc. that you are looking for.
Search Type	The same concept as listed previously in the Filter Data chart. **Exact Match**: Searches for exactly what you have typed in. **Example**: If you type in **Smith** it will search only for **Smith**. **Partial Match at Beginning**: searches only for the letters/numbers you have typed at the beginning of the word **Example**: If you type in **123** it will search only for items beginning with **123** (it could find 12345 and 12321 but <u>not</u> 51234 or 11233). If you type in **sm** it will search only for items beginning with **sm** (it could find Smith but <u>not</u> Blacksmith). **Partial Match Anywhere**: Searches anywhere in the words/numbers for what you have typed in. **Example**: If you type in **123** or **sm** it will search for items that contain **123** or **sm** anywhere in the sequence (it could find 12345 <u>and</u> 54123; it could find Smith <u>and</u> Blacksmith).
Fields	Select what field you would like searched from the drop-down list.
First	On the customer list, this will place an arrow next to the first item that matches the search criteria you have specified. If you have already clicked next a couple of times, clicking **First** again will bring you back to that first item.

Next	On the customer list, this will move the arrow to the next item that matches the search criteria you have specified (the next one after whatever is currently selected or displaying an arrow). ***Note**: When you click **Next**, the Locate Data box will close. If you reopen the Locate Data box, your search criteria will still be there, meaning you can still click **Next** to navigate to the next item that matches that criteria.

10.2.2 First Name Custom Completion Tab

Under the **General** section click on **Customers**. Select the **Auto Completion** tab. Select the **First Name Custom Completion** tab.

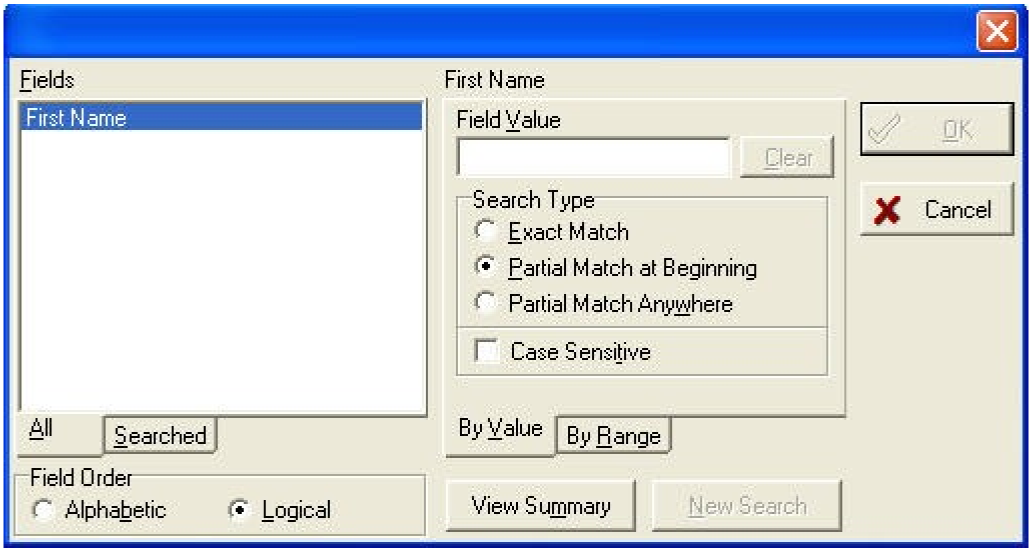
First Name Custom Completion



The First Name Custom Completion area is the same concept as the Address Custom Completion area except it only uses first names for imported or added customer data. Within the Filter Data and Locate Data options, the only difference is that you would only have the **First Name** as an option field to search within.

How to use these options was covered previously (see **Address Custom Completion Tab**).

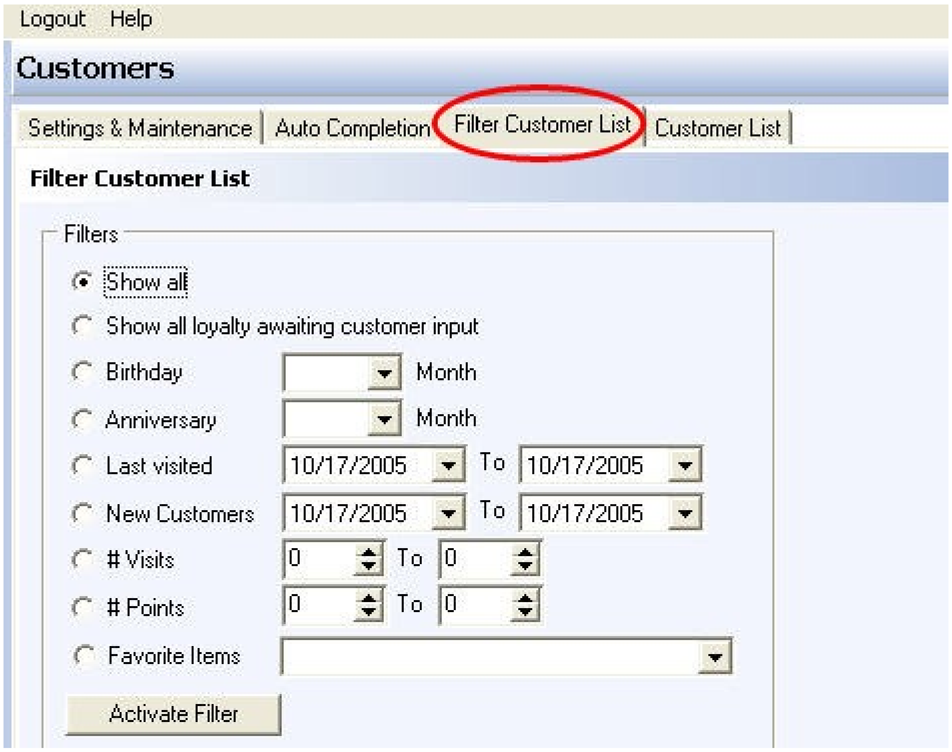
Example: Visual of Filter Data; as you can see, the only searchable field is "First Name."



10.3 Filter Customer List Tab

Under the **General** section click on **Customers**. Select the **Filter Customer List** tab.

Filter Customer List



- Filters -

Show all	Shows all the customers in the database in alphabetical order. ***Note**: If you have previously filtered the list, click this and then press **Activate Filter** if you would like the database to go back to showing all the customers.
Show all loyalty awaiting customer input	Searches customer database for loyalty accounts that have been created but have not had the rest of the customer information entered yet (such as name, address, etc.).
Birthday	Searches the customers based on their birthday month. Use the drop-down list to select the number corresponding with the month you would like to search for. ***Note**: You must have birth dates entered for the customers to get any results from this filter.

Anniversary	Searches the customers based on their anniversary month. Use the drop-down list to select the number corresponding with the month you would like to search for. ***Note**: You must have anniversaries entered for the customers to get any results from this filter.
Last visited	Searches for customers whose last visit falls in between the dates you specify using the drop-down calendars.
New Customers	Searches for new customers you added between the dates you specify using the drop-down calendars.
# Visits	Filters the data by the number of visits the customers have had. When you specify a range, the lowest number has to come first. **Example**: You can enter "1 to 99," but if you enter "99 to 1" no customers will show up. ***Note**: This section only works if you have visits as an available option for the customers to acquire under the Loyalty section of Back Office (see Loyalty->Visit Setup).
# Points	Filters the data by the number of points the customers have accrued. When you specify a range, the lowest number has to come first. **Example**: You can enter "1 to 99," but if you enter "99 to 1" no customers will show up. ***Note**: This section only works if you have points as an available option for the customers to acquire under the Loyalty section of Back Office (see Loyalty->Point Setup).
Favorite Items	Filters the customers by the item specified in the drop down menu. ***Note**: If you know the name of the item you would like to search by you can type it into the field, but if the item has not as of yet had any customers tied to it, the search will be ineffective. Instead of selecting an item that appears on the drop-down list, you can type it, but the spelling must be the same. Beginning to type an item can also help you select that item from the drop-down list more quickly.
Activate Filter	Once you have selected how you would like the customer database filtered, click **Activate Filter** to have the data sorted. Click the **Customer List** tab to view the filtered data.

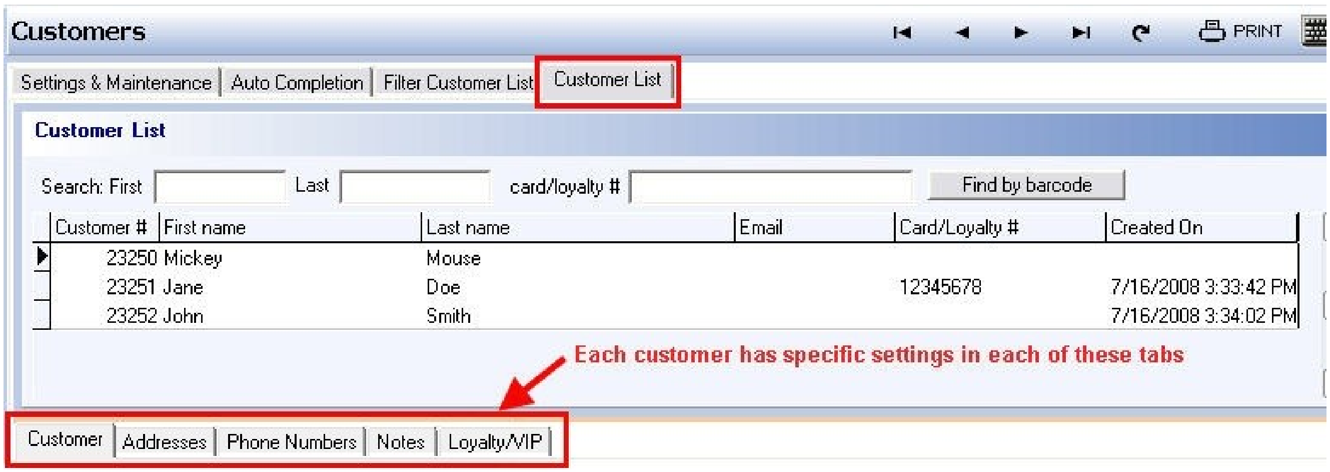
***Note:** For those filters that require you to fill in something (a date, number range, etc.), don't forget also to click the circle to the left of that filter name before pushing

10.4 Customer List Tab

Under the **General** section click **Customers.** Select the **Customer List** tab.

Customer List

You can search the customer list by first and/or last name and by card/loyalty #. you can also find the customer by barcode if you have assigned a tag with a barcode on it to the customer.

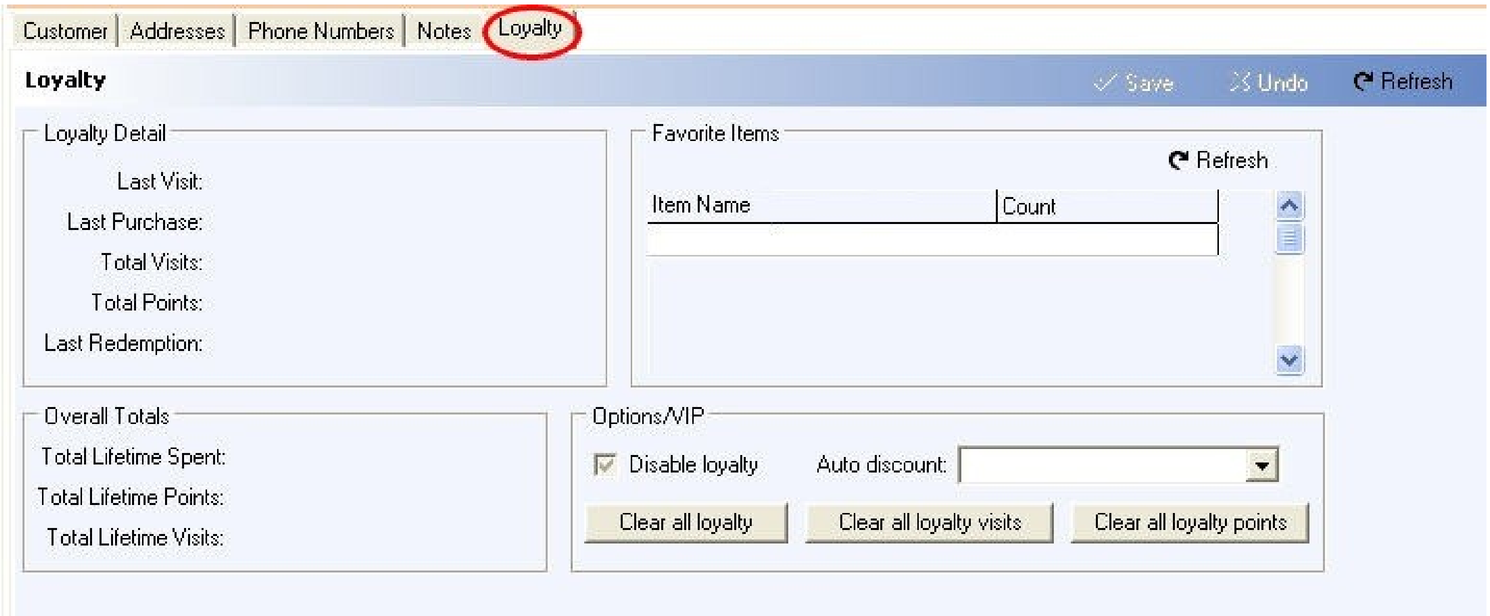


***Note**: The black arrow points to the customer currently selected; if you need to select a different customer you would just click on their name to highlight that customer as your selection.

Customer Tab	This will bring up customer detail. In this section you must fill out the First Name and Last Name fields. The other fields are optional. ***Note**: The Customer Card # is usually a field filled out for a customer having a loyalty card or member card assigned to them. If you are creating a customer for take out or delivery, they do not need a card # so this option does not have to be filled out.
Addresses Tab	This information is necessary for when the customer is having food delivered to them. If the customer is just ordering takeout, this area will probably not be filled out.
Phone Numbers	These are the customer's main contact number(s).
Notes	If you have any special notes you would like to add about the customer this is the section to add them to. When you assign the customer to a delivery or takeout order, the notes you enter here will pop up in the upper left corner of SoftTouch for a few seconds. This is good for putting things like "Doesn't like cheese."

- Loyalty/VIP Tab -

The Loyalty Detail and Overall Totals section will automatically list what the customer currently has for all items applicable, as will the Favorite Items section.



Options/VIP section

Disable Loyalty	If you check this option on for the customer selected in the list, they will no longer be able to receive loyalty points and/or visits.
Auto Discount	Within this section you select a discount to be applied automatically to this customer's checks. The discount must be listed in the Adjustments section to show up as an option here. ***Note**: To understand adjustments right now see Financial Section->Adjustments. You can set up any adjustments you would like specifically for the auto discount section.
Clear all Loyalty	Clears all accumulated customer loyalty points and/or visits for the currently selected customer.
Clear all loyalty visits	Clears all accumulated customer loyalty visits for the currently selected customer.
Clear all loyalty points	Clears all accumulated customer loyalty points for the currently selected customer.

Part XI

Scheduling

Part 11 Scheduling

Under the **General** section click on **Schedules** to open Schedules Setup screen.

Scheduling

Scheduling Setup includes the following:

1. System Schedules

2. Employee Schedule Setup

3. Employee Scheduling

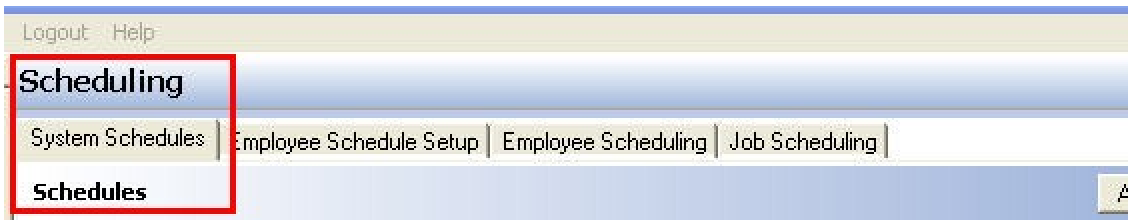
4. Job Scheduling

11.1 System Schedules Tab

Under the **General** section click on **Schedules**. Select the **System Schedules** tab.

Schedules

In the Schedule Section is where you would set up the schedules for the menus to follow and for the employees to follow.



IMPORTANT!

12:00 am rule:

Before we set up schedules we must first understand the following concept. Restaurants set their operation date from beginning to close. Their operation date may start at 11:00 am and end at 2:00 am. Restaurants want all sales during this time period to report for this business day.

In the real world however, the next day really starts at 12:00 am. In other words, Monday switches to Tuesday at 12:00 am (midnight) in the real world. Schedules follow the real world.

Therefore when programming schedules one must realize that if a restaurant wants to schedule a time for 9:00 pm to 2:00 am we must observe the 12:00 am rule that the real world recognizes from 12:00 am to 2:00 am as the next day even though the restaurant does not.

In other words, to add Monday 9:00 pm to 2:00 am to your schedule, you need to add both Monday 9:00 pm to 11:59pm and Tuesday 12:00 am to 2:00 am.

System Scheduling includes the following:

1. Add Schedule

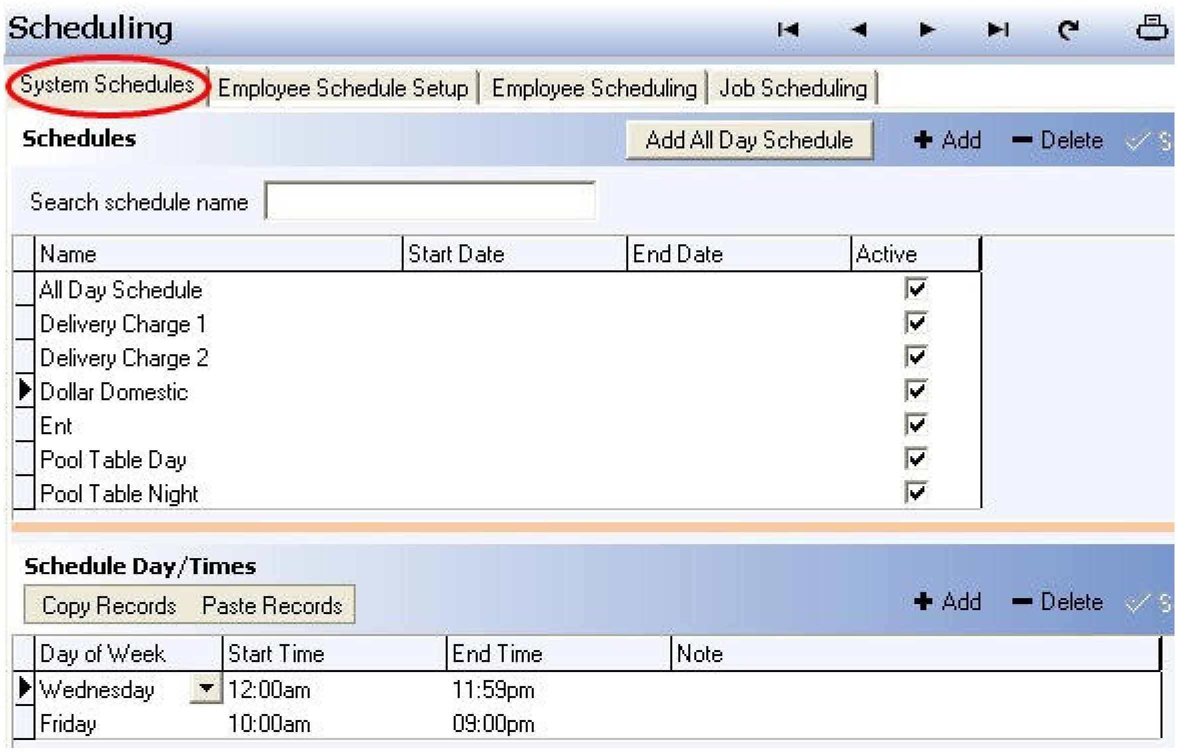
2. Copy Schedule Records

11.1.1 Add Schedule

Under the **General** section click on **Schedules**. Select the **System Schedules** tab.

- Add Schedule -

Here you create all your schedules and give a name to each schedule, start and end dates, days of the week and start and end times.



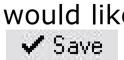
Schedules are times that the menu items and menus themselves will actually be available for sale at a restaurant. Schedules can be for Happy Hour, Item Specials that are only available Wednesday Night between the hours of 7pm to 9pm for example. Schedules may also be used for when Lunch and Dinner menus begin and end.

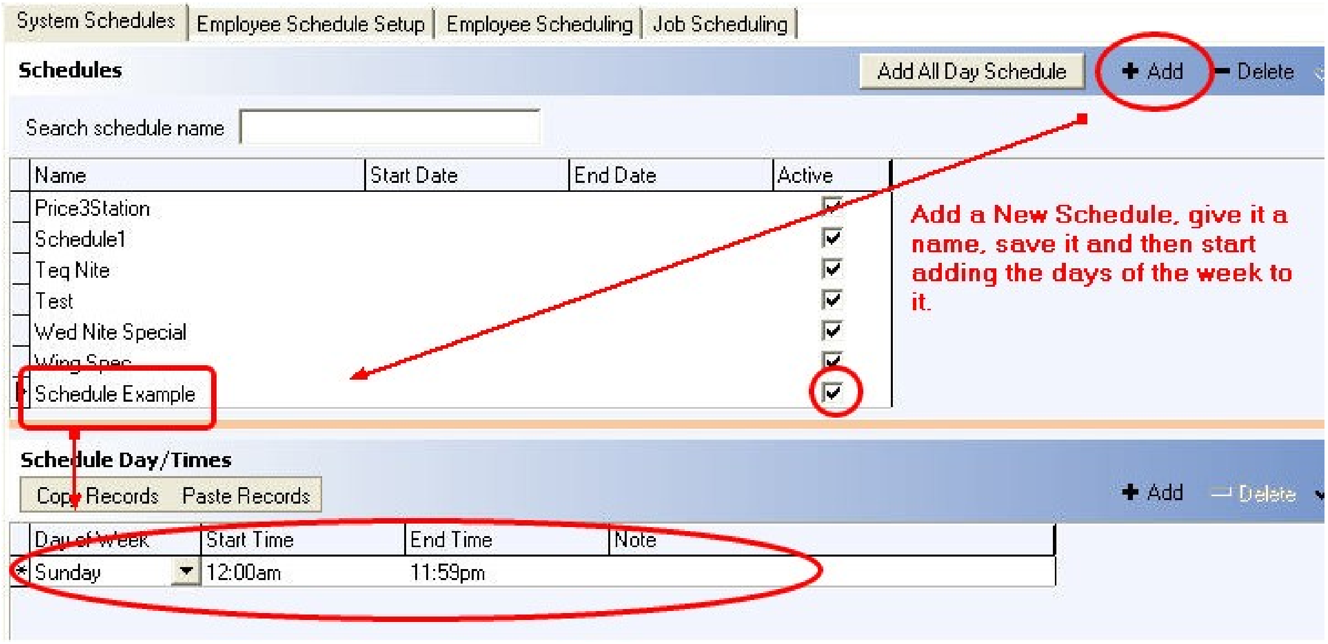
- To Add the Schedules -

Step 1.

First you should always add an all day schedule by clicking on the Add All Day Schedule button. The days of the week will be automatically added in from Sunday to Saturday from 12:00am to 11:59pm. All your priced items whether Food or Liquor will be assigned to the All Day schedule by default if the don't have any specific schedule assigned to them. This will allow their prices to be available all operation day long.

Step 2.

Click on the  button in the **Schedules** part of the screen. This will bring up a blank space to put the name into. Name the schedule. If you would like to have this schedule be used, make sure the active option is checked on. Click the  button when you are done.



Step 3.

Under the Schedule Day/Times there will be a blank area for the schedules. Click on the drop down menu for Day of the Week and select what day you would like the week to start on for the restaurant.

> ***Note:** As shown in the example image above, once you choose the day of the week you would like, the Start Time and End Time are automatically filled in to be 12:00am for the start time and 11:59pm for the end time.

Step 4.

To add more days to the schedule keep clicking the + Add button in **Schedule Day/Times** part of the screen. You can list any variety of days you would like.

> **Example:** Adding a Happy Hour Schedule: To add a happy hour schedule from Monday - Thursday from 4pm to 7pm you would just add the schedule Happy Hour and create Monday - Thursday as the days of the week and put the start times on all to 4pm and the end times to 7pm.

Step 5.

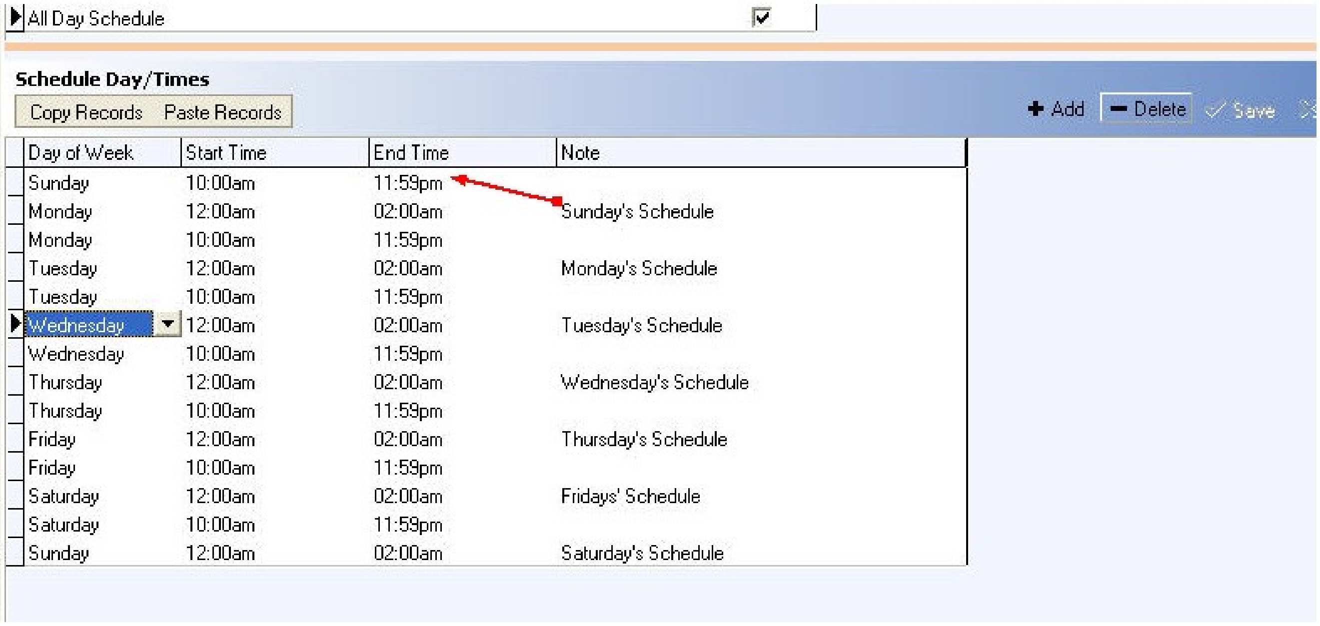
As noted, by default the schedule is always from 12am start time to 11:59 end time. You can change this by clicking within the start time area and typing in what you would like the start time to do and then do the same for the end time area.

- Adding Schedules for a restaurant open past midnight -

To Add: Say you have a restaurant that runs from 10:00 am to 2:00 am. If a particular schedule goes past Midnight, then you must stop the time at 11:59 pm on each day and create a new start time for the next day at 12:00 am to whatever am time you want it to stop (for example 2am).

> ***Note:** This means you will be using Sunday from 10am to 11:59pm and then the real world Tuesday from 12am to 2am in Monday's operation day schedule.

This is and example of what the set up would look like:



***Note:** See above image:

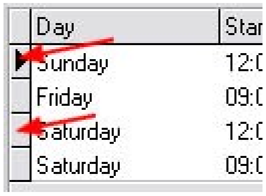
The Sunday schedule goes from 10:00am to 2:00am. In order to achieve this, a Sunday was added that goes from 10:00am to 11:59pm. Then a schedule is added below that is for Monday that goes from 12:00am to 2:00am. A note was placed next to it to show that the Monday schedule from 12am to 2am is really part of Sunday's schedule. This note is not necessary, but is useful to remind someone of how the schedule is set up.

11.1.2 Copy Schedule Records

Under the **General** section click on **Schedules**. Select the **System Schedules** tab.

- Copy Schedule Days/Times -

To copy one or more records press and hold Ctrl key on your keyboard and click the grid on the left of the day(s) you wish to copy (this way you specify that this is the record to be coped). See image:



- Currently selected record

- Record to be copied

- Multiple selected records

After you have selected records you wish to copy click the "Copy Records" button under **Schedule Day/Times**. See image below:

Then in the **Schedules** part of the screen highlight the schedule name you wish to copy the selected records to and click "Paste Records" button under **Schedule Day/Times**. See image:

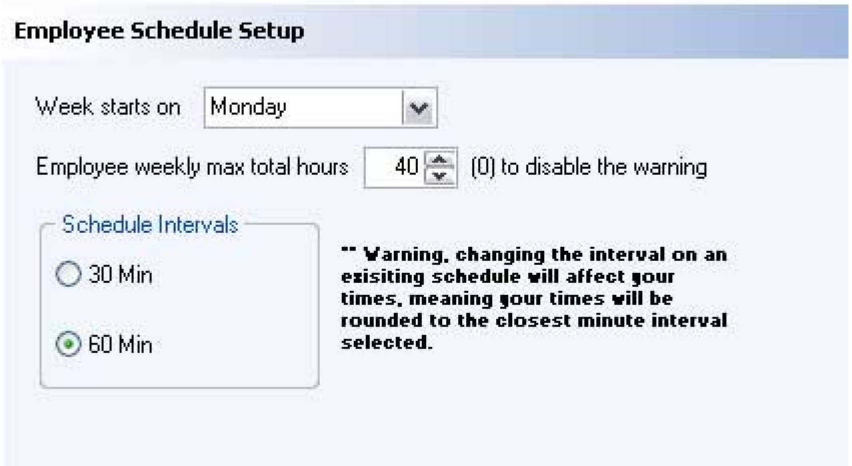
Tip: You can copy multiple items at one time by holding down the CTRL key as you select them.

11.2 Employee Schedule Setup Tab

Under the **General** section click on **Scheduling**. Select the **Employee Schedule Setup** tab.

Employee Schedule Setup

Here you specify how you want your employee schedule to be set up.



Week starts on:

Select the start day of the week you prefer from the drop-down menu.

***Note:** Most restaurants prefer to start their day on Sunday.

Employee weekly max total hours:

Specify the maximum total hours a week for your employees.
If an employee reaches their maximum weekly hours, a warning dialog will be displayed to notify them.
0 value disables the warning and no maximum weekly hours are set.

- Schedule Intervals -

30 Min	If this option is selected, the time grid in the employee scheduling has 30 minutes appended to each hour. **Example**: 1:00 PM 1:30 PM 2:00 PM 2:30 PM 3:00 PM 3:30 PM etc. ***Note:** this setting takes up more screen space.

60 Min	If this option is selected, the time grid in the employee scheduling increases by 1 hour. **Example**: 1:00 PM 2:00 PM 3:00 PM etc.

****WARNING****

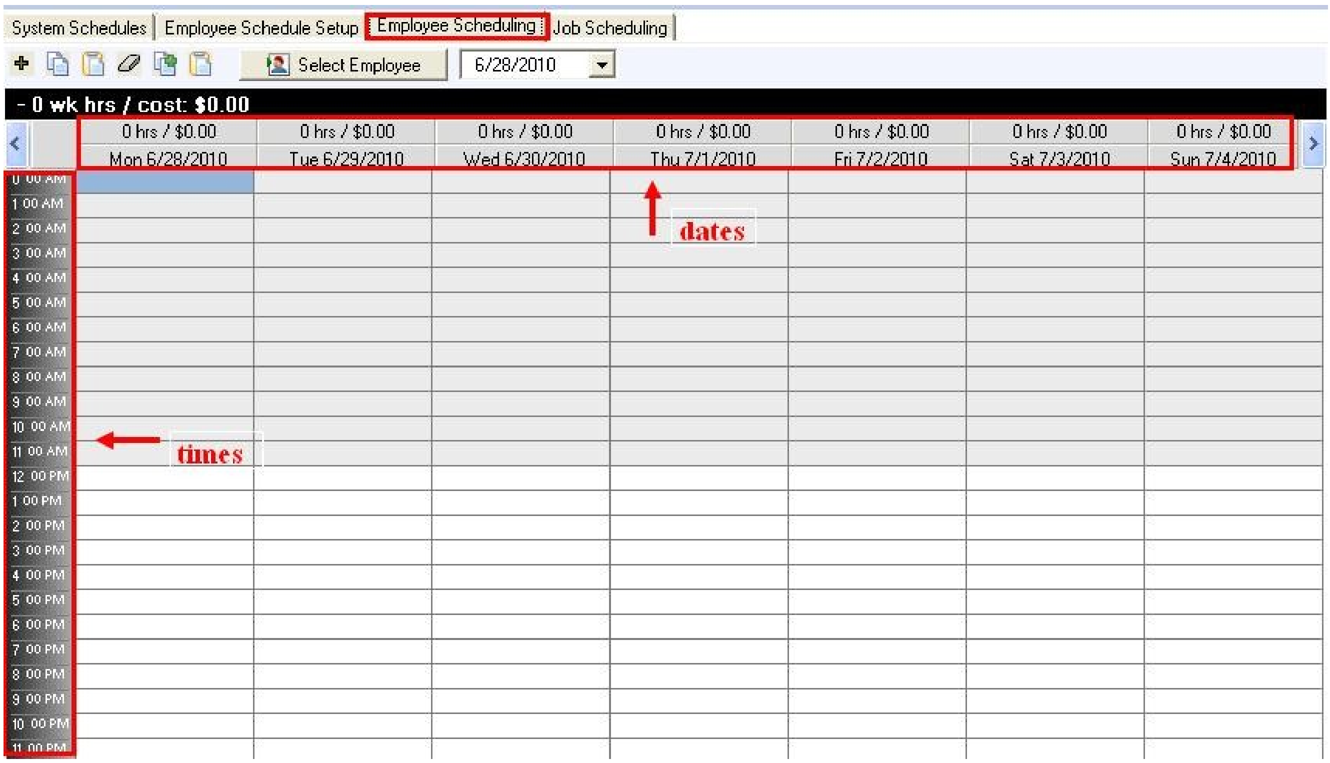
Once you have employee schedule times all set in the BackOffice and you later decide to change schedule intervals, your times will be affected; the system will round your times to the closest minute interval selected.

11.3 Employee Scheduling Tab

Under the **General** section click on **Scheduling**. Select the **Employee Scheduling** tab.

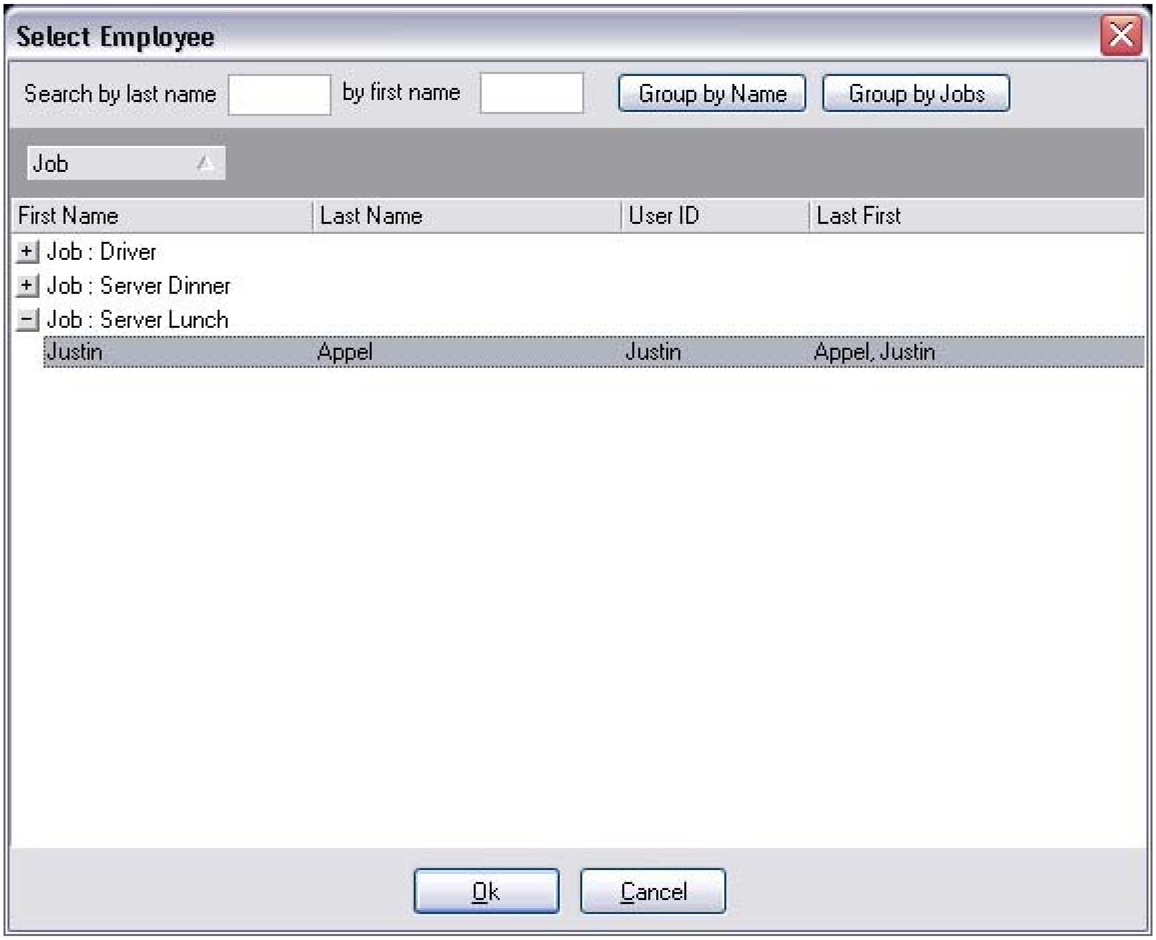
Employee Scheduling

In the Employee Scheduling you see a grid of the week with dates and times. Dates at the top and times on the left side.



Step 1. Click on **Select Employee** button at the top 

They are grouped by job or name (you can switch between the groupings by pressing the buttons at the top); click the plus signs to show all employees in the group.

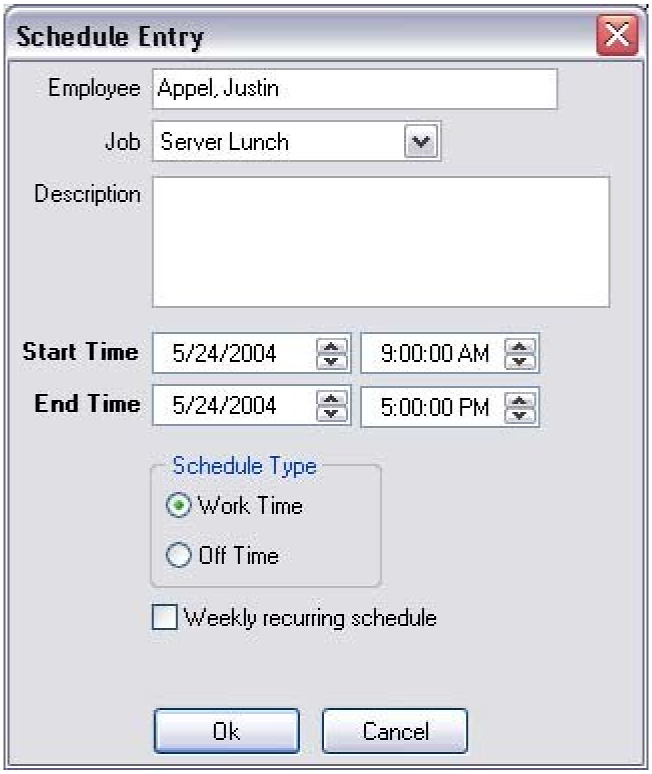


Step 2. Select an employee whom you are creating this schedule for and click Ok.
***Note:** Only Employees who have scheduling enabled will show up in the list of employees to choose from. To enable an employee to be scheduled, go to the Employees area in BackOffice, select an employee, then go to the Scheduling tab for that employee. Put a check mark in the "Scheduling Enabled" option.

- Add Schedule Item -

Step 1. Click the **+** sign button at the top left to add a schedule item.

Step 2. Next you fill out fields in the Schedule Entry screen that shows up



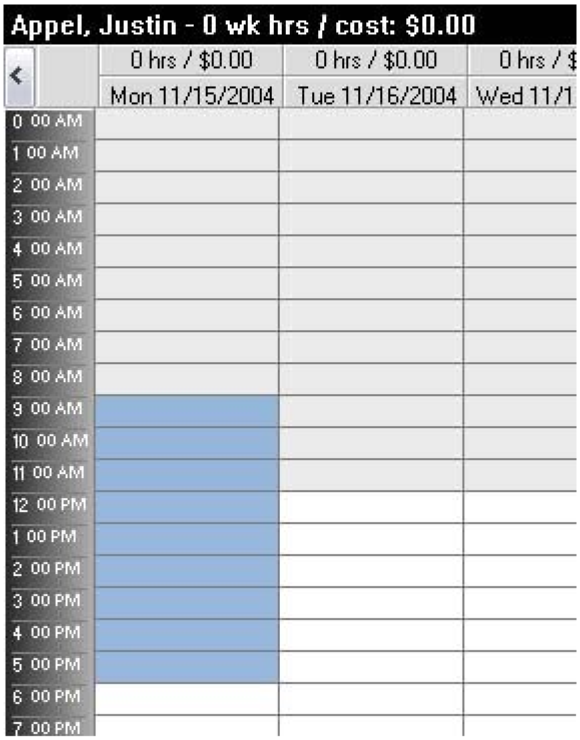
Employee	You've already selected which employee you are creating this schedule for by clicking the Select Employee button, so this employee's name is displayed here.
Job	Employee may have more than one job assigned to them so make sure to specify from the drop-down menu which of their jobs this schedule is for.
Description	Enter a description of the schedule for an easy reference later. (Optional.)
Start Time	Specify the start date and time of the schedule.
End Time	Specify the end date and time of the schedule.
Schedule Type	Select whether it is a work time or an off time.
Weekly recurring schedule	If this option is checked the schedule will repeat weekly. You don't have to manually copy and paste the same schedule from one week to the other ones. This is good if you know a certain employee can never work on Tuesdays, for example.

You can also create schedules by clicking and dragging the mouse on the grid from the start time to the end time under the specific date column.

Example: Let's say you've decided to create a schedule for an employee on 11/15/2004 from 9:00 AM to 5:00 PM.

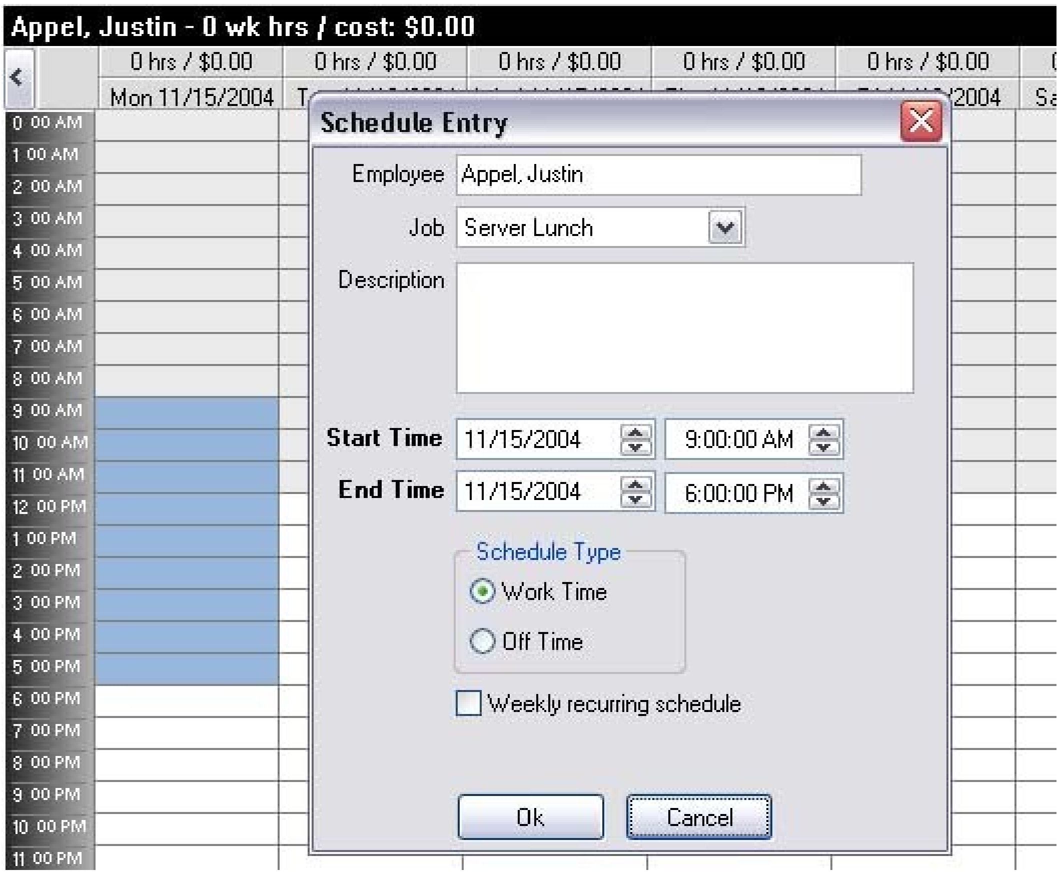
Step 1.

Under the selected date column (11/15/2004) you left click and hold with your mouse the field/cell on the selected start time (9:00 AM) and drag the mouse down until you reach the selected end time (5:00 PM). You see the fields from 9:00 AM to 5:00 PM get highlighted according to your dragging selection.



2. Now right click with your mouse in that highlighted area.

3. Next you fill out fields in the Schedule Entry screen that shows up. Since you already automatically specified date, start and end times of the employee schedule while dragging the mouse through the time fields, you will only need to fill out Job, Description (optional) and Schedule Type fields, and if applicable the Weekly recurring schedule checkbox. Refer back to **Add Schedule** above for a detailed description of each option.



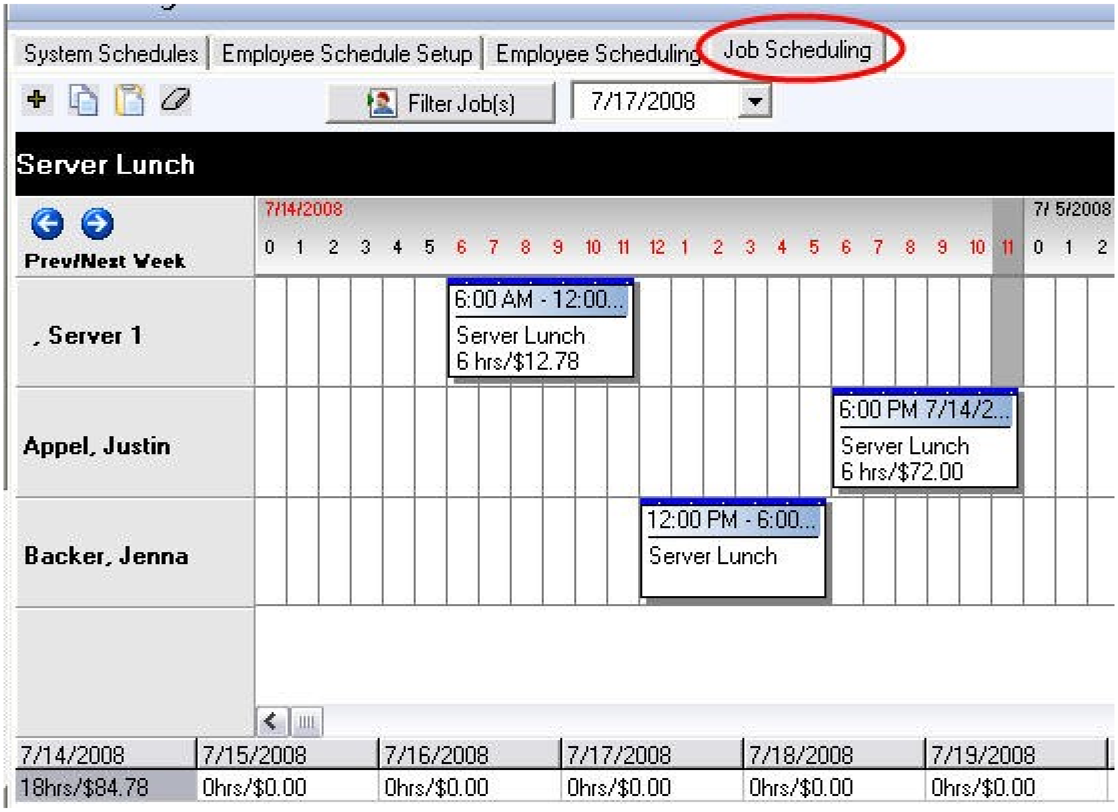
***Note:** If a down pointing arrow shows up in the schedule box it means that the schedule extends from one day to the next (example: from 11/15/2004 at 8:00 PM to 11/16/2004 at 3:00 AM).

11.4 Job Scheduling Tab

Under the **General** section click on **Scheduling**. Select the **Job Scheduling** tab.

Job Scheduling

Job Scheduling has the same concept as the **Employee Scheduling** and works exactly the same when creating a schedule by the job. But instead of the Select Employee button at the top we have a Filter Job(s) button, and the grid is a little different.



- Filter Jobs Button -

Clicking the Filter Job(s) button allows you to select only those jobs you wish to create schedules for and/or view schedules of. In other words, only the jobs you select are displayed in the grid.

- The Grid -

Both the dates and the times are at the top of the grid. The time is displayed from AM (left) to PM (right).

Part XII

Item Builder

Part 12 Item Builder

Under the **General** section click on **Item Builder** to open the **Menu Builder** screen.

Item Builder

Item Builder includes the following::

1. Departments

2. Menu & Rule Builder

3. Smart Rules

4. Menu Categories

5. Item Maintenance

12.1 Departments

Under the **General** section click on **Item Builder**. Select the **Departments** tab.

Departments includes the following:

1. Departments

2. Copying Items

3. Deleting Items

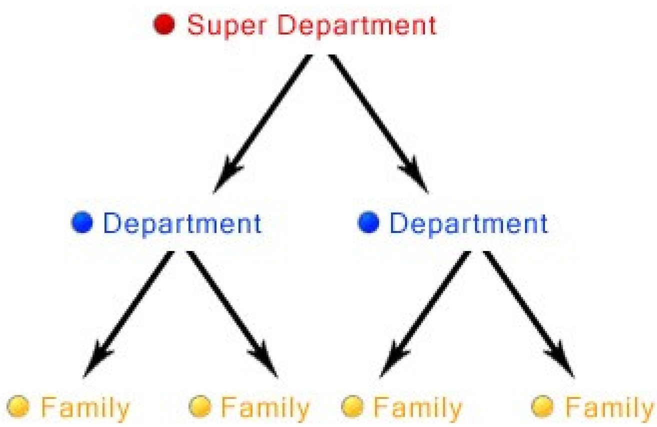
12.1.1 About Departments

Under the **General** section click on **Item Builder**. Select the **Departments** tab to open the **Departments Setup** screen.

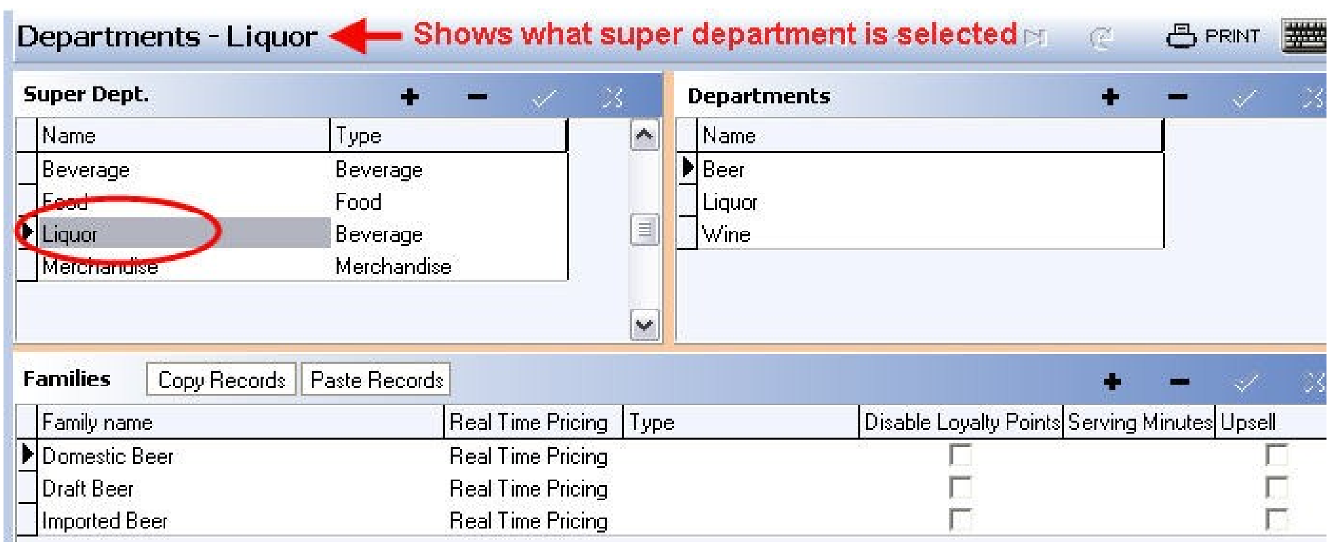
Departments:

You always need to create a **Super Department** first that will hold your **Department(s)**, which will then hold the **Families**.

Example: tree view structure of the Departments is illustrated below to help you.



- Super Departments -



Step 1.

To create a Super Department click on the 

sign located within the same line as the name Super Department and type in the name you would like to give the Super Department. There are usually three to four category names added to this section, but (as shown in the example above) you can have as many categories as you would like.

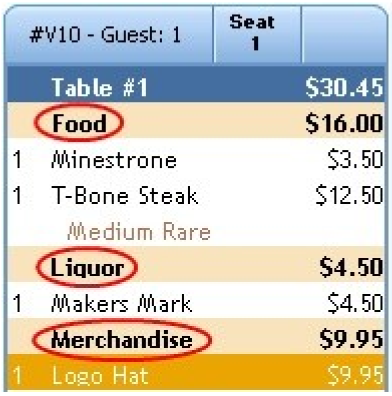
Example:

The main categories usually used for Super Departments are:

1. Food (food)
2. Beverages (non-alcoholic drinks)
3. Liquor (alcohol items; beer, wine, etc.)
4. Merchandise (t-shirts, mugs, etc.)

The name of the Super Department is what will be displayed on-screen in the check display area of SoftTouch.

Example: (see image below):



***Note:** These Super Departments allow you to give discounts to certain categories without affecting the other categories

Example: A discount on all food items that won't give a discount to liquor and merchandise as well.

(See **Financial->Adjustments** for more information about setting up discounts.)

Step 2.

Super Departments <u>must</u> have a Type assigned to them. There are only three types: Food, Beverage, and Merchandise. Use the drop down under **Type** to select the correct type.

***Note:** Assigning "Beverage" as the type will allow it to be used for the POS button named Reorder 1st order, which allows a server to order a second, third, or fourth round of drinks that's the same as the first without also reordering, say, an order of chicken wings they ordered with it (discussed in the SoftTouch POS manual).

You can also customize your remote printer tickets based off the Type assigned to a Super Department. (For more information on setting up printing, see **Printers/Coursing**.)

Step 3.

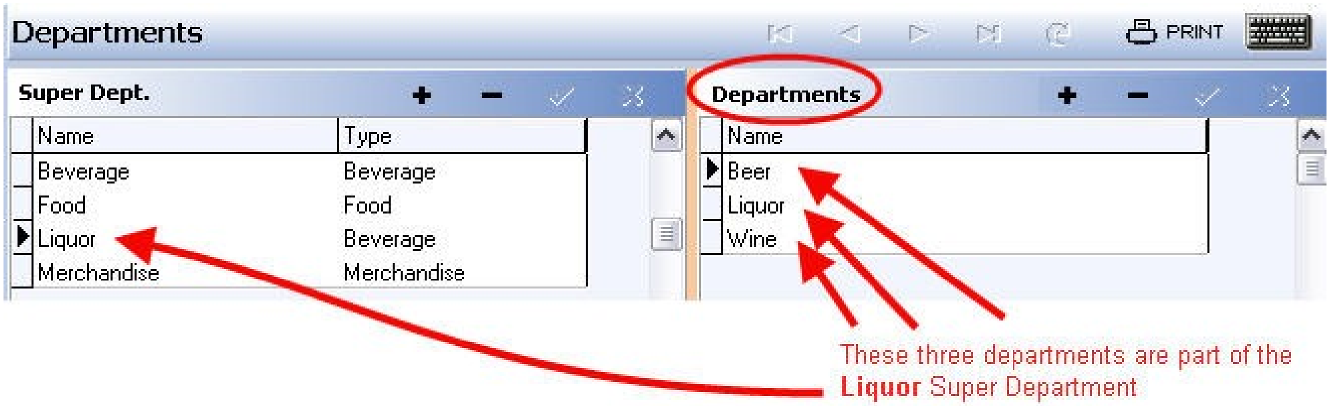
Click the 

button to save it. To delete a Super Department click the button.

***Note:** Once a super department has sales history tied to it through the family and department, it cannot be deleted.

- Departments -

Departments' categories are needed by accountants and/or bookkeepers for report purposes.



Step 1.

The Departments are linked to the Super Departments. To add a Department, make sure you have the correct Super Department highlighted before you begin.

Step 2.

Once you are ready to add a Department, click the + Add button to add it, and type a name under **Name**.

You can have as many Departments as you would like listed under the Super Department highlighted and/or you can name your Department with the same name you used for your Super Department.

Examples:

The super department of Beer could have a department named Beer.

The super department of Merchandise could have Retail and Rentals as the departments.

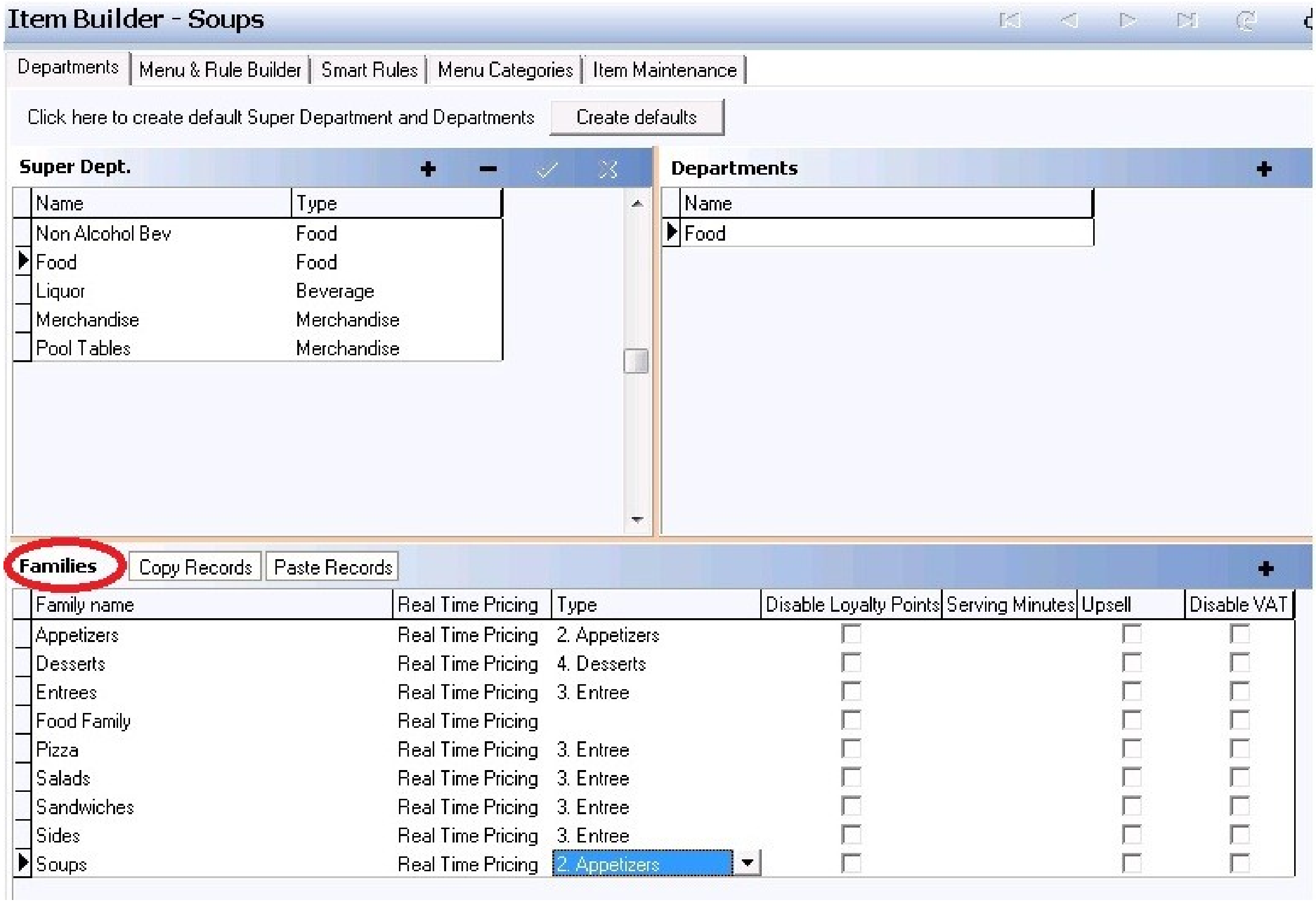
Step 3.

Click the ✓ Save button to save it. To delete a Department click the − button.

***Note:** Once a Department has sales history tied to it through the family, you cannot delete the Department.

- Families -

Every item in the menu must be tied to a family for report purposes. Here we will create families; information about tying individual items to families will be given under **Menu Builder Tab->Items->Assign Family...**.



Step 1.

Families are linked to departments, which are linked to super departments. Make sure you have the correct super department and department selected.

Step 2.

Once you are ready to add a family, click the  to add it, and type in the name under **Family name**.

Typical Families might include Appetizers, Entrees, and Deserts if you're in the food department, or Vodka, Gin, Rum, Red Wine, and White Wine if you're in the liquor department.

Step 3.

Each Family has several options; see below for descriptions:

Real Time Pricing	The Drop Down menu gives you two options: **1. Real Time Pricing:** SoftTouch overrides the price according to the schedule and system's current time. **Example**: 4:00pm-7:00pm Budweiser is $1.50 7:00pm-12:00am Budweiser is $3.00 So if Sam orders a Budweiser at 5:00pm he pays $1.50. Then if he re-orders it 6:00pm he still pays $1.50, but if he orders it again at 8:00pm he has to pay $3.00 ***Note**:This is useful for re-ordering when you have schedules setup (we will talk about schedules later or you can learn about them now by going under **General section->Scheduling**.) **2. No Real Time Pricing:** If the Family is set with No Real Time Pricing, SoftTouch will not override the price depending on current time. **Example:** Early Bird price is available for any check opened under Early Bird schedule until the check is cashed out. ****IMPORTANT**** **Liquor should always be under Real Time Pricing. Food should be under No Real Time Pricing.**
Type	The drop down menu lets you assign a type to the family from one of four options: **1. Beverages** **2. Appetizers** **3. Entrees** **4. Desserts** There is a "Switch View" button in SoftTouch which enables you to see what course each table is currently on. In order for this to work, you MUST assign a type to each family. ***Note:** If a family doesn't exactly match one of the 4 types, you can leave this field empty for that family. ****IMPORTANT**** **All drinks must have "Beverage" set as the Type for both the Super Department and the Family in order for them to work with the Reorder 1st Order button (orders a second, third, or fourth round of drinks that's the same as the first) and the Beverage Count to Seat Count feature.**

Type	The drop down menu lets you assign a type to the family from one of four options: **1. Beverages** **2. Appetizers** **3. Entrees** **4. Desserts** There is a "Switch View" button in SoftTouch which enables you to see what course each table is currently on. In order for this to work, you MUST assign a type to each family. ***Note:** If a family doesn't exactly match one of the 4 types, you can leave this field empty for that family. ****IMPORTANT**** **All drinks must have "Beverage" set as the Type for both the Super Department and the Family in order for them to work with the Reorder 1st Order button (orders a second, third, or fourth round of drinks that's the same as the first) and the Beverage Count to Seat Count feature.**
Disable Loyalty Points	If there are certain Families that should not be included in Loyalty calculations, such as Liquor or other alcoholic beverages, then put a check mark in the box for "Disable Loyalty Points" for that particular family.
Serving Minutes	Used in conjunction with the "Is food served" alert in the pager and alerts system. The "Is Food Served" alert must have the "Use family serving times" option enabled. (See more information about setting up pagers and alerts under **Hardware->Pager/Alerts**.) **Example:** If you put in 20 minutes for the Serving Minutes on the Pizza family, and the "Is food served" alert is active with the "use family serving times" enabled, then an alert will be sent to the server's or manager's pager if the food hasn't been served 20 minutes from when it was added to the check. ***Note:** A barcode scanner must be set up in the kitchen which will scan a barcode on the ticket which will in turn send a page to the server to tell them to pick up the food. Once the server picks up the food, they can scan a second barcode on the ticket to mark the food as served.
Upsell	If this is checked, the family will be shown in the Upsell display. The Upsell display is shown by manually clicking the "Upsell Display" button while taking an order in SoftTouch. ***Note**: The Upsell display can be displayed automatically when sending a check. To enable this, go to the Stations area in BackOffice (under Hardware) and then to the Options tab. With the correct station selected, put a check mark in the "Display Upsells" option box. The SoftTouch POS manual explains how to have it displayed manually.

Disable VAT	If this option is checked, if any item from this family is added to a check in any mode (Bar, Dining, Delivery, etc.), the VAT will be automatically disabled for all items on the check. **Example**: Some states allow you to use VAT on liquor items in the bar, but as soon as food is added to the check, then the whole check must use regular add-on tax. In this scenario, you would put a check mark in the "Disable VAT" option for all the food families, and leave it unchecked on all the liquor families.

Step 4.

Click the button to save it. To delete a family click the button.

***Note:** Once a family has sales history tied to it, you cannot delete the family.

***Note:** If you later decide to change the name of a Super Department, Department, or Family just highlight its name first by clicking on it and then type in the new name over the selection and save it.

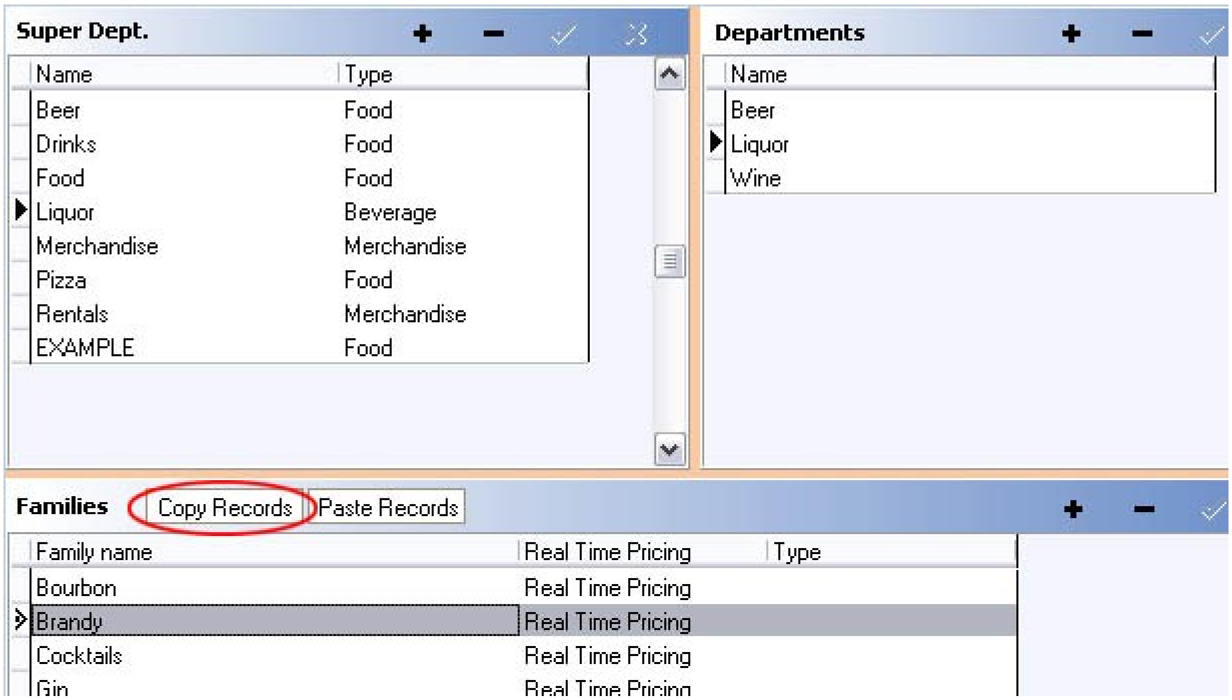
12.1.2 Copying Items

Under the **General** section click on **Item Builder**. Select the **Departments** tab to open the **Departments Setup** screen.

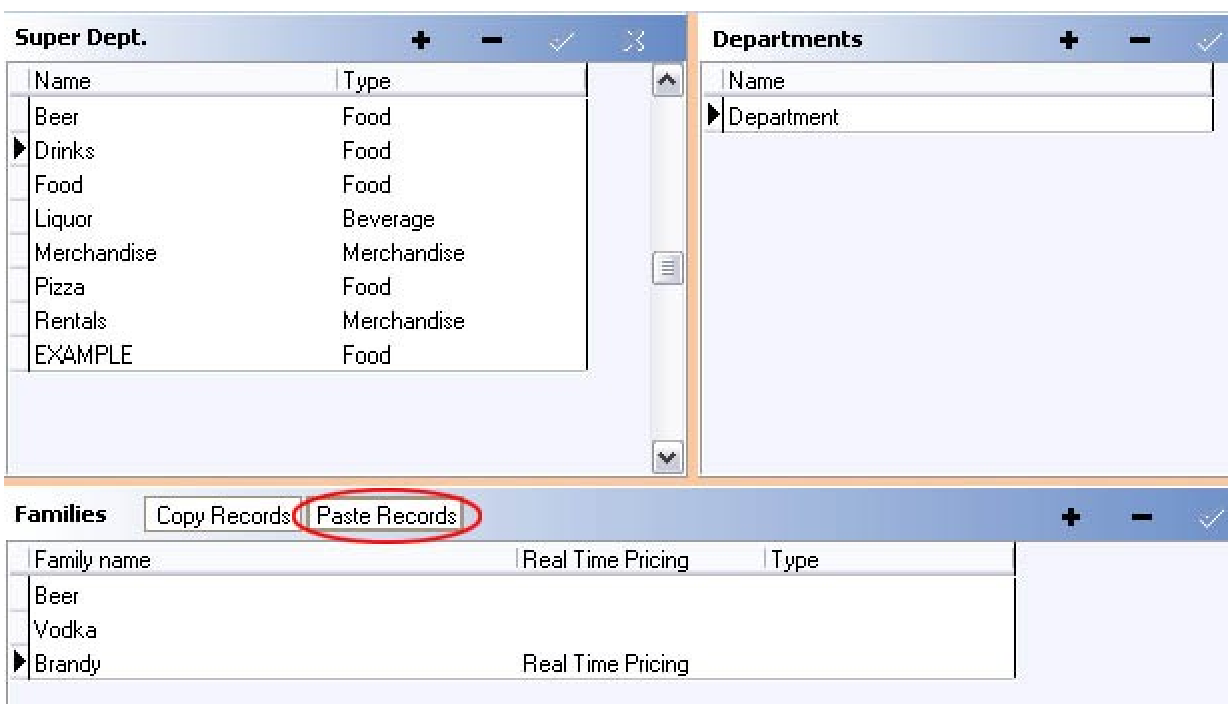
You can easily copy Family items between Departments or a Super Departments.

-Copy Item(s) -

To copy a Family item simply highlight it first and then click **Copy Records** button. See image below:



Next, highlight the Super Department and then the Department where you want to place the copied item to and click **Paste Records** button. See image:



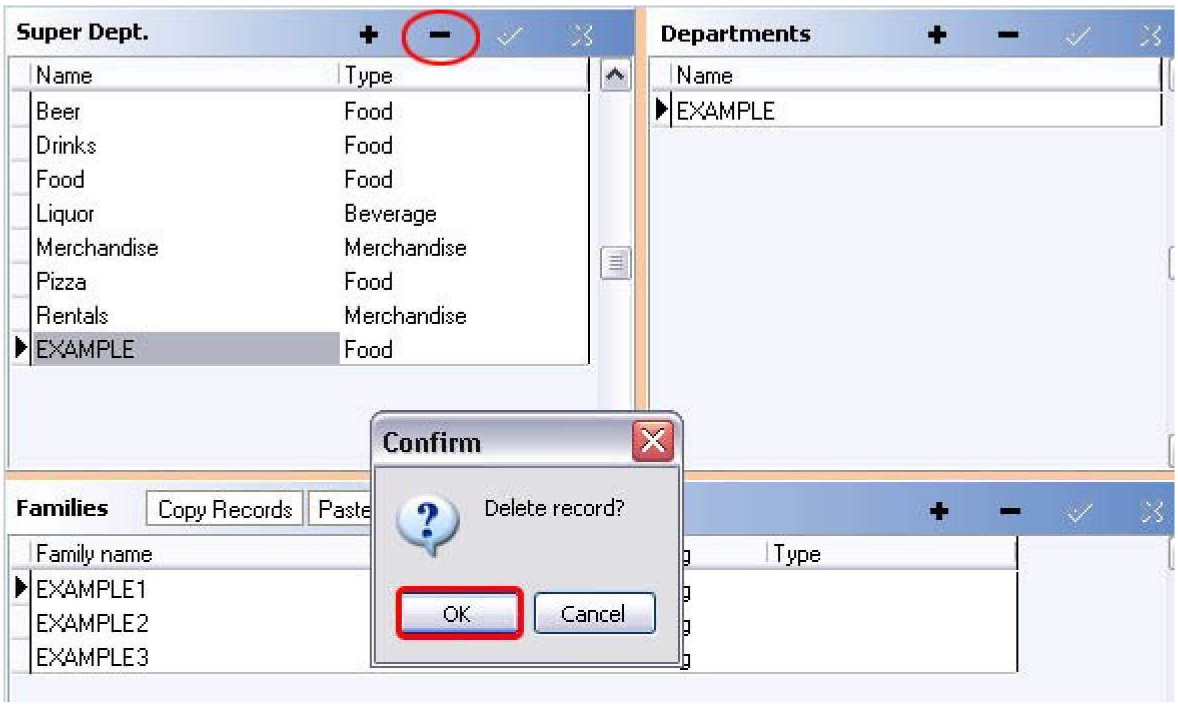
Tip: You can copy multiple families at one time by holding down the CTRL key as you select the families.

12.1.3 Deleting Departments

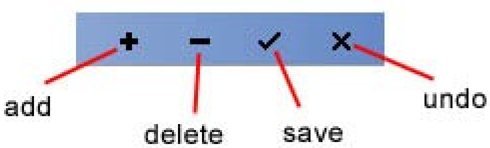
Under the **General** section click on **Item Builder**. Select the **Departments** tab to open the **Departments Setup** screen.

Delete Departments:

If you wish to delete a Super Department, Department or a Family highlight it first by clicking on its name and then click the − sign in the appropriate section of the screen (Family, Department or Super Department depending which one you want to delete). A confirmation dialog will show up asking if you really want to delete item. Click yes. See image:



Explanation to what the action of each button is.



12.2 Menu Builder Tab

Under the **General** section click on **Item Builder.** Select **Menu & Rule Builder** tab.

Menu & Rule Builder Tab

Before you start building items and menus you must first setup:

1. Printers

Note: Instructions for setting up the printer hardware is in the **Complete Setup Guide**. But click the link above for instructions on setting up printers in BackOffice.

2. Tax Table

3. Departments

The Menu Builder explanation includes the following:

1. Command Bar

2. Modifiers

- About Modifiers
- Create Modifiers
- Rename Modifiers
- Assign Family to Modifiers
- Attach Price to Modifiers
- Customize the Button of Modifiers
- Duplicate Modifier Groups

3. Links

- Create Links
- Rename Links
- Adding Modifiers to Modifiers
- Link Modifier to Modifier

4. Items

- Create Menu Items
- Rename Menu Items
- Assign Family, Attach Price, Customize Button, Assign Adjustments

- Special Pricing
- Add Modifiers to Items
- Set Properties and Organize
- Copy Modifiers from Item to Item
- Duplicate Item Groups

5. Sizing the Grid

6. Making Menus from Item Groups

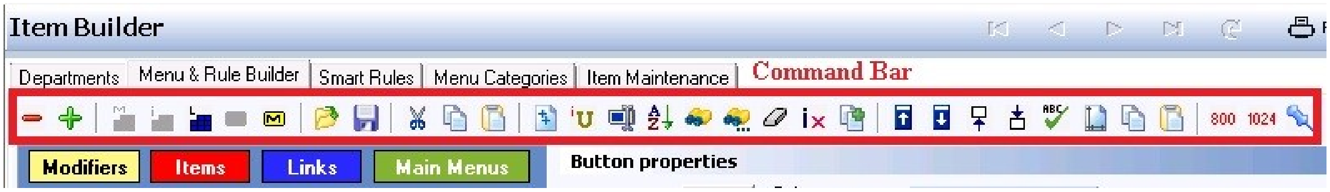
7. Main Menus

12.2.1 Command Bar

Under the **General** section click on **Item Builder.** Select the **Menu & Rule Builder** tab. Listed in this section is the **Command Bar**.

Command Bar

The Command Bar is the group of options listed at the top of the Menu Builder Tab.



- Above Buttons Explained - Left to Right -

These are in order from left to right. In BackOffice you can also see the names of the buttons by holding your mouse cursor over them without clicking (the name will appear after a moment).

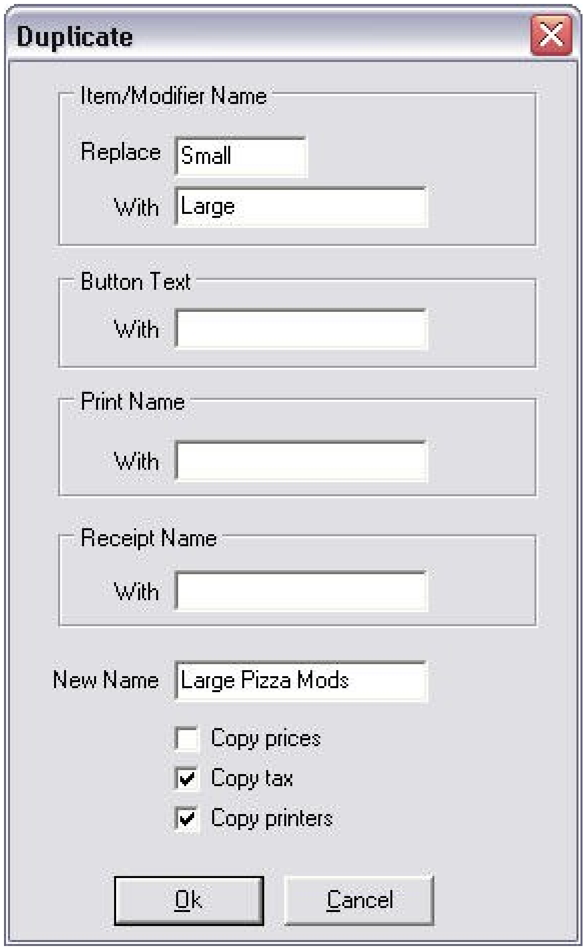
Expand All Nodes	If you are in Modifiers, Items, or Links, clicking on this will expand all the groups.
Collapse All Nodes	If you are in Modifiers, Items, or Links, clicking on this will collapse all the items so all you will see is the top group in the hierarchy.
Add a Modifier Group	**1.** Within the Modifier section, click on the Modifier Builder, and now you can click this button to add a new Modifier group. Once you have named the modifier group you then have the option to start building modifiers under the group. You can immediately add a price to the modifier in this section. When you are done adding modifiers click the cancel button. **2.** If you are within the Items or Links tabs you can use this button to add a modifier group you've already created to an item, item group, or linke group. ***Note:** This is explained in further detail here.

Add an Item Group	**1.** Within the Items section, click on the Item Builder, and now you can click this button to add a new Item group. Once you have named the item group you then have the option to start building items for the group. Under the item group builder you have the options to either create new items or you can select existing items that are currently under another item group to copy properties from. **2.** If you are copying the properties of another item, you have the option of copying not just the item but also the item's modifiers and/or links by checking on the "Yes copy modifiers and Links" option at the bottom of the pop up window. You must type in an item name for this to work. **3.** Within the Links section, you can add Item groups to Link groups. Link groups can also have individual items added to them. ***Note:** This is explained in further detail here.
Add a Link Group	**1.** If you have selected the Link Builder within the Links section, you can click this button to add a new Link group. After you have added the Link group, you can add modifier groups, item groups, or even other link groups. **2.** You can create a new item or new modifier under the Link group. ***Note:** This is explained in further detail here.
Add an Item	**1.** You can add an item to an Item Group within the Item Builder or to Link groups within the Link Builder. **2.** You can create an item and then tie a link group, item group, and/or a modifier group to that item to use as modifiers. **3.** You cannot add an item to a modifier group. ***Note:** This is explained in further detail here.
Add a Modifier	**1.** You can add a Modifier to a modifier group, item group, or link group. **2.** You can copy an existing modifier under an item, item group, and/or link group. **3.** You cannot add a modifier to a modifier.

Open node from Disk	This option lets you import a pre-saved Menu into the system. In order to load a menu the sales history has to be cleared. **Note:** The menu must be placed saved within the C drive - either in the Softtouch folder, in it's own folder, or on the C drive with its own folder. You cannot place the menu on the desktop or within the My Documents folders and upload it. The menu must be a zipped file in order for it to load. ****Warning****: The Menu you load has to be on the same version of **SoftTouch** that your system is on.
Save Node do Disk	Saves the entire menu to disk. You can specify where you would like the menu to be saved and give it any name you would like.
Cut Node(s)	Lets you select a group or node within a group and cut the node and/or group. If you cut a Group node everything listed under will also be cut and remain tied to the group node. If you cut just a node anything tied to the node (such as an item) will remain tied to the node. **Example:** Works like cut and paste. You can use this to cut the ketchup modifier from the "Burger mods" group and paste it to the "French fry mods" group.
Copy Node(s)	Lets you select a group or node in a group and copy the node or group. If you copy a Group or a node anything listed under it will be preserved.
Paste Nodes	**1.** Lets you paste a node you have copied and/or cut. This will paste everything tied under the node as well. **2.** If you have only selected one node to be pasted you will be asked Do you wish to add a new item from this copy? You can choose Yes, No, or Cancel. If you choose yes, nothing will be tied to the new node - no family, no price, no print groups, etc. If you choose no, everything will be tied - printers, taxes, prices, all the names you gave the buttons, printing, etc. In essence, choosing No will create a copy of the same item into another group, so the same item is now in two places.

Duplicate Selected Items

Select a Modifier Group, Item Group, or Link Group. Choose the Duplicate Selected Items option. The below image is what you will see.



1. Item/Modifier Name: You can choose this option to replace any modifier name you have with another name. This is used subsequently with the either the Button Text, Print Name, Receipt name, or the node's Name.

Example: Very useful for pizza mods. You can duplicate the Small Pizza Mods and Replace the word "Small" with "Large." All new modifiers will be created in the new group, but they will have the same names as they did in the original group.

2. Button Text: Can be used in conjunction with the Replace option listed under Item/Modifier Name area to Replace the button text with a different name.

3. Print Name: The name that will print on the kitchen remote printers.

4. Receipt Name: This will be what prints out on the check and receipt for the guest.

5. New Name: You can rename the group a different name if you don't want to just replace aspects of the name.

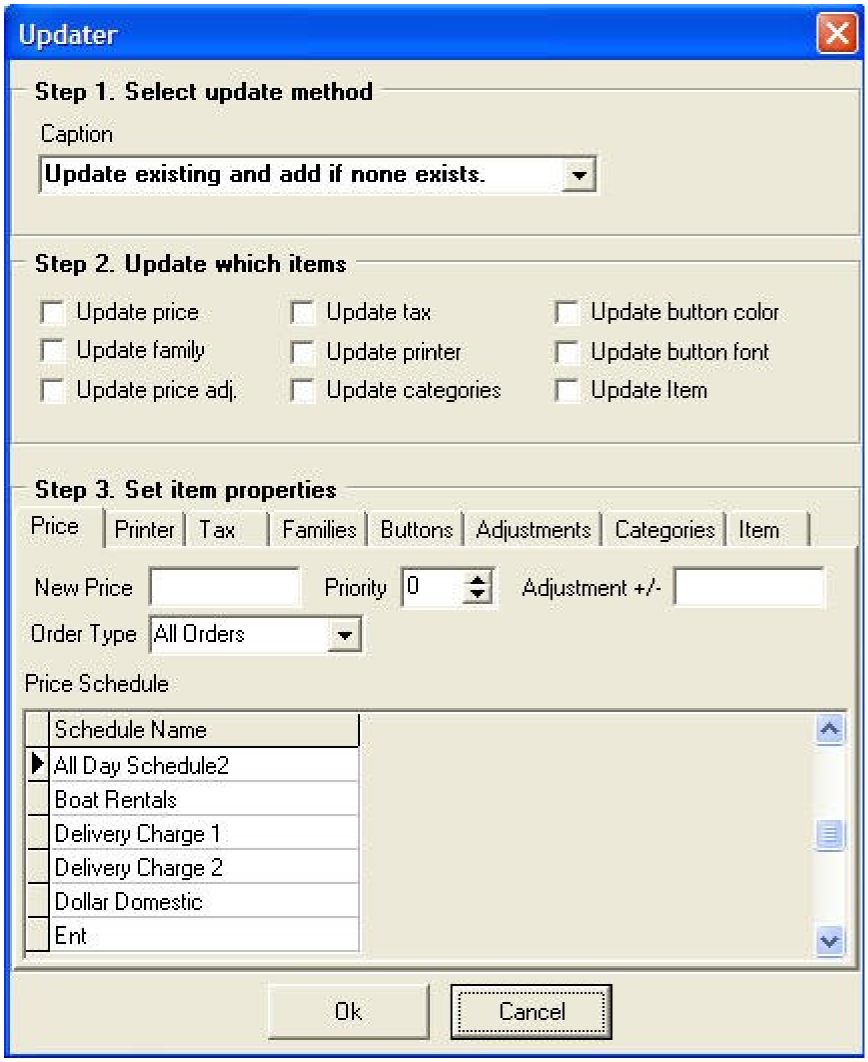
6. Copy prices, tax, or printers area: If you check any of these on you can copy the prices, the tax, and or the printers assigned to the items, modifiers, etc. listed within the group you are

Node Updater

You can use the node updater on several modifier or item nodes you have selected or just one.

Tip: You can select multiple items or modifiers using the SHIFT or CTRL keys as you click on the items (within one group at a time, not across multiple groups). You can also simply select a group to update all the items or modifiers within it.

***Note:** If you are changing the price on different nodes just make sure the nodes you have selected are the ones you want to be on the price you are changing it to unless you are just adding a new price and leaving the price that already exists.



Step 1: Lets you choose how you want to update the node you have selected. There are there options in the drop down section that are user friendly and self-explanatory.

Step 2: Choose the area(s) of the node you would like the update to affect by placing a check mark in the blank box(es).

Step 3: Set the changes you would like to make. Note that additional options are displayed across the different tabs. Changes will only affect the categories you selected in step 2.

Rename Node	Lets you rename a group or a node within a group. ***Note:** If you rename an Item or Modifier that is located in multiple groups, the name will change in all places.
Sort Node	Sorts the nodes you have selected alphabetically from A to Z.
Find...	If you cannot find a node or item you can select this button and typing in what you think the node has in its name (anywhere in its name) to search for it.
Find Next...	If you have used the "find" option you can then use this option to keep searching through the finds for the sub-string you have searched. It will continue to highlight items until it cannot find anymore matches, at which time you will get a message saying "search string: sub not found."
Delete Node	Deletes highlighted items, modifiers, links, or groups (nodes). ***Note:** If you delete a modifier group, you must also remember to delete it from any items it may be attached to.
Clear all Menus	This will clear the entire menu. This means the menu will be gone, completely gone. No menu, no menu tied to a station, no Items/Stock anymore. Nothing. ****Warning**:** Do not use this unless absolutely necessary. The only time this should be used is if you need to re-program an entirely new menu with all different items.
Copy all Items into this Link Node	Copies all items into highlighted link groups. ***Note:** Used only for Online menu creation. Do not use for other purposes.
Move Node Up	Lets you move the selected node up one. Works when you have selected a modifier, an item, a modifier group, an item group or a link group underneath the Modifier Builder, Item Builder, or Link Builder. ***Note:** If you right click on the item this option is also listed.
Move Node Down	Lets you move the selected node down one. Works when you have selected a modifier, an item, a modifier group, an item group or a link group underneath the Modifier Builder, Item Builder, or Link Builder. ***Note:** If you right click on the item this option is also listed.

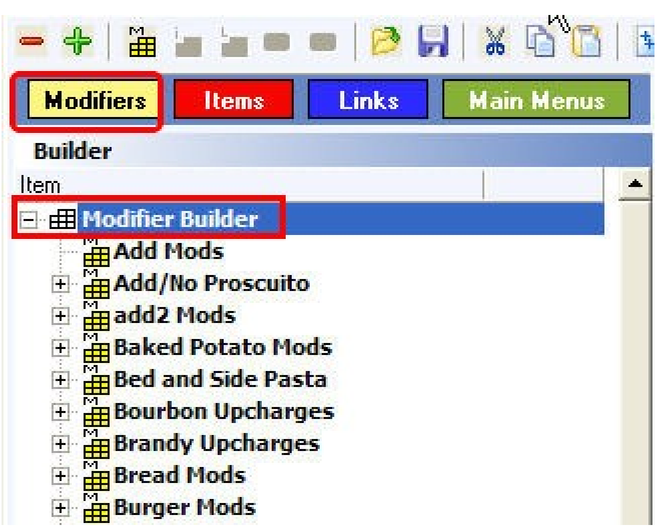
Move Node to Top of List	Lets you move the selected node to the top of the list. Works when you have selected a modifier, an item, a modifier group, an item group or a link group underneath the Modifier Builder, Item Builder, or Link Builder. ***Note:** If you right click on the item this option is also listed.
Move Node to Bottom of List	Lets you move the selected node to the bottom of the list. Works when you have selected a modifier, an item, a modifier group, an item group or a link group underneath the Modifier Builder, Item Builder, or Link Builder. ***Note:** If you right click on the item this option is also listed.
Spell Check	Word must be installed on the computer in order to use this spell check feature because it uses Word's spell check engine. ****Warning**:** Do not try to use this option unless you have Word installed on the machine.
Set Default Button Color Scheme	This option will set the color for the node(s) you have selected to the default blue color used for **SoftTouch.**
Copy Button Color Scheme	**1.** You can select a Modifier, Modifier Group, Item, Item Group, or Link Group (basically anything in the menu) and copy the color scheme of the object you have selected. **Example:** If I select a Modifier Group and copy its color scheme that I then paste the button color scheme onto another Modifier Group, nothing within the group's color schemes will be affected, only the group node. **2.** If you have selected an item or modifier node that you pasted under a different area as a copy of the and you choose to not add a new item/modifier from the copy and you go to change the button colors on one of the items, the other item will not be affected. **Example:** Select the Coke item under Beverages in the Items section and change the color to red. Copy the Coke item and paste it into any link group. Go back to the original coke item listed in the beverages item group and change the color to green. Now look at the color scheme of the coke item under the link group, you will see it stays red. ***Note:** It will only copy the color scheme for the actual node selected and if you have pictures placed on the node's button that you are copying, the pictures will not be copied with the color scheme to the other node; you would have to load the picture separately.

Paste Button Color Scheme	You can paste a color scheme you have copied from any node or node's group onto any other node or node group. It will only affect the node you have selected. ***Note:** See "Copy Button Color Scheme" examples (above) for details.
800	Lets you see how the button configurations and colors will look on an 800x600 screen resolution. ***Note:** This is just for testing button colors, setup, display, etc. This does not upload the menu with the proper buttons for you.
1024	Lets you see how the button configurations and colors will look on a 1024x768 screen resolution. ***Note:** This is just for testing button colors, setup, display, etc. This does not upload the menu with the proper buttons for you.
Update Stations	Lets you do a menu update while you are live so you do not have to restart all the POS stations. ***Note:** This only updates any menu changes you make. If you change any other settings not in the Menu Builder section in SoftTouch you will want to restart the POS for the changes to take effect.

12.2.2 Modifiers

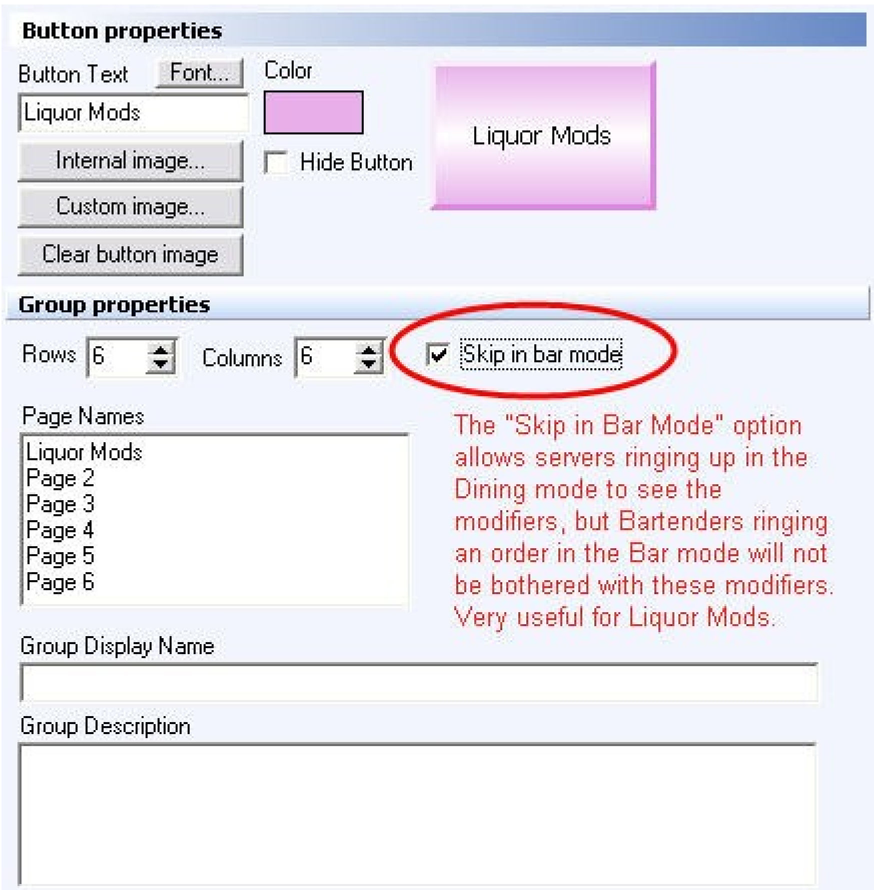
Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Modifiers** button.

- Modifiers -



Everything on the screen below is what is listed for a modifier group. The biggest thing to pay attention to on this screen that is different from Items and Links sections is the option to **Skip in Bar Mode.**

Skip in Bar Mode lets you create a modifier group for things such as liquor and have that modifier group available for servers to select from but hides the modifier group from the bartenders.



Modifiers explanation includes the following:

1. About Modifiers

2. Create Modifiers

3. Rename Modifiers

4. Assign Family to Modifiers

5. Attach Price to Modifiers

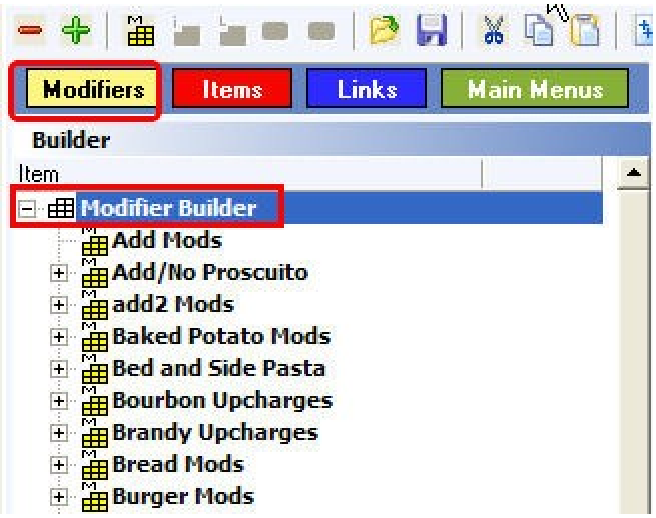
6. Customize the Button of Modifiers

7. Duplicate Modifier Groups

12.2.2.1About Modifiers

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Modifiers** button.

About Modifiers



Step 1. You must set up the modifiers first before you can build the actual menu items.

Step 2. Modifiers are everything that you can add to, remove from, or replace on your items - in other words, everything you can customize your items with.

> **Examples:** The temperature of a steak, the kind of dressing for the salad, the toppings on a pizza, extra pickles and no mayonnaise are all modifiers.

Step 3. In the **SoftTouch** System there are two types of modifiers: automatic and manual.

Automatic modifier	This is a group of options that automatically pops up when the item is chosen in **SoftTouch**. **Example:** When you choose a salad in **SoftTouch** a choice of dressing can pop up automatically.
Manual modifier	These are choices that do not pop up automatically when an item is chosen in **SoftTouch**. A Server needs to highlight the item and press the Modify button in order for the modifiers to show. **Example:** Steak comes with Mushrooms and the customer requests NO MUSHROOMS. A server would select the steak on a check in **SoftTouch**, press the button to bring up the modifiers and choose No Mushrooms.

- Examples of Modifiers -

NO Modifiers	For when a customer wants to exclude something that comes with the ordered item.
ADD Modifiers	When a customer wants to add something that does not come with the ordered item. ADD Modifiers can be set to have an additional price on top of the item.
XTRA Modifiers	When a customer wants more of something that already comes with the ordered item. XTRA Modifiers can be set to have an additional price on top of the item, but might be a lower price than an ADD modifier since this already comes with the menu item and we are just adding some more of it. **Example:** extra cheese or extra dressing.
SUBSTITUTE Modifiers	When a customer wants something else instead of what already comes with the ordered item. If restaurant allows substitutions of this type then here is where you would enter it. This modifiers can be set to have an additional price. **Example:** Customer wants a side salad instead of fries.
INSTRUCTION Modifiers	When a customer makes a special request. **Example:** Ordered item includes sauce and a customer has requested sauce be put on the side. Other Instructions are Rush, See Server, Do Not Make, etc.

- Manual Modifiers may be set up in two different ways -

One way is to set up groups for all menu items (for example: Filet, NY Steak etc.) You would then go through each menu item and add all the possible NO, ADD, XTRA, SUBSTITUTE and INSTRUCTION modifiers for each individual item on the menu. If the item comes with tomatoes for example, then you must add NO TOMATOES modifier for this item. If there are 10 other items with tomatoes then you must add NO TOMATOES for each of those items. This way of creating modifiers is tedious and hard to maintain. If you want to add another No Modifier, NO CHEESE for example, to a couple of menu items you would have to go to each individual group of each item to add it.

Another way is to set up general groups for NO, ADD, XTRA, SUBSTITUTE and INSTRUCTION modifiers. You would then add all the possible No Modifiers for all items on the menu into the NO group, all the possible Add Modifiers into the ADD group, all Xtra Modifiers into the XTRA group etc. Those general groups would be tied to all the menu items and the Servers can pick the modifiers they want out of these general groups.
There might appear, for example, a No Mushrooms modifier for a certain menu item that does not have mushrooms to begin with, but the Server would simply not pick No Mushrooms for this item.

This way of creating modifiers is far faster and easier to maintain. If you want to add another No Modifier all you have to do is add it once into the general NO Modifier group and it will be available to all the other items that may also use this No Modifier.

Always create groups for your modifiers. You will then add all the modifiers from the entire menu into the appropriate groups.

- Few examples of Modifier Groups and Modifiers -

Modifier Group	**Dressings**	**Pasta Choice**
Modifiers	House Creamy Bleu Cheese Ranch Honey Mustard French Caesar etc.	Linguini Spaghetti Angel Hair Rigatoni Penne Gnocchi etc.
Pizza Toppings	**Meat Temperatures**	**Sauces**
Pepperoni Sausage Mushroom Green Peppers Hot Peppers Black Olives Anchovies etc.	Rare Medium Rare Medium Medium Well Well	Tomato Marinara Mushroom Sauce Meat Sauce Marsala Sauce etc.

****Warning**:** Modifiers (yellow) can never be used to modify modifiers.

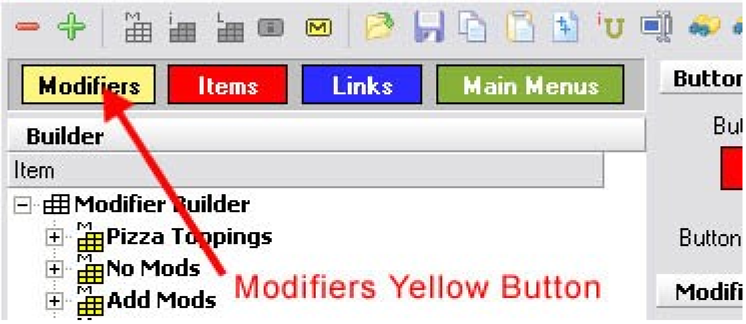
12.2.2.2 Create Modifiers

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Modifiers** button.

-Create Modifiers-

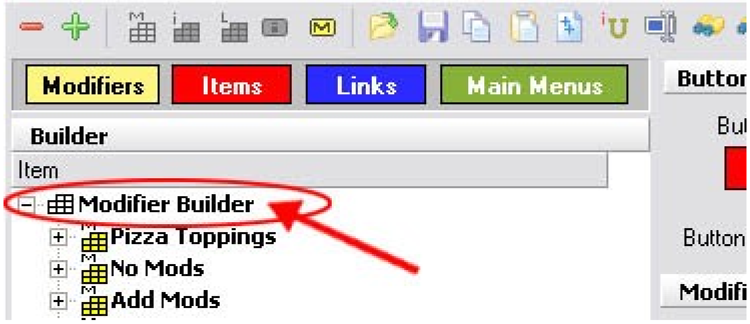
Step 1.

Click on the yellow button labeled Modifiers. See image below:



Step 2.

Highlight the top category called Modifier Builder by clicking on it. See image:



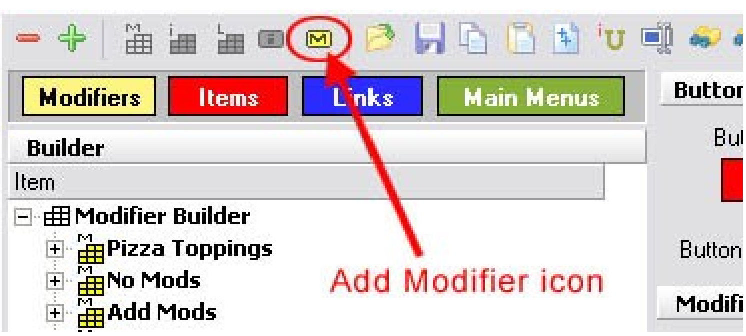
Step 3.

When Modifier Builder is highlighted click on the Add Modifier Group icon (yellow block with label M) See image:

Step 4.

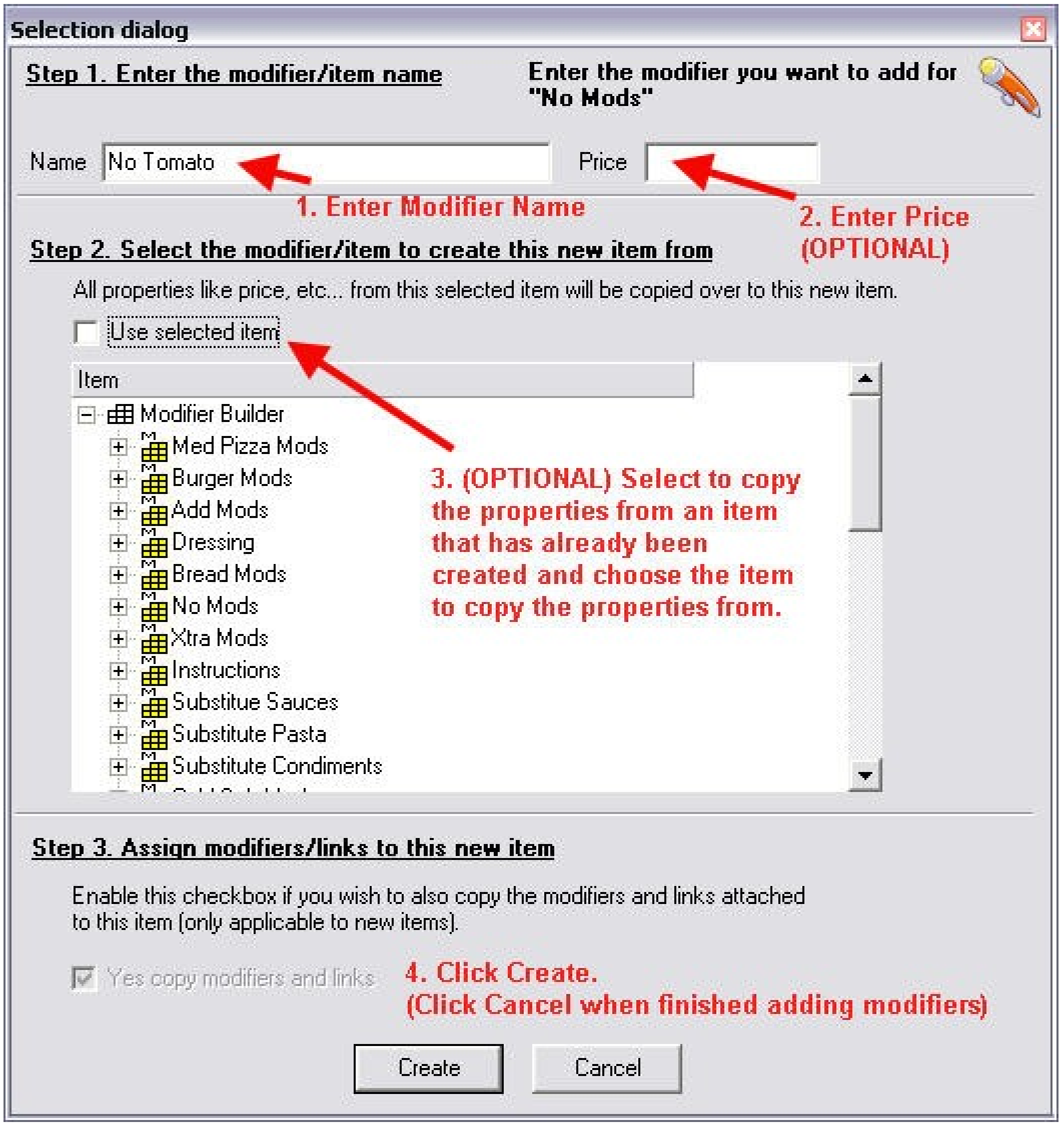
A small window will pop up asking for a New Modifier Group Name. If you want to start setting up No Modifiers enter No Modifiers as a name. We have just created a Modifier Group. A dialog box will appear that asks you if wish to start entering the names of the items that will fall in this menu item group. To add modifiers to a group right away, just enter the item name and price (if applicable), then press the Create button at the bottom of the dialog box. When you have finished creating modifiers for this group, press the Cancel button at the bottom of the dialog box.

If you created the group and did not add modifiers to the group, or to add modifiers to an existing group, highlight a modifier group by clicking on it. Then click on the Add Modifier icon (small yellow M). See image:



Step 5.

A window will pop up asking to enter a Modifier name. Enter No Tomato for example and press Create. We have just created a Modifier. The window will stay up after you create each modifier. You can continue adding more modifiers and click Create each time. When you are finished adding modifiers to the current modifier group, click the Cancel button.

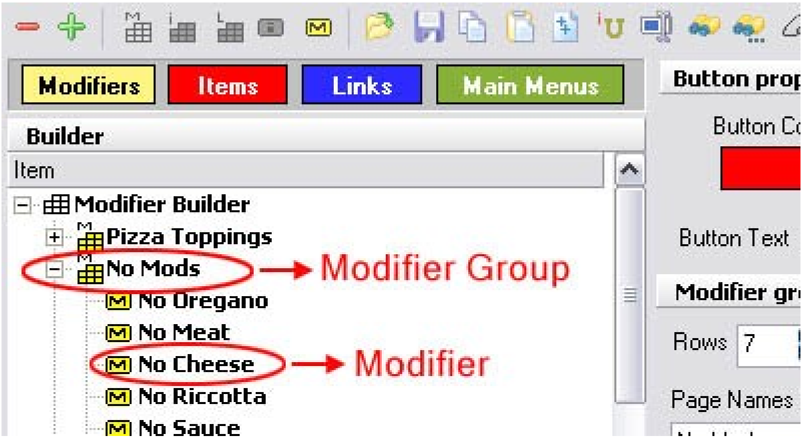


12.2.2.3 Rename Modifiers

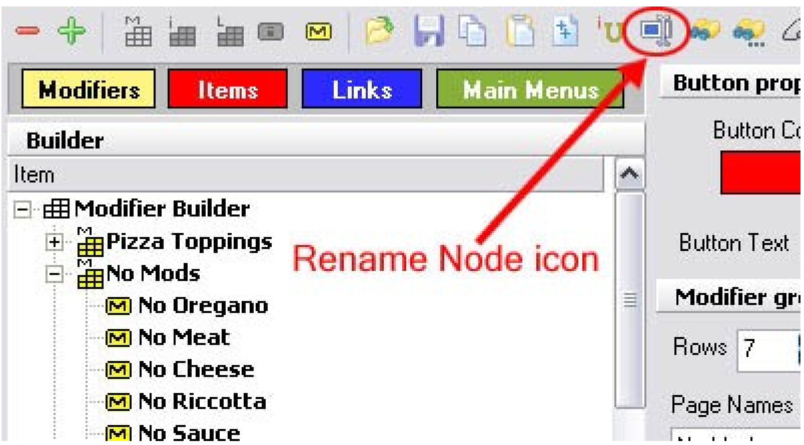
Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Modifiers** button.

- Rename Modifiers -

Step 1. Highlight either the Modifier Group or the Modifier that you wish to rename.



Step 2. Click on the Rename Node icon. (Or right-click and select Rename Node.)



Step 3. Enter new name and click OK.

Step 4. Change the button text to the same corresponding name. More information on customizing buttons is provided shortly (see Customize the Button of Modifiers).

12.2.2.4 Assign Family to Modifiers

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Modifiers** button.

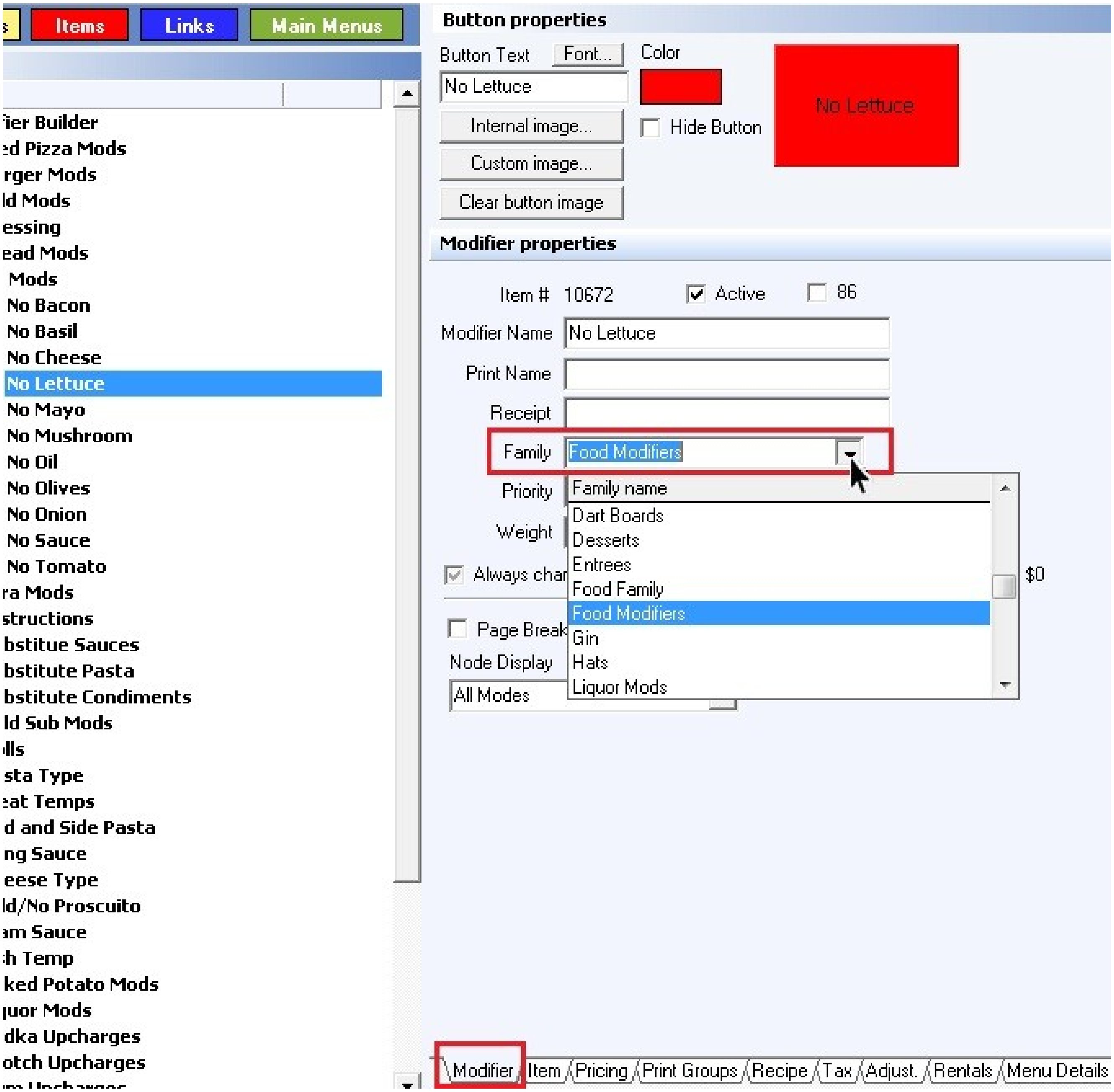
- Assign Family to Modifiers -

After adding all the No Modifiers, you must double click the No Modifier Group or click the + sign next to the No Modifier Group to expand it and you'll see all the modifiers you have just added. You must now assign a family to each modifier that you have created. Remember you created Families previously under Departments? For a reminder, see Item Builder->Departments.

Highlight the first "No Lettuce" modifier by clicking on it. On the right side of the screen, make sure the Modifier tab at the bottom is selected and look at the fields under Modifier properties. Click the drop-down menu in the Family field and all the families that you have previously created will show up. Select the "Food Modifier" family. See image:

***Note:** You can assign a family to multiple nodes amongst other things using the "node updater" (refer back to Item Builder->Command Bar).

Now the "No Lettuce" modifier is completed:



***Note:** The **Print Name** is what would be sent to the kitchen; the **Receipt Name** is what would print on the check/receipt. You can name both whatever you want, or if you leave either of these fields blank then the modifier or item name will print.

12.2.2.5 Attach Price to Modifiers

 Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select **Modifiers** button.

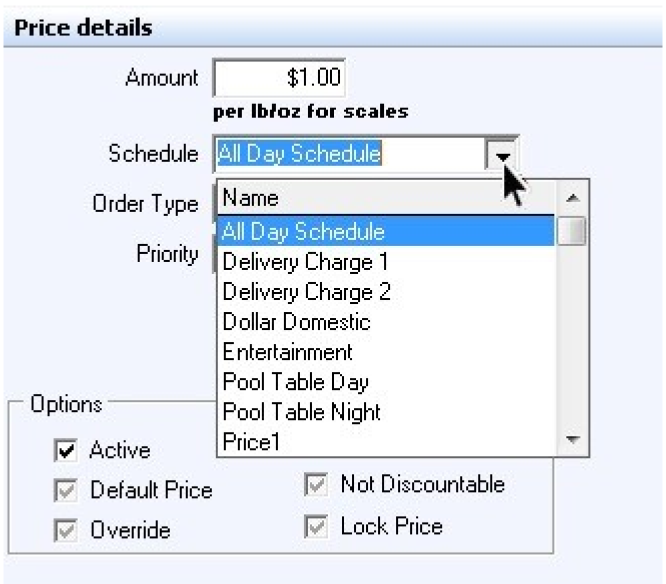
- Attach Price to Modifiers -

Some modifiers may have a price attached to them (usually some ADD, XTRA and SUBSTITUTE modifiers).
Highlight a modifier you want to attach a price to by clicking on it. On the right side of the screen

at the very bottom you will see folder-like tabs. Click the Pricing tab. See image below:

***Note:** When a modifier is selected, the only tabs you can open are Modifier, Pricing, Menu Details, and Stock. Other information like tax will be the same as the item it's modifying.

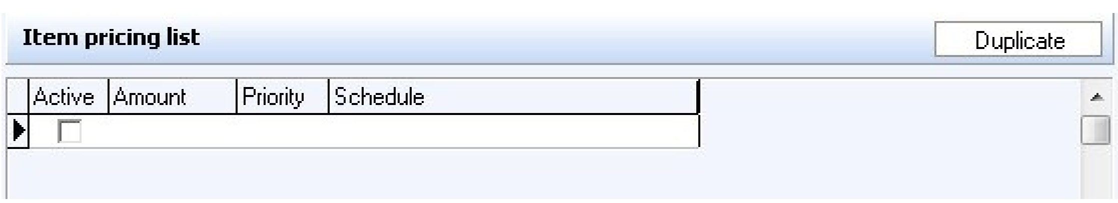
You will now see Price Details fields right above the tabs. In the **Amount** field type in the price for the modifier then in the Schedule field click the drop-down menu. All the schedules that you have previously created will show up. (You can learn how to create schedules under **Scheduling->Add Schedule**.) Select the All Day Schedule if you would like the modifier to have that price all day long.



If it should be different prices during different schedules, use the **Add** button to create multiple prices, selecting the schedule and filling out the pricing options for each (explained below). All prices are shown under the Item pricing list.

You can also have different prices during the same schedule but for different order types (takeout, delivery, etc., explained below).

To make changes to one of the prices, click on it under the **Item pricing list** to highlight it and then edit the **Price details** below.



- Pricing Options -

***Note**: The **Default Price**, **Override**, and **Lock Price** boxes are obsolete. They have been overtaken by security items in the Security applet and also by the **Priority** here in the Pricing tab in Items & Stock.

Order Type	You can specify what order type you would like the pricing tied to. You can select All Orders or pick one specific type. **Example**: If you put the price to be only for Dining mode, the selected price will only be reflected on a check created in Dining mode.
Active	If the box is unchecked, the selected price will not be charged.
Open Price	Enables you to put whatever price you would like on the item.
Not Discountable	Sets up the node's price to not be affected by any adjustments/discounts.
Priority	Lets you choose which price should go into effect if the schedules of any active prices overlap. **Example:** If you have items that need a happy hour price of say $1.00 and then a regular (all day schedule) price of say $3.00, you need the happy hour price to go into effect when both the happy hour and all day schedules are overlapping. So the priority is what allows you to choose which price goes into effect when you have overlapping schedules. Set the happy hour price priority to 1 and all day schedule price to 2. (Lower number - 1 - is first priority.)

Amount is per lb/oz for scales	You have already typed in the price here in the **Amount** field. Note, however, that if you are using scales/weight for the item it is modifying then you would want to set the price amount as what the item would cost per pound or ounce so when the item is weighed the price can be calculated correctly. To enable scales/weight for an item, click on that item (red), click on the Item tab on the bottom right, and look for the Enable Scale field. From that drop-down, select either Pounds (lbs) or Ounces (oz). **Example**: Put the price at $1.00 and set the node up as a weighted node. This means whenever this node is chosen and you place an item on the scale to be weighed, SoftTouch will calculate how much the item ways times the price you have entered in Back Office. So if you have a 2lb chicken with a price of $1.00 per lb, the chicken's total would then be $2.00.

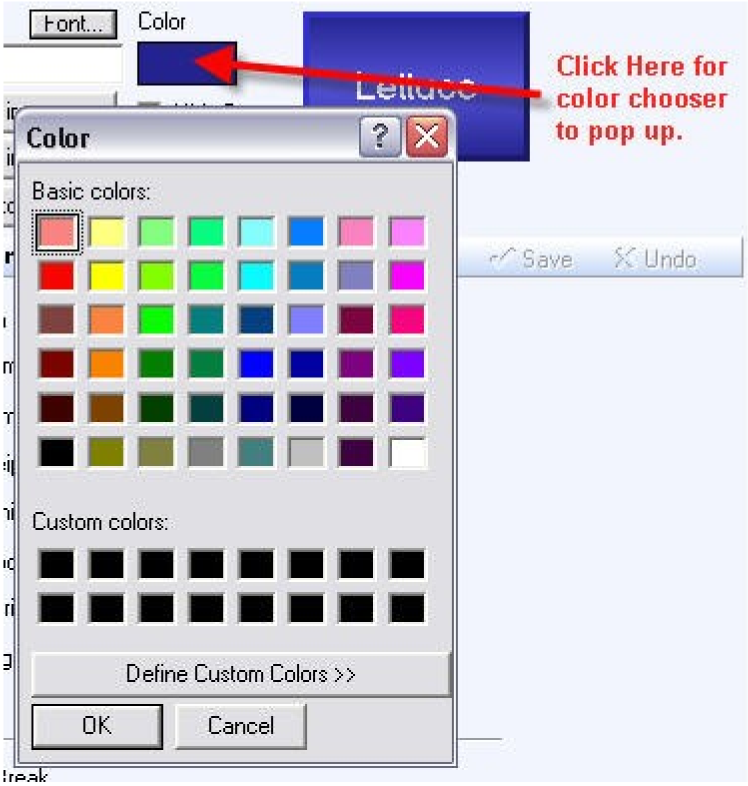
***Note:** You can assign price to multiple nodes using the "node updater" listed here.

12.2.2.6 Customize the Button of Modifiers

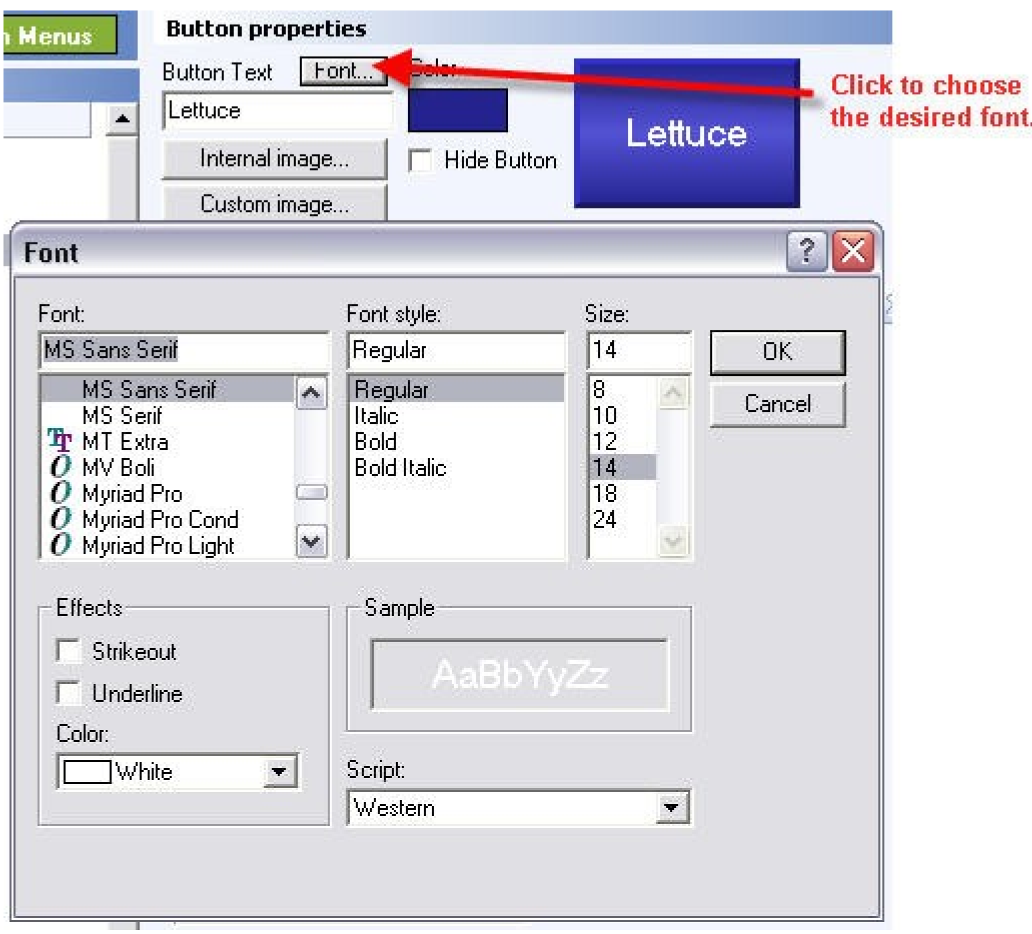
Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select **Modifiers** button.

Customize the Button of the Modifiers -

You can change the button color, font style and color of every modifier. This feature is available to you on the right side of the screen when the Modifier tab is selected. You'll see the options at the very top under **Button properties**. With the modifier selected/highlighted on the left side of the screen, to change the button color simply click the rectangle under **Color** and all the colors will pop up. Choose your color and click OK.

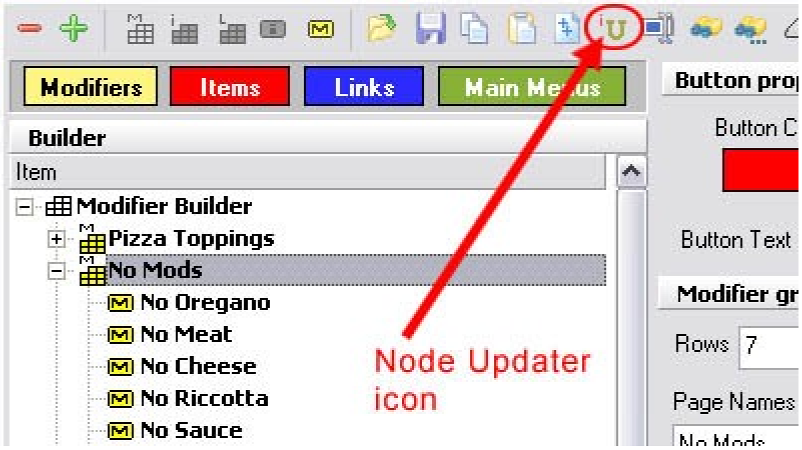


To change the size, style and/or color of the font on a button highlight your modifier first then click the Font button (between Button Text and Color). A font properties screen will pop up from where you will be able to set different font, style, size and color. See image below:

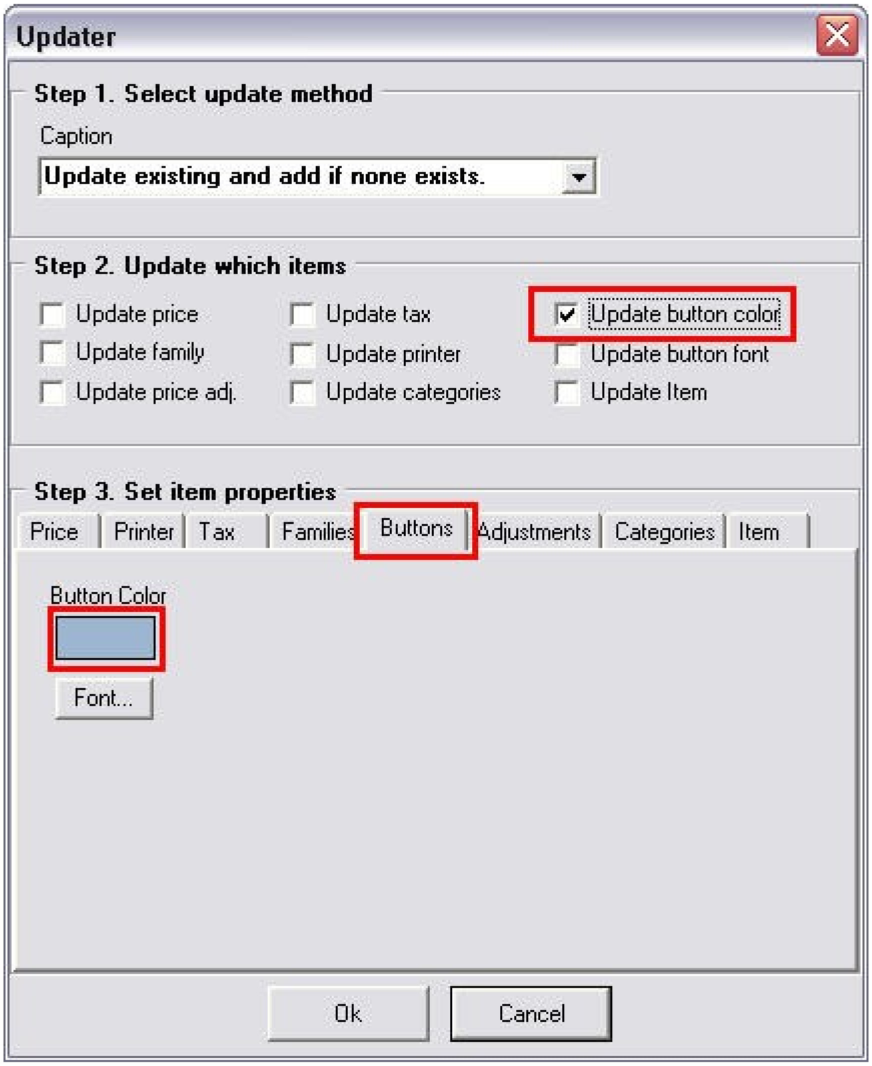


- SHORTCUT -

There is a shortcut to assign a Family and customize button colors, font size and colors for a group of modifiers at once.
Highlight the major group "No Modifiers" for example. Then click on the "Node Updater" icon (it looks like U letter). See image below:



An Updater screen will show up and you will see check boxes to update price, family, tax, button color and font, and printer. You will also see folder-like tabs for these items as well.



Select the Buttons tab, and there you can choose button color and font type, size and color. Click the Family tab, scroll down the list and choose Food Modifiers as your family. Now check the check boxes (under Step 2) marked Update family, and Update button color, and Update button font, as those are the three things you are setting now. When the boxes are checked click the OK button. The system will now update all Modifiers in the modifier group that you have highlighted.

You may do the same thing for pricing for a group if all the pricing is the same. If each price is different, then you will have to highlight each modifier separately and enter a price and schedule under the Pricing tab for that particular modifier.

12.2.2.7 Duplicate Modifier Groups

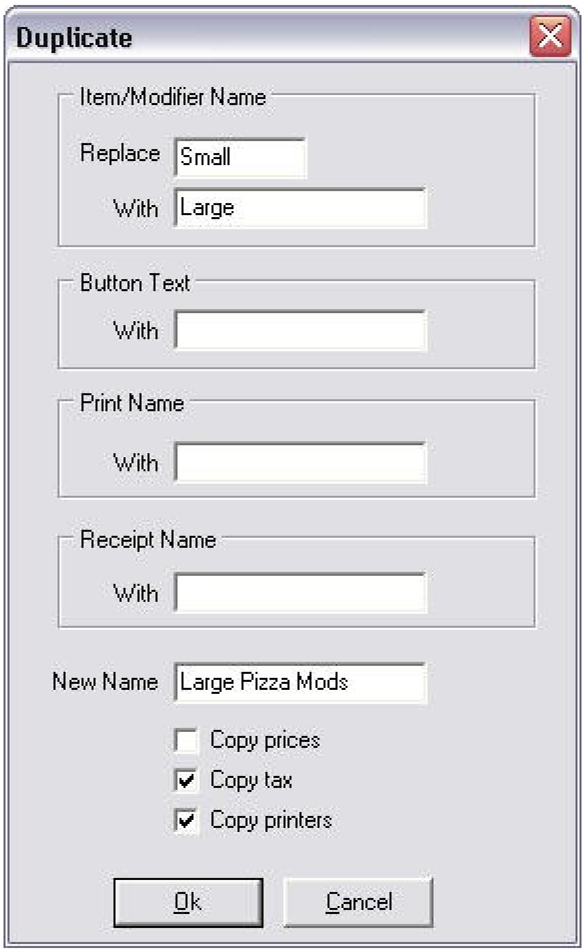
Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select **Modifiers** button.

-Duplicate Modifier Groups-

Step 1. Highlight the Modifier Group you wish to duplicate.

Step 2. Click on the Duplicate icon in the toolbar. See image below:

Step 3. A small window will pop up with a few fields. Enter the existing text you want to replace in the "Replace" field and enter the text you want to change it to in the "With" field. The example below would change "Small Pizza Mods" to "Large Pizza Mods". You also have the option to change the Button Text, Print Name, and/or Receipt Name for the new group.



Example: If you're duplicating Sm (small) Pizza modifiers with Lg (large) Pizza modifiers, simply put in Sm in the "Replace" field and Lg in the "With" field. All the new duplicated modifiers will now have Lg instead of Sm in front. If you did not label Sm Pizza modifiers, then just leave the first "Replace" field blank and enter Lg in the second field ("With"). Lg will now be added to the front of all new duplicated modifiers.

Step 4. Once you click OK, it will take a few seconds (depending on how many modifiers are in the group). Once it is finished duplicating the group, you will see the new group at the bottom of the list.

12.2.3 Links

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Links** button.

- Links -

After you've set up modifiers (if you haven't learned how to set up modifiers yet, see under **Modifiers**) you will want to link NO MODIFIERS, ADD MODIFIERS, XTRA MODIFIERS, SUBSTITUTE MODIFIERS and INSTRUCTION MODIFIERS together. This allows the Servers to choose these modifiers as categories.

Links explanation includes the following:

1. Create Links

2. Rename Links

3. Adding Modifiers to Modifiers

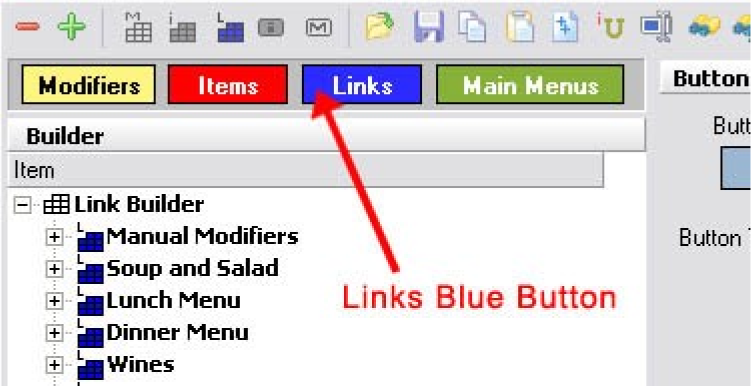
4. Link Modifiers to Modifiers

12.2.3.1Create Links

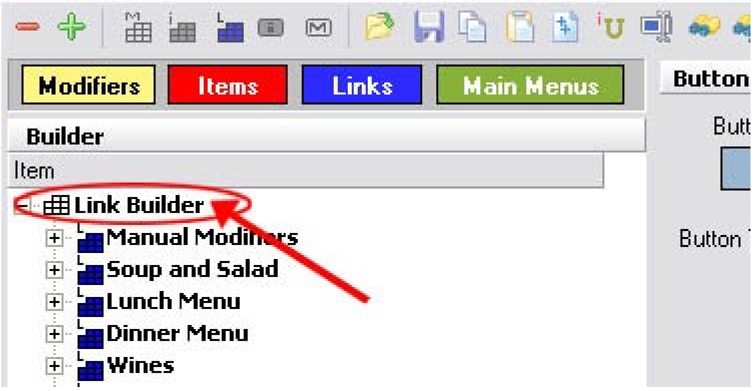
Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Links** button.

Create Links

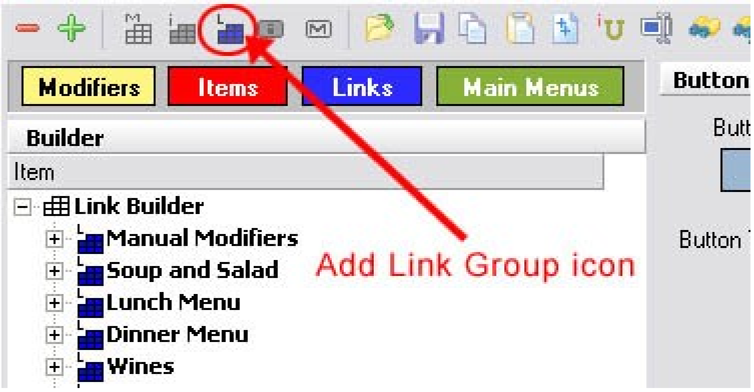
Step 1. Click on the blue button labeled Links. See image below:



Step 2. Highlight the top category called Link Builder by clicking on it. See image below:



Step 3. When the Link Builder is highlighted click on the Add Link Group icon (blue block with label L). See image below:



Step 4. A small window will pop up asking for a New Link Group Name. Name your link group "Manual Modifiers." We have just created a Link Group. Now we need to the add NO, ADD, XTRA, SUBSTITUTE and INSTRUCTION Modifier Groups (yellow) to it that we discussed creating under

Modifiers->About Modifiers and **Create Modifiers**.

To do so highlight the link group you have just created, Manual Modifiers, by clicking on it. Then click on the Add Modifier Group icon  (yellow block with label M). All the modifiers you have created earlier will appear. Hold down the CTRL key on your keyboard and highlight the NO, ADD, XTRA, SUBSTITUTE and INSTRUCTION groups and click Select button.

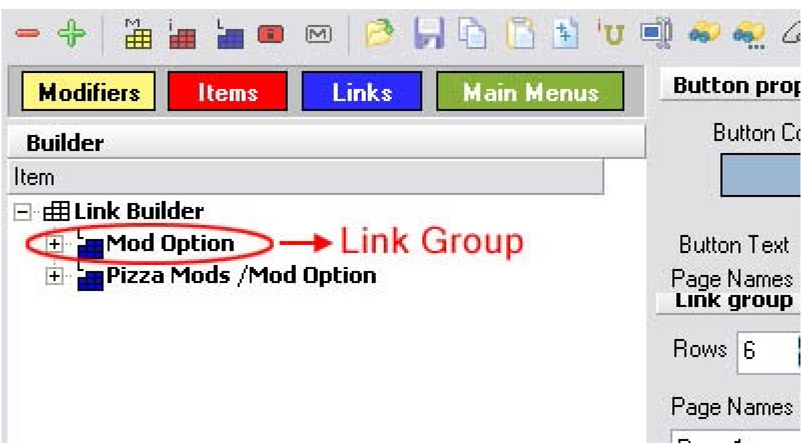
All these modifiers will be joined together under the link group "Manual Modifiers." You can click on the plus sign next to "Manual Modifiers" to see the modifiers you added. This is the link group that we will link to the menu items instead of linking each of the above modifiers to each item.

12.2.3.2Rename Links

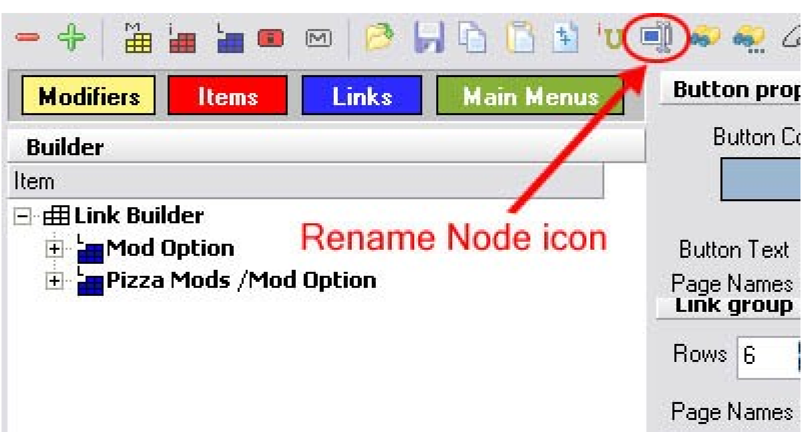
Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Links** button.

Rename Links

Step 1. Highlight the Link Group you wish to rename.

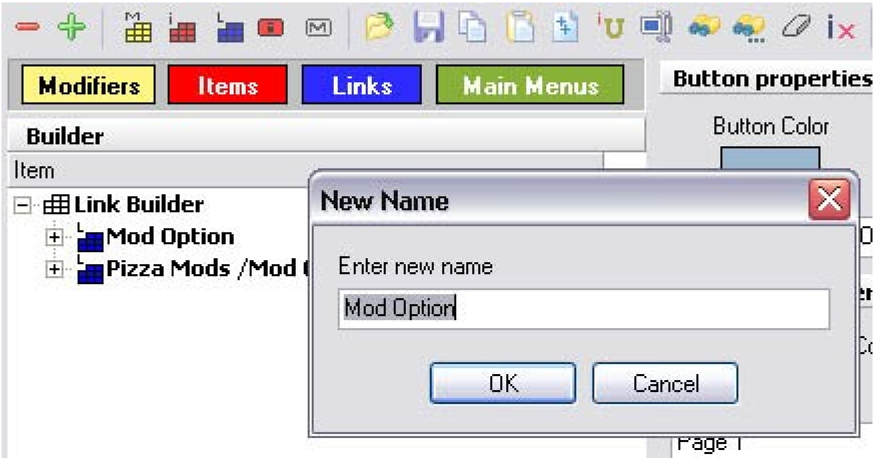


Step 2. Click on the Rename Node icon.



***Note:** You can also highlight the link and right click to select the "rename node" option.

Step 3. Enter new name and click OK.



12.2.3.3Adding Modifiers to Modifiers

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Links** button.

Adding Modifier Items to a Link Group

Occasionally there will be choices of Soup or Salad for Entrees. There is no problem with Soup, but Salad may require a dressing. If you create these add-on Soups and Salads as Yellow modifiers (because they're modifying a food item by adding onto it), you will find that you will not be able to add dressing to the Salad.

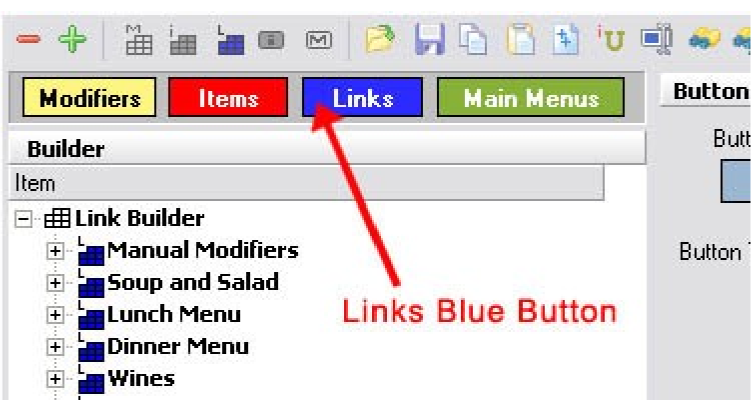
> This is because **You CANNOT modify a Modifier with a Modifier** (in other words: anything Yellow cannot be modified with a modifier [yellow]).

You may however create Links Groups containing modifiers that can then be linked to items for modification purposes.

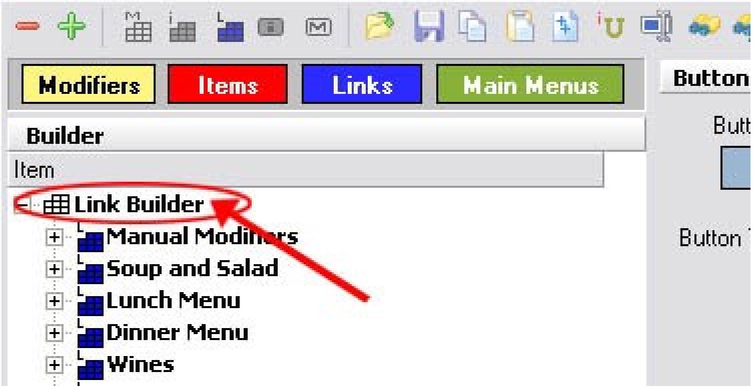
> **Example:** You want to create a Soup or Salad modifier with Dressings as a modifier for Salad.

To do that you must first create Dressings as a Yellow modifier group as was previously discussed (you can learn how to create modifiers under **Modifiers**).

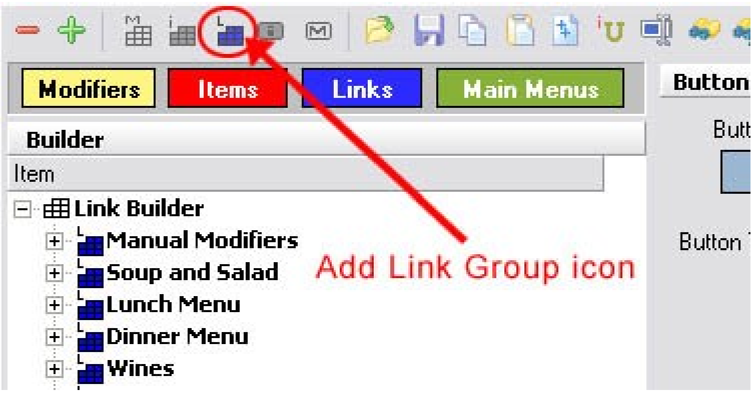
Step 1. Click on the blue button labeled Links. See image below:



Step 2. Highlight the top category called Link Builder by clicking on it. See image below:

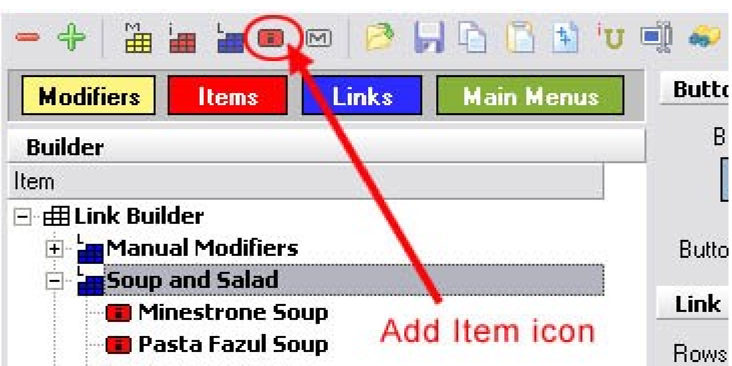


Step 3. When the Link Builder is highlighted click on the Add Link Group icon (blue block with label L). See image below:



Step 4. A small window will pop up asking for a New Link Group Name. Name your link group "Soup or Salad".

Step 5. Highlight the new Soup or Salad group you just created. Then click on the Add Item icon (small red i). See image below:



A dialog will pop up asking to enter an item name (and price if applicable) you wish to add. Type in the name of the first kind of soup and click Create. The dialog will still be open and you can continue typing in the name of each soup and each salad offered.

CAUTION: You are only allowed one unique name to an item or modifier. Using the name a second time will address the first item with the same name. **Each item must have a unique name for Food or Liquor Costing purposes**.

For this example what you should type is Side Soup and Side Salad so as not to be confused with other salads that you may want to add later on.

After adding Side Soup and Side Salad or side Pasta Fagiole, side Minestrone, side House Salad, and side Caesar Salad etc., click Cancel to stop adding any more items.

Because we're going to make these items available as optional add-ons to other menu items, we'll call them "Modifier Items."

- Assign Family to Modifier Item -

Now double click the Soup or Salad Link Group or click the + sign next to the Soup Link Group to expand it and you'll see all the items you have just added. You must highlight each item and assign a family to it like you did previously for modifiers (select the Item tab on the bottom right and fill in the Family field under Item properties).

- Attach Price to Modifier Item -

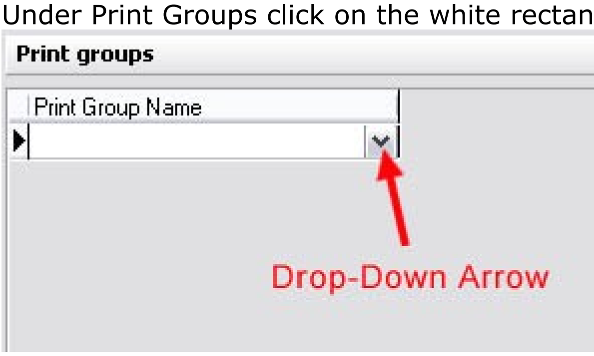
If there are any prices that you want associated with any of these modifier items go to the Pricing tab at the bottom of the screen and enter it there. See image below:

If adding a price, do not forget to assign a price schedule for the item.

- Assign Printer and Tax -

Since this is an item to be used as a modifier you must assign a printer for this item to go to and tax.
Highlight an item first then on the right side of the screen at the very bottom click the Printers tab. See image below:

Under Print Groups click on the white rectangle for the drop-down arrow to show up. See image:



Then click the drop-down arrow and choose the printer.

Now click the Tax tab at the very bottom of the screen. See image:

Under Tax Tables click on the white rectangle for the drop-down arrow to show up. Then click the drop-down arrow and choose the tax that you have created in the Tax Tables area. You can specify more than one tax if necessary.

*Note: You can add Adjustments if you would like to these items as well using the Adjustment tab. This will not make the system automatically apply adjustments to the item, it just makes them available to be applied.

12.2.3.4 Link Modifier to Modifier

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Links** button.

- Link Modifier to Item Modifier -

After completing everything described for adding modifier items to link groups (under Adding Modifiers to Modifiers), highlight your first or only side salad (item) within the Soup or Salad Link group by clicking on it.

Step 1.

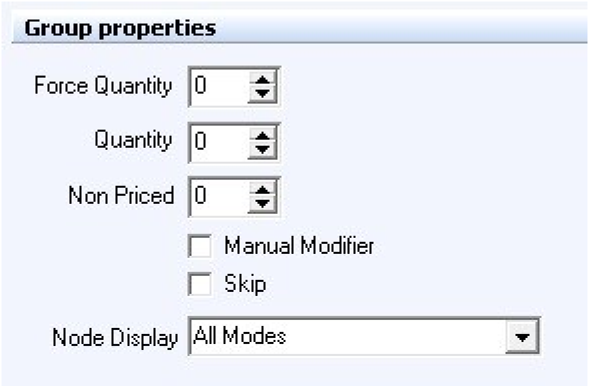
With the salad highlighted click the Add Modifier Group icon (yellow block with label M).

You will see all the modifiers that you have previously created. Highlight Dressings and click the Select button. Now dressings are tied to your side salad.

Step 2.

Click the + sign next to side salad within the Link group and you will see the dressings group that you have just added.

Highlight that dressings group by clicking on it and on the right side of the screen under Group properties you will see the fields Forced Quantity, Quantity, Non Priced, Manual Modifier, Skip, and Node Display.



For Dressings we would likely want to put the Force Quantity at at least 1 (see explanation below). (It may help to add a No Dressing modifier in the dressing modifier group in case someone does not want dressing; this will be more clear than a salad with no dressing specified.)

*Note: If it is not the server that makes the salad, this helps the expo because then they would know what dressing to put with the salad.

In this case we want the dressings to be automatic so when the Server selects Salad in SoftTouch a choice of Dressings automatically pops up So we will not put on the Manual Modifier Option.

Group Properties

Force Quantity	Any number put into the Forced Quantity field would be how many modifiers the server would be forced to select before they can move on. If you put the Force Quantity to 0, the Servers can choose to use the Go On button without choosing any modifier options. If you set the Forced Quantity to 1 the Server would be forced to choose at least one modifier before they could go to the next screen. (You can set this to higher numbers as well.) **Example:** Say I want a server to be required to select one dressing for a salad before going to the next screen. I would put the Forced Quantity at 1 and then the server would be able to go to the next screen only if they selected at least one dressing.
Quantity	If you leave the Quantity field at 0 then the Servers will have unlimited choices of Salad Dressings (can select as many as they want before continuing). If you only allow a choice of 1 dressing then you must enter 1 in the Quantity field. If you allowed 2 choices then you would enter 2 in the Quantity field.
Non Priced	Allows you to specify a number of modifiers to be non-priced. **Example:** If you would like the include the first two modifiers on a pizza for free but charge for the rest, set the Non Priced Modifiers option to 2.
Manual Modifier	A modifier group is always automatic by default, meaning it will automatically appear after selecting an item it's attached to. If you want a modifier group to be a manual modifier you must check the check box called Manual Modifier. Manual modifiers will not pop up automatically when you order the item in SoftTouch. You have to select the item in the check, then hit the "Modify" button, and then the manual modifiers will show up. ***Note:** This can only be turned on for **one** of the modifier or link groups assigned to an item. Also, the modifier or link group that is selected as the manual modifier should be the bottom most group attached to the item.

Skip	If you have a modifier group you do not currently need for an item, rather than deleting the group you can check on the Skip option so that group is skipped. When you want to have the modifier group available for the item again you would just have to uncheck the skip option for the group. **Example:** For a limited time a BBQ rib dinner platter has the choice of another set of side options. While in effect, the skip option would not be checked. Once the special ends (but it is a special that re-occurs once ever couple of months) you would just check the skip button on so you do not have to delete the group.
Node Display	**All Modes:** Displays the modifier group option in all modes. **SoftTouch Only:** Only displays the modifier group in the SoftTouch Mode. **Example:** This is good if you need to add a specific group modifier that is only going to be used for the online menu. **Online Only:** Only displays the modifier group for the Online mode. **Kiosk Only:** Only displays the modifier group for the Kiosk mode. ***Note:** Defaults to All Modes.

Step 4.

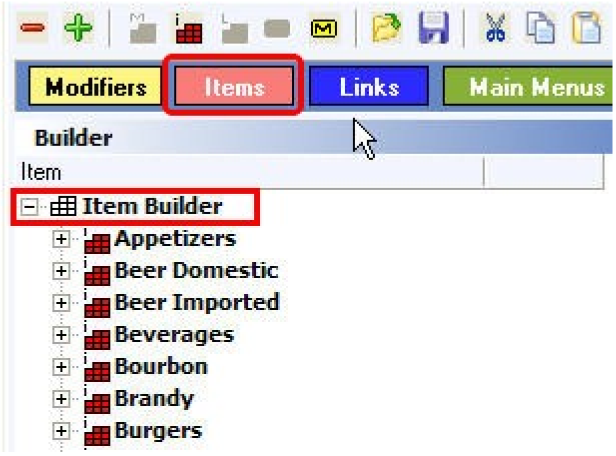
We have now created item modifiers for menu items that require a Soup or Salad with Dressing choice. This link group is now ready to be added to items (see Items->Add Modifiers to Items).

Example of What a Soup or Salad Link Modifier would look like:

12.2.4 Items

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Items** button.

- Items -



After you've set up Modifiers (you can learn how to create modifiers under **Modifiers**) and then Links (you can learn how to create links under **Links**) you can build the actual Menu Items.

Items explanation includes the following:

1. Create Menu Items

2. Rename Menu Items

3. Assign Family, Attach Price, Customize Buttons, Assign Printers, Tax, and Adjustments

4. Special Pricing

5. Add Modifiers to Items

6. Set Properties and Organize

7. Copy Modifiers from Item to Item

8. Duplicate Item Groups

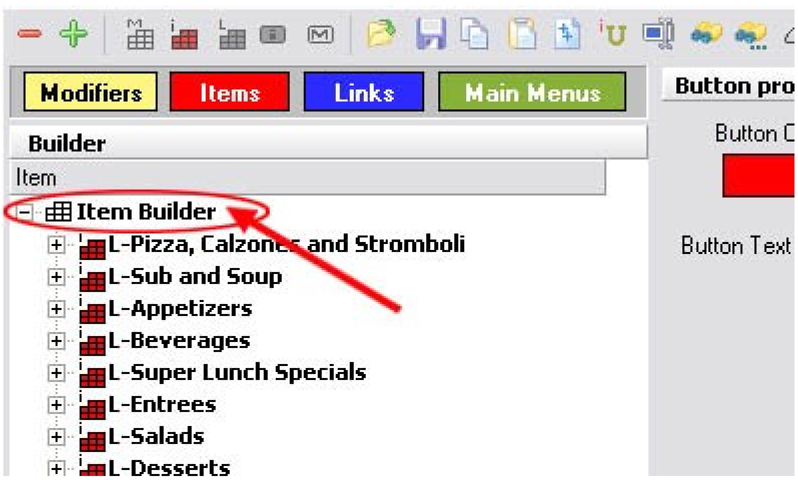
12.2.4.1Create Menu Items

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Items** button.

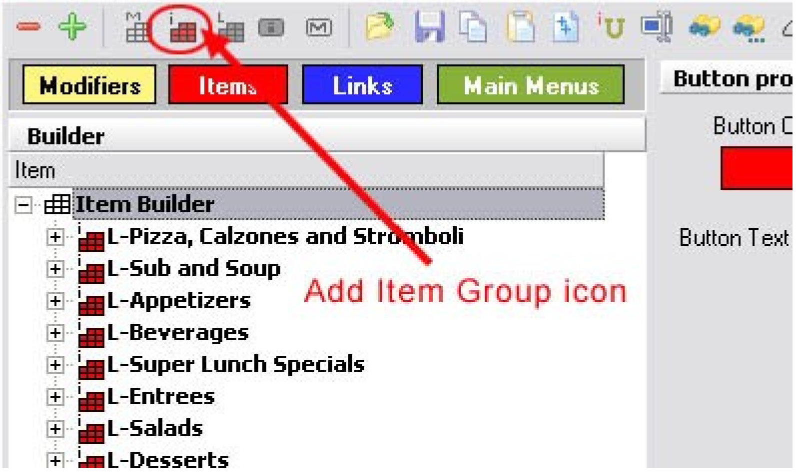
- Create Menu Items -

Step 1. Click on the red button labeled Items. See image below:

Step 2. Highlight the top category called Item Builder by clicking on it. See image below:

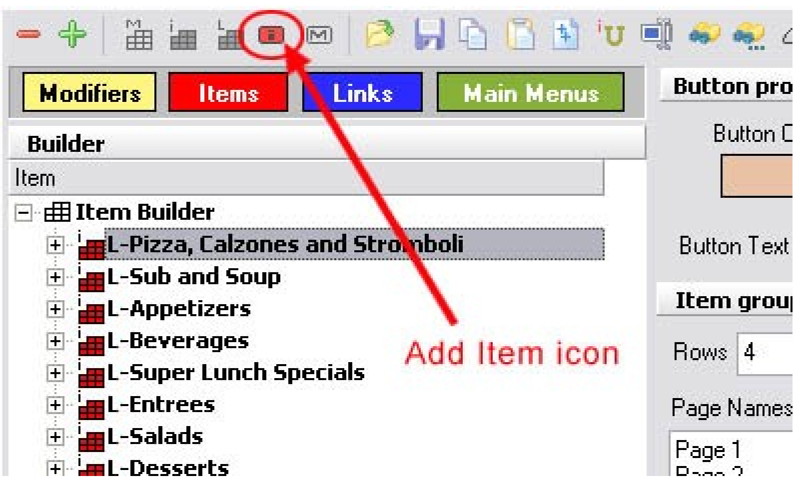


Step 3. When the Item Builder is highlighted click on the Add Item Group icon (red blocks with label I). See image below:

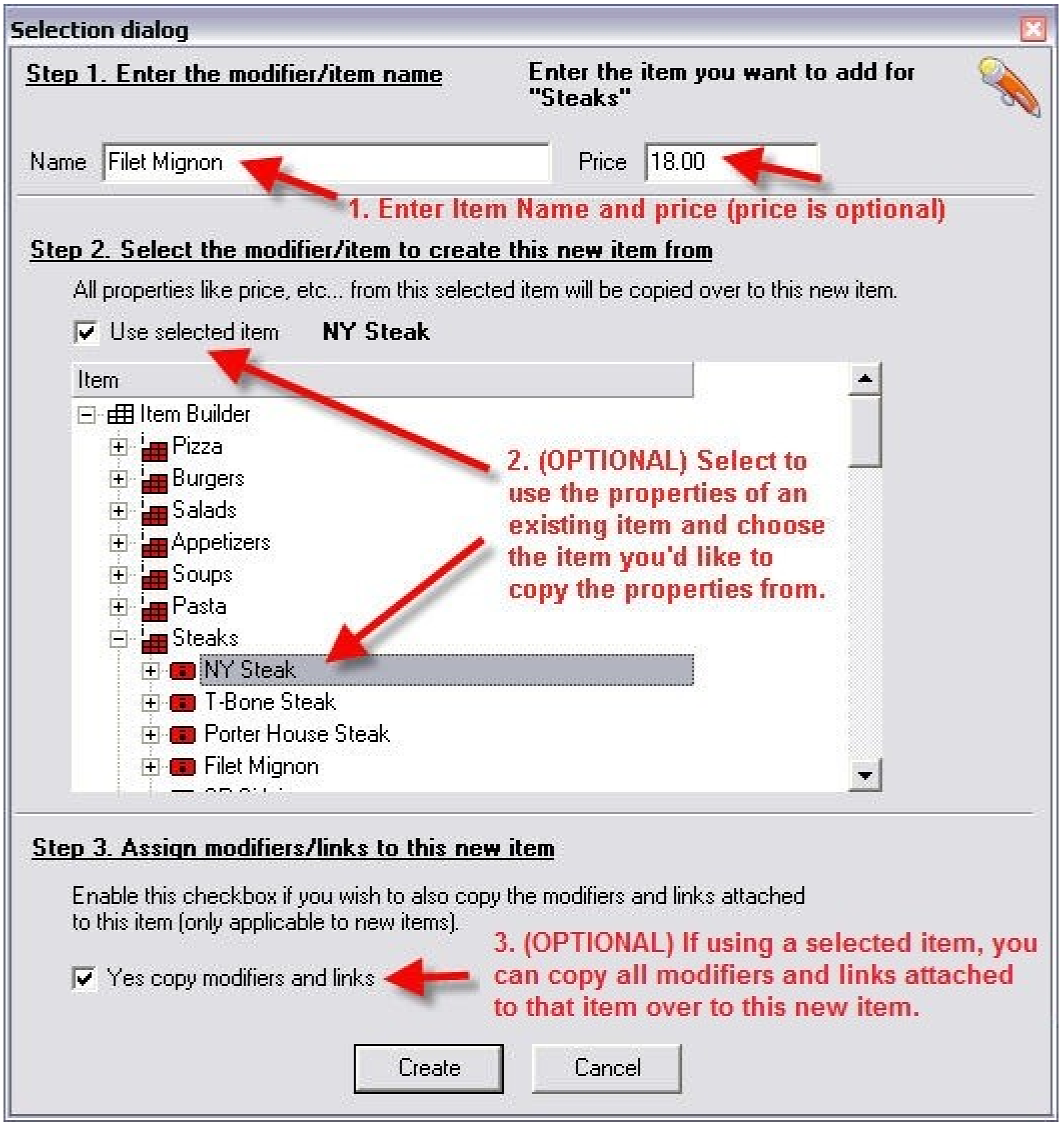


You can now add Item Groups using the same manner as you did with **Modifier** and **Link Groups**
.

As soon as you create an Item Group you will be prompted to start adding items (with prices) to that group immediately, or you can hit cancel on that screen if you like to create more Item Groups before you start adding individual items. To manually add items to a group later, highlight the group you want to add to by clicking on it and then click the Add Item icon (small red i). See image below:



Start adding items for the group highlighted. Click **Create** after each item, then hit **Cancel** when finished adding items to that group.



Example: If the group is Appetizers, then add all the appetizers from the menu. If you are separating Lunch and Dinner Appetizers then remember to use an L or D in front of the item name to distinguish it from Lunch and Dinner.

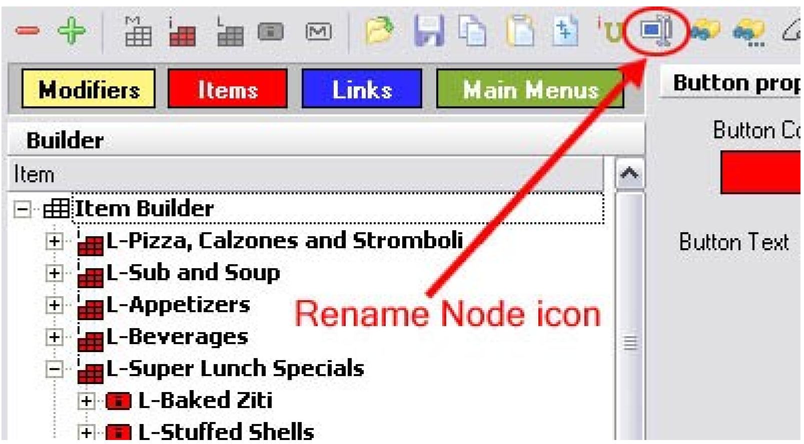
12.2.4.2Rename Menu Items

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Items** button..

- Rename Menu Items -

Step 1. Highlight either the Item Group or the Item itself you wish to rename:

Step 2. Click on the Rename Node icon (or right click and select Rename node). See image below:



Step 3. Enter new name and click OK.

Step 4. If an individual item (not an item group), click the Item tab on the bottom right and change the button text and print name to match.

12.2.4.3 Assign Family, Customize Button, Attach Price, Assign Printer and Tax

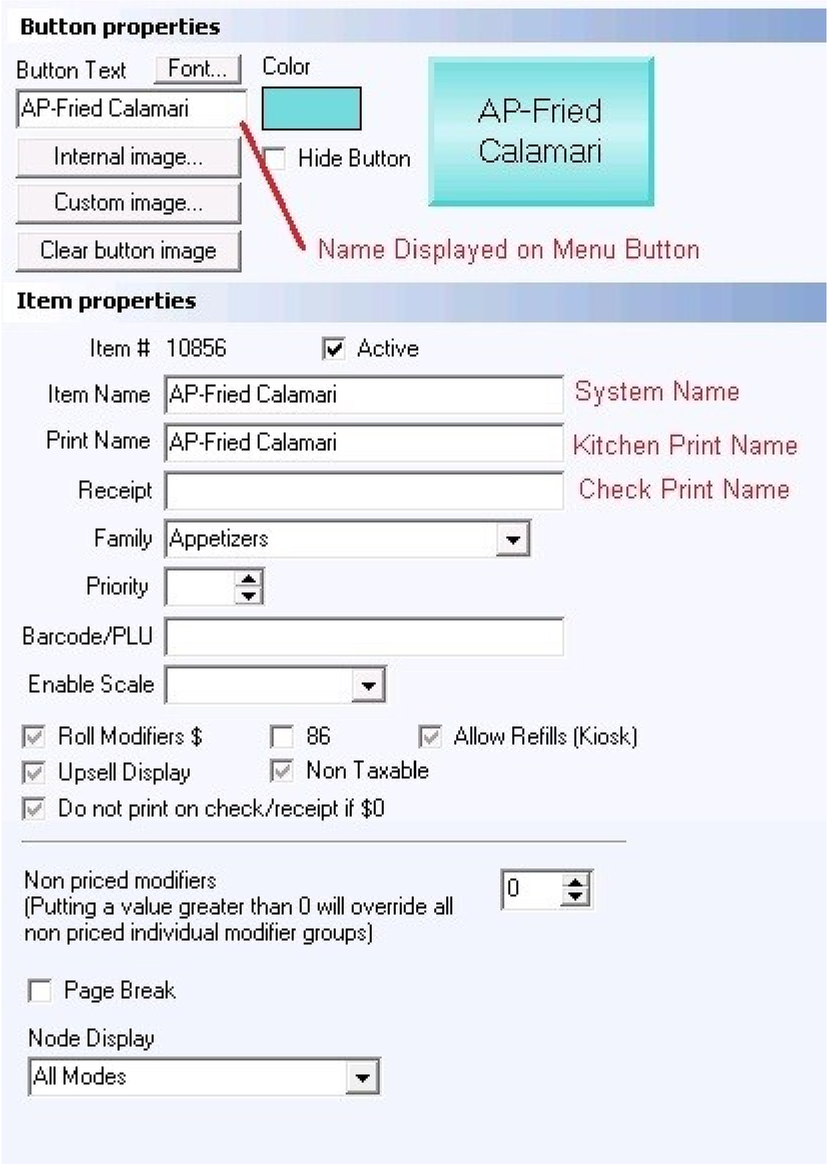
Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Items** button.

Using the Node Updater icon you can assign Families, make button changes, and assign Print Groups and Tax to all the items in the group **at once** (see **Command Bar**) or you may assign a Family, attach a Price and Price Schedule, and assign Print Groups and Tax using the bottom tabs for each item in the group **separately** one at a time.

***NOTE:** When you are in the Items section of the Item/Menu Builder you will be able to access all tabs on the bottom right except the Modifier tab. The **Menu Details** tab is used for Online Ordering.

- Customize Button, Assign Family, and Other Item Options -

Each individual item will allow you to have a different name displayed on a button (Button Text) from what you have entered as the Item Name. You can also customize the name of the item as it should appear when printed remotely (Print Name) and on guest checks (Receipt). If you do not change/edit the Print Name or Receipt fields, the system will assume the same name (that you entered in the beginning) for all areas and will use that name. See image:



Family	Select this item's family from the drop-down. Families will only appear here if you have created them under **Item Builder->Departments**.
Barcod e/PLU	Note that this is the section where you enter the barcode or PLU for items that can be scanned. This is also important for use with Liquor Dispensing (see **Hardware->Stations->Hardware Devices->Liquor Dispensing**). **NOTE:** If you are using **Price Embedded Barcodes**, then only put the actual PLU code in this field, do not put the entire barcode into this field.

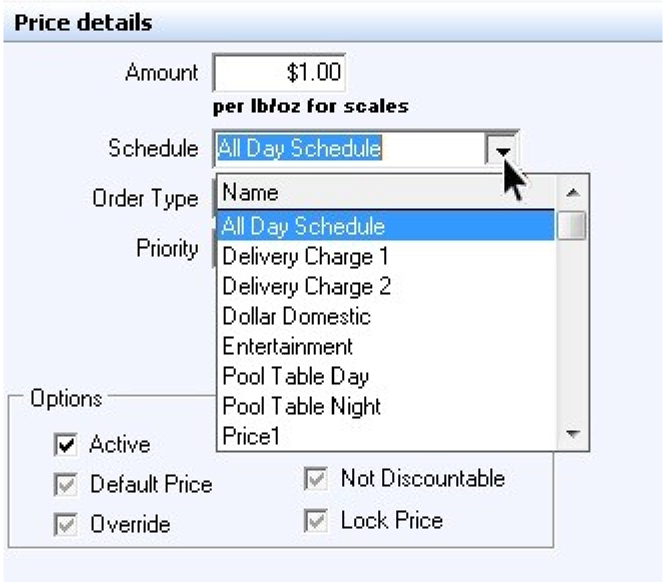
Enable Scale	From the drop-down you can choose to disable the scale or select whether you will be weighing in ounces or pounds. If you select to weight in ounces or pounds, whatever you enter for the amount on the **Pricing** tab will be the price per ounce or pound (whichever you selected here).
Roll Modifiers $	Adds the price of any modifiers into the price of the item when printed.
86	Disables this item from being ordered in SoftTouch and also disables customers from ordering this item online if online ordering has been enabled.
Allow Refills	Used with self-ordering, this allows customers to order a refill of this item (at no charge).
Upsell Display	Displays this item in the Upsell feature when activated, which can be chosen manually or automatically through use of SoftTouch's Seat Statistics to suggest an upsell based on seating demographics.
Non Taxable	All modifiers and items normally have to be assigned to a tax. If there are any items that should not be charging tax, then this option must be enabled for those items.
Do not print on check/receipt if $0	If this is a non-priced item and you do NOT want it to print on the guest check and customer receipt, enable this option.
Non priced modifiers	Allows you to specify a number of modifiers attached to this item to be non-priced. **Example:** if you would like the include the first two modifiers on a pizza for free but charge for the rest, set the Non Priced Modifiers option to 2. ***Note:** Only works for the first modifier group attached to the item.

Page Break	**1.** When this option is checked on, a page break is created so that when you go to the POS your modifiers/items will be listed on more than one page for easier reading. **2.** A page break should go on the item/modifier right before the item you would like to start on the new page. **3.** Enter page names so that each tab will have an appropriate name.  *In the above screenshot, the page break would go on the last chicken item in the Chicken and Veal group so that all the veal items will be on a separate page.* **Tip:** Use the "800" or "1024" buttons to preview what the group looks like after enabling the page break for one or more of the items in group.
Node Display	**All Modes:** Displays the modifier group option in all modes. **SoftTouch Only:** Only displays the modifier group in the SoftTouch Mode. **Example:** This is good if you need to add a specific group modifier that is only going to be used for the online menu. **Online Only:** Only displays the modifier group for the Online mode. **Kiosk Only:** Only displays the modifier group for the Kiosk mode. ***Note:** Defaults to All Modes.

- Set Item Price -

Highlight an item you want to attach a price to by clicking on it. On the bottom right side of the screen, click the **Pricing** tab. See image below:

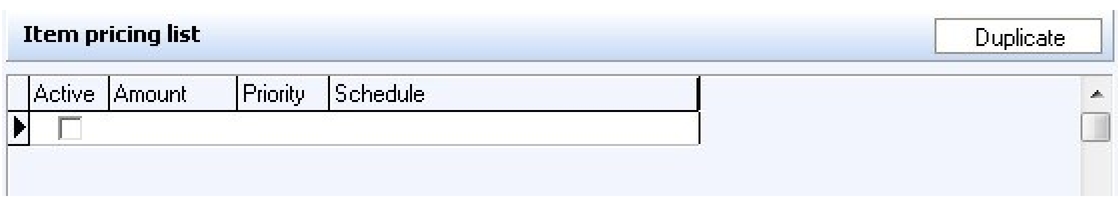
You will now see Price Details fields right above the tabs. In the **Amount** field type in the price for the item then in the Schedule field click the drop-down menu. All the schedules that you have previously created will show up. (You can learn how to create schedules under **Scheduling->Add Schedule**.) Select the All Day Schedule if you would like the item to have that price all day long.



If it should be different prices during different schedules, use the **Add** button to create multiple prices, selecting the schedule and filling out the pricing options for each (explained below). All prices are shown under the Item pricing list.

You can also have different prices during the same schedule but for different order types (takeout, delivery, etc., explained below).

To make changes to one of the prices, click on it under the **Item pricing list** to highlight it and then edit the **Price details** below.



***Note**: The **Default Price**, **Override**, and **Lock Price** boxes are obsolete. They have been overtaken by security items in the Security applet and also by the **Priority** here in the Pricing tab in Items & Stock.

Order Type	You can specify what order type you would like the pricing tied to. You can select All Orders or pick one specific type. **Example**: If you put the price to be only for Dining mode, the selected price will only be reflected on a check created in Dining mode.
Active	If the box is unchecked, the selected price will not be charged.
Open Price	Enables you to put whatever price you would like on the item.
Not Discountable	Sets up the node's price to not be affected by any adjustments/discounts. Be sure to check on this option for each individual price/schedule it applies to. (See **Set as Not Discountable** for an example walk-through on setting up this feature.) **Example**: A customer has a 20% off coupon and you have a caviar item that you don't want to discount. If that item is set to Not Discountable, 20% off will be applied to everything on the check except the caviar.
Priority	Lets you choose which price should go into effect if the schedules of any active prices overlap. **Example:** If you have items that need a happy hour price of say $1.00 and then a regular (all day schedule) price of say $3.00, you need the happy hour price to go into effect when both the happy hour and all day schedules are overlapping. So the priority is what allows you to choose which price goes into effect when you have overlapping schedules. Set the happy hour price priority to 1 and all day schedule price to 2. (Lower number - 1 - is first priority.)
Amount is per lb/oz for scales	You have already typed in the price here in the **Amount** field. Note, however, that if you are using scales/weight for the item then you would want to set the price amount as what the item would cost per pound or ounce (depending on which you selected) so that when the item is weighed the price can be calculated correctly. To enable scales/weight for an item, click on that item (red), click on the Item tab on the bottom right, and look for the Enable Scale field. From that drop-down, select either Pounds (lbs) or Ounces (oz). **Example**: Put the price at $1.00 and set Enable Scale to Pounds (lbs). This means whenever this node is chosen and you place an item on the scale to be weighed, SoftTouch will calculate how much the item weighs times the price you have entered in BackOffice. So if you have a 2lb chicken with a price of $1.00 per lb, the chicken's total would then be $2.00.

***Note:** You can assign price to multiple nodes using the "node updater" listed here.

- Print Groups and Tax -

***IMPORTANT*:**

DO NOT FORGET to specify printers and tax for each item!! With an item selected, click the Print Groups and Tax tabs on the bottom right.

For print groups and taxes to display in the drop-downs for each of these tabs, you must first create them.
Read about setting up printers and print groups under **Hardware->Printers/Coursing**.
Read about creating taxes under **Financial->Tax Table**.

If you use an expediter printer in your establishment, make sure you also add the expediter print group.
Read about expediter under **BackOffice Toolbar->Template Screen->Expediter Template and Seat Positions**.

- Adjustments -

On this tab you can choose to attach adjustments to the item. Adjustments can be coupons, discounts, specials, etc.

You must create the adjustments first in order for them to show up on the drop-down menu. Read about adjustments under **Financial->Adjustments**.

12.2.4.4 Set Item as Not Discountable

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Items** button.

- Set Items as Not Discountable -

If you wish to not discount some items, you can set those items to Not Discountable in the Menu Builder, as outlined below.

Example: A customer has a 20% off coupon and you have a caviar item that you don't want to discount. If that item is set to Not Discountable, 20% off will be applied to everything on the check except the caviar.

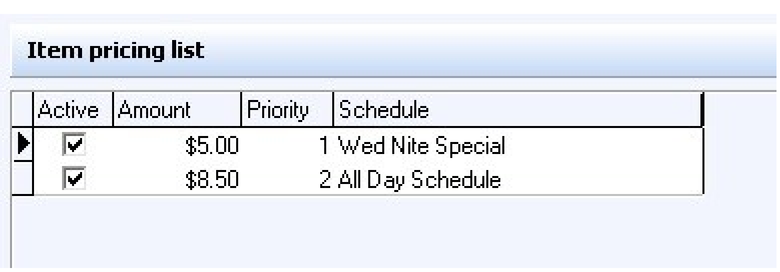
Step 1. In the menu builder click on the red button labeled Items.

Step 2. Expand an Item Group inside of which is the Item you wish to set to Not Discountable.

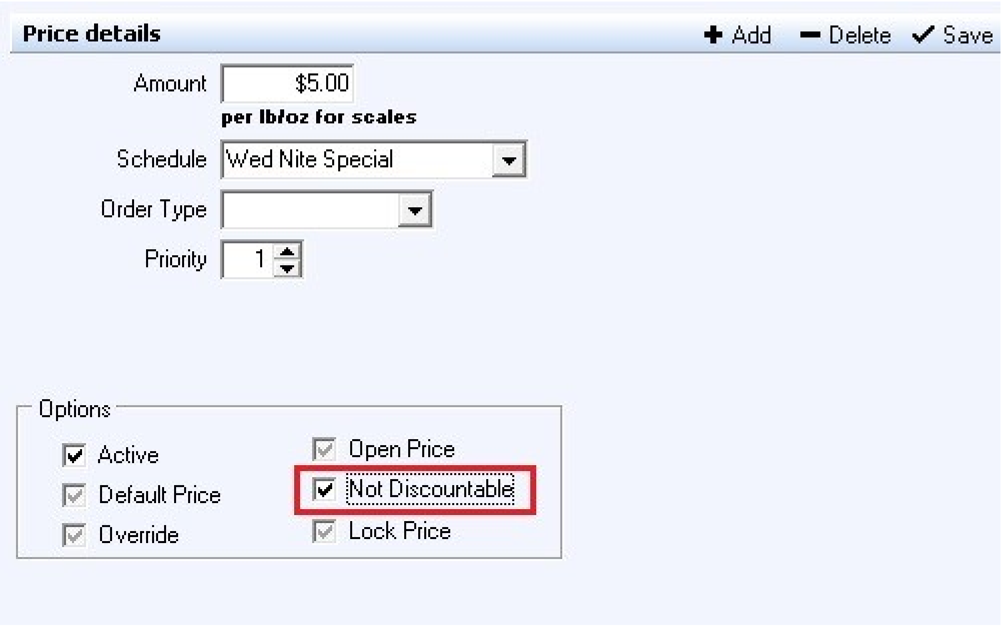
Step 3. Highlight that item by clicking on it.

Step 4. On the right side at the very bottom click on the Pricing tab.

Step 5. If your item has several prices then under **Item pricing list** section select the one you want to be not discountable by clicking on it.



Step 6. Under **Price details** section select the Not Discountable checkbox.



Step 7. Repeat steps 5-6 if you want to set other prices for that item to Not Discountable as well.

Step 8. Repeat steps 2-6 for all other items you want to be Not Discountable.

12.2.4.5 Add Modifiers to Items

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Items** button.

- Add Modifier Groups or Link Groups to Items -

After you have added Items to an Item Group and assigned the necessary information to the items, you can now add Modifier Groups and/or Link Groups to an Item. (Refer back to **Modifiers->Create Modifiers** and **Links->Create Links** for help setting these up.)

Step 1.
Highlight the Item you want to add a Modifier or Link Group to, then click on the Add Modifier Group icon (yellow block with label M) or Add Link Group icon (blue block with label L).

Step 2.

In the window that shows up you will see all the modifier or link groups you have created earlier. Highlight the modifier or link group you want to add and click the Select button. **Tip:** You can hold down the CTRL key to select multiple groups at one time.

You have now added a Modifier or Link Group to an Item.

Recall and consider adding some of the link groups we created earlier, such as Manual Modifiers (see **Links->Create Links**) and Add Soup or Salad (see **Links->Adding Modifiers to Modifiers**).

****WARNING**:** Only one group under an item can be a Manual Modifier (have the Manual Modifier option checked). **If you add a manual modifier to an item, it must be the LAST modifier group listed under that item.**

- Add Item Groups as Modifier Groups to Items -

You can add an Item group to an item as a modifier much the same way as you add a Link Group to an item.

This is good for if you have an item that is a modifier that needs to have modifiers tied to it as well. This works basically the same as using a Link as a modifier does, except you are not limited to how many item groups you use as modifiers under an item.

> **Example:** You need a group of sides for a steak, but there is a potato option and the potato needs to have items tied to it as well. You would create all the side options as items and with the potato you could then tie regular (yellow) modifiers. Then you can take that item group and tie it to the steak for side options.

12.2.4.6 Set Properties and Organize

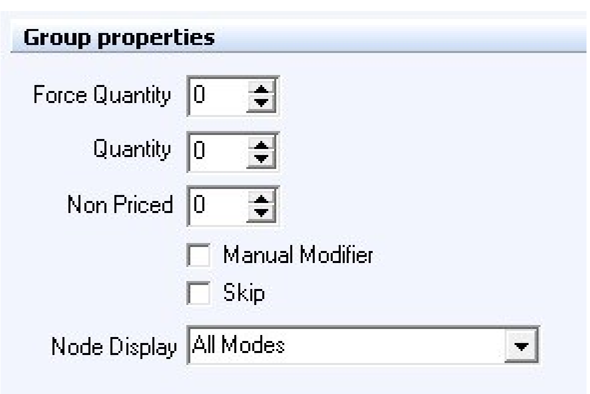
Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Items** button.

- Set Properties and Organize -

After you have added all the modifier, link, and item groups you want to the menu item, double click the item and/or the group that this item is located in or click the + sign next to them. All the modifier (yellow), link (blue), and item (red) groups that you've added will show underneath.

Step 1.

Highlight the first modifier group (any color). Under the **Group properties** you'll see the options that were explained under **Links->Link Modifier to Modifier**. Adjust these as needed.



If using the Add Soup or Salad Link Group we created in **Links->Adding Modifiers to Modifiers**, the Quantity (not forced) should be set to 1 if only one soup or salad can be added on to an entree for that price.

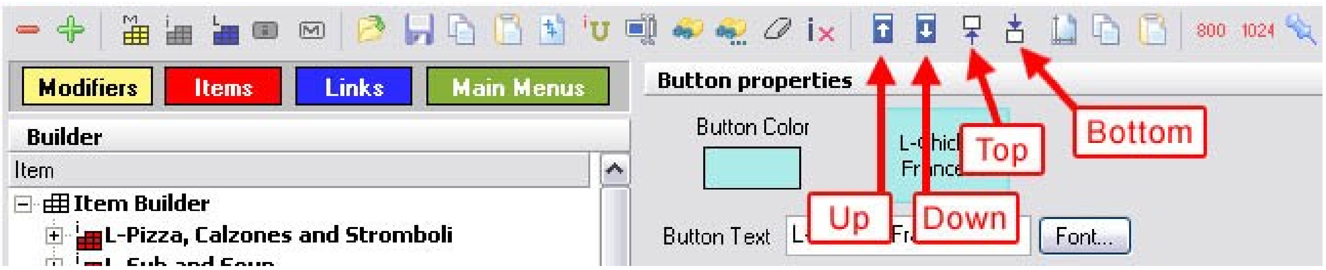
If using the Manual Modifiers Link Group we created in **Links->Create Links**, the Quantity (not forced) should be left at 0 so the server can choose as many manual modifiers as needed. Remember to check the Manual Modifier option box so these modifiers will pop up only if the server pulls them up by touching that item on the check in SoftTouch.

ATTENTION:

Make sure Manual Modifiers are the last group attached to an item.

Example: Soup or Salad should come before Manual Modifiers (which are NO, ADD, XTRA, SUBSTITUTE and INSTRUCTION modifiers).

If you need to move a Modifier up or down, there are an Arrow icons to move it one space up or down, or to the top or bottom of the group. See image below:



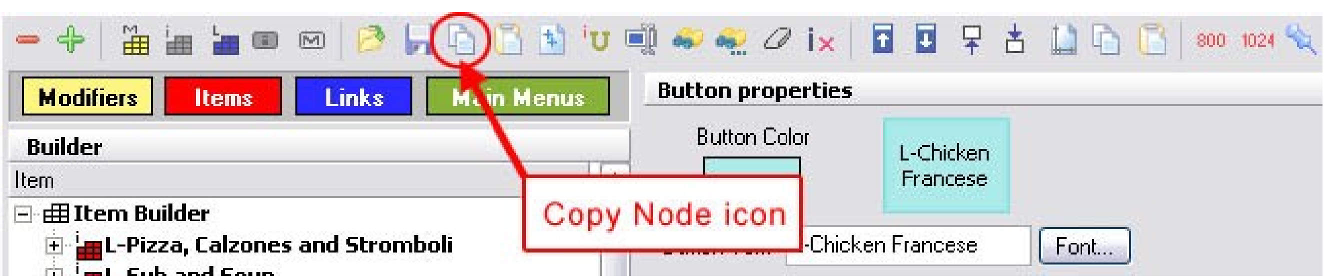
12.2.4.7Copy Modifiers from Item to Item

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Items** button.

- Copy Modifiers from Item to Item -

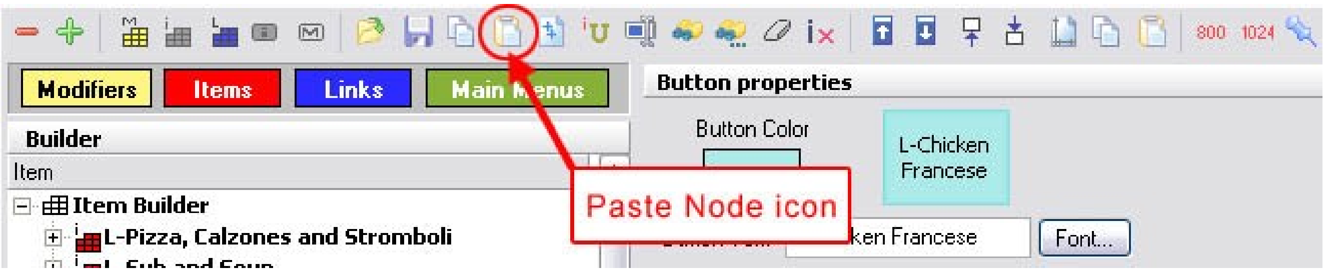
Once you have added all the modifiers you needed to the item, you may copy these modifiers to another menu item under the same group or to an item under another group that needs to use exactly the same modifiers.

Step 1. Highlight the Menu Item you want to copy Modifiers from and click the Copy Node icon on the toolbar. See image:



***Note:** You can also highlight the item, right click and select Copy node.

Step 2. Now highlight the Menu Item you want to copy Modifiers to and click the Paste Node icon on the toolbar. See image:



***Note:** You can also highlight the item, right click and select Paste node.

You have now copied all the Modifiers, including Quantity field value and Manual check box selection, from one menu item to another menu item.

If you want to keep copying the same Modifiers to more Menu Items, you can continue selecting items and pressing the Paste Node icon (you do not have to copy the same modifiers over and over).

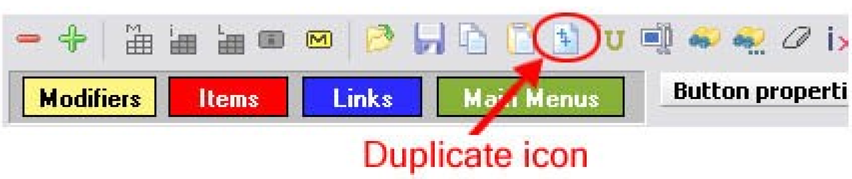
12.2.4.8 Duplicate Item Groups

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Select the **Items** button.

- Duplicate Item Groups -

Step 1. Highlight the Item Group you wish to duplicate.

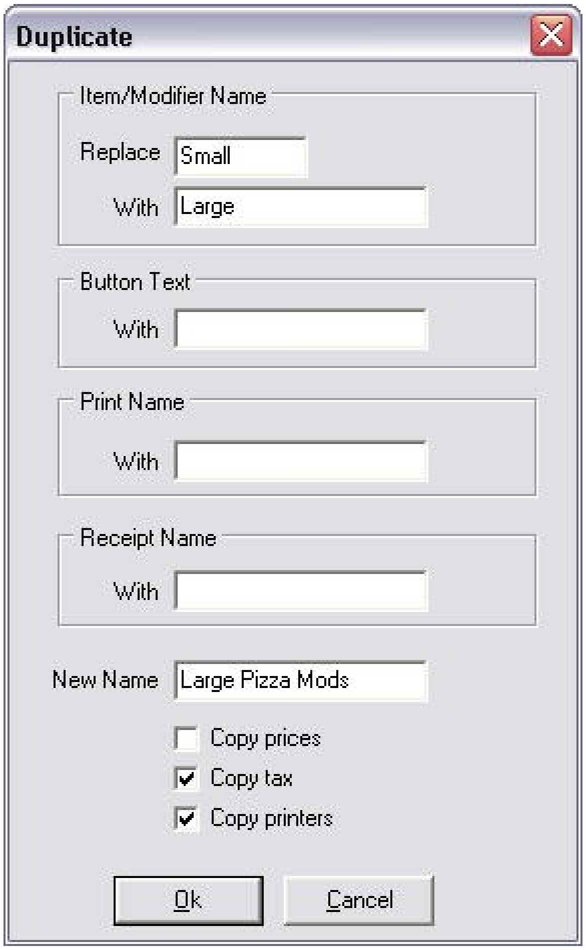
Step 2. Click on the Duplicate icon in the toolbar. See image:



Step 3. A small window will pop up with a few fields. Enter the existing text you want to replace in the "Replace" field and enter the text you want to change it to in the "With" field.

Example: The following example would change "Small Pizza Mods" to "Large Pizza Mods".

You also have the option to change the button text, Print Name, and/or Receipt Name for the new group, and to copy the prices, tax, and/or printers. This is explained in detail here.



Example: If you're duplicating Sm (small) Pizza items with Lg (large) Pizza items, simply put in Sm in the first "Replace" field and Lg in "With" field. All the new duplicated items will now have Lg instead of Sm in front. If you did not label Sm Pizza items, then just leave the first field "Replace" blank and enter Lg in the second field "With". Lg will now be added to the front of all new duplicated items.

Step 4. Verify/Enter the name for the new Group and click OK.

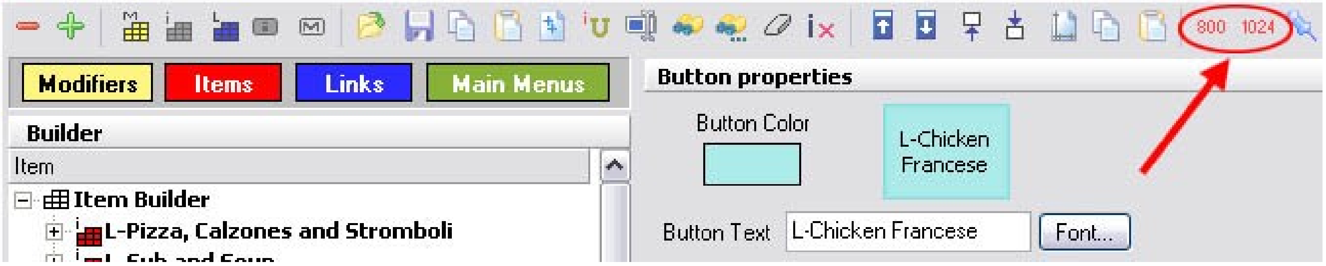
12.2.5 Sizing the Grid

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab.

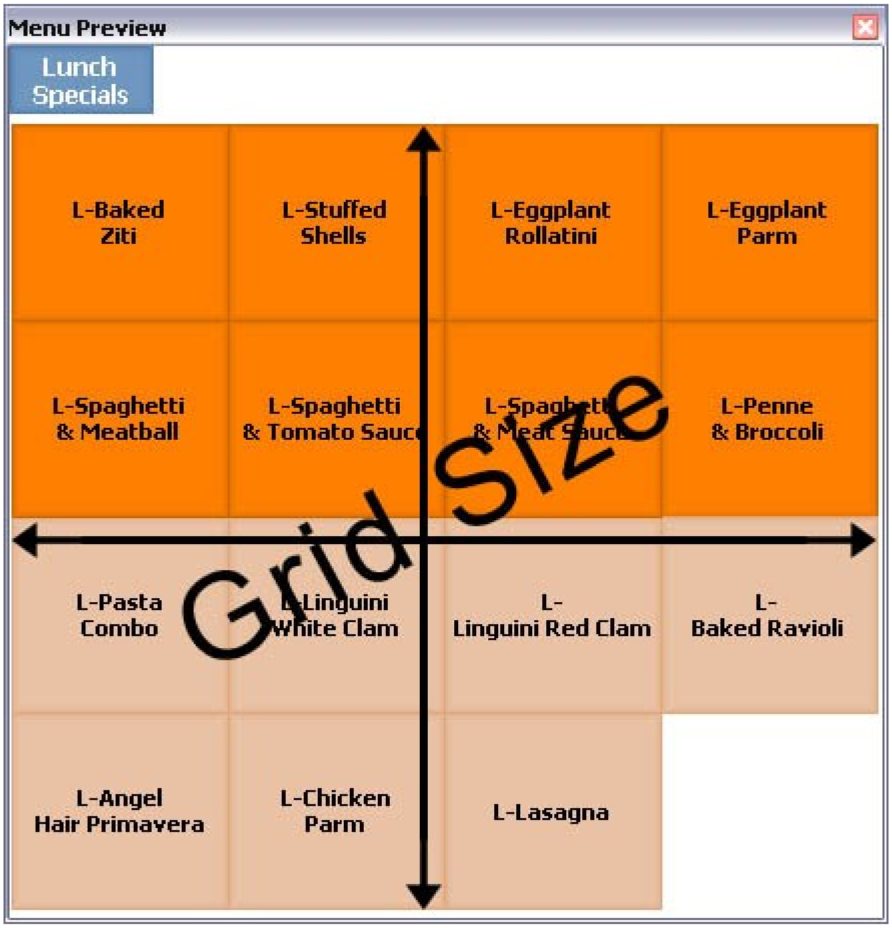
- Sizing the Grid -

When you have all the Items, Modifiers and Links added to a group, you can change the grid size to fit the menu.

Highlight the Item Group and click on the 800 icon or 1024 icon on the toolbar. See image below:

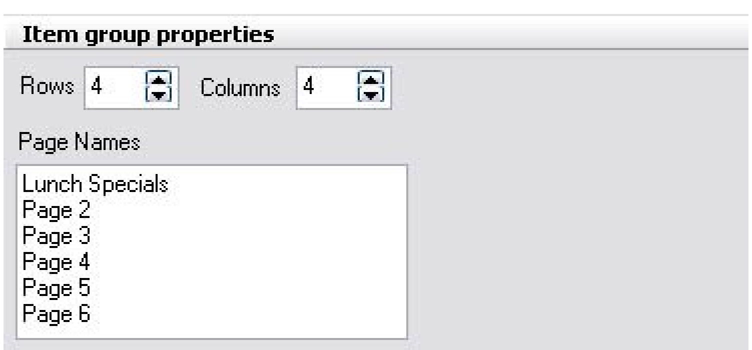


This will open the preview window of the grid size. See image:



When you're ready, click the red X in the top right corner of the grid preview window to exit it.

If you want to make the buttons bigger or smaller, on the right side of the screen under the **Group properties** you will see a Rows field and a Columns field with numbers in them. See image:



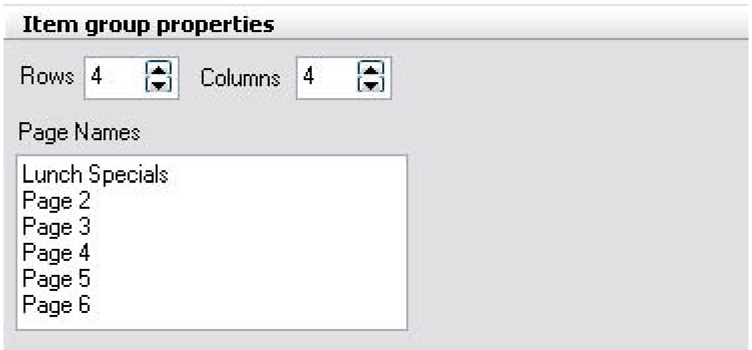
Rows is the number of buttons going vertically.
Columns is the number of buttons going horizontally.

Increasing the number of Rows and/or Columns will make the buttons smaller and decreasing the number will make the buttons larger.

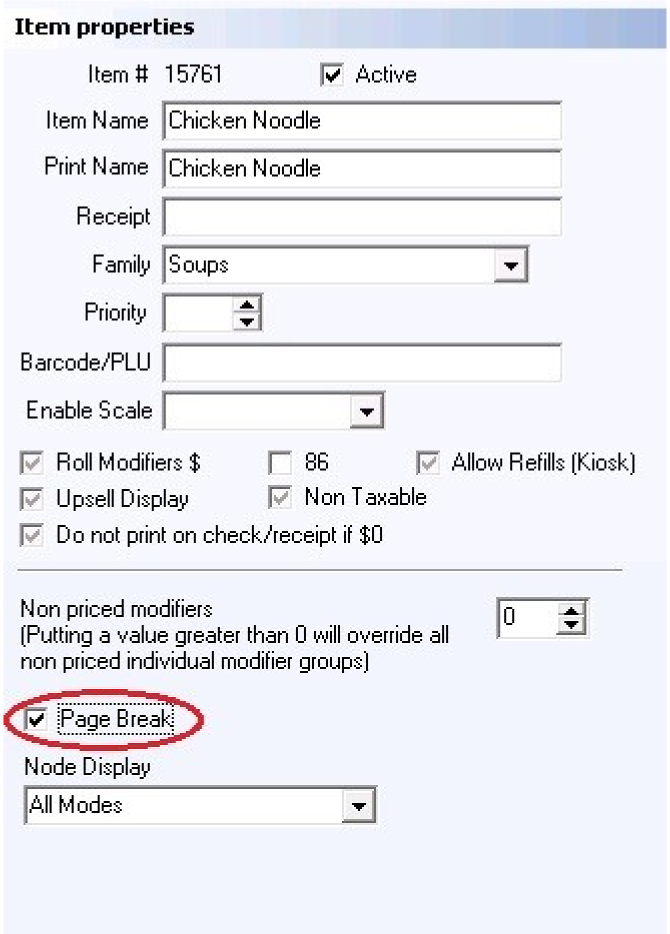
To see how it works play with these numbers by entering different values. Then re-highlight the Item Group and choose the 800 or 1024 icon to preview the new results.

- Paging the Grid -

If the menu goes onto another page, you may label the pages in the white space under **Page Names**. See image:



If you want to force items to go to another page, highlight the item that you want to be the last one on the previous page and check on the Page Break check box. See image:



This will force all the following items to go to the next page.
You can have up to 6 pages total.

****WARNING**:**

When using the grid Rows and Columns feature, make sure you do not set the Rows and/or Columns to be so big that it cannot accommodate all the menu items in that group. If the menu items cannot be displayed, there will be an error message.

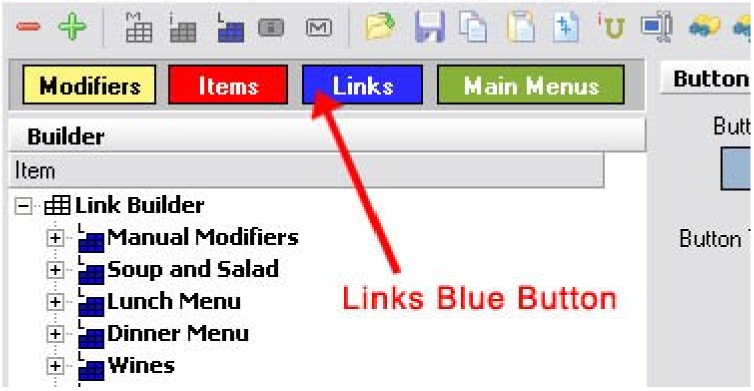
12.2.6 Making Menus from Item Groups

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab.

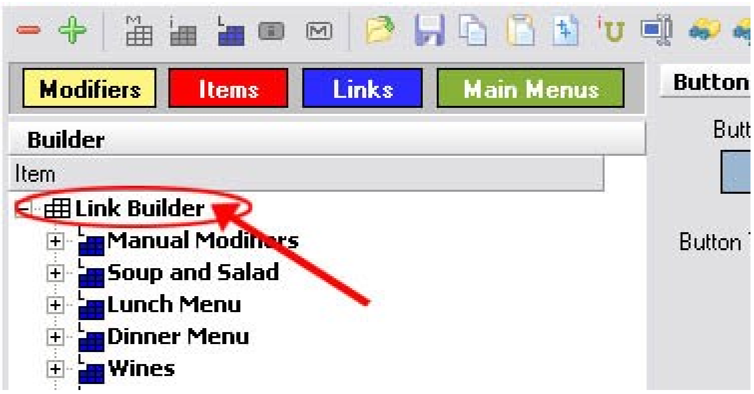
- Making Menus from Item Groups -

After all the menu items are added into their appropriate groups (for example: Appetizers, Entrees, Desserts) you will need to make them into a completed menu.

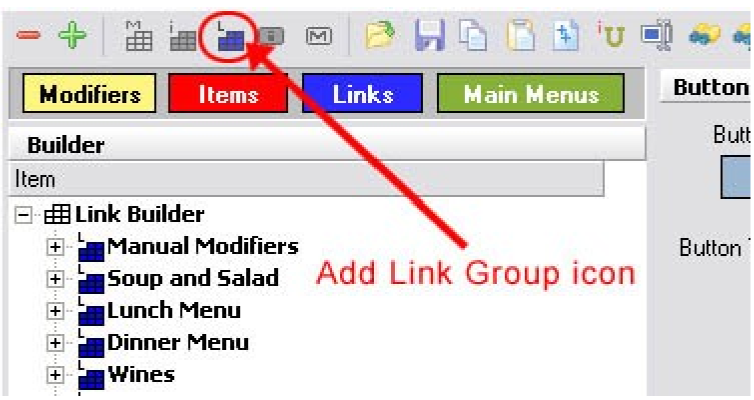
Step 1. Click on the blue button labeled Links. See image below:



Step 2. Highlight the top category called Link Builder by clicking on it. See image:

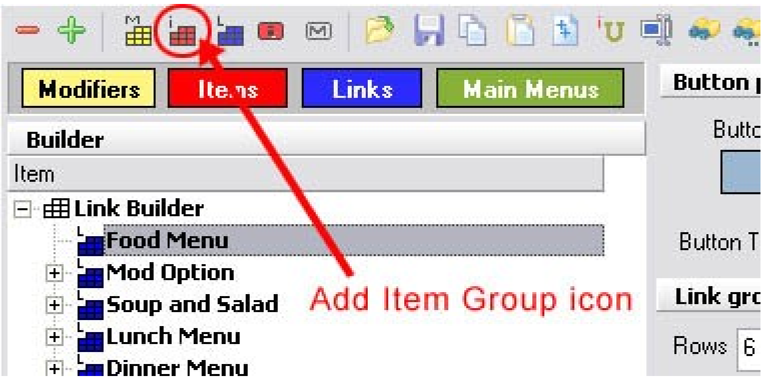


Step 3. When the Link Builder is highlighted click on the Add Link Group icon (blue block with label L). See image:



Step 4. Enter a New Link Group Name (for example: Lunch Menu, Dinner Menu, Liquor Menu). Name it depending on the Restaurant needs. For our examples, we will call it a Food Menu or the Main Menu.

Step 5. Now highlight this Food Menu group you've just created and click on the Add Item Group icon (red block with label i). See image:



Step 6. In the window that shows up you will see all the Item Groups you created earlier. Highlight all the groups that you want to have in this Food Menu or Main Menu (or whatever you've called it) by holding down the CTRL key while you select the groups or Shift key while clicking the first and last in a series. Then click the Select button.

Click on the plus sign next to the Food Menu / Main Menu to see all of the item groups you've added to it.

The following example shows what the Main Menu Link might then Look like:

***Note:** You can create new Link Groups for Liquor or Lunch and Dinner. Follow the same steps starting from **Step 2**.

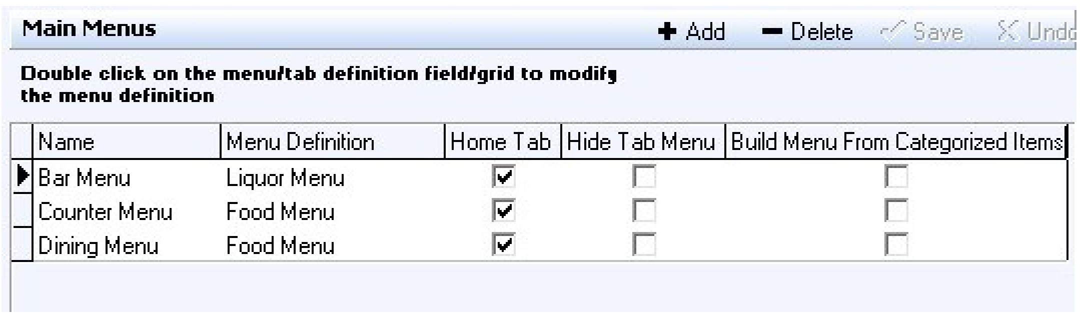
12.2.7 Main Menus

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab. Click on the **Main Menus** button.

Once you have created your Food Groups and have linked all your items to them, you have to define those link groups as actual menus by going to the "Main Menus" area.

Step 1. Click on the green button labeled Main Menus. See image below:

Step 2. On the right side of the screen under the **Main Menus** title you will see a little black triangle with fields for **Name** and **Menu Definition**. See image below:



Click the  button and under the Name field create a unique name for the menu you want to link to.

> **Examples:** Dining Menu, Bar Menu, Lunch Menu, and Dinner Menu. If you have a unique Take out menu then create the name Take Out Menu.

Next to the name you just entered, click in the white space under Menu Definition. A window will show up and you will see the Food Menu group you created earlier, and all other Menus that you have created.

Highlight Food Menu (or other desired menu) and click the Select button.

You have now linked the Food Menu to the name Dining Menu. Repeat the same steps starting from Step 2 until all the Menus have been named and linked under the Main Menus.

***Note:** If you've already filled in the Menu Definition field but want to change it, you have to double click that field.

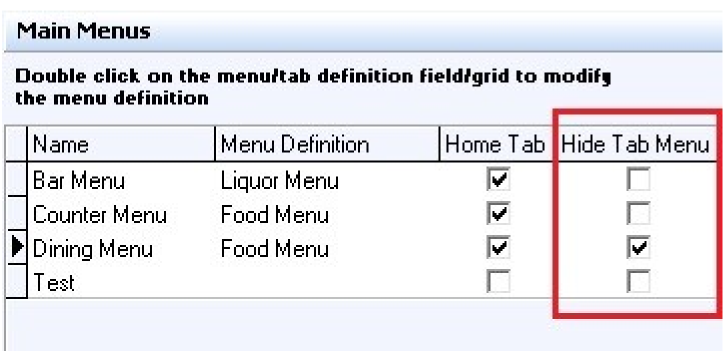
Step 3. Another feature you will need to understand in the Main Menus area concerns the **Home Tab**.

This field allows you to customize how your users will see the order screen in SoftTouch. By default, when you create a new menu name, the **Home Tab** is not checked. This means that when you enter the order screen for that area (let's say Counter, for instance), you will be presented with the first group (the one that is at the top of the list) in your Food Menu. See image below.

Now let's take a look at the Dining Menu with the Home Tab checked. You will see that it displays all of the groups in the Food Menu in the main screen. See image below.

You will notice that the side, hot-jump menu does not change. This feature can be very useful in a bar situation, where you would like to have you most sold items as the main order page and still have quick access to the rest of the menu on the right.

Step 4. If you do not wish the menu categories on the right-hand side to appear, check on the **Hide Tab Menu** button.


Main Menus

Double click on the menu/tab definition field/grid to modify the menu definition

Name	Menu Definition	Home Tab	Hide Tab Menu
Bar Menu	Liquor Menu	☑	☐
Counter Menu	Food Menu	☑	☐
Dining Menu	Food Menu	☑	☑
Test		☐	☐

This is what the Dining Menu would look like with both the **Home Tab** and the **Hide Tab Menu** options checked on.

You are now finished with the building and linking of your Menus. These menus must be assigned to Stations (learn how under **Hardware section->Stations->Menus tab**) and Price Schedules must be attached to Stations (learn how under **Hardware section->Stations->Price Schedules tab**).

12.3 Smart Rules Tab

Under the **General** section click on **Item Builder**. Select the **Smart Rules** tab.

This section is explained in detail in the Coupons and Combos Manual. This manual can be downloaded at: www.softtouchpos.com

12.4 Menu Categories Tab

Under the **General** section click on **Items & Stock**. Select the **Menu Categories** tab.

Menu Categories

***Note:** This section is used for SoftTouch programmers who handle the Online set up.

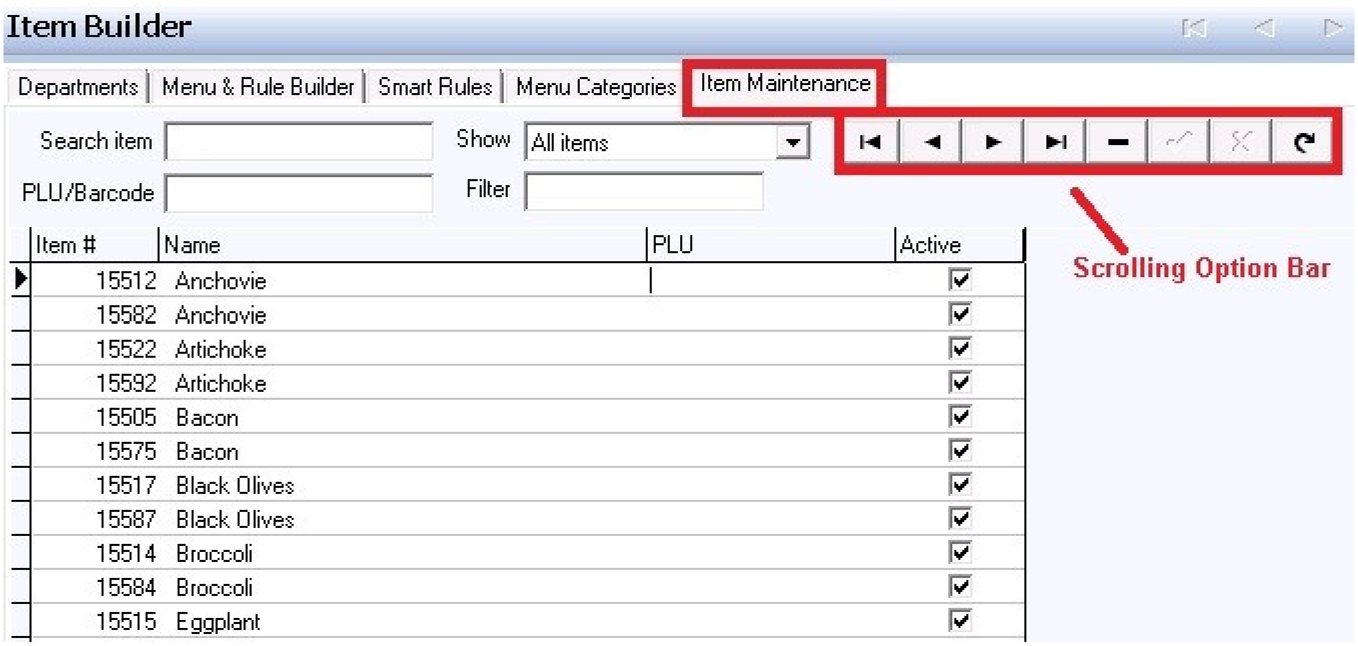
Sort	The Sort Order displays in which order the online tabs will appear on the website.
Category and Tab Name tabs	The Category and Tab name are usually the same name as what is posted on the restaurant's take out menu.
Description (html allowed)	The Description area is where we can fill in information about the Group. You can put html coding in this section.
Hide Tab	The Hide Tab option allows us to either see or hide the tab online for the menu category. ***Note:** If you choose to hide a tab it will still be listed under the default tab named "All categories" when viewing the menu online.

12.5 Item Maintenance Tab

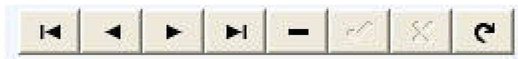
Under the **General** section click on **Items & Stock**. Select the **Item Maintenance** tab.

Item Maintenance

This area is to list all the created items in the database. If you delete nodes from the menu, the nodes will still appear in this area until deleted from this area as well.



Search Item	You can type the partial first part of an item or the full name. If you type the first letter, it will automatically scroll down to that area, and as you type each letter it will search through to find the item that contains the letters.
Show	**All items**: Lets you sort through modifiers as well as the items **Items Only**: Lets you sort through just the items (no modifiers) **Modifiers Only**: Lets you sort through just the modifiers (no Items)
PLU/Barcode	You can look up an item by its barcode or PLU by placing these in this field. ***Note**: You should be able to scan or manually type in the code to search.

Filter	Filters items by letter combinations entered in the field. **Example:** If you start typing in "pa" it will look up all items that have "pa" anywhere in the name (not just the beginning). It is not case sensitive.
Scrolling options	 The arrows with a line next to them go to the beginning or end of the entire list. The arrows without the lines go up or down one by one. The minus button deletes items. The Check-mark button saves the item. The X Button undoes a change you have made. The curved arrow button refreshes the list.
Active	Check or uncheck this box next to any item that you wish to activate or deactivate. If the item is inactive (box unchecked) the item cannot be ordered. ***Note:** If you deactivate the item/modifier here, it will deactivate the item/modifier in the menu as well.

Part XIII

Stock/Barcodes

Part 13 Stock/Barcodes

Under the **General** section click on **Stock/Barcodes**.

Stock/Barcodes

Stock/Barcodes explanation includes the following:

1. Create and Manage Items

2. Tie Stock Item to Menu Item

3. Barcodes

13.1 Stock

Under the **General** section click on **Stock/Barcodes**.

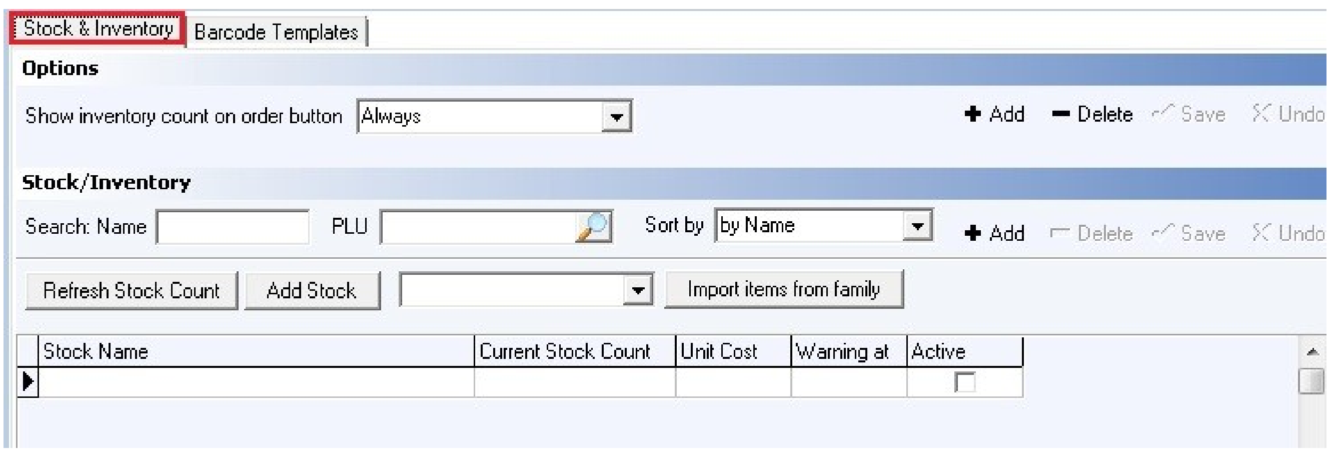
Stock/Barcodes

SoftTouch point of sale includes stock counts. The stock items entered can be linked to multiple items. For example, if you enter a bottle of wine as a stock item, you can link it to the bottle in menu items with a count of 1 and also tie it to the glass of wine with a quantity of .125 (where you get 8 glasses from one bottle).

If you wish to do full blown inventory, please check the member area of the SoftTouch website, www.softtouchpos.com, to check for certified partners that we integrate with.

13.1.1 Create and Manage Items in the Inventory

Under the **General** section click on **Stock/Barcodes**. Select the **Stock & Inventory** tab.



- Stock/Inventory -

This is where you add and manage your inventory items. When adding new stock items you can either manually enter them one by one or you can import items from a family.

- Add Stock/Inventory -

To add a new stock item, click the  button in this section and fill out the fields below:

Stock Name	The name of your stock item.
Current Stock Count	Number of items you currently have in stock.

Unit Cost	Cost per item.
Warning at	Specify a quantity after which the warning of low stock is displayed. If 0 value entered the warning is never displayed. ***Note:** Once you run out of an item in the inventory you will not be able to ring up that item anymore.

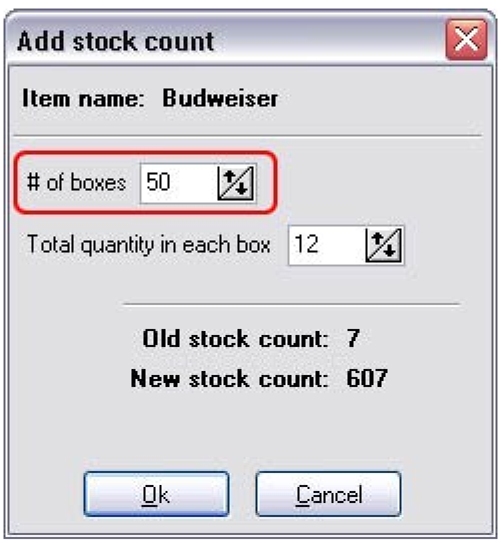
- Add Stock Button -

If you are entering stock items that are packaged by boxes rather than being a single item, it's useful to utilize the **Add Stock** button, which does the calculations for you.

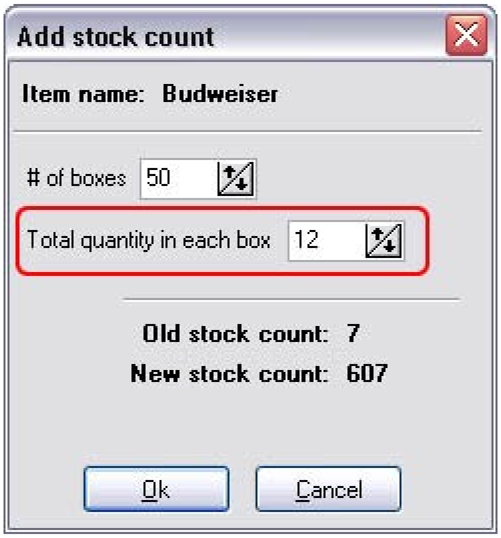
Step 1. Highlight the stock item you need to update.

Step 2. Click the Add Stock button (next to Refresh Stock Count button).

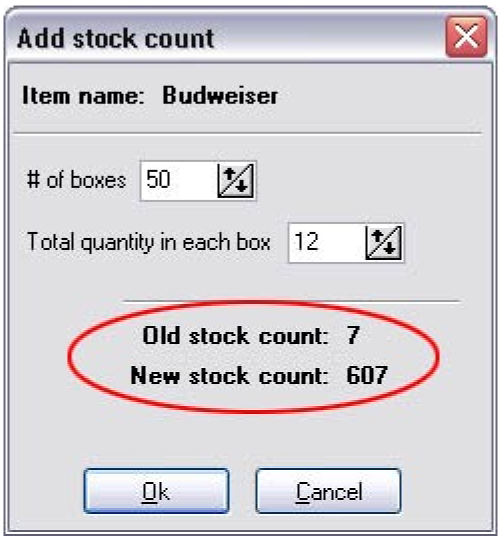
Step 3. Enter the number of boxes for the item.



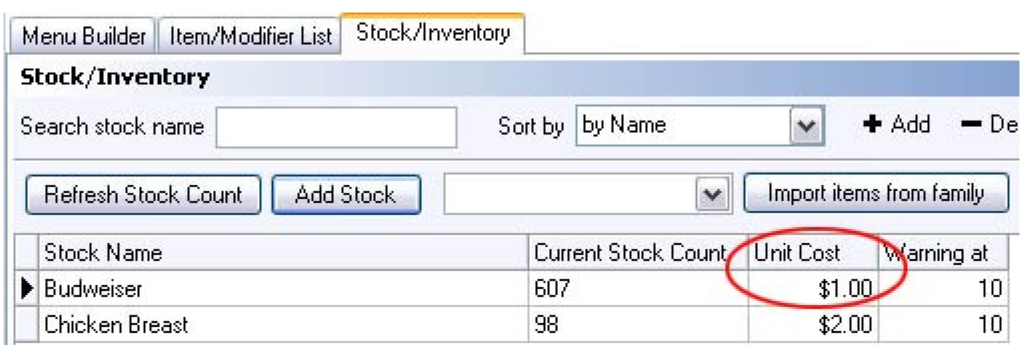
Step 4. Enter the total item quantity in each box.



Step 5. Your old stock count and the new stock count you just entered are displayed below. Click Ok.



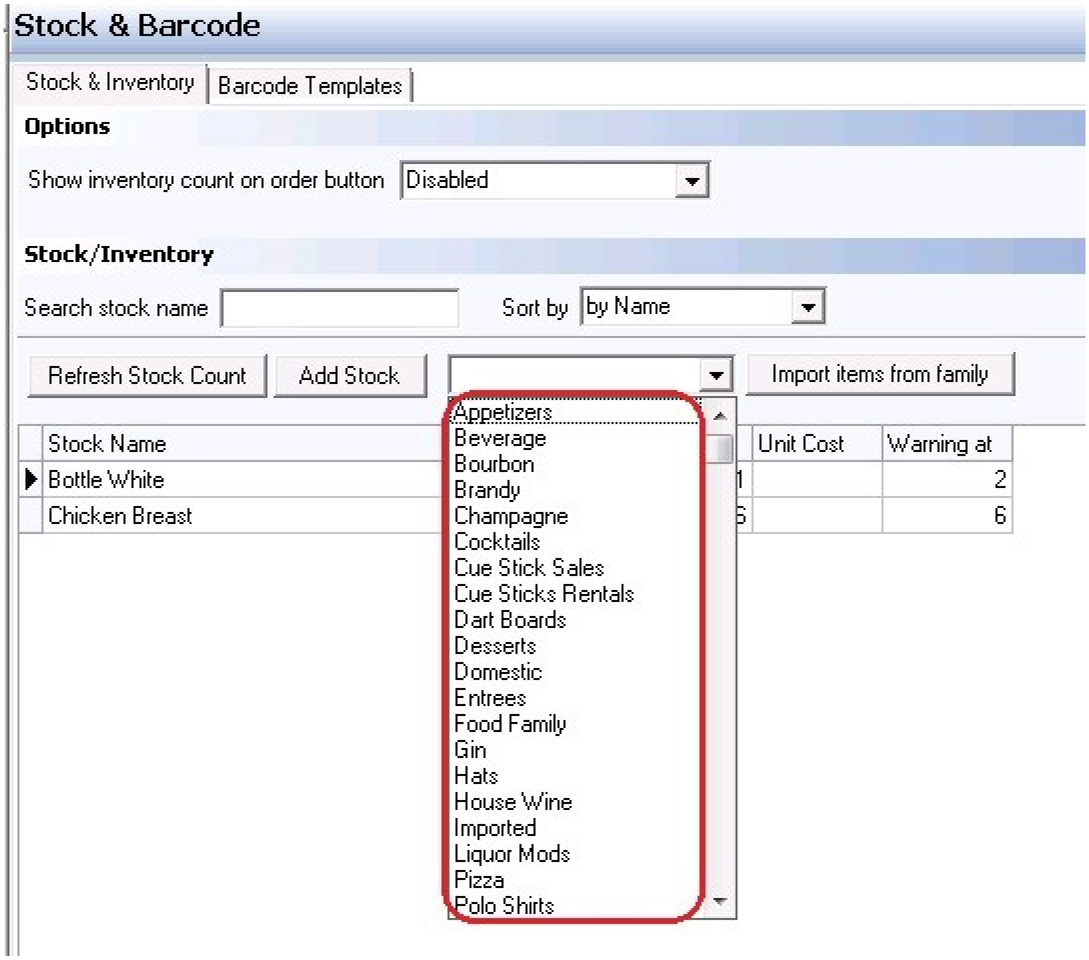
Step 6. Enter unit cost (if you haven't already).



Step 7. Specify a quantity for the low stock warning (if you haven't already).

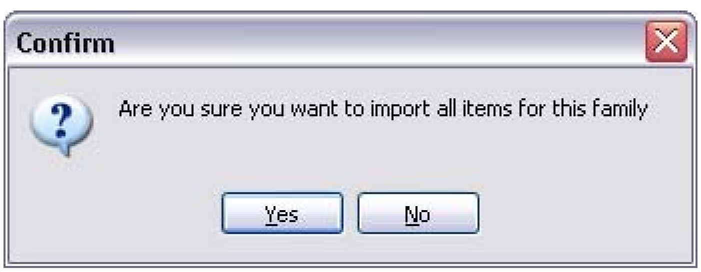
- Importing Items from a Family -

Step 1. From the drop-down menu to the left of the **Import items from family** button, select the family containing the items you wish to import into inventory.

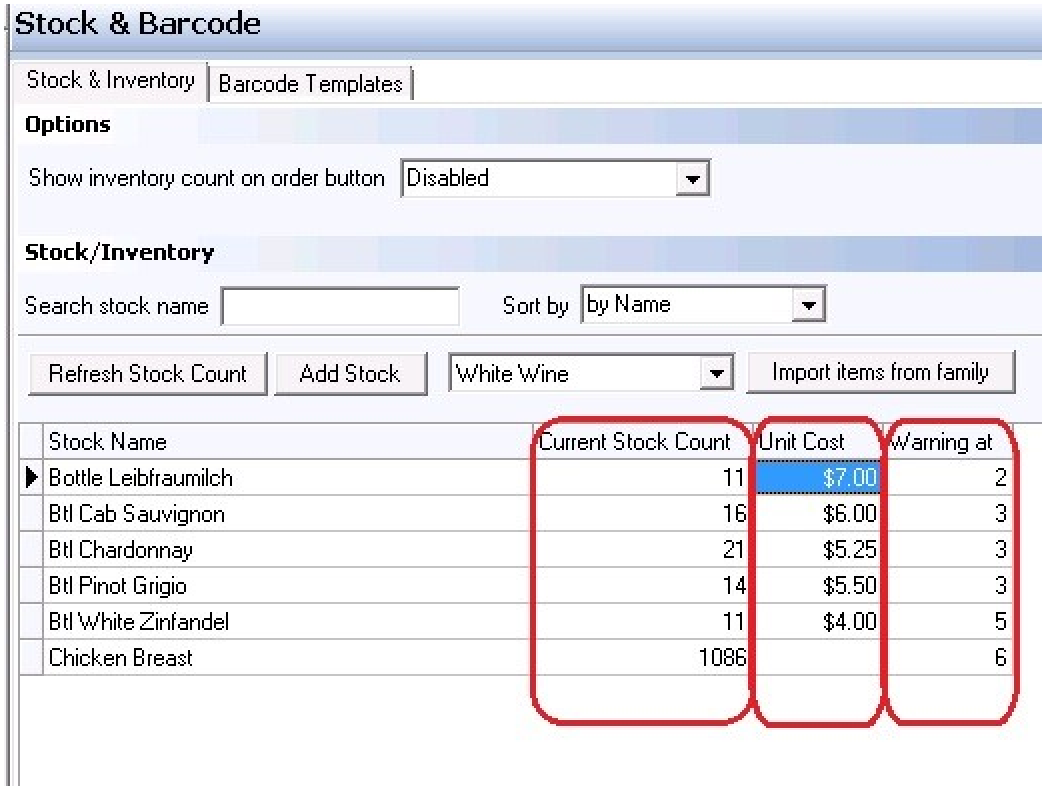


Step 2. Click **Import items from family** button.

Step 3. Click Yes to the confirmation dialog.



Step 4. Item names from that family are imported and appear on the list. Now you need to set the Current Stock Count, Unit Cost and Warning at (if desired) for each of the imported items.

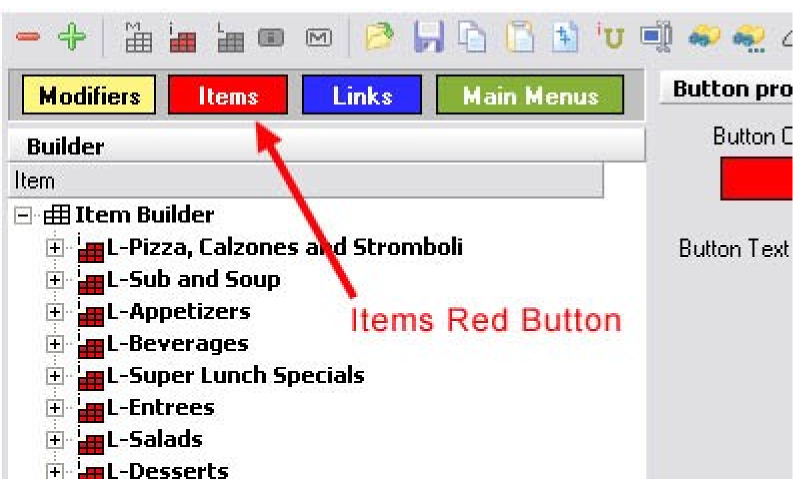


13.1.2 Tie Stock Item and Menu Item Together

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab.

- To Tie a Stock Item and a Menu Item Together -

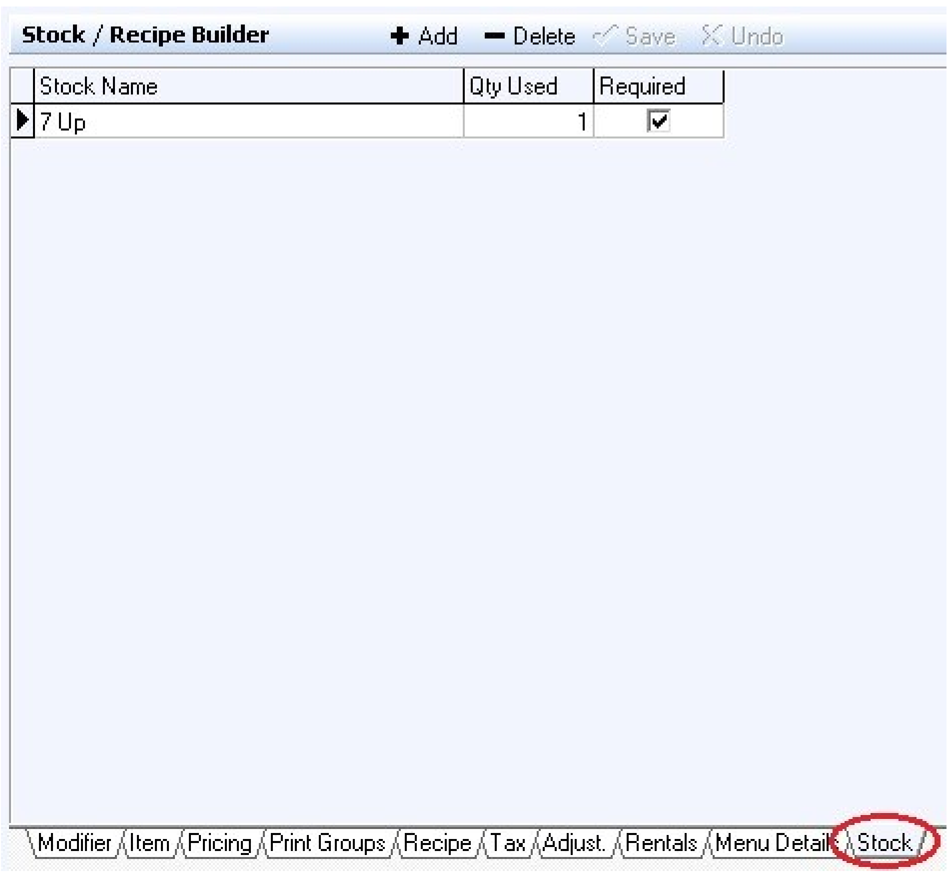
Step 1. Under the Menu Builder tab click on the red button labeled Items.



Step 2. Expand the Item Group that contains the Item you wish to tie to an inventory.

Example: You want to tie the item 7 *Up*, which is in the group of *Beverages*, to your inventory. To do this, you start by expanding the ***Beverages*** item group and highlight the ***7 Up*** item.

Step 3. Select the Stock tab on the bottom right. Click on the blank space under **Stock Name** and select the corresponding name from the drop-down list. For it to appear in the drop-down list, you must first create it (refer back to **Create and Manage Items in the Inventory** if needed).



Step 4. Next set the quantity used by clicking in the blank space under **Qty Used** and typing a number. Each time you ring up this item, the number you enter for Qty Used is deducted from inventory. In this case you will most likely have the Unit value set to 1. When a customer orders a bottle of ***7 Up***, 1 bottle of 7 Up is taken out of the inventory.

Take apple pie as an example of when you might want to set the Qty Used to a value other than 1. If you sell it by the slice and there are 4 slices to a pie, you would set the Qty Used to 0.25. That way, the apple pie inventory would go down by 1 after 4 slices have been ordered.

Step 5. If the item contains multiple parts that you want to keep inventory for, use the Add button and repeat Steps and 3 and 4 for each component.

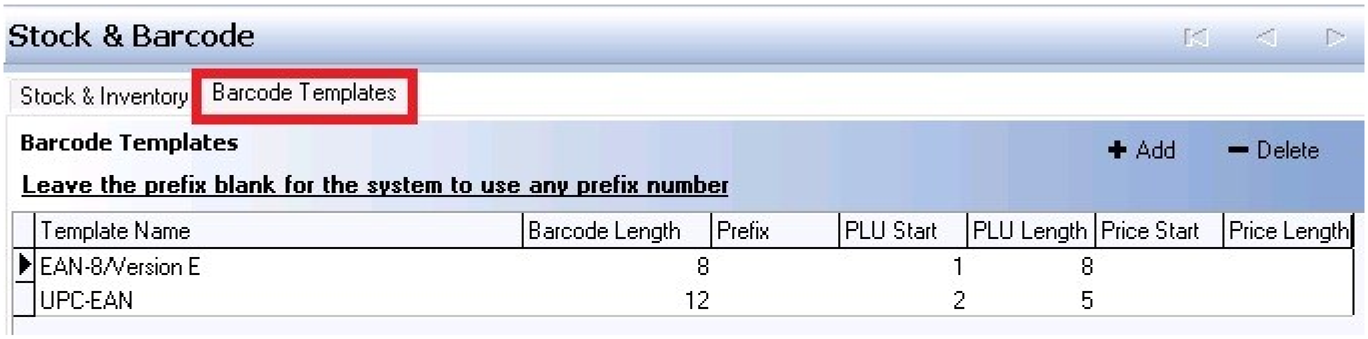
Example: For a hamburger, maybe you want to separately track inventory of burger patties and buns, especially if you also use buns for say a pulled pork sandwich, meaning you likely use a different number of patties than buns.

13.2 Barcodes

Under the **General** section click on **Stock/Barcodes**. Select the **Barcode Templates** tab.

Barcode Templates

This area is used to define **Price Embedded Barcodes** (barcodes that have the price of the item encoded within it).



***Note:** There are default templates within the system. If the entire number in the image below is the item's PLU, you would not need a template and you would want to either delete or define the pre-existing templates listed in this section to correspond to the barcode.

***Note:** When you are using **Price Embedded Barcodes**, you should only enter the **PLU** portion of the barcode into the PLU field on the item. Do not put the entire barcode into the item's PLU field.

Template Name	This is where you can name the template what you would like to; usually the name corresponds with the type of barcode, but it does not have to be named anything specific.
Barcode Length	Enter the length of the barcode here. ***Note:** If you scan the barcode into Notepad, it is whatever number the barcode scans in first that is to be counted; that would let you know if the first number (say the 0 in the image at the bottom of the page) is part of the barcode or not.
Prefix	The prefix is the 1 digit identifier of the barcode. You only need to use a prefix if you define 2 templates of the same length, the prefix will identify which template to use. **Example:** If you have two barcodes that are both 12 characters long, you would want to use the prefix to establish the difference between the barcodes.
PLU start	The character where the PLU starts. **Example:** In the image at the bottom of the page, the PLU would be 16000 and the location would start at number 2. So for the PLU start area you would put the number 2.

PLU Length	The length of the PLU. **Example:** In the example on the bottom, the PLU would be 16000 and the length would be 5. So you would put five in the PLU length area.
Price Start	Where the Price would start in the barcode. **Example:** In the Image below we can say the price is $60.60 which means the price would start 8 numbers into the barcode sequence. You would then put the number 8 for the Price Start. ***Note:** If you are not going to use the embedded barcodes, this area should be left blank.
Price Length	The Length of the price that is embedded within the barcode. **Example:** In the image below the price length would be 4 (if it is $60.60 as mentioned above) so you would put a 4 in this area. ***Note:** If you are not going to use the embedded barcodes, this area should be left blank.

Barcode Example:

0 16000 66060 1

Part XIV

Seating/Zones

Part 14 Seating/Zones

Under the **General** section click on **Seating/Zones**.

Seating/ Zones

Seating Setup includes the following:

1. Sections

2. Designer

3. Rentals

4. Zones

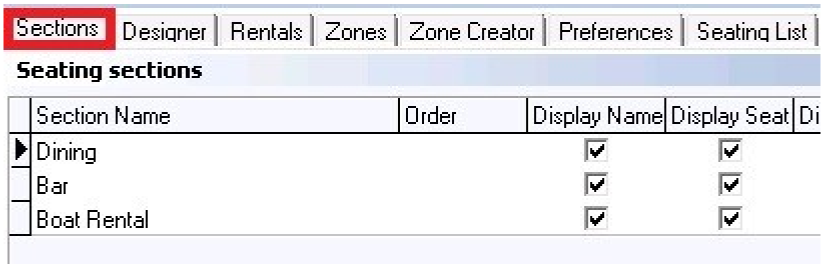
5. Zone Creator

6. Preferences

7. Seating List

14.1 Sections Tab

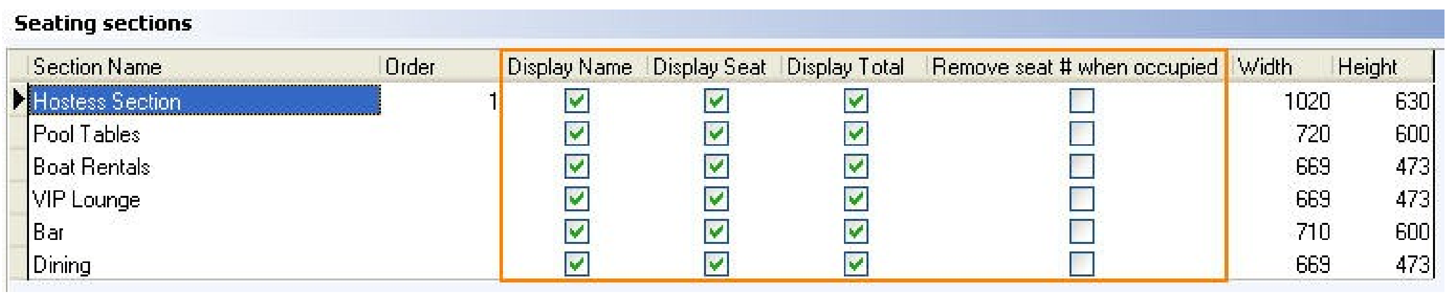
Under the **General** section click on **Seating/Zones**. Select the **Sections** tab.



Sections

If your place of business is big you can create sections you can switch between. For example, you can have Main Dining Room, a Sidewalk Cafe and a Main Bar sections.

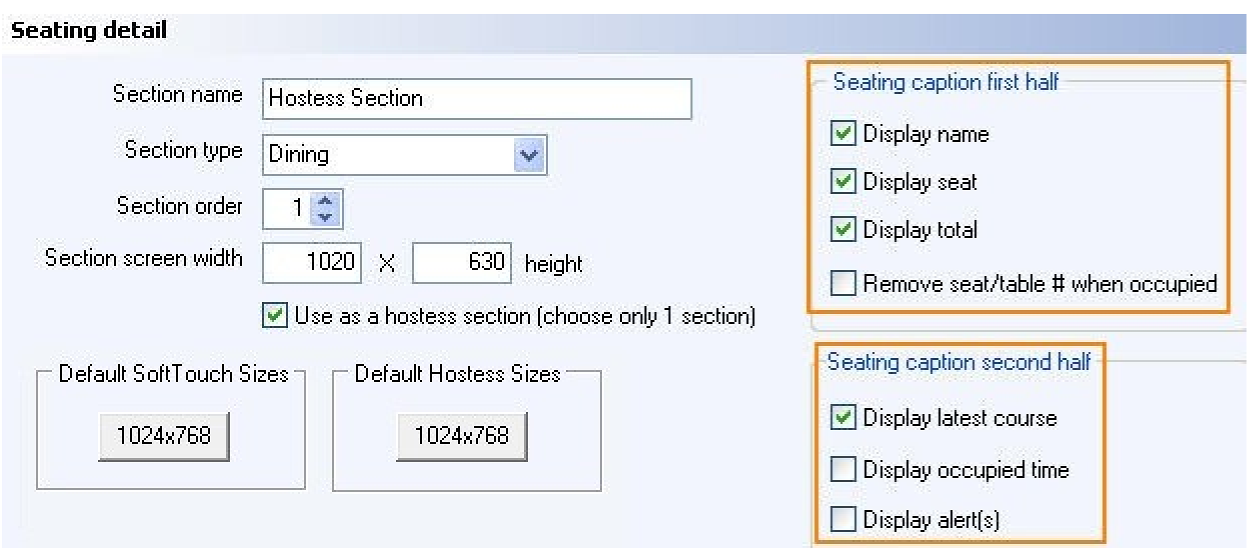
- Seating Sections -



Sections you add show under the Seating Sections part of the screen. Check boxes and all other fields will shows the settings you have selected in the Seating detail section, which is on the lower half of the screen.

- Seating Detail -

Here you add sections and select options for the seats/tables in that section.



- Create Sections -

In the Seating Detail part of the screen click on the  button and fill out the fields below:

Section name	Enter name for the section.
Section type	Select the station type. Your choices are Dining or Bar.
Section order	Decides where the section will be listed in the front end. If you put a 3 here, it will be the 3rd section in the list of sections. A 1 entered here would show up at the top.
Section screen width and height	Notice that the Default SoftTouch and Hostess Size buttons will change this to 1024x768. If you change the layout size to be bigger than your monitor can fit for display, SoftTouch will automatically create quadrants.
Use as a hostess section	If checked, this seating layout will be used for the hostess system (if you are using SoftHost). ***Note:** Only one section can be used for the hostess layout. If you have multiple seating layouts, you will need to combine those layouts into one large layout to use with the hostess program.

- Seating caption first half -

Display name	If checked, customer name will be shown on a seat/table.
Display seat	If checked, a seat number will be shown on a seat/table.
Display total	If checked, a total will be shown on a seat/table.
Remove seat/table # when occupied	If checked, a seat/table number will not be shown while a customer is at the table.

- Seating caption second half -

Display latest course	If checked, customer's current meal course will be displayed on a table. **Example:** If a customer is having dessert, dessert will be displayed on their table. This is useful because it helps you tell how soon a customer is to leaving based on how close their current course is to the end of a meal.
Display occupied time	If checked, the customer's length of stay is displayed.
Display alert(s)	If checked, server or time alerts will be displayed.

Click the 

button when finished.

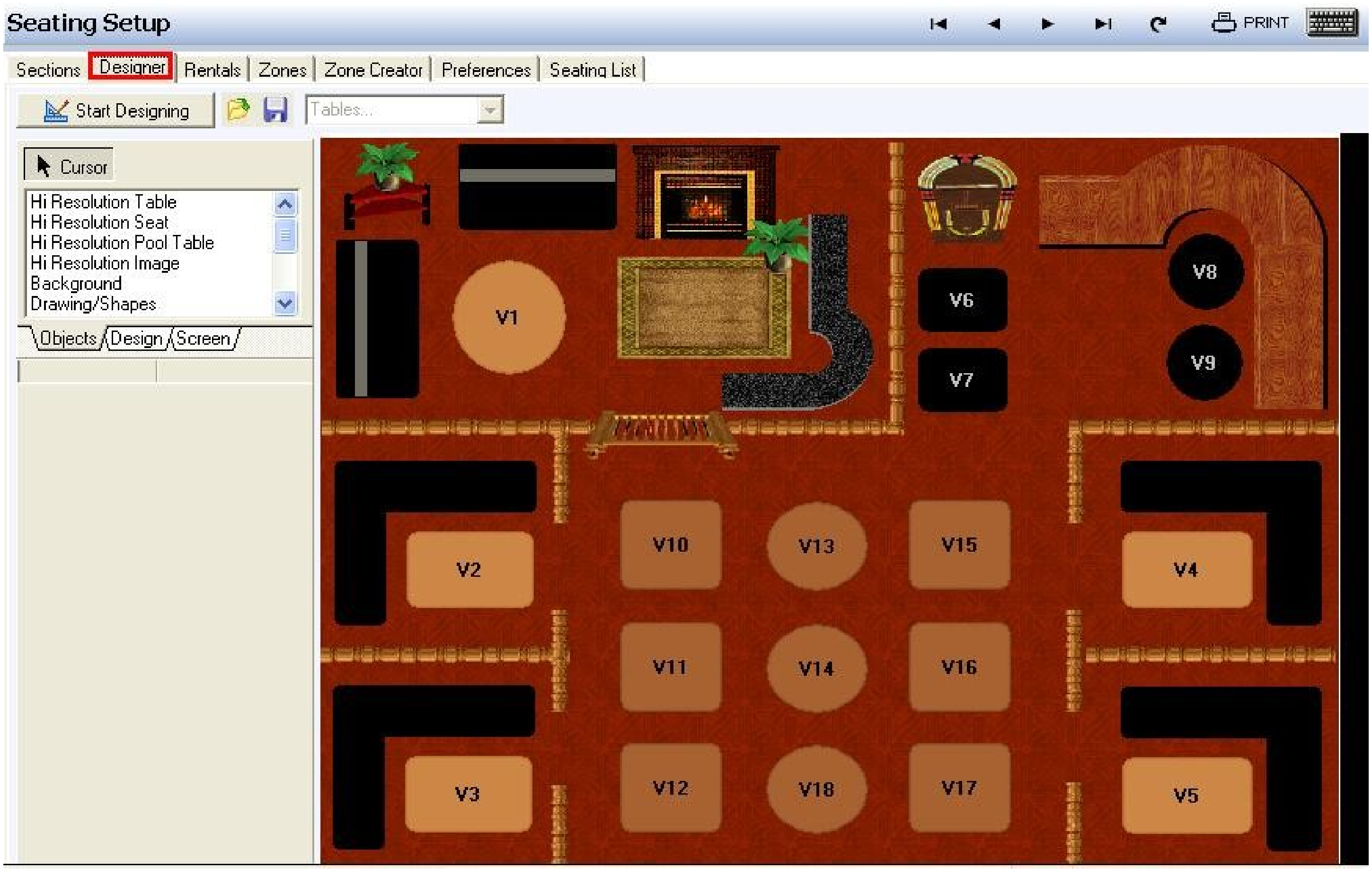
The next step is to go to the [**Designer**] tab and begin designing the seating layout.

14.2 Designer Tab

Under the **General** section click on **Seating/Zones**. Select the **Designer** tab.

Designer

This is where you create the floor plan or floor plans for the different areas in the restaurant. Whichever section is currently selected under the **Sections** tab (refer back to **Sections Tab** if needed) is the one that you will be creating or editing the design of here. Remember, the screen size here is determined by what you entered for **Section screen width** and **height** under the **Sections Tab**.



- Start Designing -

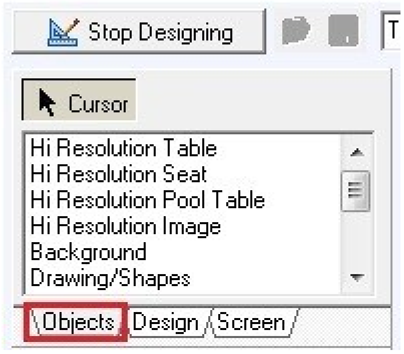
In order to begin making changes to the selected floor plan, click the **Start Designing** button.

As soon as you click this button, it will change to "Stop Designing"; you will click this button when you are finished making changes.

- Objects, Design, and Screen Tabs -

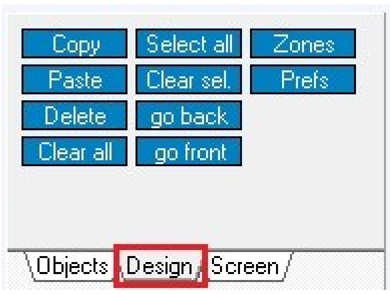
Before you begin to add objects, it's helpful to understand these three tabs on the left.

Select the **Objects** tab for a scrollable list of items you can add. To add an item, click on its name in this list and then click anywhere on the design screen.



If you have clicked on one of the item names on the left but don't actually want to add an item right now, you can click on the **Cursor** button to be able to click normally and select rather than add items.

Select the **Design** tab for a number of helpful tools.

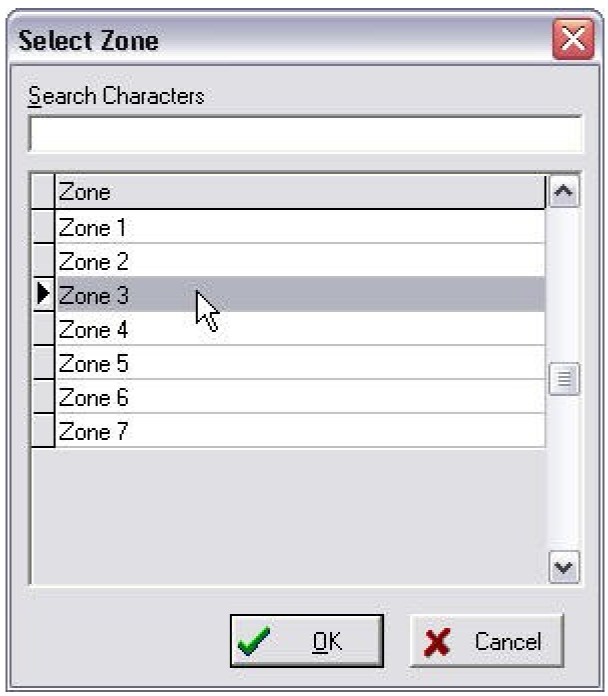


***Tip:** You can select multiple items by holding Shift and clicking multiple items.

Copy	Copies the selected item(s). (You must then paste the item if you want the copy to show up.) This tool is also available when you right click on an item.
Paste	Pastes the copied or cut item(s). You can paste an item multiple times without clicking copy again. This tool is also available when you right click on an item.
Delete	Cuts or deletes the selected item(s). (You can then paste the item if you want it to reappear.) This tool is also available (as Cut/Delete) when you right click on an item.
Clear all	This will delete all items from the current floor plan. A dialog box will pop up asking you to confirm that you want to clear the entire page.

<table>
<tr><td>Select all</td><td>Clicking this button will select all items.</td></tr>
<tr><td>Clear sel.</td><td>Clicking this button will unselect all items.</td></tr>
<tr><td>go back</td><td>This will send the selected item(s) behind any other items it overlaps.</td></tr>
<tr><td>go front</td><td>This will send the selected item(s) in front of any other items it overlaps.</td></tr>
<tr><td>Zones</td><td>
You can use this to assign a zone to the selected item(s). This will bring up a dialog box with choices available based on what you set up under the Zones tab.

Select the zone you would like to add the table to then click OK.

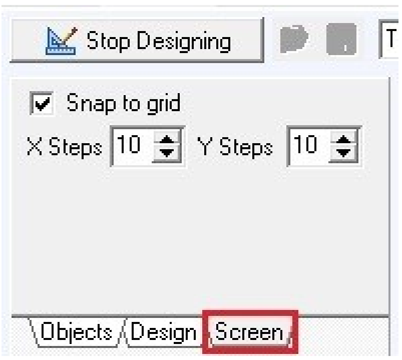


This tool is also available (as Assign Zone) when you right click on an item.

*Tip: Select multiple tables and assign a zone to all tables with the same zone.
</td></tr>
</table>

Preferences	You can use this to assign a preferences setting to the selected item(s). This will bring up a dialog box with choices available based on what you set up under the **Preferences** tab. This tool is also available (as Assign Seat Prefs) when you right click on an item. ***Tip:** Select multiple tables and assign a seating preference to all tables with the same seating preference.

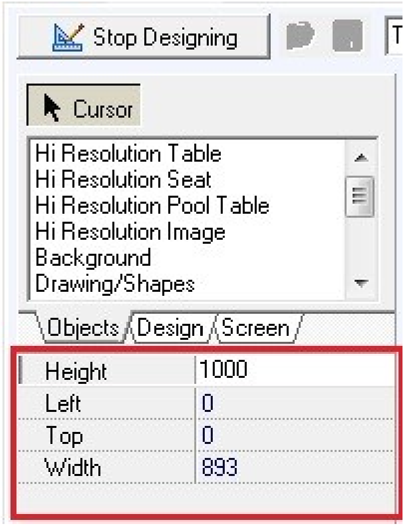
Select the **Screen** tab to change the way you move items across the screen.



Snap to grid	Put a check in this box if you would like items you move to move by the increments you set for **X Steps** and **Y Steps** (below). This can make it easier to line up items with one another.
X Steps	Set this to the number of steps an item should move to the left or right when you move it. If an item is placed at coordinates 0, 200, for example, and has X Steps set to 10, moving it to the right will move it to 10, 200 then 20, 200 and so on.
Y Steps	Set this to the number of steps an item should move up or down when you move it. If an item is placed at coordinates 200, 0, for example, and has Y Steps set to 10, moving it downward will move it to 200, 10 then 200, 200, 20 and so on.

- Item Properties -

No matter which tab on the left is selected, the bottom left will show (and allow you to edit) the selected item's properties.



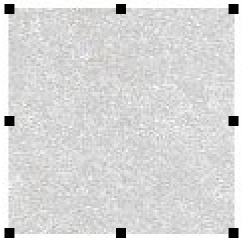
If more than one item is selected, only properties that can be set for both items will be shown (and can be edited).

If you select the blank design screen, the screen's properties are shown (and can be adjusted).

All items have four properties in common, which are explained here. Properties unique to different types of items will be discussed below as we talk about each type of item.

Height	This shows the current height. You can change this number to edit the height. Height will be added to or subtracted from the bottom.
Left	This number indicates where this item starts, counting from the left side of the screen. You can change this number to move the item; decreasing it will move it to the left and increasing it will move it to the right.
Top	This number indicates where this item starts, counting from the top of the screen. You can change this number to move the item; decreasing it will move it upward and increasing it will move it downward.
Width	This shows the current width. You can change this number to edit the width. Width will be added to or subtracted from the right.

You can also change the size and position of selected items by using your cursor. When you click on an item, black dots will appear around its outer edge. To change the size, click on any of these dots and drag. To move it, click anywhere inside of it and drag.



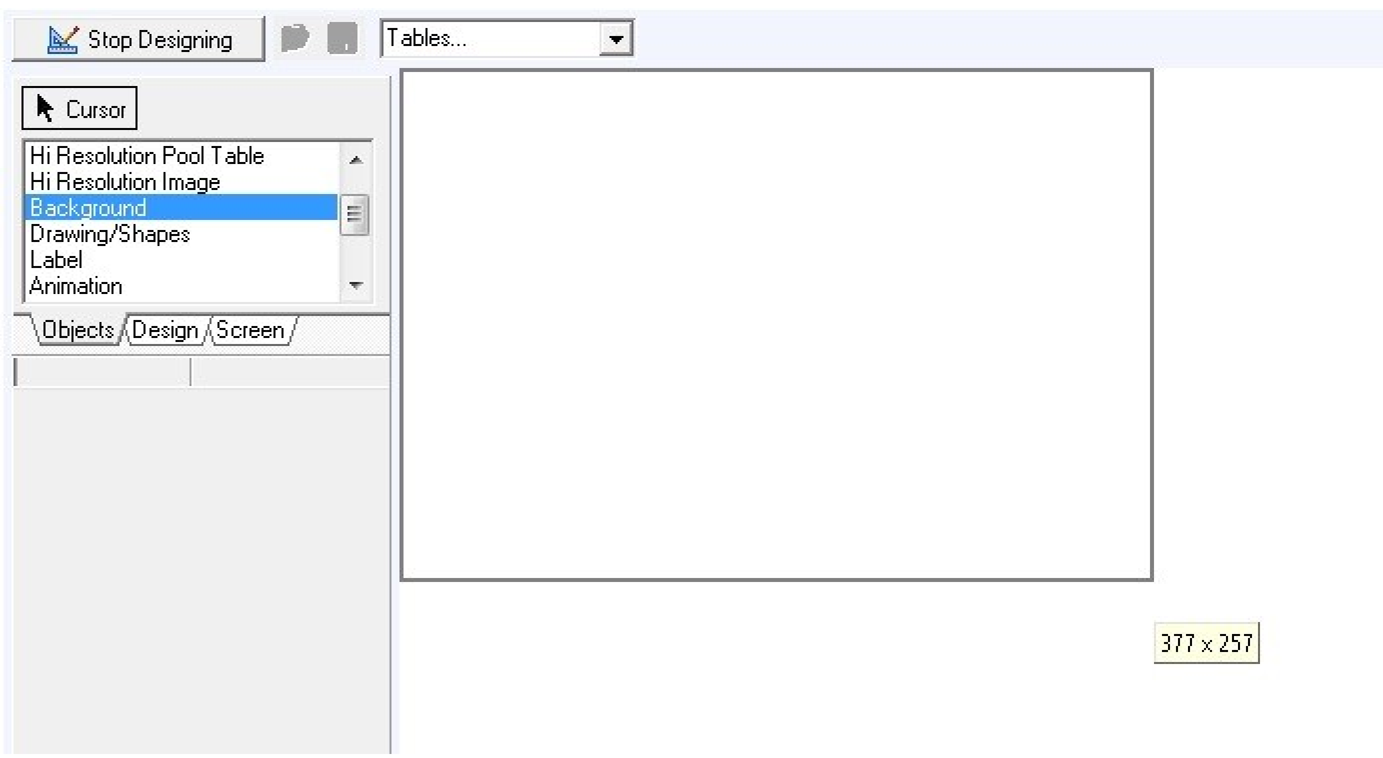
- Table Selector -

Once you've placed tables/seats (explained later), an easy way to find/select a certain one is to choose it from the drop-down near the Start/Stop Designing button.

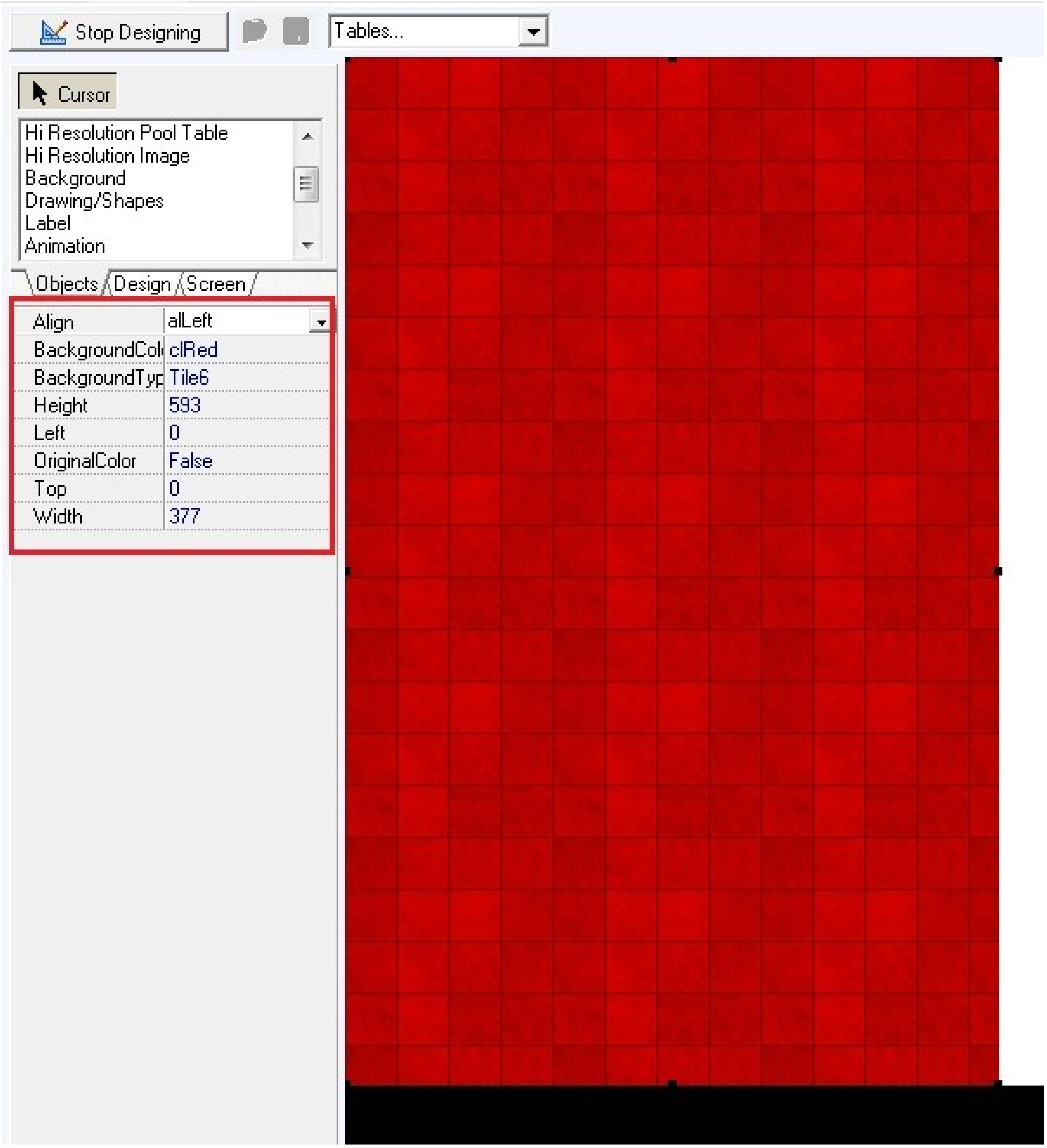
- Background -

Let's start by adding a background. Generally this represents the floor of this section of the restaurant.

Select Background from the **Objects** tab on the left. Click and drag on the white space on the right to create a space where you want that background to appear, or just click and a small-sized background will appear.



Now click on the background item to see and edit its properties.



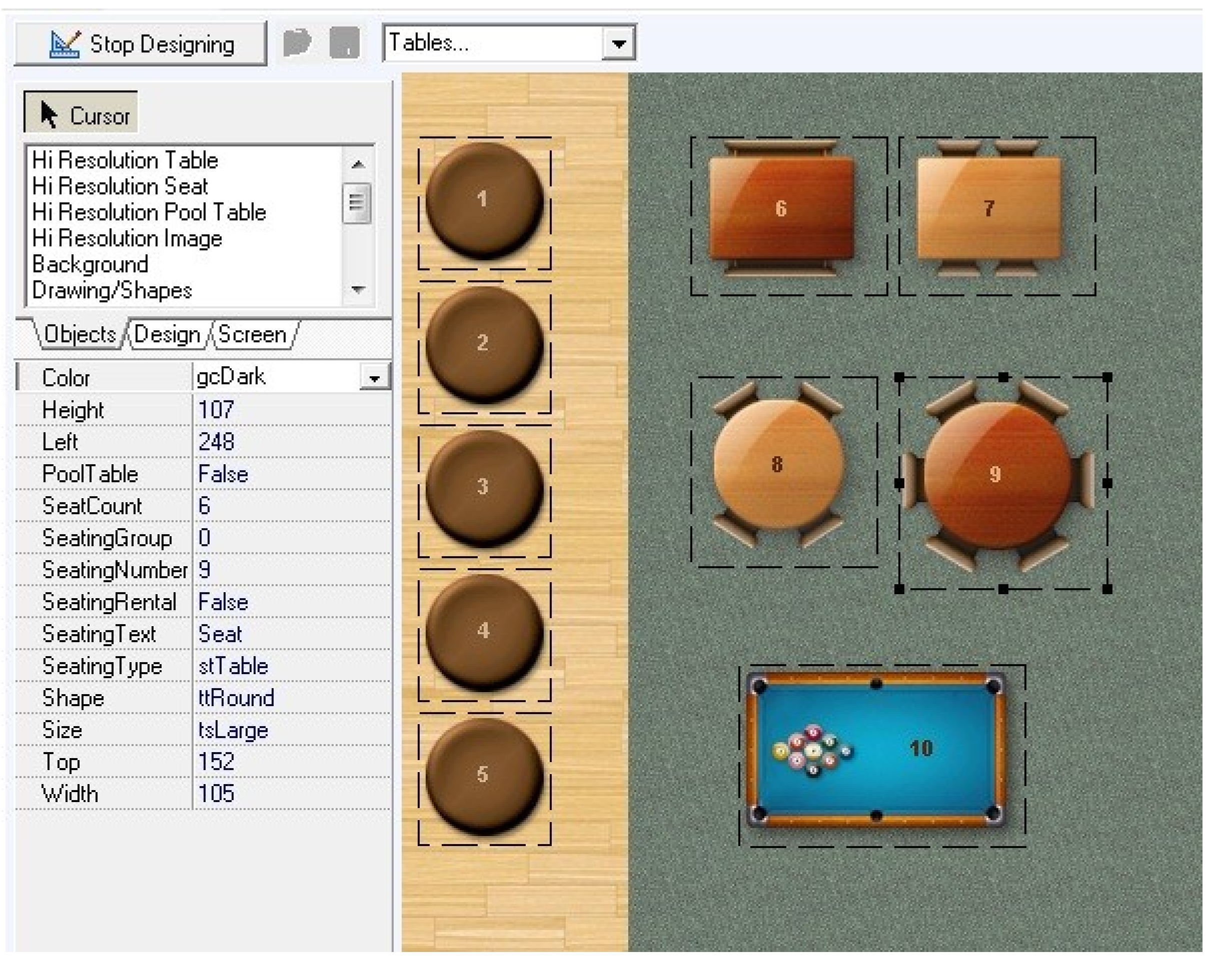
Align	These will change the position of the selected background, maintaining its current width. **alBottom** - Positions it along the entire bottom side. **alClient** - Makes the background occupy the entire floor. If you want to change away from this, it may be easiest to first adjust the height (below). **alCustom** - Custom alignment; select this if you want to change it from one of the other alignments. **alLeft** -Positions it along the entire bottom side. **alNone** - No alignment; the first setting from when you created it. **alRight** - Positions it along the entire right side. **alTop** - Positions it along the entire top side.

BackgroundColor	Use this drop-down to change the color.
BackgroundType	Use this drop-down to change the texture/pattern. There are carpets, tiles, woods, and more.
OriginalColor	If you set this to **True**, it will revert back to the color it was when you created it.

- High Resolution Tables, Seats, and Pool Tables -

On the **Objects** tab on the left side of the screen, find **Hi Resolution Table**, **Hi Resolution Seat**, and **Hi Resolution Pool Button**. Each time you want to create one of these, click the name and then click anywhere on the designing screen.

***Note:** If you use computers that require simpler graphics, you can use low resolution versions of these items instead (explained below).



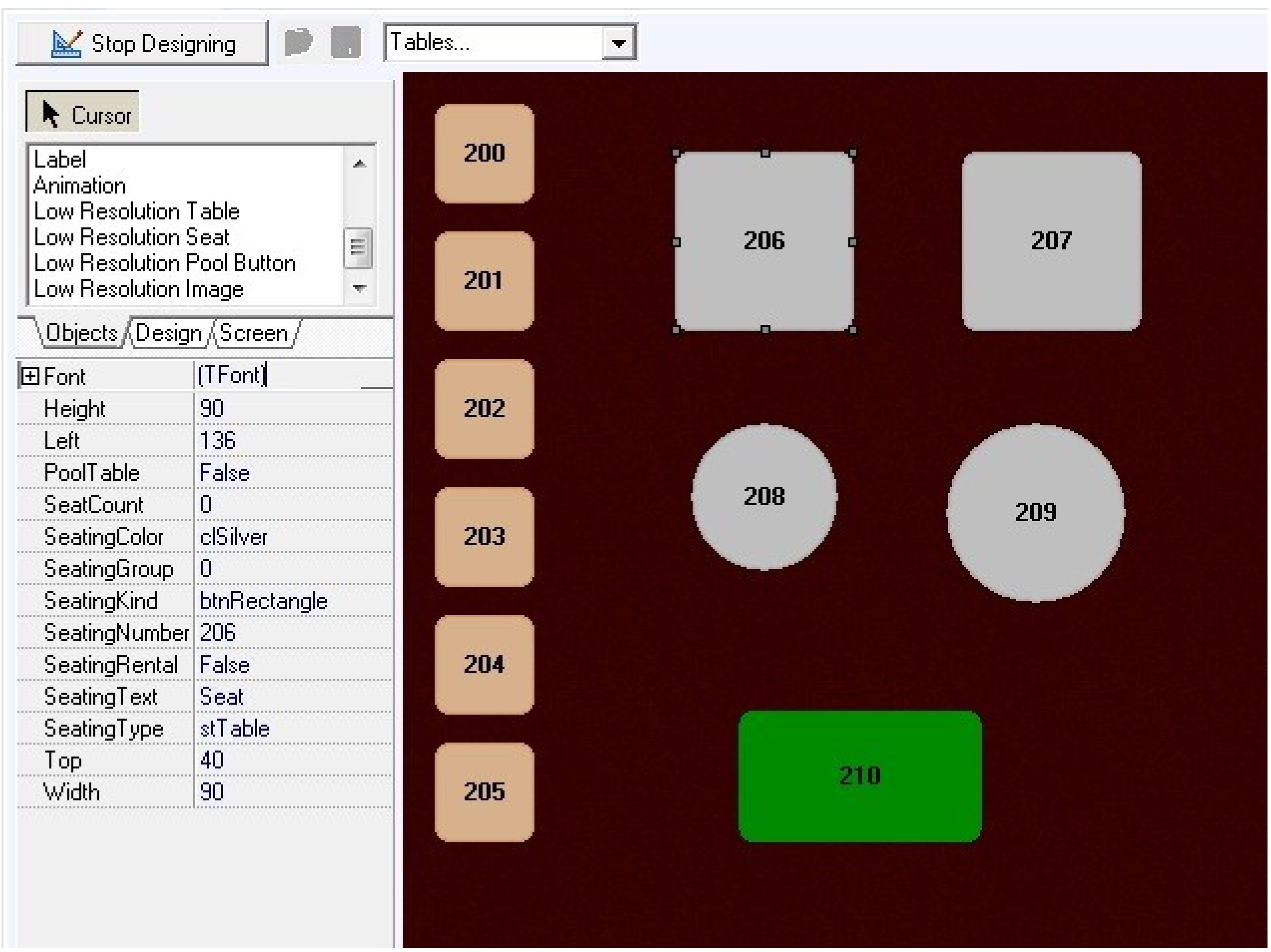
Color	There are two color options - **gcDark** and **gcLight**. For tables, **gcDark** will make the table dark and the number light, and **gcLight** will make the table light and the number dark. For pool tables, color only affects the number. For bar seats, color has no effect.
PoolTable	This should be set to **True** for pool tables and **False** for tables and seats.
SeatCount	For tables, use this to edit the maximum number of people that can sit here. (Up to 8 chairs will be added on the image, but set this number as high as needed.) This is important for use with SoftHost so that the system knows how many people can be seated at each table. ***Tip:** You can change the seat count of multiple tables at the same time by holding down the SHIFT key while you click on the tables and then changing the number in this field.
SeatingNumber	This number is used to identify the seat, table, or pool table. You may need to refer to these numbers when working under the **Zones**, **Zone Creator**, and **Seating List** tabs.
SeatingRental	When setting up rentals, set this to **True**. Refer to **Rentals Tab** for more information on setting up rentals.
SeatingType	This shows whether the item is a seat (**stSeat**) or a table (**stTable**).
Shape	This is particularly useful for tables, as you can change the shape of the table to round (**ttRound**) or square (**ttSquare**) and also have the option of it being a booth (**ttBooth**). You can also use this field to change the item between a table, bar stool (**ttBarStool**), and pool table (**ttPoolTable**).

Size	The size of a table can be set to small (**tsSmall**), medium (**tsMedium**), or large (**tsLarge**). A bar stool can be set to small or large (you can set it to medium, but it will appear the same as the large setting). The size of pool tables cannot be adjusted. ***Note:** For these items, size should be adjusted instead of Height and Width.

***Note:** If you need to create more than one of the same image or animation (or any other item), you can copy and paste that item. Right click the item and click **Copy**, then right click the screen and click **Paste**.

- Low Resolution Tables, Seats, and Pool Tables -

If your computers require simpler graphics, you may want to use low resolution tables, seats, and pool tables. On the **Objects** tab on the left side of the screen, find **Low Resolution Table**, **Low Resolution Seat**, and **Low Resolution Pool Button**. Each time you want to create one of these, click the name and then click anywhere on the designing screen.



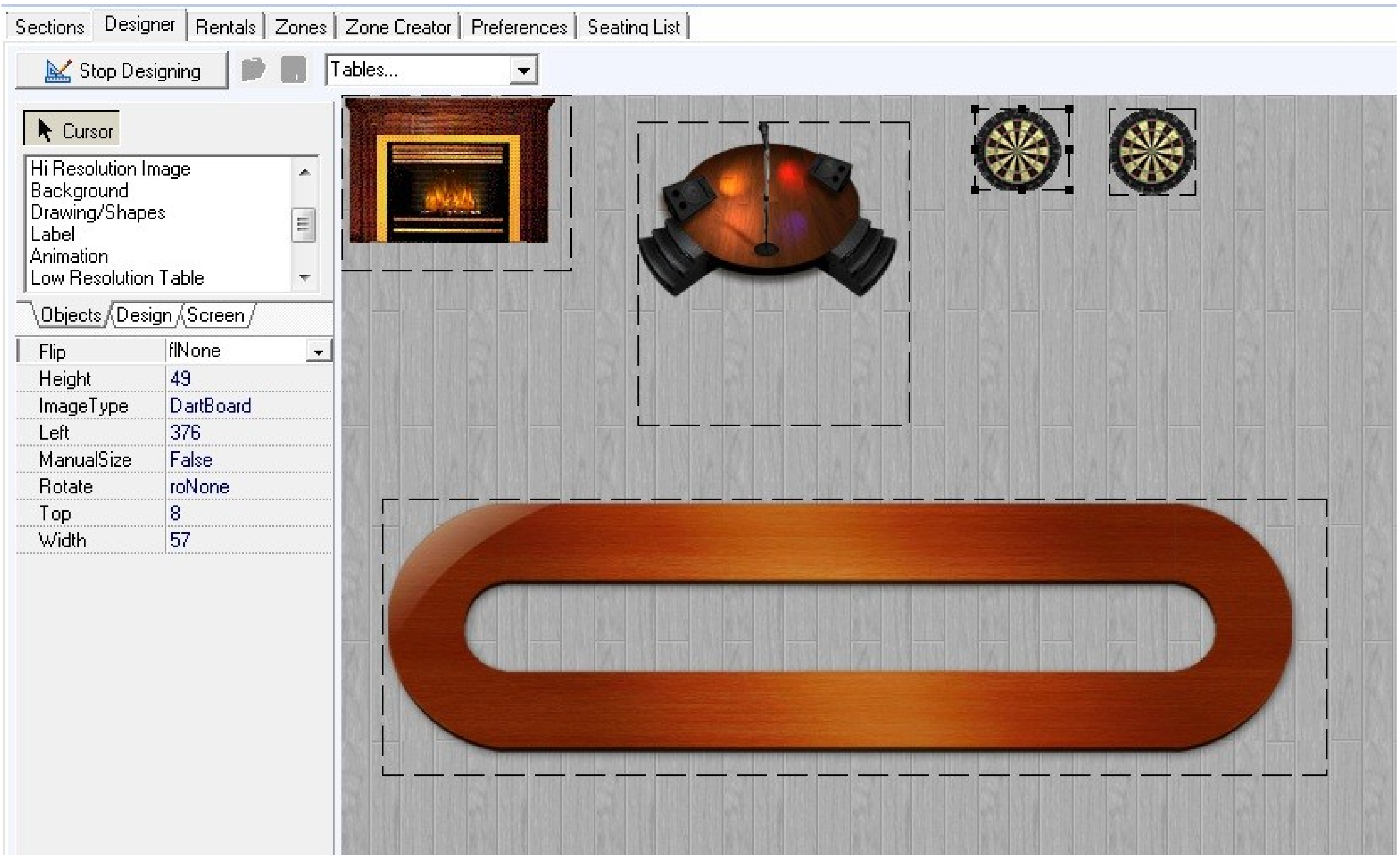
Font	Use this field to change the font of the number that appears on the item. To change it, click on the field where it says (TFont) and a button with three dots will appear on the right-hand side.  Click this button, choose the font features you want, and click Ok.
PoolTable	This should be set to **True** for pool tables and **False** for tables and seats.
SeatCount	For tables, use this to edit the maximum number of people that can sit here. (Up to 8 chairs will be added on the image, but set this number as high as needed.) This is important for use with SoftHost so that the system knows how many people can be seated at each table. ***Tip:** You can change the seat count of multiple tables at the same time by holding down the SHIFT key while you click on the tables and then changing the number in this field.
SeatingColor	Use this drop-down if you would like to change the color of the item.
SeatingKind	Use this drop-down to change the shape of the item. You can change it to a rectangle (**btnRectangle**), oval (**btnOval**), or capsule shape (**btnCapsule**).
SeatingNumber	This number is used to identify the seat, table, or pool table. You may need to refer to these numbers when working under the **Zones**, **Zone Creator**, and **Seating List** tabs.
SeatingRental	When setting up rentals, set this to **True**. Refer to **Rentals Tab** for more information on setting up rentals.
SeatingType	This shows whether the item is a seat (**stSeat**) or a table (**stTable**).

- Images and Animations -

Images and animations help replicate actual floor plans onto the screen, giving employees a better visual representation of your restaurant. Use these items to add bar surfaces, computers, dart boards, jukeboxes, stages, plants, and more.

On the **Objects** tab on the left side of the screen, find **Hi Resolution Image**, **Low Resolution Image**, and/or **Animation.** Each time you want to create one of these, click the name and then click anywhere on the designing screen.

***Note:** You may have to increase the size of an item for the entire image to display. Size can be adjusted by clicking an dragging the dots around the edge of a selected item or by editing the height and width fields on the left.



You will see some of these fields depending on which item is selected:

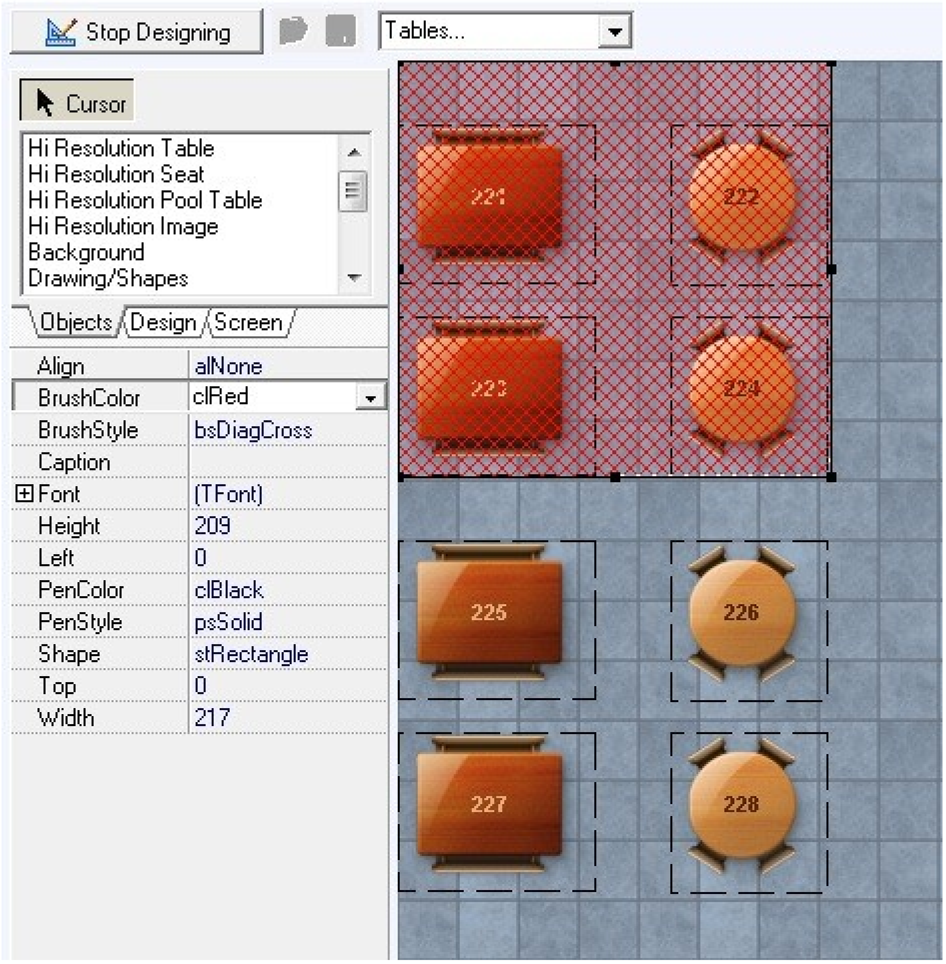
Flip (low-res images)	**flFlipDown** - Flips the item over a horizontal axis (turns it upside down). **flFlipRight** - Flips the item over a vertical axis (flips everything from left to right). **flNone** - This will revert the image back to its normal position without being flipped vertically or horizontally.
ImageType (low-res images; hi-res images)	Use this to choose what image you would like. Choices include bar surfaces, computers, stages, plants, and more.

AnimateType (animations)	Use this to choose what animation you would like. Choices include a fire place, palm trees, fish, and more.
Animate (animations)	Set this to **true** if you would like to use the image's animation/movement. Set this to **false** if you would like it to stay still like a regular image.
ManualSize (low-res images; animations)	Set this to **true** if you would like to be able to adjust the size of the actual item. If this is set to **false**, the size of the item's outer edge will change the but the image inside it will stay the same size.
Rotate (low-res images)	**roNone** - This will revert the image back to its normal position without being rotated to the left or right. **roRotateLeft** - Rotates the image left by ninety degrees. **roRotateRight** - Rotates the image right by ninety degrees.

- Drawing/Shapes -

Drawing/Shapes can be added to your floor plan / design for any purpose you might need. In the image below, for example, maybe the the red crisscrossed area represents an area that is undergoing renovations where parties should not be seated. You might use drawing/shapes to create other basic images of objects in your restaurant for which an image or animation is not available.

On the **Objects** tab on the left side of the screen, find **Drawing/Shapes**. To create a shape, click on this item name and then click and drag to the appropriate size on the designing screen.



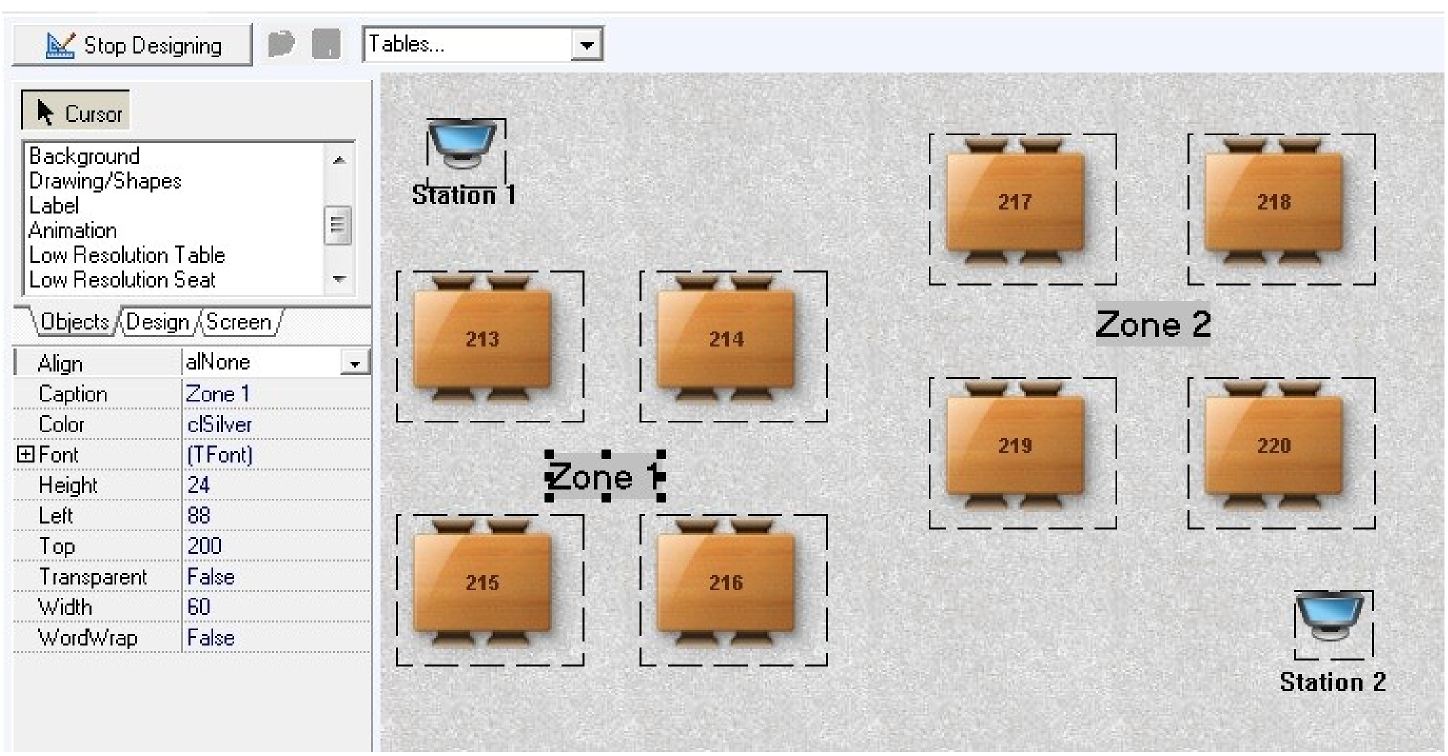
Align	These will change the position of the shape. This should primarily be used for rectangle shapes (see **Shape** below). **alBottom** - Positions it along the entire bottom side. **alClient** - Makes the background occupy the entire floor. If you want to change away from this. **alCustom** - Custom alignment; select this if you want to change it from one of the other alignments. **alLeft** -Positions it along the entire bottom side. **alNone** - No alignment; the first setting from when you created it. **alRight** - Positions it along the entire right side. **alTop** - Positions it along the entire top side.
BrushColor	Change the color inside of the shape.
BrushStyle	Change the pattern inside the shape.
Caption	Enter text here if you would like the shape to have a caption. The caption will appear in the center of the shape.

Font	Use this to change the font of the caption if there is one. To change it, click on the field where it says (TFont) and a button with three dots will appear on the right-hand side.  Click this button, choose the font features you want, and click Ok.
PenColor	Change the color of the shape's perimeter.
PenStyle	Change the pattern of the shape's perimeter.
Shape	Change the shape. You can choose from a circle, ellipse, rectangle, rounded rectangle, rounded square, or square.

- Label -

Labels can be used to add text anywhere to your floor plan / design. In the image below, for example, labels have been used to help identify the different computer stations and seating zones.

On the **Objects** tab on the left side of the screen, find **Label**. Each time you want to create a label, click this item name and then click anywhere on the designing screen.



Align	These will change the position of the label. **alBottom** - Positions it along the entire bottom side. **alClient** - Makes the background occupy the entire floor. If you want to change away from this. **alCustom** - Custom alignment; select this if you want to change it from one of the other alignments. **alLeft** -Positions it along the entire bottom side. **alNone** - No alignment; the first setting from when you created it. **alRight** - Positions it along the entire right side. **alTop** - Positions it along the entire top side.
Caption	Enter the text you want to appear.
Color	Choose a color for label (background color). For this color to show, you must set **Transparent** (below) to **False**.
Font	Use this to change the font of the caption if there is one. To change it, click on the field where it says (TFont) and a button with three dots will appear on the right-hand side.  Click this button, choose the font features you want, and click Ok.
Transparent	**False** - The entire label, including background color, will display. **True** - Only the text will display.

- Stop Designing -

When you are finished designing the selected section, press the **Stop Designing** button.

- Load and Save -

Use the load button (folder with a green arrow) to open a saved floor plan / design. A dialog box will appear; navigate to the correct location and file name then click **Open**.

Use the save button (blue disk) to save the current floor plan / design to a location on your computer or connected external drive. A dialog box will appear; navigate to the correct location, type in a file name, then click **Save**.

***Note:** These buttons are only usable when you have clicked on **Stop Designing**.

14.2.1 Hostess Layout

Under the **General** section click on **Seating/Zones**. Select the **Designer** tab.

Combining Layouts

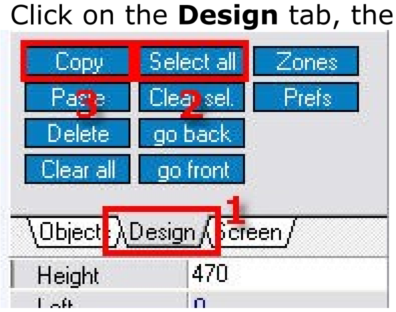
This is of special importance for use with **SoftHost**.

If you have a restaurant that has multiple seating layouts, you will need to combine those layouts into one large layout to use with the Hostess program. For instructions on combining seating layouts (assuming you have already created them separately), follow the instructions below:

1. First, make sure a section has been added for this hostess layout under the **Sections Tab**. Select/highlight the first section you need to add to the hostess section.

2. Now under the **Designer** Tab, click "Start Designing."

3. Click on the **Design** tab, then click "Select All," then "Copy."



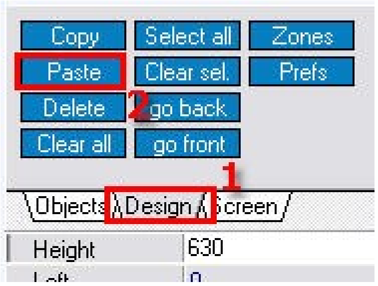
4. Click "Stop Designing."

5. Go back to the **Sections Tab** and select/highlight your Hostess layout, then go Back to Designer.

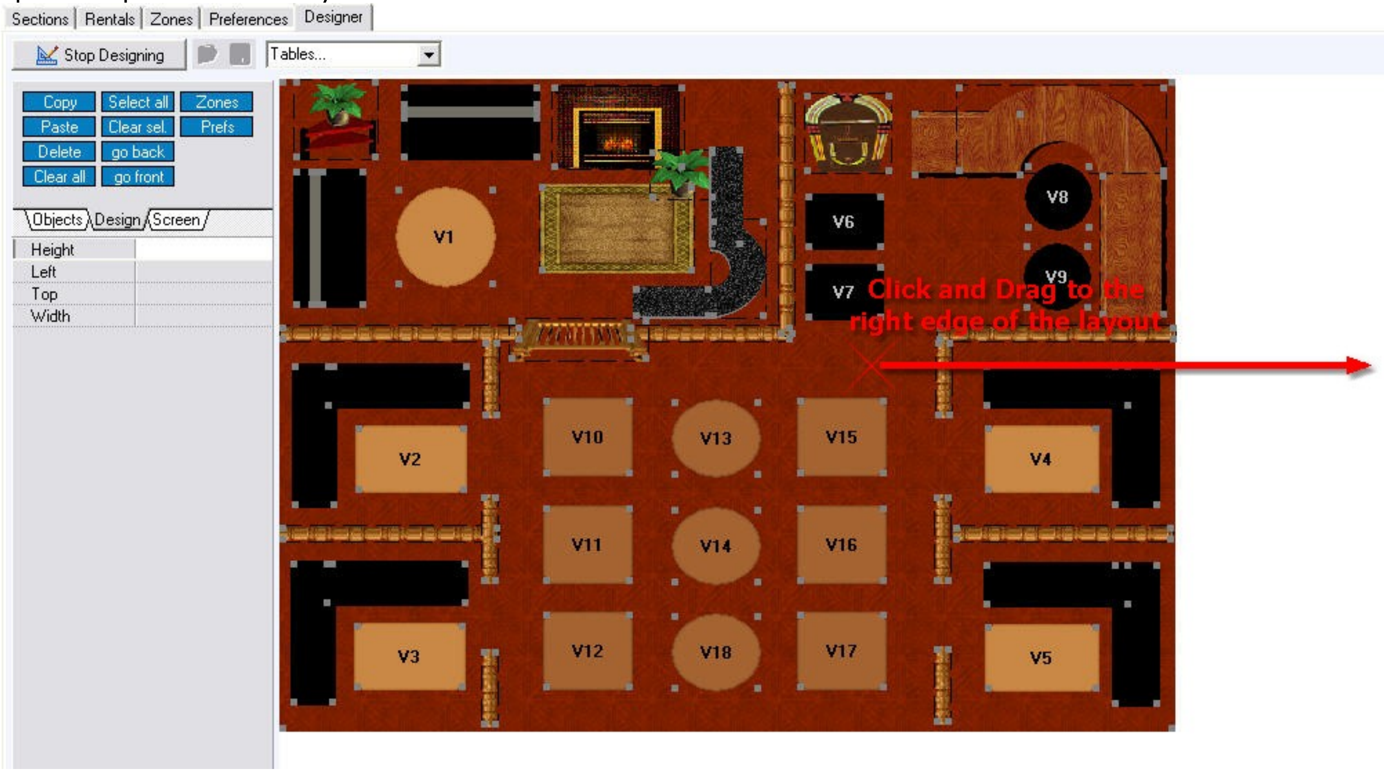
Section Name	Order	Display Name	Display Seat	Display Total	Remove seat # when occupied	Width	Height
Bar	-1	☑	☑	☑	☐	720	630
Boat Rentals	1	☑	☑	☑	☐	650	470
Bar 2	1	☑	☑	☑	☐	1020	630
Patio	3	☑	☑	☑	☐	650	470
VIP Lounge	4	☑	☑	☑	☐	650	470
Hostess		☑	☑	☑	☐	1020	630

6. Click "Start Designing"

7. Click on the Design tab, then click "Paste".



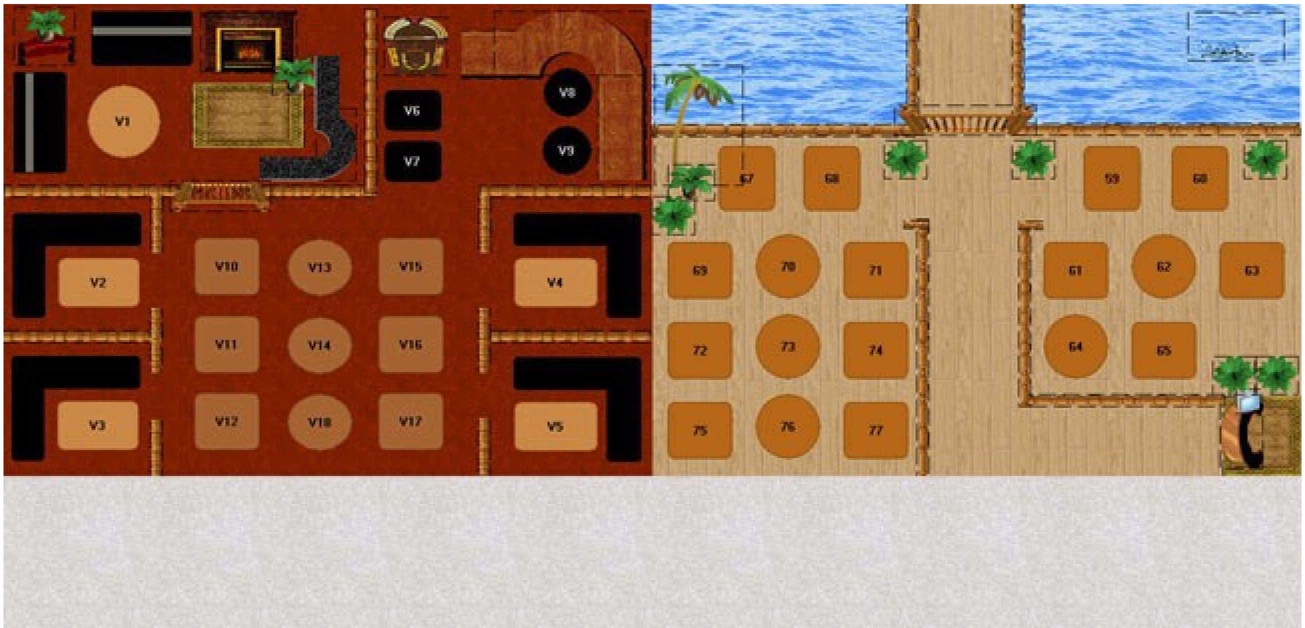
8. You will see that the layout gets pasted to the blank space in your Hostess layout. While the layout that you pasted is still highlighted, click and drag the whole layout to the right so that you will have space to put the next layout.



9. Click "Stop Designing"

10. Now we must repeat the process for adding more layouts to this one. Go back to Sections and select the second layout you wish to add to the Hostess layout, then proceed back to the Designer tab. **Now repeat steps 6 - 19**.

11. If you have followed all the step properly thus far, you should have successfully combined two layouts into one. The new layout should look something similar to below with two layouts directly side by side:

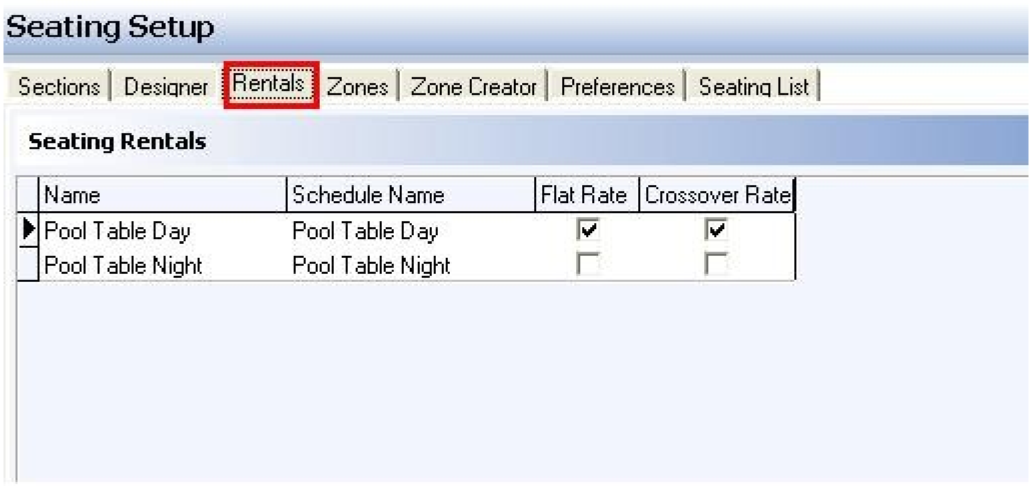


You can continue adding more layouts to this one; just make sure your Section screen width and height for this layout are large enough to fit more layouts.

14.3 Rentals Tab

Under the **General** section click on **Seating/Zones**. Select the **Rentals** tab.

Rentals



In our rentals example we are going to use Pool Table rentals.
Before you start setting up pool table rentals (or any other rentals for that matter), you must first set up Schedules for each individual pool table or for all pool tables. Set up day and night schedules and perhaps weekend and weekday schedules as well. If your rentals are going to be the same price all the time, then you don't need to create a new schedule; you can just use the All Day Schedule.

If needed, refer to **Scheduling** in this manual for detailed information on how to set up schedules.

Rentals explanation includes the following:

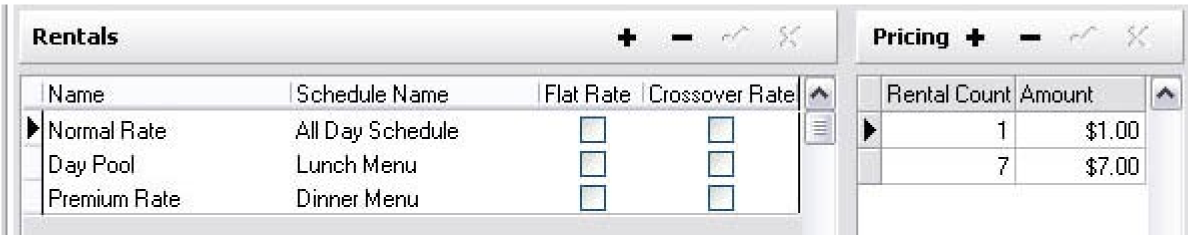
1. Create Rental
2. Activate Rental in Seating Designer
3. Create Department for Rentals
4. Add Rental Item to Main Menu

14.3.1 Create Rental

Under the **General** section click on **Seating/Zones**. Select the **Rentals** tab.

Rental Description of Options

Here you create your rentals and assign schedules, rental count and amounts to them.

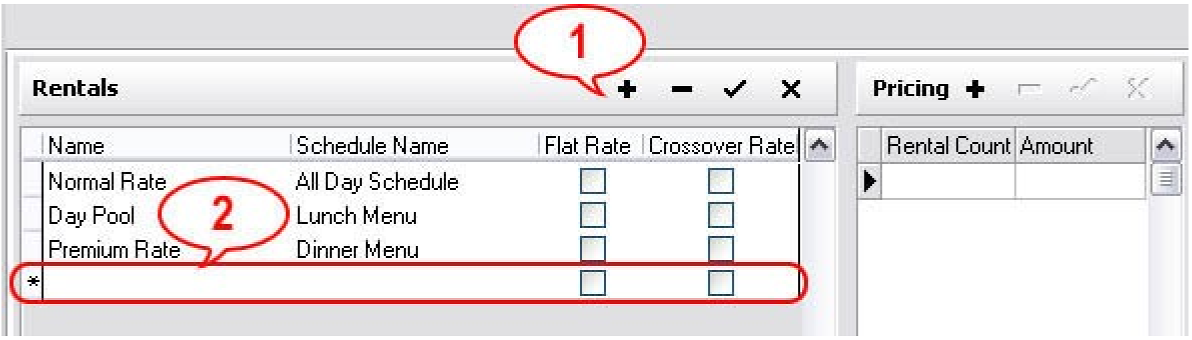


Flat Rate	When this option is checked the system charges a specified flat rate no matter how long the customer uses the rental. So if you want to charge hourly, leave the Flat Rate option unchecked. **Example:** Your hourly rate for the number of 7 customers is $7.00. If they use a rental for 3 hours, you charge them $21.00. But if the **Flat Rate** option is checked than no matter how many hours they use a rental (3 or 5 or more) they still pay only $7.00.
Crossover Rate	When this option is checked the system knows to jump to the next schedule once the schedule at which the rental was initiated is over. **Example:** From 9:00 am to 6:00 pm (day time) your rate is lower and from 6:00 pm to 12:00 am (night time) your rate is higher. You would have two rental names with two different schedules. Let's say a customer rents a pool table at 4:00 pm and uses it until 8:00 pm. If the **Crossover Rate** option is checked, the system will know to start charging customer a higher (night time) rate after 6:00 pm. But if it's not checked then a customer continues to pay the lower (day time) rate even though it is after 6:00 pm and the rent amount at these hours is different.
Rental Count	You can set the rate depending on the number of people using the rental. To do so specify the number of customers here.
Amount	Enter the amount depending on the specified number of customers. **Example:** if 1 customer - it is $1.00 if 7 customers - it is $7.00 if 10 customers - it is $15.00

- Create Rental -

Step 1.

First you need to give your rental a name. To do so click on the button in the **Rentals** part of the screen on the left and a blank line for the new record will appear with a star indicator next to it. See image:



Click next to the star and type in a name for your rental. Now under the **Schedule Name** column click in the white space for the drop-down menu to appear and choose a schedule for this rental. If this rental will have a Flat Rate make sure you check Flat Rate option otherwise leave it unchecked. If this rental will have a Crossover Rate make sure you check Crossover Rate option otherwise leave it unchecked. Click the button to save when you are finished.

Step 2.

Now we need to specify pricing for the new rental we just created.
Highlight a rental name if isn't already by clicking on it and in the **Pricing** part of the screen to the right click on the button. If you want to set the rate by the number of customers using the rental, click in the white space under Rental Count column and type in a number of customers. Then under Amount column click in the white space and type in the price for the number of customers you just entered. Create as many Rental Counts and Amounts for that rental as you need. Click the button to save when you are finished.

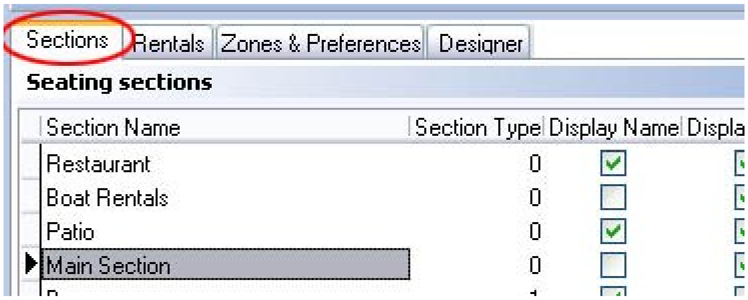
14.3.2 Activate Rental in Seating Designer

Under the **General** section click on **Seating/Zones**.

Activating a Rental in Seating Designer

Step 1.

First, from the Sections tab, select the seating section in which you want to activate your rentals. See image below:

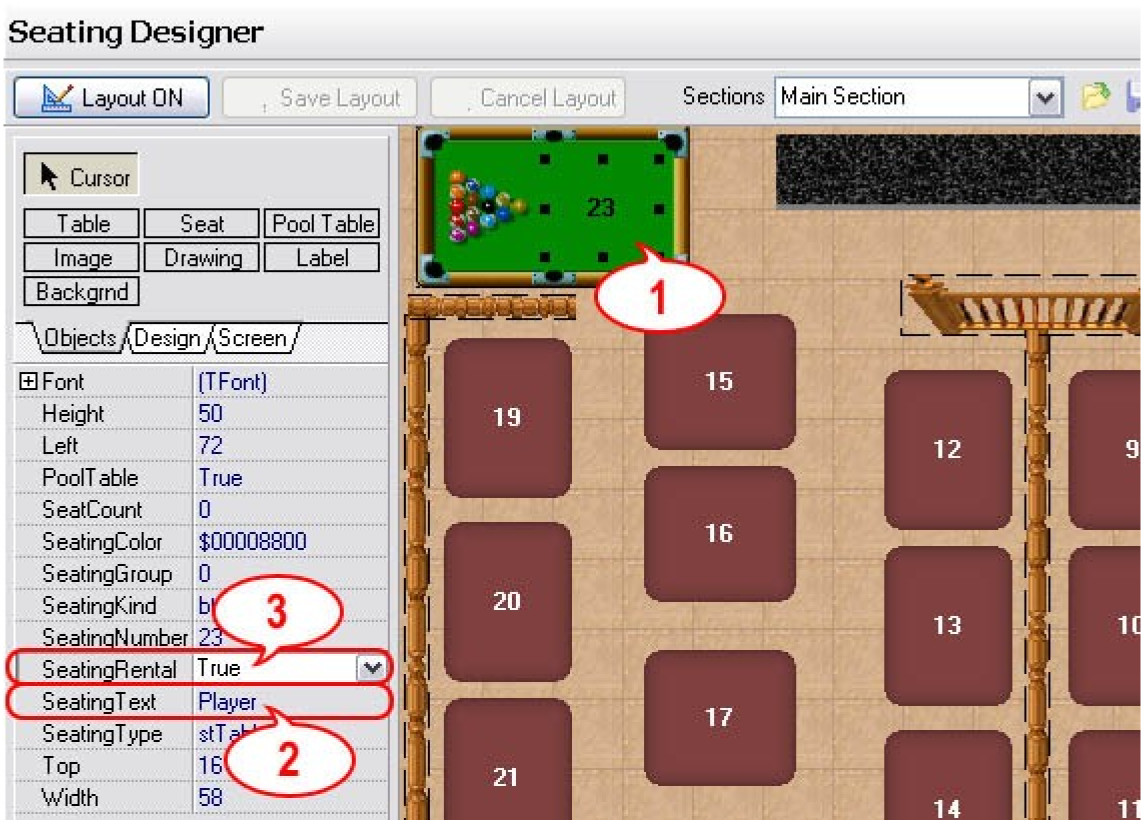


Step 2.

Now select the Designer tab and turn on the Designer by clicking the  button.

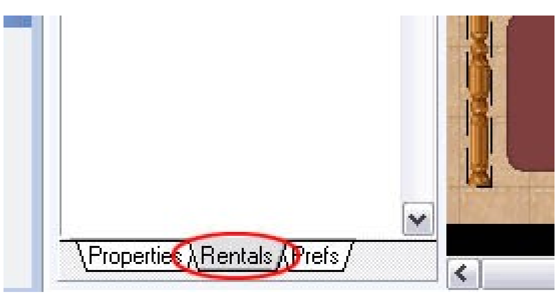
Step 3.

Select the rental item by clicking on it. (Be sure to click on the Pool Table number). In this case we use pool table as an example. Set SeatingText as Player and SeatingRental to True. See image:



Step 4.

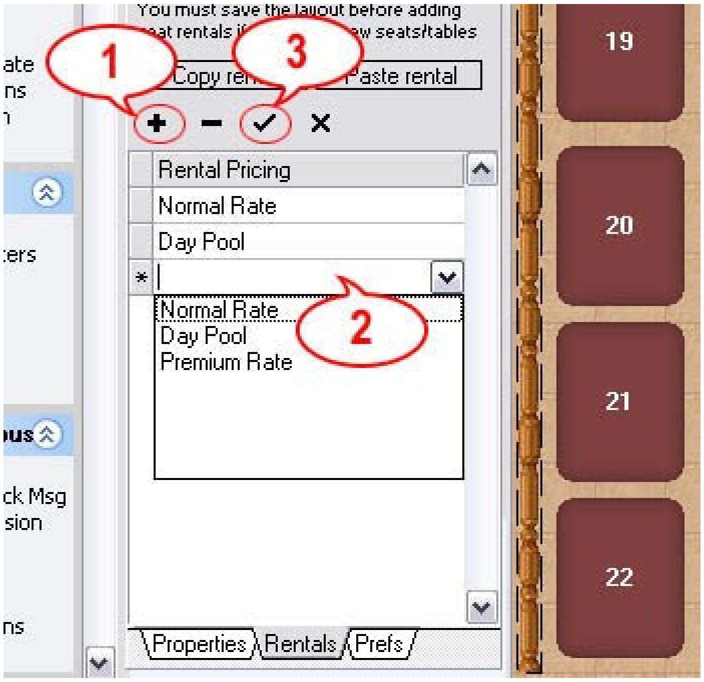
Having pool table still selected click on the Rentals tab at the bottom of the screen. See image:



Step 5.

Under **Rental Pricing** section of the screen you need to add the appropriate rate schedules that you created earlier under **Create Rental** to this pool table.

Click on the + button, then click a field next to the star for the drop-down menu to show up, choose the schedule and click on the ✓ button to save the changes. See image:



You have to do all of the steps described above for each individual pool table.

If you have already set the properties of each pool table to SeatingRental True and SeatingText Player, you can use the **Copy Rental** and **Paste Rental** buttons to copy one table's rental pricing to other tables.

Step 6.

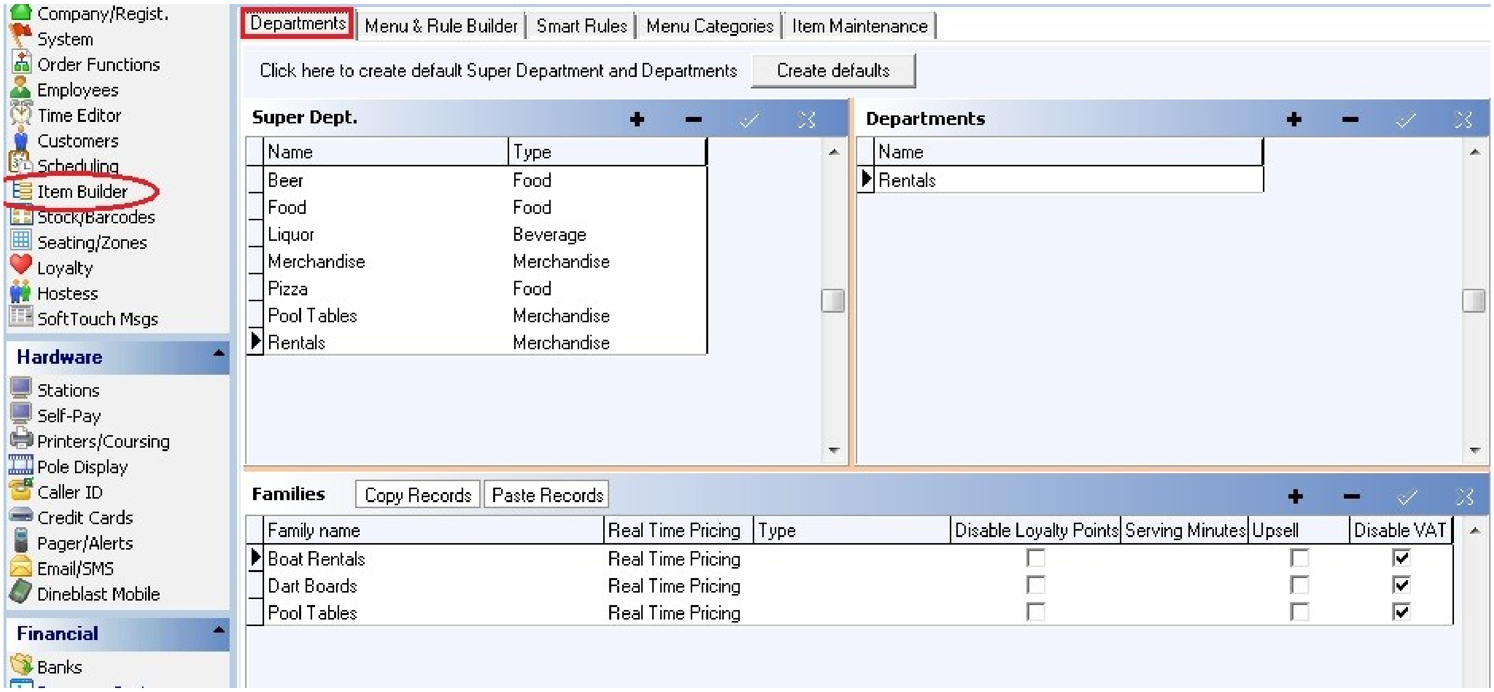
When you are finished, exit the Design mode by clicking the Stop Designing button. The changes you've made will be automatically saved.

14.3.3 Create Department for Rentals

Under the **General** section click on **Seating/Zones**.

Creating a Department for Rentals

Under the **Departments** tab of the **Item Builder**, set up a Super Department, Department and a Family (or Families) for rentals.
See example image below:



If needed, refer to [**Item Builder->Departments**] in this manual for detailed information on how to set up departments.

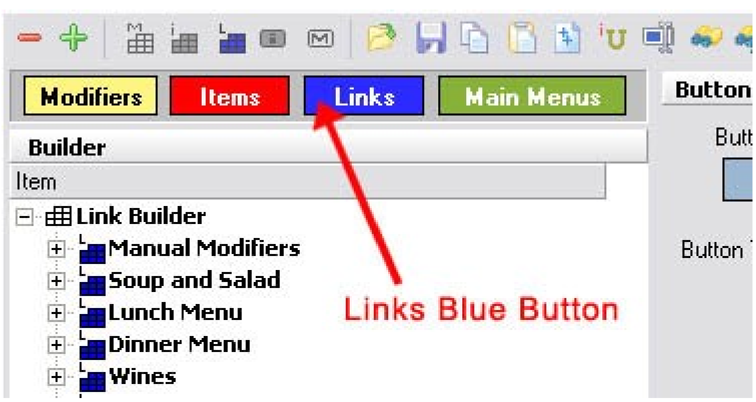
14.3.4 Add Rental Item to Main Menu

Under the **General** section click on **Item Builder**. Select the **Menu & Rule Builder** tab.

Adding a Rental Item to the Main Menu

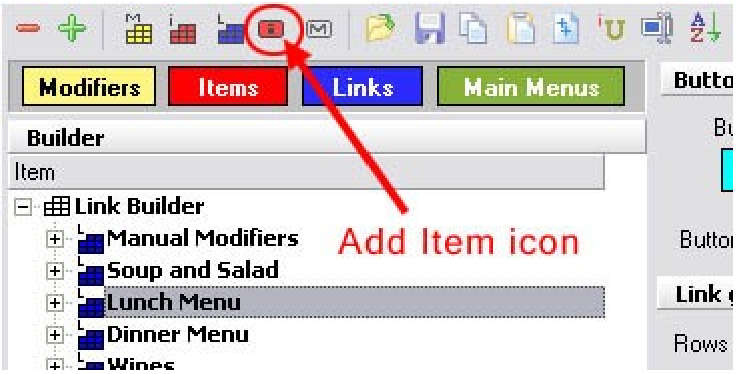
Step 1.

Click on the blue button labeled Links. See image below:



Step 2.

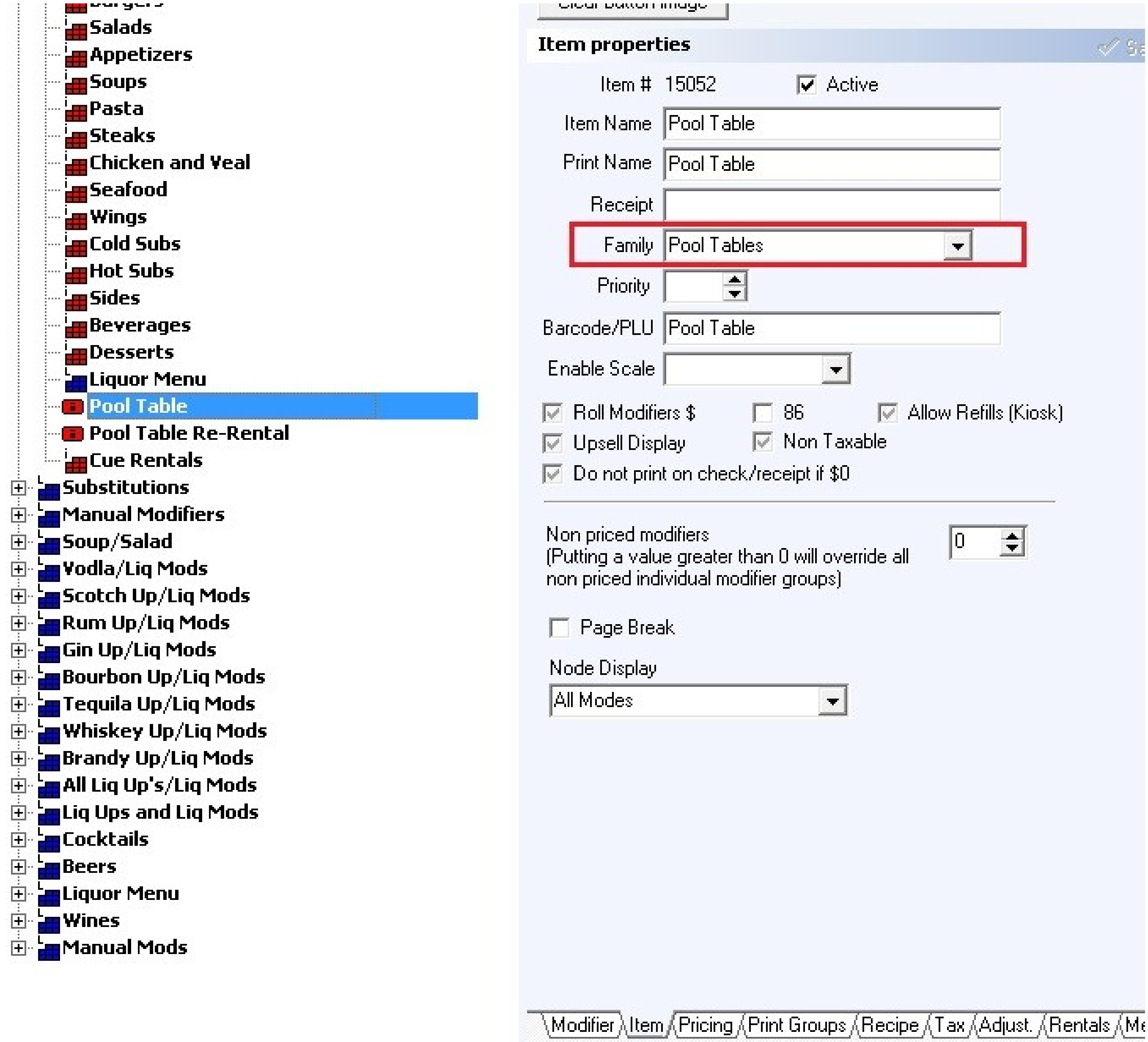
You need to add your rental to the main menu. Highlight your Main Menu group and click on the Add Item icon (small red i). See image:



Call this item Pool Tables.

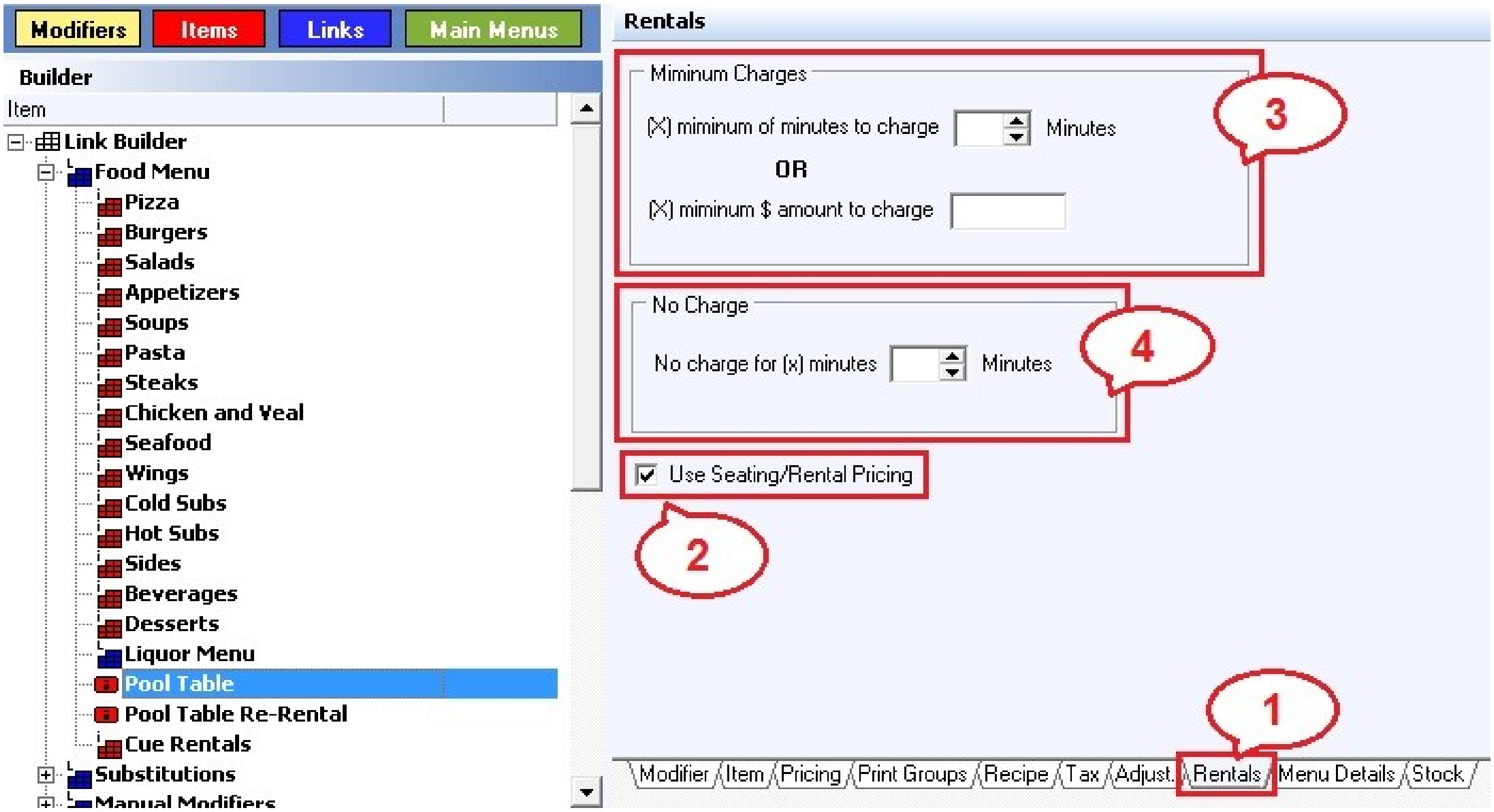
Step 3.

Highlight your newly created Pool Tables item. With the **Item** tab selected on the bottom right, under **Item properties** select the Family to be Rentals or Pool Tables (depending on how you've set it up earlier in the Departments). See image:



Step 4.

At the bottom of the screen on the right click the **Rentals** tab (it is located right after Adjustments tab) and set up the properties for this rental item.
First, check the Use Seating/Rental Pricing checkbox. Then under Minimum Charges specify a minimum charge for minutes if there is any or a minimum charge of a fixed dollar amount if there is any. Under No Charge specify the number of minutes for no charge. This allows a customer to change their mind during the specified number of minutes without incurring any charge. See image:



Step 5.

Add another item called Pool Table re-rental. Under the rental properties do not add any minimum charge or any free charge. This button is used for re-starting the pool table timer when a player leaves.

14.4 Zones

Under the **General** section click on **Seating/Zones**. Select the **Zones** tab.

Zones

Zones are reserved for use with **SoftHost**.

A **zone** is a group of tables that a server will work during his/her shift.

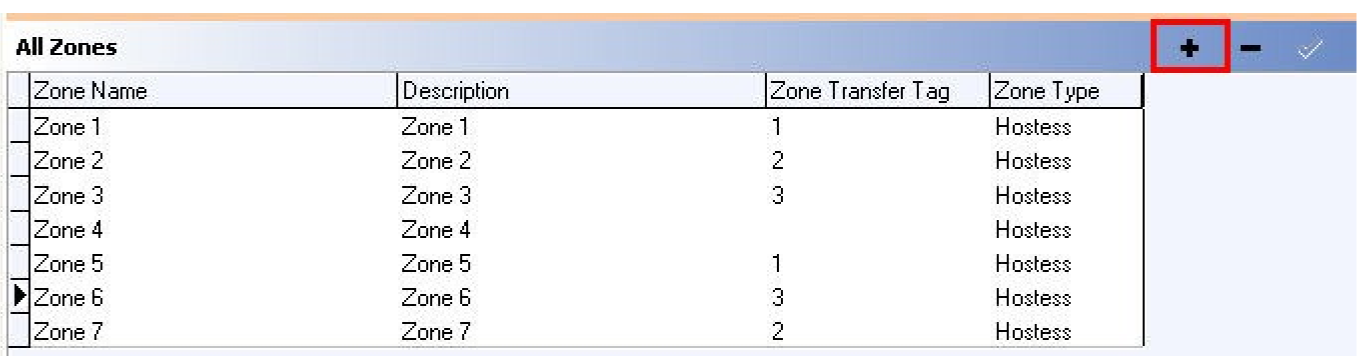
A zone group is a group of zones. Zone Groups allow you to have different zone configurations based on how many servers are working. For example, you can make a zone group with 4 zones for when there are 4 servers working and also make a zone group with 3 zones for when there are 3 servers working.

Before you begin setting up zones, make sure you know the different zones being used, which tables are in each zone, and different zone configurations when different numbers of servers are working.

***Note:** You can also mass create zones and the zone group they are part of by using the Zone Creator tab.

- Add Zones -

1. In the **All Zones** section, click on the plus sign (+) to create a new zone.



Zone Name	Description	Zone Transfer Tag	Zone Type
Zone 1	Zone 1	1	Hostess
Zone 2	Zone 2	2	Hostess
Zone 3	Zone 3	3	Hostess
Zone 4	Zone 4		Hostess
Zone 5	Zone 5	1	Hostess
Zone 6	Zone 6	3	Hostess
Zone 7	Zone 7	2	Hostess

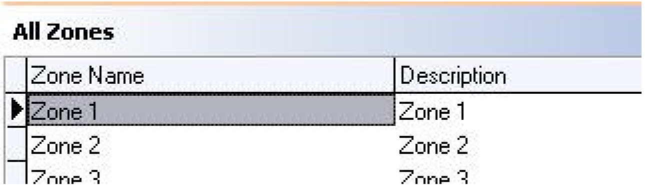
2. Give the zone a name and description. Don't worry about the **Zone Transfer Tag** field for now; it is explained later.

3. Leave the Zone Type field set to Hostess.

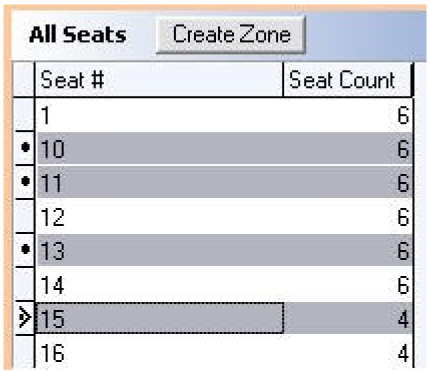
4. Continue until you have created all your zones.

- Add Seats to the Zones -

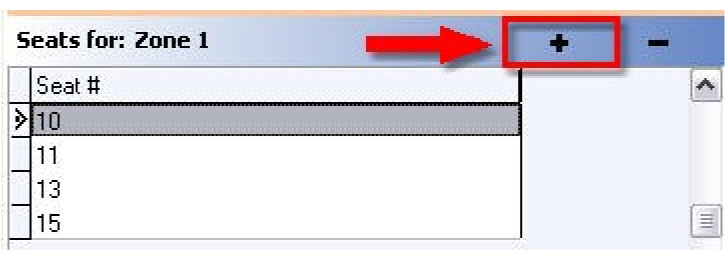
1. In the **All Zones** section, highlight the zone you would like to add seats to.



2. In the All Seats section, select multiple tables you would like to add to the zone by holding down the CTRL key while clicking them.



3. Now click the plus (+) sign in the **Seats for: Zone (x)** section to add those seats to the zone. Click Yes on the dialog box that pops up to confirm this is what you want to do.



- Create Zone Groups -

Zone groups are needed so that it will be easy to change configurations as servers go home throughout the night.

Here is an example restaurant that uses 3 different Zone Groups: "4 Servers", "3 Servers", and "2 servers".

- Create Zone Groups -

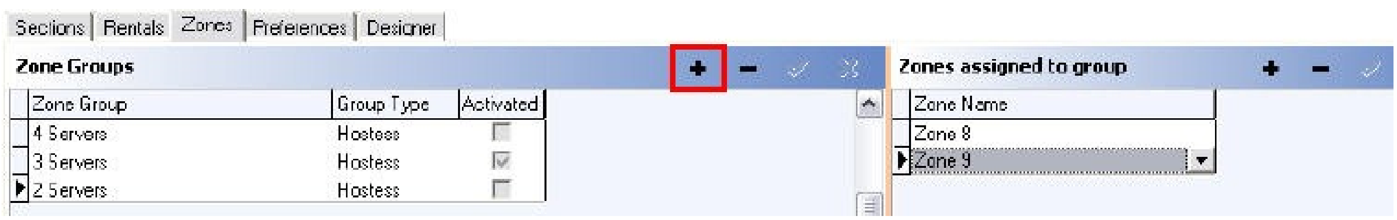
1. Make sure you have created all the zones you will need under the **All Zones** section. Remember, if for example you want to have a zone group of four zones when you have four servers, a zone group of three zones when you have three servers, and a zone group of two zones when you have two servers, this will require nine zones.

A four server zone group could include zones 1-4. (Notice here that table 13 is assigned to both Zone 2 and Zone 3. In this scenario, SoftHost will ask which server to assign the check to because it will see there is an option there. The same goes for table 10, which is assigned to both Zone 1 and Zone 4.)

A three server zone group could include zones 5-7.

A two server zone group could include zones 8-9. (This zone group can also be used when there is only one server; you will just need to assign the same server to both Zone 8 and Zone 9 at the same time.)

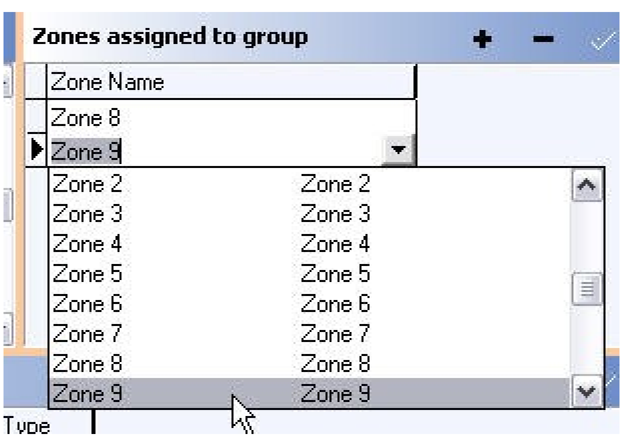
2. In the **Zone Groups** section, click the plus sign (+) to add a new zone group. Give it a name. Leave Group Type as "Hostess."



3. Now save the changes by pressing the save button .

4. Select/highlight the Zone Group you want to add zones to.

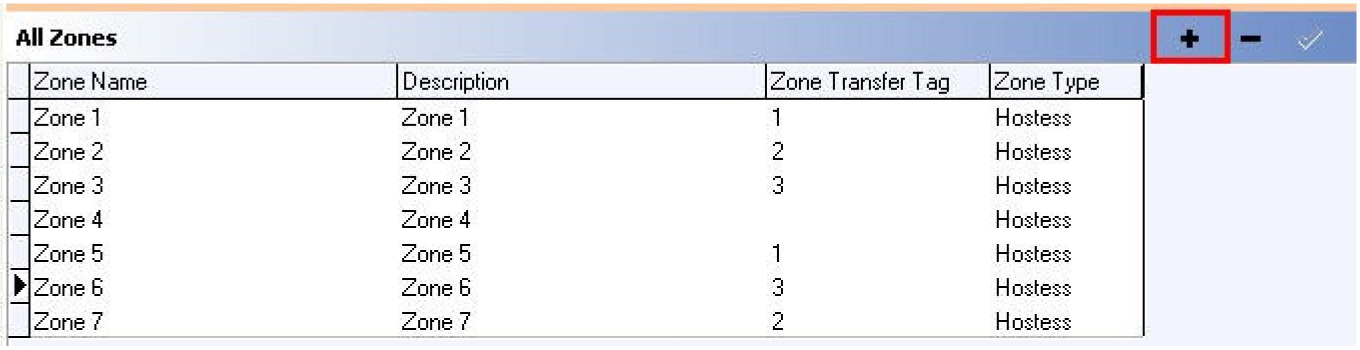
5. In the **Zones assigned to group** section, click the plus sign (+) to add a zone to that group. Click on the new blank field under Zone Name and click on the drop-down to select a zone you would like to add. Continue adding/selecting zones until you have added all zones needed for that group.



6. Continue adding the rest of your groups and the zones in those groups by repeating steps 2-4.

- Create Zone Transfer Tags -

Zone Transfer Tags are used so that servers can be automatically reassigned to another zone as servers go home and different zone groups must be used. In the All Zones section, click in the field under Zone Transfer Tag to type in a tag name. You can use any text you want; in the image below, numbers were used.



Zone Name	Description	Zone Transfer Tag	Zone Type
Zone 1	Zone 1	1	Hostess
Zone 2	Zone 2	2	Hostess
Zone 3	Zone 3	3	Hostess
Zone 4	Zone 4		Hostess
Zone 5	Zone 5	1	Hostess
Zone 6	Zone 6	3	Hostess
Zone 7	Zone 7	2	Hostess

In the image above, Zone 1 and Zone 5 have the same Zone Transfer Tag.

Let's say that Zone 1 is in the zone group used when there are four servers and Zone 5 is in the zone group used when there are three servers.

When a server leaves and there are three servers instead of four, the server who was assigned to Zone 1 will be automatically reassigned to Zone 5 because these zones share the same Zone Transfer Tag.

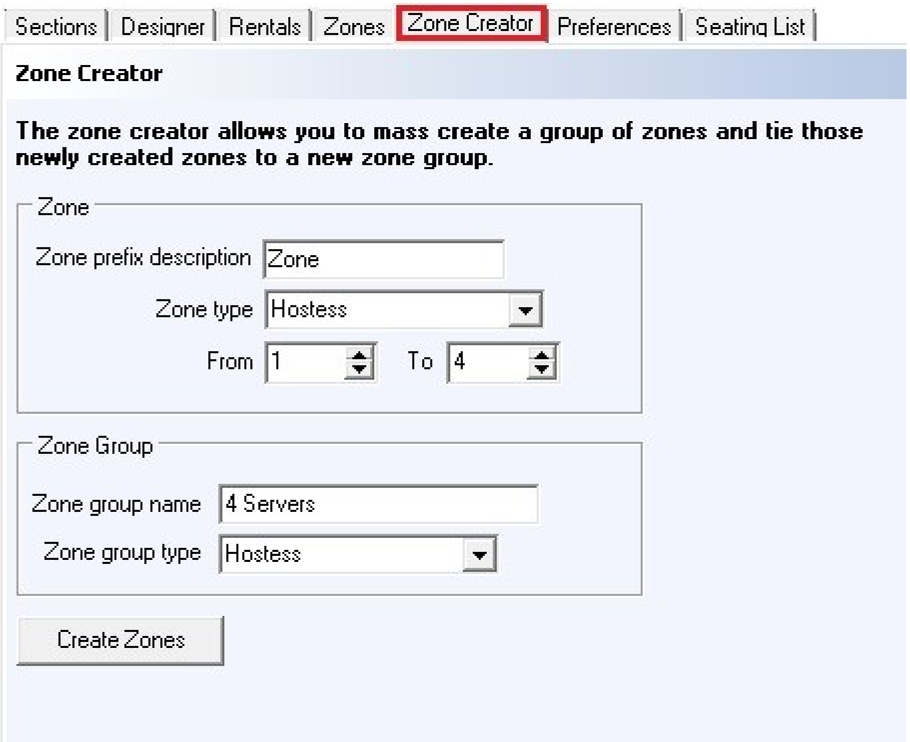
14.5 Zone Creator

Under the **General** section click on **Seating/Zones**. Select the **Zone Creator** tab.

Zone Creator

Zones are reserved for use with **SoftHost**.

The Zone Creator allows you to mass create multiple zones and the zone group they are part of all at once. However, you will still need to assign seats to these zones as well as any Zone Transfer Tags under the **Zones** tab.



Zone prefix description	When creating zones, it will add whatever you type here to the beginning of each table number added. **Example:** If you want each new zone to be named Zone1, Zone2, Zone3 etc., type "Zone" here.
Zone type	Set this to Hostess.
From ____ To ____	Specify the range of zones you want to create. **Example:** If you enter From 1 to 4, zones 1, 2, 3, and 4 will be created.

Zone group name	Type a name for a new Zone Group you would like the zones you are creating to be added to.
Zone group type	Set this to Hostess.

14.6 Preferences

Under the **General** section click on **Seating/Zones**. Select the **Preferences** tab.

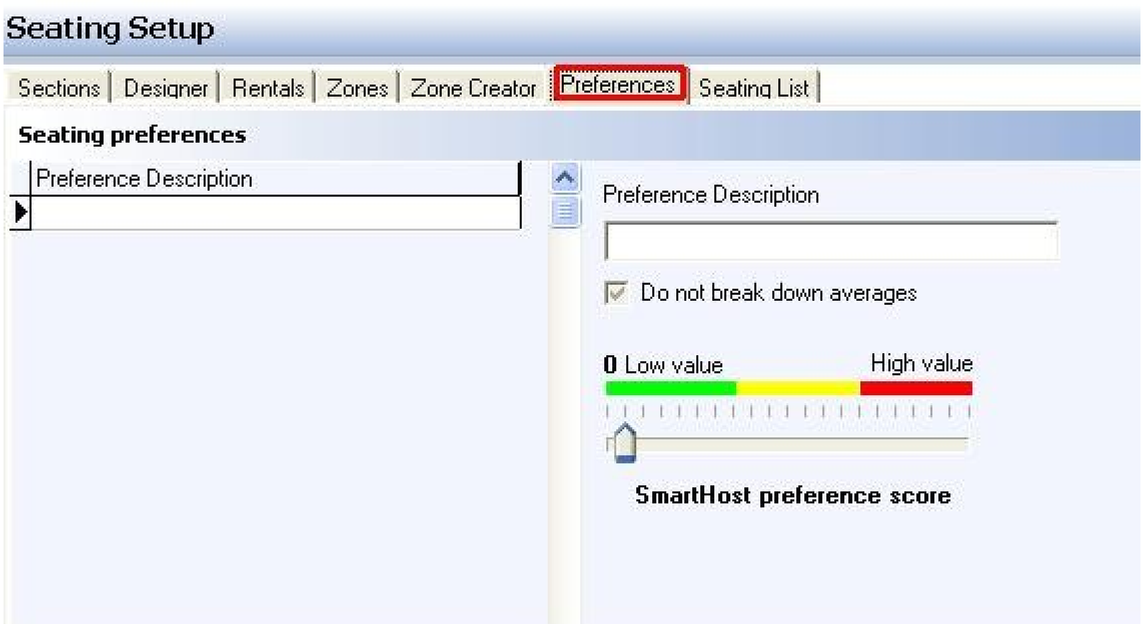
Preferences

Preferences are reserved for use with **SoftHost**.

At almost any restaurant, people are going to ask to sit in certain areas of the restaurant, such as sitting in a booth rather than a table.

Use this section to set up sets of tables that meet certain guest preferences.

Once this is set up, SoftHost is able to look at specific tables that meet the customer's preferences and create a customized estimated wait time for the availability of those specific tables.



- Create Preferences -

1. Click the plus sign (+) to add a new Preference. Type in a name in the **Preference Description** field.

2. Now save the changes by pressing the save button .

3. Place a check in the box for "Do not break down averages" if desired.

If the box is checked, the average stay/wait times for this set of tables will be pooled in with the average of other tables to create a more overall restaurant-wide average.

If the box is not checked, SoftHost will isolate the average for tables in this preference group. This may be useful if you have an "Outside Seating" preference or other group that includes tables where people are known to stay longer than if sitting in other areas of the restaurant.

4. Set the **SmartHost preference score** by moving the slider along the scale.

If a **high value** is set for a preference area, SoftHost will work to seat guests at other tables in the restaurant before these ones. In other words, these seats are highly requested and should be left if possible for those who request them.

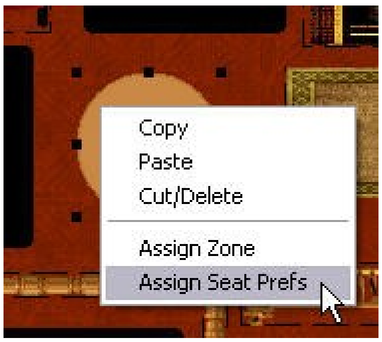
A **low value** for a SmartHost preference score will mean that the tables will not be weighted any differently than tables that have no specific preferences assigned.

- Assign Preferences to Tables -

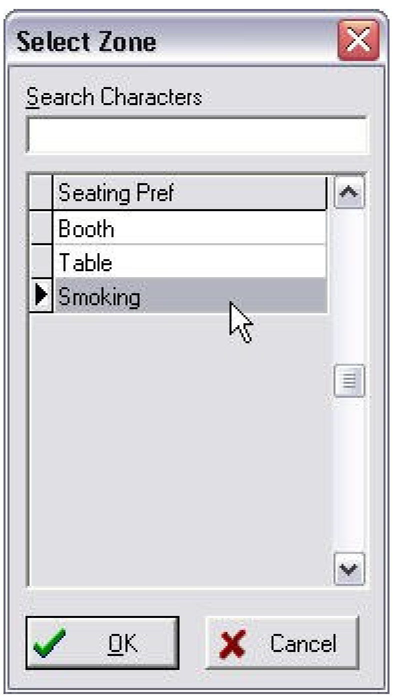
1. Make sure your hostess layout is selected in the **Sections Tab**, then go to the Designer tab.

2. Click the **Start Designing** button.

3. Click on a table you would like to assign a preference to. Then "Right Click" on the table. A small option menu will pop up. Choose "Assign Seat Prefs."



4. Select the preference you would like to add to the table to then click OK.



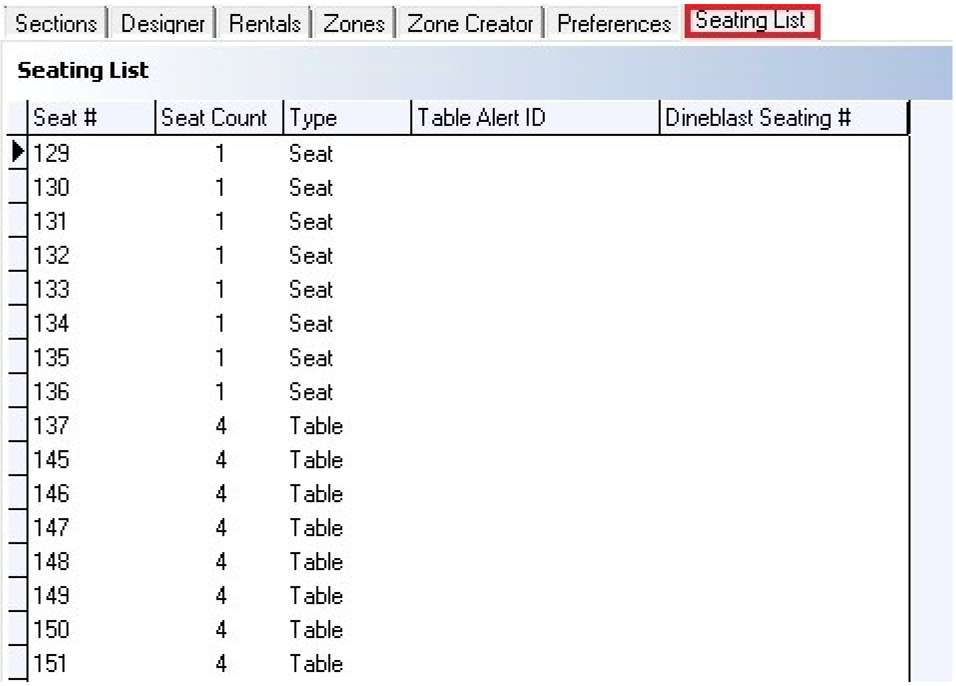
5. Click "Stop Designing" when finished.

Tip: You can select multiple tables at the same time by holding down the SHIFT key. Then you can "Right Click" on one of the tables that you highlighted, click "Assign Preference", and select a preference. This will assign the same preference to all the highlighted tables at the same time.

14.7 Seating List

Under the **General** section click on **Seating/Zones**. Select the **Seating List** tab.

Seating List



Seat #	Seat Count	Type	Table Alert ID	Dineblast Seating #
129	1	Seat		
130	1	Seat		
131	1	Seat		
132	1	Seat		
133	1	Seat		
134	1	Seat		
135	1	Seat		
136	1	Seat		
137	4	Table		
145	4	Table		
146	4	Table		
147	4	Table		
148	4	Table		
149	4	Table		
150	4	Table		
151	4	Table		

Seat #	This is a list of the seats in the system.
Seat Count	This defines how many people can fit at the table.
Type	This is automatically filled in based on how you labeled this seat number when using the Designer (see **Designer Tab**).
Table Alert ID	ID of the Table Alert unit that is going to be placed at this table.
Dineblast Seating #	If you have subscribed to use self-pay, this shows the Dineblast Seating IDs you should post at the tables for customers to use. To generate these numbers, select the **Seating List** drop-down menu from the gray tool bar at the very top and then click on **Generate Table #'s for Dineblast**.

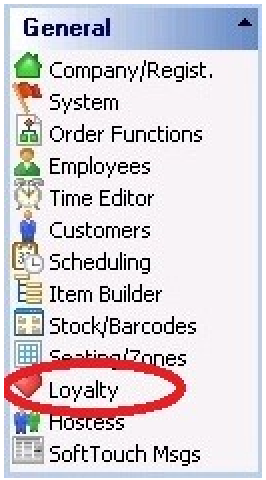
Part XV

Loyalty

Part 15 Loyalty

Under the **General** section click on **Loyalty**.

Loyalty



Loyalty includes the following:

1. General Settings

2. Visit Setup

3. Point Setup

15.1 In-Store Loyalty

Under the **General** section click on **Loyalty**. Select the **In-Store Loyalty** tab.

In-Store Loyalty includes the following:

1. General Settings

2. Visit Setup

3. Point Setup

15.1.1 General

Under the **General** section click on **Loyalty**. Select the **In-Store Loyalty** tab and then the **General** tab.

Here you setup your general loyalty settings.

- Loyalty -

These options allow you to make individual settings within each store.

Allow daily duplicate loyalty transactions	This allows a customer to visit a store more than once per day and still get credit for the visit.
Disable Loyalty Print Chit	This will prevent the loyalty chit from being printed manually.

Enable visit scans without an order	This allows the customer to visit a store but not have to purchase anything to get credit for the visit.

***Note:** One Loyalty Point is given for each dollar spent.

Example: If a customer orders a pizza that is $10.00 then he will get 10 loyalty points.

15.1.2 Visit Setup

Under the **General** section click on **Loyalty**. Select the **In-Store Loyalty** tab then the **Visits** tab.

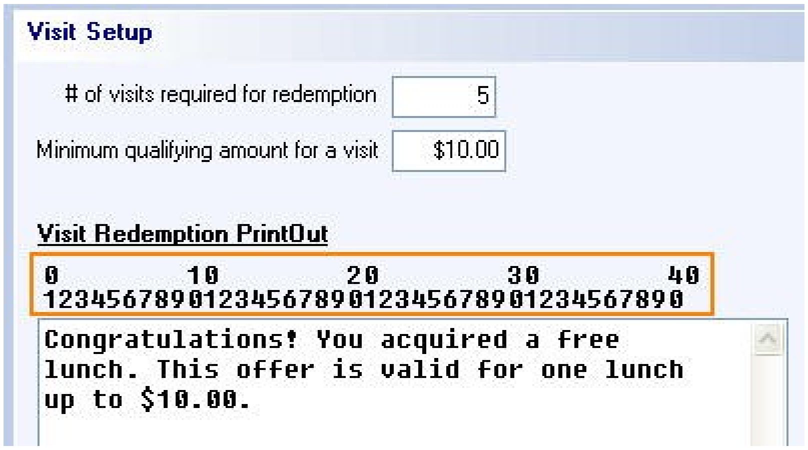
Here you setup your loyalty visit setting receipt.

- Visit Setup -

When setting up the visit count, there are two areas of concern:

1. number of visits required for redemption
2. minimum qualifying amount for a visit

The first setting is always required for the loyalty visit program to work, but the second can be overridden on the General tab with the **Enable visit scans without an order** setting (see **In-Store Loyalty->General**).



- Visit Redemption PrintOut -

This is the space where you enter what you want your redemption receipt/chit to look like. This will be printed on the customer receipt if they have the number of visits that are required, so make it easy to read and understand.
Follow the 40 character ruler so that all type is visible on the receipt.

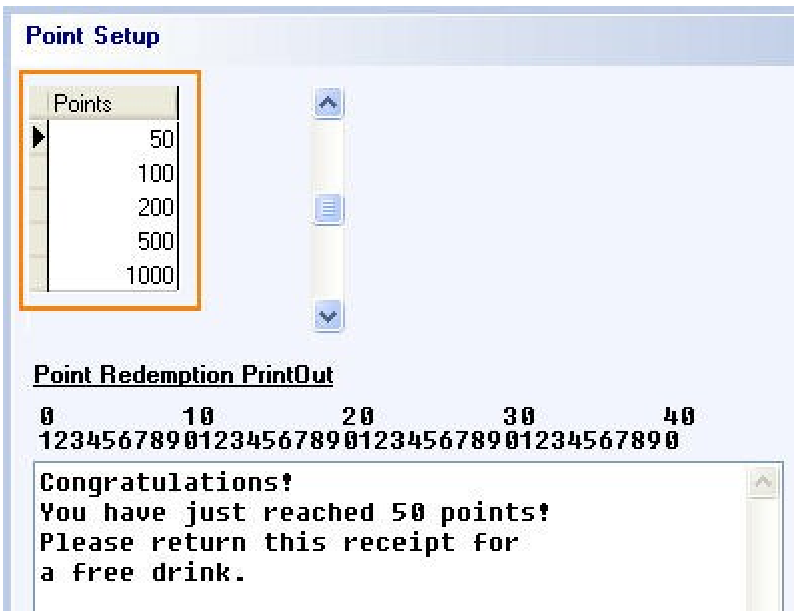
15.1.3 Point Setup

Under the **General** section click on **Loyalty**. Select the **In-Store Loyalty** tab and then the **Points** tab.

Here you setup your loyalty points settings and receipts/chits.

- Point Setup -

Here you will set up your redemption breakpoints. You can set up as many breakpoints as you want. Enter the lowest point value first and use the **Add** button or the down arrow on your keyboard to enter the next point value. Continue until all breakpoints are entered.



- Point Redemption PrintOut -

This is the space where you enter what you want your redemption receipt/chit to look like. This will be presented to the customer, so make it easy to read and understand.

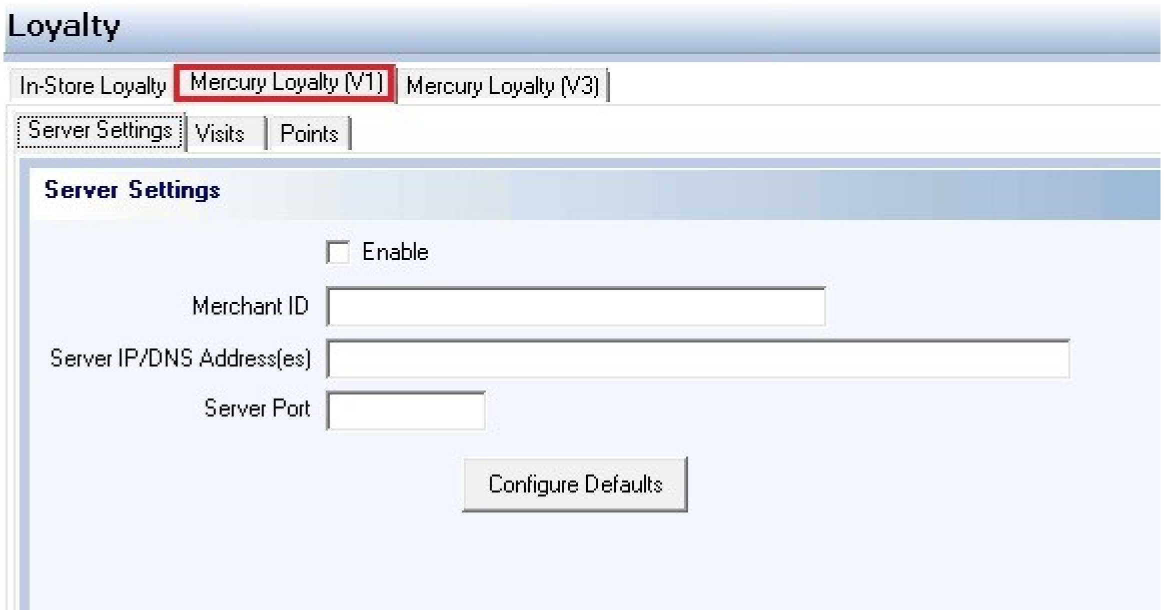
Follow the 40 character ruler so that all type is visible on the receipt.

Realize that each breakpoint must have a separate PrintOut entered.

***Note:** It is recommended that you add to the receipt footer all of the possible point redemption levels and what the customer will get once they reach those point levels. This way the customer will know what discounts are available to them once they reach certain point levels. Go to Miscellaneous->Receipt Template for instructions on editing your receipt template.

15.2 Mercury Loyalty (V1)

Under the **General** section click on **Loyalty**. Select the **Mercury Loyalty (V1)** tab.



- Server Settings Tab -

These settings make it possible to use Mercury Payment Systems to record your loyalty transactions and use SoftTouch at multiple stores.

This means that a customer can visit any one of your locations and know that their loyalty visits and points will follow them to each store.

Enable	This allows the multi-store function to work.
Merchant ID	This is the merchant ID provided to you by Mercury Payment Systems.
Server IP/DNS Address(es)	Internet address(es) to link to Mercury Payment Systems.
Server Port	This is the port used to communicate from your server to the DNS address.

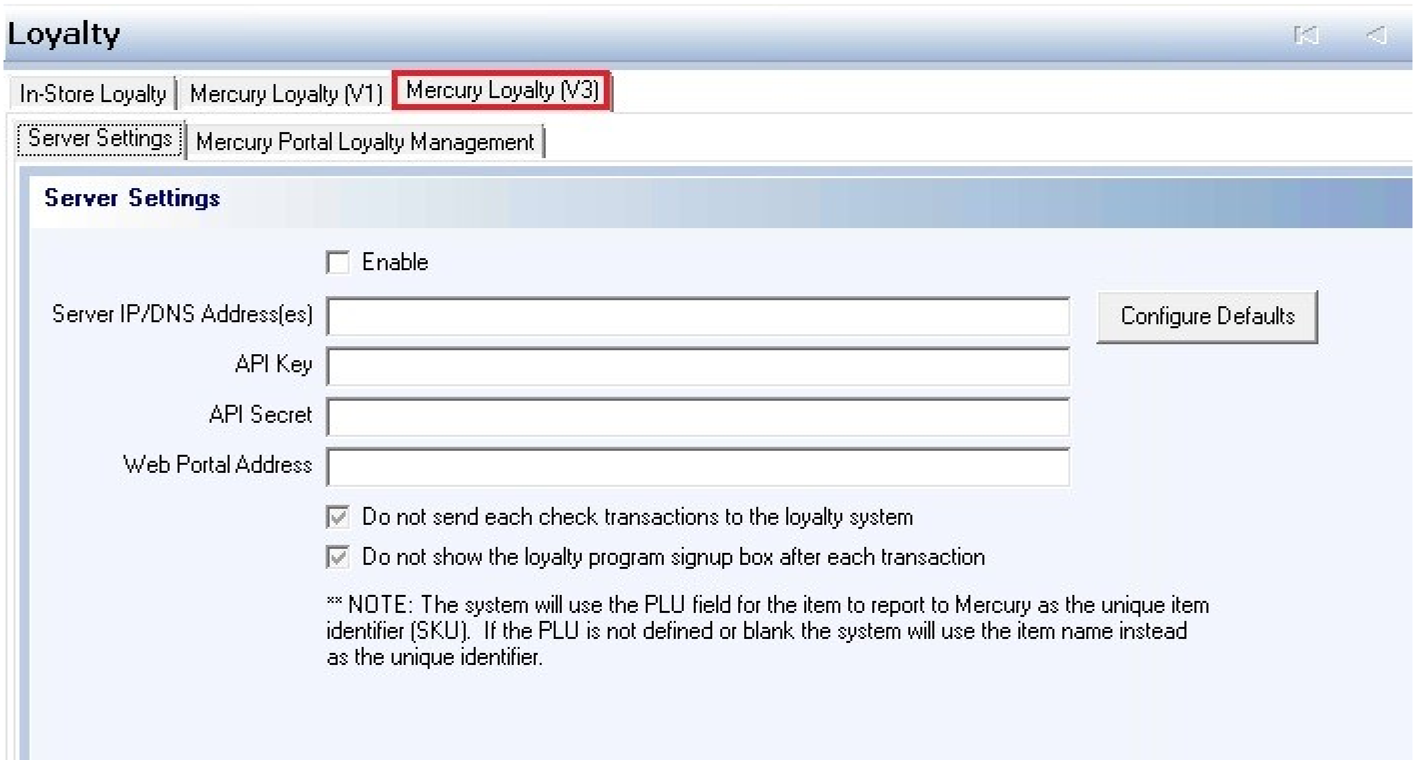
- Visits and Points Tabs -

The information here is automatically copied over from what was entered under the In-Store Loyalty tab (see **In-Store Loyalty->Visit Setup** and **Point Setup**).

15.3 Mercury Loyalty (V3)

Under the **General** section click on **Loyalty**. Select the **Mercury Loyalty (V3)** tab.

Mercury Loyalty (V3) has been disabled.



Part XVI

Hostess

Part 16 Hostess

Under the **General** section click on **Hostess**.

Hostess

Hostess includes the following:

1. Hostess Module Setup

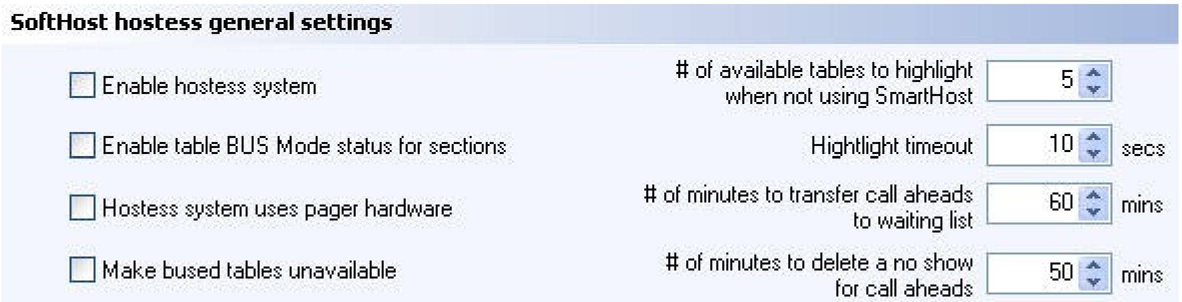
2. Hostess Delete Reasons

16.1 Hostess Module Setup Tab

Under the **General** section click on **Hostess**. Select the **Hostess Module Setup** tab.

Here you setup your SoftHost module estimate and SmartHost settings.

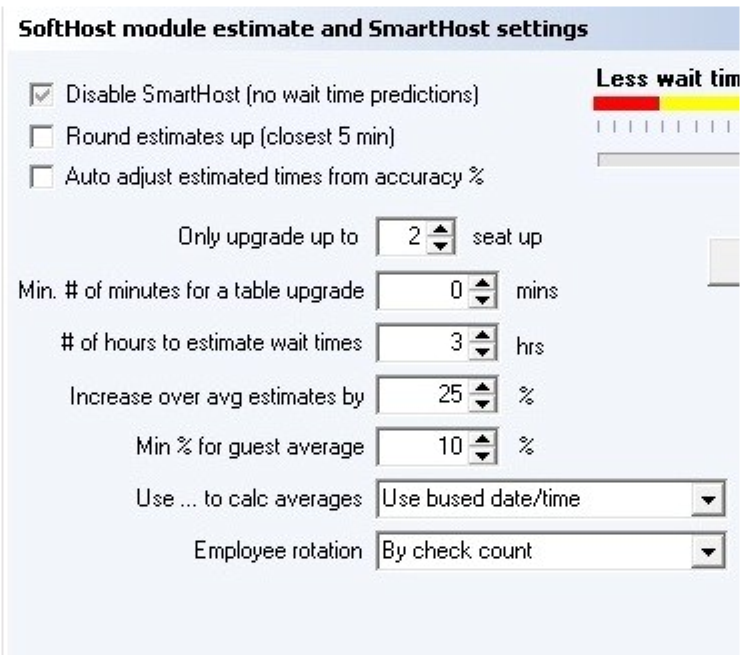
- SoftHost hostess general settings -



Enable hostess system	This allows the Hostess functions within SoftTouch to work.
Enable table BUS Mode status for sections	This will change the color of the tables or seats to green after they have been cashed out which signifies that the table will be available soon. A server or bus boy needs to press that table or a seat in order to confirm that indeed that table or seat has been bused and is now ready for seating the next customer. **NOTE:** It is very important for the bus boy or server to mark a table in SoftTouch as bused immediately after they have cleared the table. This will help the SmartHost system to give more accurate estimates for wait times.
Hostess system uses pager hardware	Enables pager (coaster) hardware to be used in conjunction with SoftHost so that parties on the waiting list can be handed a coaster that can be called when a table is available for them.
Make bused tables unavailable	If checked, the SmartHost system will see tables that are in "bused" status as unavailable.
# of available tables to highlight when not using SmartHost	This refers to the # of available tables that will be highlighted in blue if not using SmartHost. If SmartHost is enabled, then two tables will be highlighted.
Highlight timeout	This sets the number of seconds to highlight tables.

# of minutes to transfer call aheads to waiting list	This sets the number of minutes before a call ahead's scheduled arrival time to be transferred into the waiting list.
# of minutes to delete a no show for call aheads	If a call ahead has not arrived by x minutes past their scheduled arrival time, they will be automatically deleted.

- SoftHost module estimate and SmartHost settings -

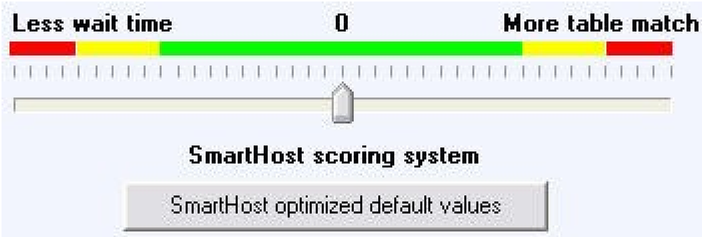


Disable SmartHost	Disables the SmartHost system. The Hostess system can still be used without SmartHost enabled, but you will not get any wait time prediction.
Round estimates up (closest 5 min)	All SmartHost estimates will be rounded up to the nearest 5 min. For example, a 12 min wait time estimate will be rounded to 15 min.
Auto adjust estimated times from accuracy %	Increases the wait time in relation to the accuracy percentage. If the accuracy percentage is 75%, this option will increase the predicted wait time by 25%.
Only upgrade to ____ seat up	Maximum table upgrade from a certain party size. For example, if set to 2, a party of 2 can only be upgraded to a table for 4 (and not a table for 5 or more).

Min. # of minutes for a table upgrade	Waiting party will not be upgraded to a larger table until the number of minutes you enter here has passed.
# of hours to estimate wait times	The SmartHost system will only estimate wait times based on the past # of hours you enter here. For example, if you enter 3 hours, the SmartHost system will only calculate wait times from averages over the past 3 hours of business.
Increase over average estimates by ____	If a table exceeds the time after which it was predicted to be available, then the SmartHost system will increase the wait time for this table by the percentage you enter here.
Min % for guest average	If this is set to 10%, for example, then if at least 10% of the current tables in the restaurant have parties of 2, then SoftHost will create a separate average for them. On the contrary, if there is only 1 party of 2 and 12 parties of 4, then the time from the party of 2 will just get thrown into the average with the parties of 4.
Use ... to calc averages	There is a choice to calculate averages based on the time from when the check was opened to when the table was bused or to when the check was closed.
Employee rotation	**By check count** - This will assign the next table to the employee that has the lowest number of active checks. **By rotation** - Tables will be assigned to employees by rotation, meaning that if there are four servers working, the first employee on the list will be assigned to serve the first, fifth, ninth (and so on) parties to be seated. ***Note:** This may not hold true while a wait is an effect, at which time parties will be seated in whichever server zone that has a table available. Assignments can also be manually overridden.

- Smart Host Scoring System -

This slider controls how the SmartHost system will assign tables.



More table match: The more you move the slider to the right, the more SmartHost will try to get an exact match for parties and their preferences. This may slightly increase wait time, but parties are more likely to get seated at their preferred table with this setting.

Less wait time: The more you move the slider to the left, the more SmartHost will try to decrease the wait time by seating parties at tables that may not exactly match their preferences or party size.

SmartHost optimized default values: This button will reset all Hostess settings to their optimized default.

Note: SmartHost can be manually overridden at any time by the person operating the Hostess program.

16.2 Hostess Delete Reasons Tab

Under the **General** section click on **Hostess**. Select the **Hostess Delete Reasons** tab.

- Hostess Delete Reasons -

Here you can setup reasons for deleting a party from the waiting list in the SoftHost package.

When you delete a party from the waiting list, you will be asked to select one of the reasons that you set up here.

To add a Hostess deletion reason, click on the Add button, enter a new reason and click the Save button to save when you are finished.

Part XVI

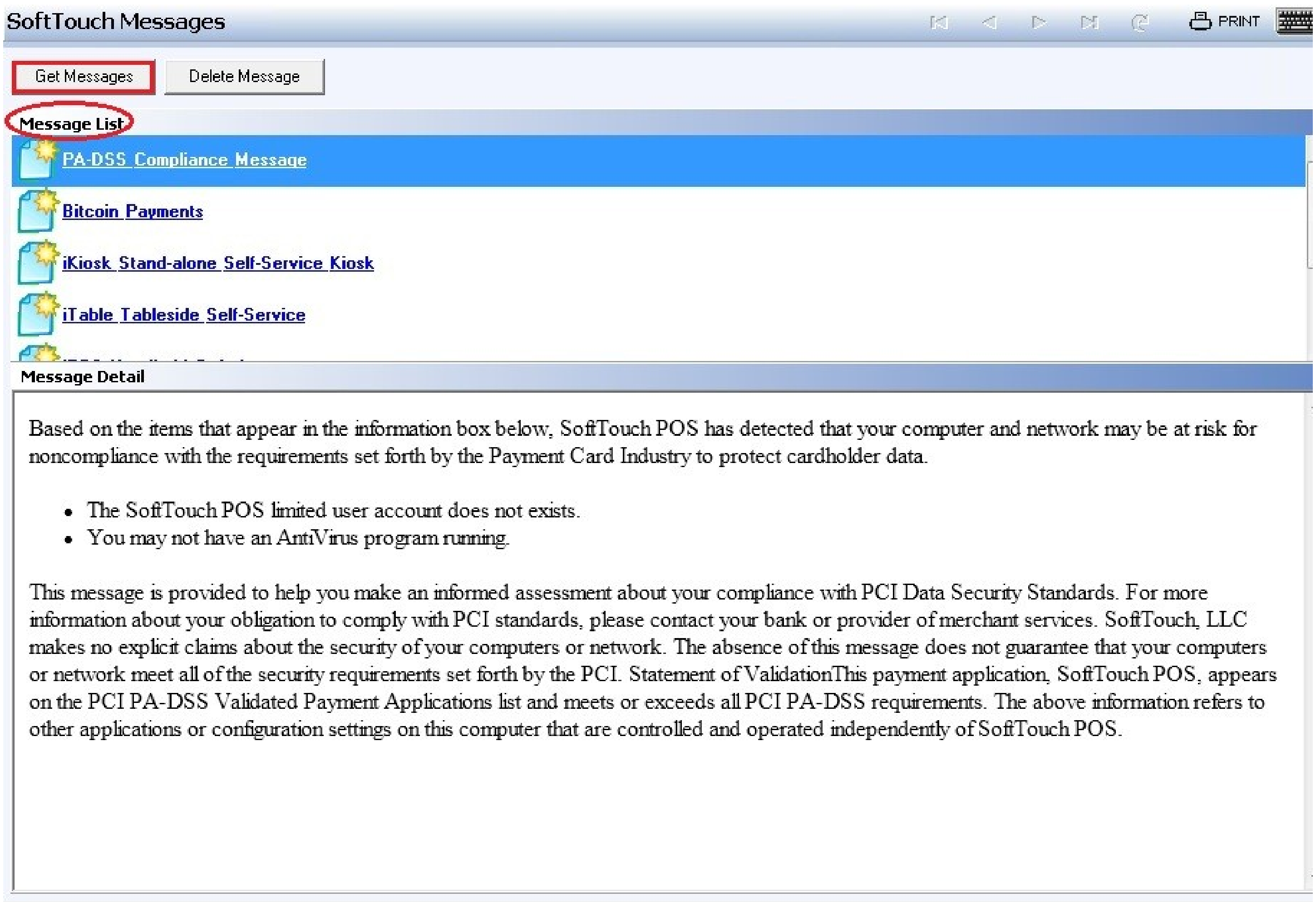
SoftTouch Msgs

Part 17 SoftTouch Msgs

Under the **General** section click on **SoftTouch Msgs**.

SoftTouch Msgs

You will see a list of any **SoftTouch** messages that the site could benefit from. To view a message, highlight the appropriate message from the **Message List** and press **Get Messages**.



Part XVII

Hardware Section

Part 18 Hardware Section

The **Hardware** section.

The Hardware section contains the following:

1. Stations
2. Self-Pay
3. Printers/Coursing
4. Pole Display
5. Caller ID
6. Credit Cards
7. Pager/Alerts
8. Email/SMS
9. Dineblast Mobile

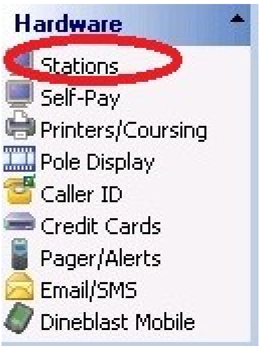
Part XIX

Stations

Part 19 Stations

Under the **Hardware** section click on **Stations**.

Stations



Stations explanation includes the following:

1. Stations
2. Options
3. Order Functions
4. Security
5. Hardware Devices
6. Tax
7. Price Schedules
8. Menus
9. Sharing

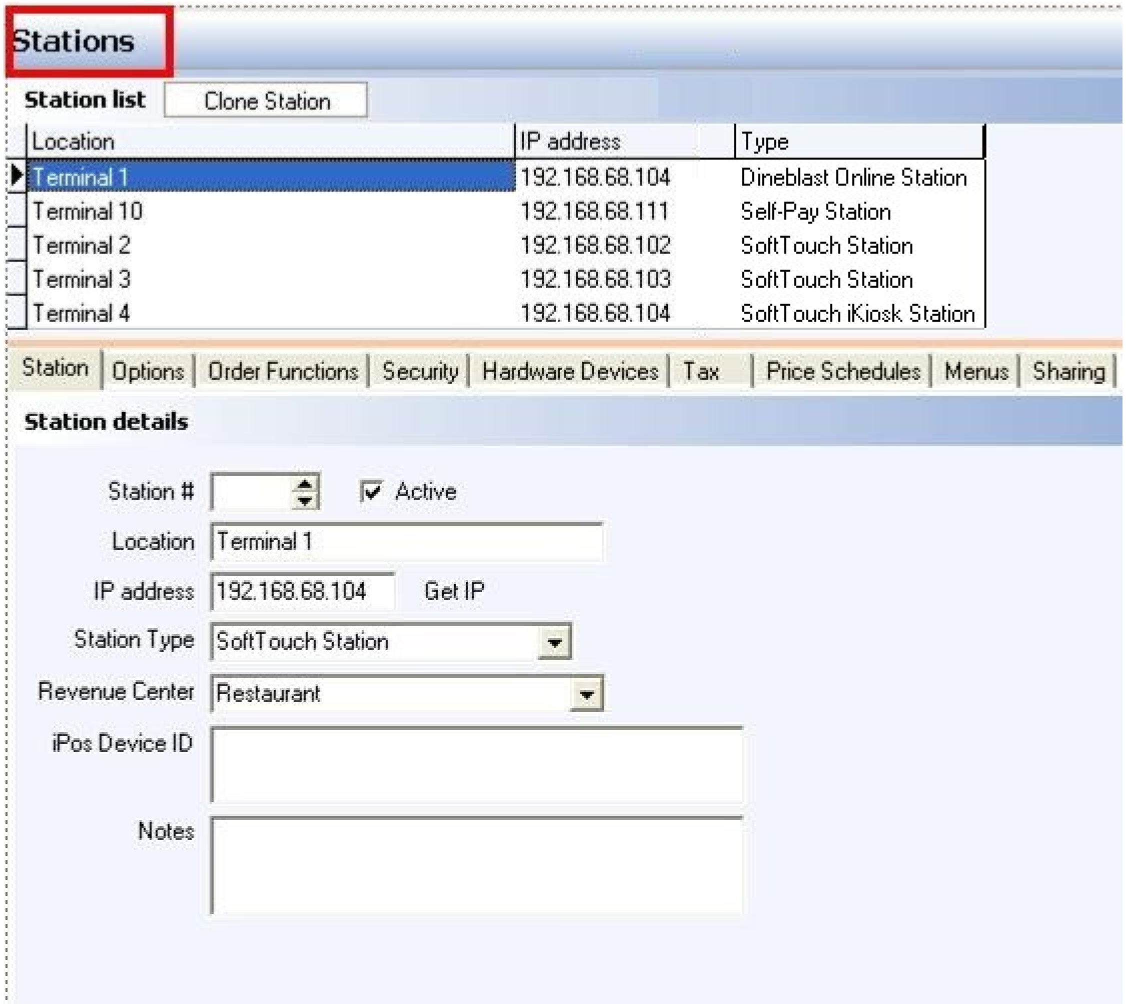
19.1 Station Tab

Under the **Hardware** section click on **Stations**. Select the **Station** tab.

Station

All the stations that you add show up under the **Station list** part of the screen.

By default, anything with just a black arrow next to it is what is highlighted/selected.



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

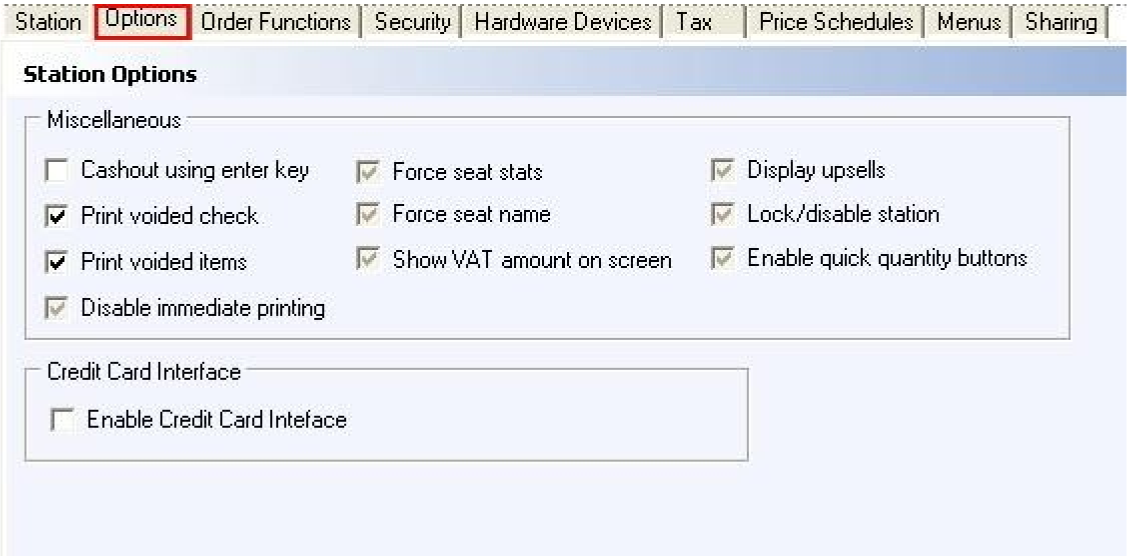
Station #	This is the SoftTouch record number for this station.
Active	This box is checked by default when you create a new workstation. It must be checked for the station to operate.

Location	This is the name you assign to the station.
IP Address	This is the station's IP address.
Get IP	Under Station List, select/highlight the name of the workstation you're on, then press the **Get IP** button. The IP of the selected workstation you are on will automatically fill in the IP of the computer you are on. ***Note: This can only be done for the workstation you are physically at.**
Station Type	Your choices from the drop down are: SoftTouch Station - used for SoftTouch POS workstations SoftTouch iTable - used for the iTable, table mounted solution Dineblast Online Station - used by SoftTouch when setting up online menus Self-Pay Station - used for Self-Pay Kiosk Dineblast Mobile Station - reserved for future use SoftTouch iPOS Station - used for the iTouch hand held devices SoftTouch iKiosk Station - used for the iKiosk stations
Revenue Center	You select the revenue center you want this station to report to from the drop down. To learn more about Revenue Centers now, click Revenue_Centers.
Device ID	This is where you enter the Device ID if using the iTouch hand held solution.
Notes	This is an optional field where you can clarify what this station is used for with a longer description than used in the Location field.

19.2 Options Tab

Under the **Hardware** section click on **Stations**. Select the **Options** tab.

Options



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

Miscellaneous

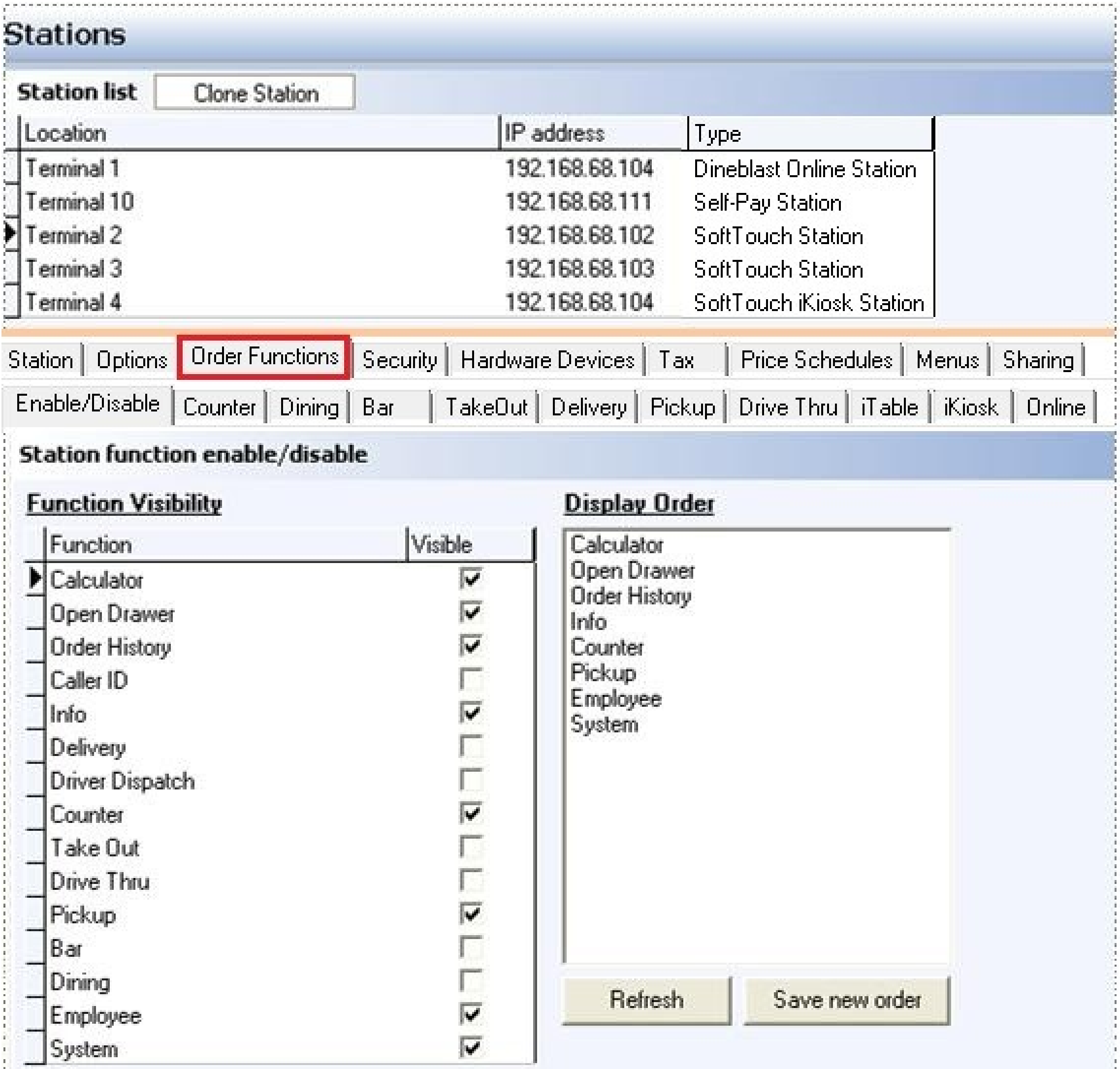
Cashout Using Enter Key	If checked, allows you to hit Enter key on the keyboard when on the cashout screen. Equivale Enter button on-screen.
Print Voided Check	When this option is checked voided checks will be printed.
Print Voided Items	When this option is checked voided items will be printed.
Disable immediat e printing	When an employee rings up a delivery order, you have the option to print the check when the when send is hit, or you can wait until the order is dispatched to a driver. If you wish to wait dispatched to a driver, check this option box.
Force seat stats	When this option is checked a server will have to enter customer statistics for each person on gender and age group. The system will then keep track of the appetizers and desserts most f each demographic and can display suggestions in the Upsell display.

Force seat name	When this option is checked a server will have to enter the customer's name occupying the se
Show VAT amount on screen	When this option is checked the value added tax is displayed for liquor items.
Display upsells	When this option is checked all upsells (from Items & Stock and from Seat Statistics) are app
Lock/Disable Station	When this option is checked you will not be able to take orders in SoftTouch from that station
Enable Quick Quantity Buttons	Puts the quantity buttons across the top of the screen for fast ordering of large quantities of a easy to punch in 6 Buds, for example. 
Enable Credit Card Interface	When this option is checked the station will allow credit cards to be accepted.

19.3 Order Functions

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab.

Order Functions



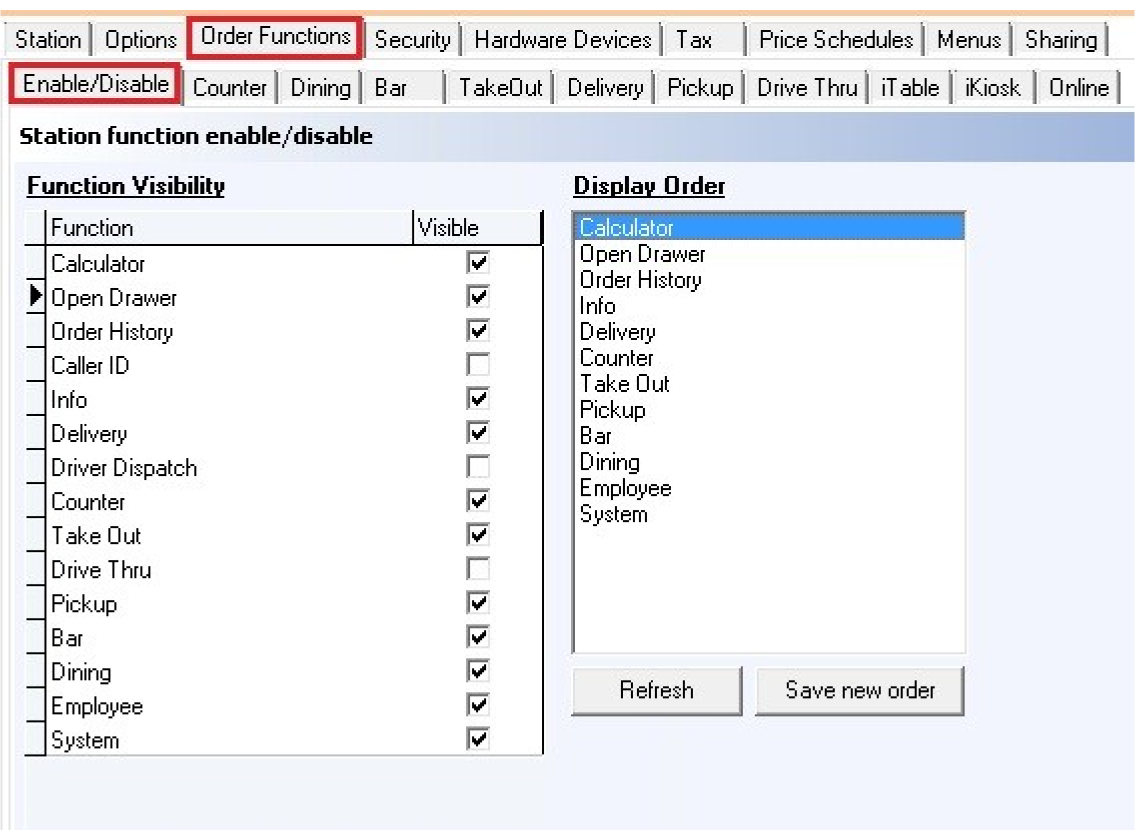
Order function explanations include the following:

1. Enable/Disable
2. Counter
3. Dining
4. Bar
5. TakeOut
6. Delivery
7. Pickup
8. DriveThru
9. iTable
10. iKiosk
11. Online

19.3.1 Enable/Disable

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **Enable/Disable** tab.

Enable/Disable



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

- Station Functions -

1. Under this list is all the options for Functions/Modes that can be displayed in the POS system. Enable only the functions needed by the restaurant.

The List:

Calculator	Useful when the cashier/server needs to figure out how to evenly split a tender between two cash tenders to get the proper change.
Open Drawer	If the drawer is set to "manual open" this option will let you manually pop open the drawer.
Order History	This button will allow you to pull up a history of the last checks rung to reopen a check, reprint a check, adjust a payment on a check or add a credit card tip to a check. The number of checks that will be displayed is determined by what you set in the System applet under the General tab (see **System->General Tab** for more information).
Caller ID	The Mode that lets you get into the Caller ID area to answer the incoming calls. Only needs to be enabled if you have Caller ID set up for your system.
Info	Gives information about SoftTouch; cannot be unchecked.
Delivery	Enables Delivery Mode.
Driver Dispatch	If you have Delivery Mode Checked on, you must also have the Driver Dispatch area checked on, because Driver Dispatch is where you assign the deliveries to the drivers.
Counter	Enables Counter Mode on the highlighted workstation.
Take Out	Enables Take Out mode on the highlighted workstation.
Drive Thru	Enables Drive Thru mode on the highlighted workstation.
Pickup	Used in Conjunction with Counter (if Counter mode is not set to cash out immediately), Take Out, and Drive Thru modes. This is the section the checks are placed in for cashout purposes.

Bar	Enables Bar mode on the highlighted workstation.
Dining	Enables Dining mode on the highlighted workstation.
Employee	Enables Employee mode. This mode is where the employees can view their checks, assign drawers, etc.
System	Enables System mode. This is where the Managers can overview checks, get into House Accounts, do a Manual Z, etc.

2. To enable any of the modes listed, place a check next to that item under the **Visible** column. Anything unchecked will not be displayed for the station selected.

Example:

- Display Order -

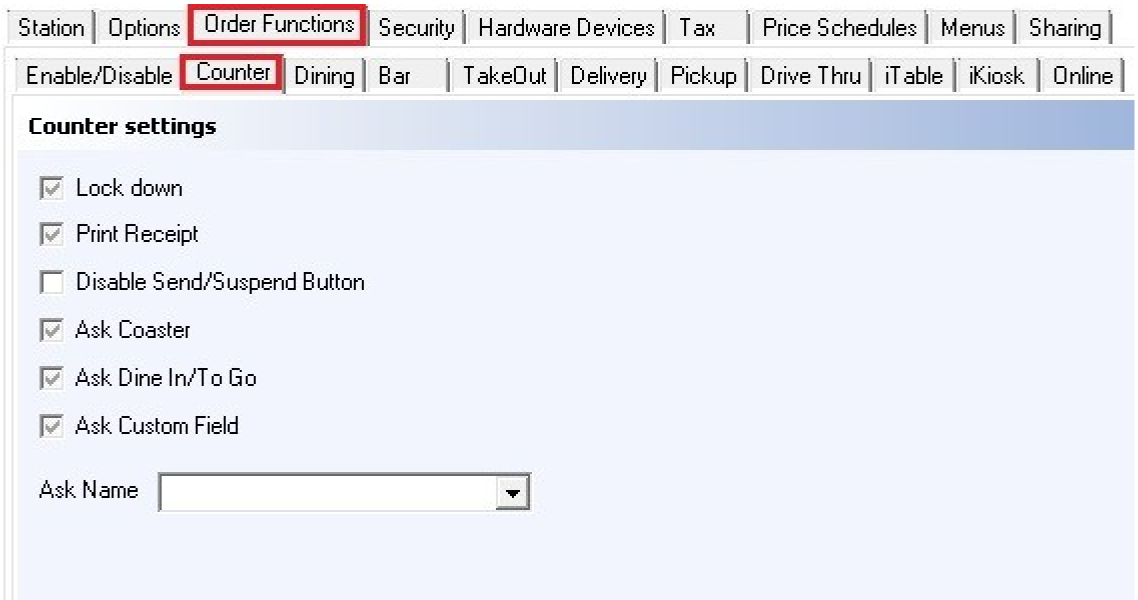
1. You can click and drag on the functions/modes that are checked on for visibility in this section. Once you have dragged and dropped the list into the order in which you would like it displayed in the POS system you can click the Save New Order button.

2. If you click the Refresh button before you click the "Save New Order" button, the list will refresh back to the original state. Once you have clicked the "Save New Order" option, if you move some things and then click refresh without clicking Save New Order, it will default to the last order of the list you saved.

19.3.2 Counter

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **Counter** tab.

Counter



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

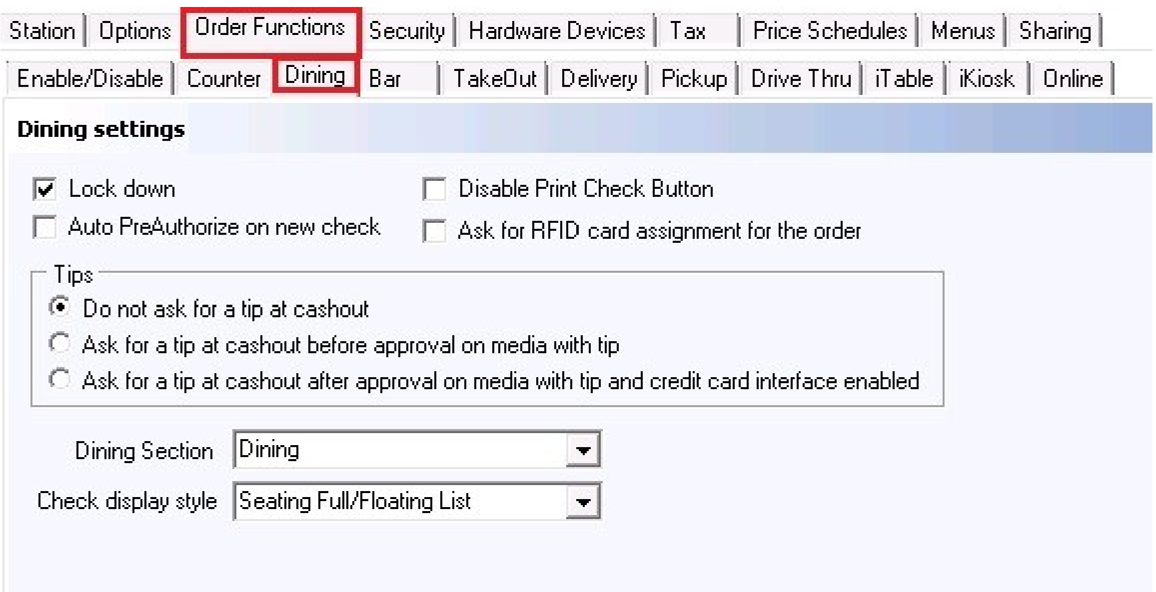
Lock Down	If checked, once you enter counter mode, the system will stay in counter mode until another mode is selected.
Print Receipt	If checked, you will get a receipt for every transaction rung in counter mode.
Disable Send/ Suspend Button	If checked, you will not be able to Send an order while in counter mode.
Ask Coaster	If checked, you will be prompted to enter the number assigned to the coaster you give the customer to page them when their order is ready.
Ask Dine In/To Go	If checked, you will be prompted to select whether each counter order is a Dine In order or a To Go order.
Ask Custom Field	If checked, you will be prompted to enter information pertaining to the custom field you set up.

Ask Name	Your options from the drop down are: Ask name on "Send" - you will be prompted for customer name only when using Send Ask name on "Cashout" - you will be prompted for customer name only on Cashout Ask name on "Send/Cashout" - you will be prompted for customer name with Send or Cashout Don't ask for a name - you will not be prompted for a customer name *** If left blank, you will not be prompted for a customer name.**

19.3.3 Dining

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **Dining** tab.

Dining



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

- Dining Options -

Lock Down	If checked, once you enter Dining mode, the system will stay in Dining mode until another mode is selected.
Auto PreAuthorize on new check	With this selected, if you ring a check in dining mode and go to the cashout screen, you will see a pre auth button that is automatically on. You can now swipe a card and it pre-authorizes the credit card rather than closing the check. This can be done by station.

Disable Print Check Button	If checked, the Print button will not work in Dining mode on the highlighted workstation.
Ask for RFID card assignment for the order	This should most likely be left unchecked except for use with self-pay stations.

- Tips Options -

Do not ask for a tip at cashout	When you select this option, you will not be asked for a tip when you apply a credit card payment to a check.
Ask for a tip at cashout before approval on media with tip	When you select this option, you will be asked to enter a charge tip before the receipt is printed for the guest to sign when you apply a credit card payment to a check.
Ask for a tip at cashout after approval on media with tip with credit card interface enabled	When you select this option, you will be asked to enter a charge tip after the receipt is printed for the guest to sign when you apply a credit card payment to a check.

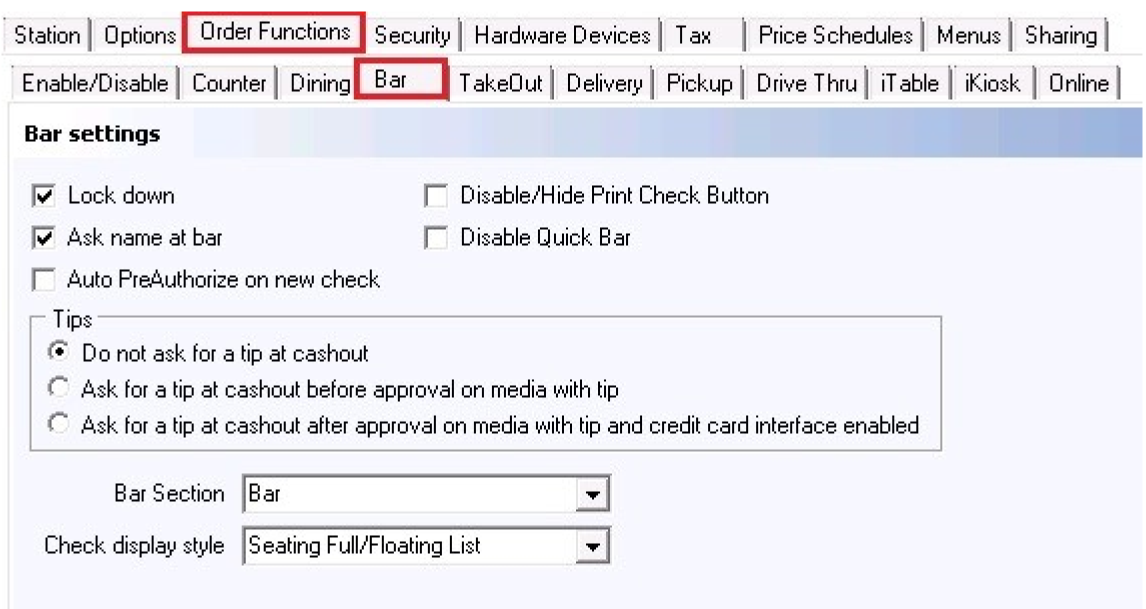
Dining Section	Select the layout you will be using for Dining mode from the drop-down. I f you wish to learn more about this feature now go to **Seating/Zones->Designer Tab**.

Check display style	You can select one of the following Check display styles form the drop down: • Seating List/Floating List • Seating Full/Floating List • Seating List/Floating Full • Seating Full/Floating Full **Seating** refers to checks at a table or seat and **Floating** refers to orders that are not attached to a certain table or seat (if someone orders a drink from the bar but walks around, for example). When you view all seating of floating checks in SoftTouch, **List** will show basic details of checks and **Full** will show the actual check images. **List** allows more to be viewed at once. **Full** may take longer to load on some computers.

19.3.4 Bar

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **Bar** tab.

Bar



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

- Bar Options -

Lock Down	If checked, once you enter Bar mode, the system will stay in Bar mode until another mode is selected.

Ask name at bar	If checked, you will be prompted to assign a name to each bar order.
Auto PreAuthorize on new check	With this selected, if you ring a check in bar mode and go to the cashout screen, you will see a pre auth button that is automatically on. You can now swipe a card and it pre-authorizes the credit card rather than closing the check. This can be done by station.
Disable/ Hide Print Check Button	If checked, the Print button will not work in Bar mode for the highlighted workstation.
Disable Quick Bar	Quick Bar is a feature that will allow an employee to ring up sales and close them out without assigning the check to a table or running a tab. It is designed for high speed scenarios where the bar will close out the checks as they ring them, for a pay as you go situation.

- Tips Options -

Do not ask for a tip at cashout	When you select this option, you will not be asked for a tip when you apply a credit card payment to a check.
Ask for a tip at cashout before approval on media with tip	When you select this option, you will be asked to enter a charge tip before the receipt is printed for the guest to sign when you apply a credit card payment to a check.
Ask for a tip at cashout after approval on media with tip with credit card interface enabled	When you select this option, you will be asked to enter a charge tip after the receipt is printed for the guest to sign when you apply a credit card payment to a check.

Bar Section	Select the layout you will be using for Dining mode from the drop down. I f you wish to learn more about this feature now go to **Seating/Zones->Designer Tab**.
Check display style	You can select one of the following Check display styles form the drop-down: Seating List/Floating List Seating Full/Floating List Seating List/Floating Full Seating Full/Floating Full

19.3.5 TakeOut

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **TakeOut** tab.

TakeOut

First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

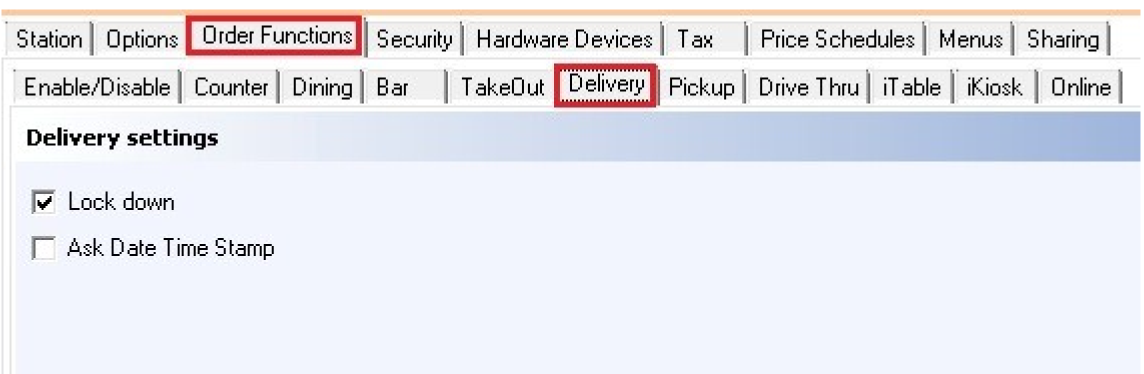
Lock down	If checked, once you enter Takeout mode, the system will stay in Takeout mode until another mode is selected.

Ask Date Time Stamp	If checked, the system will prompt the user for a date and time at the beginning of each transaction.
Print Receipt	If checked, you will get a receipt for each transaction rung in Takeout mode.
New Takeout Order Options	You can select one of the following Takeout Order Options form the drop down: **Search for a customer** - This will bring up a customer's past order history. **Do not search for a customer** - This requires customer information but does not bring up past order history. **Fast takeout only** - This does not require customer information or bring up or create order history.

19.3.6 Delivery

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **Delivery** tab.

Delivery



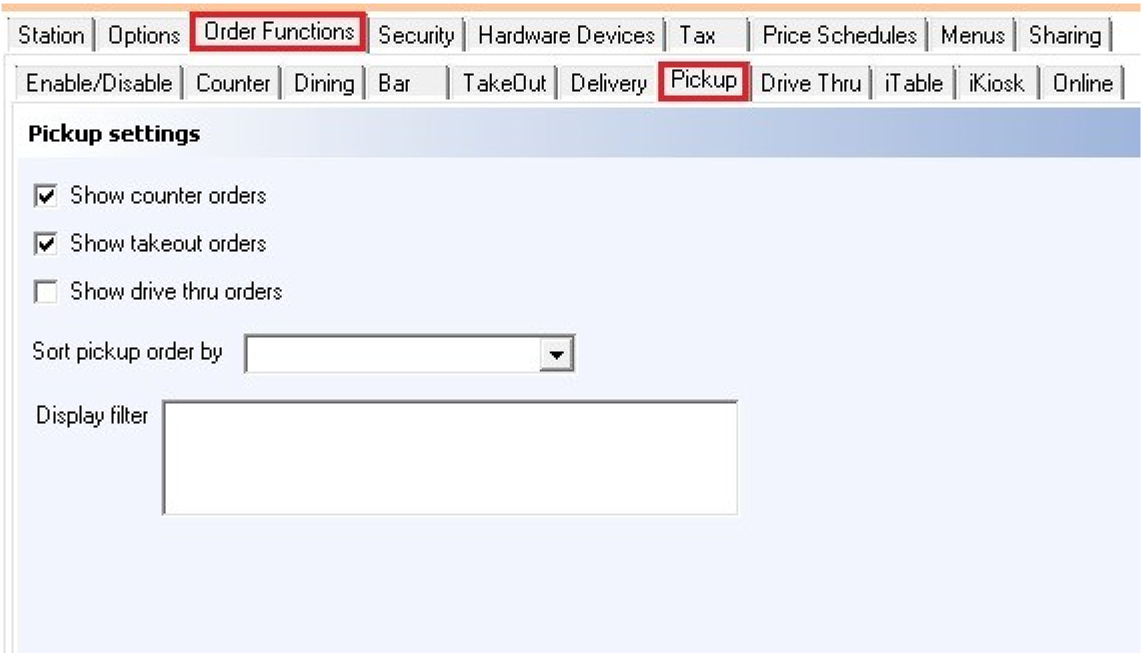
First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

Lock down	If checked, once you enter Delivery mode, the system will stay in Delivery mode until another mode is selected.
Ask Date Time Stamp	If checked, the system will prompt the user for a date and time at the beginning of each transaction.

19.3.7 Pickup

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **Pickup** tab.

PickUp



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

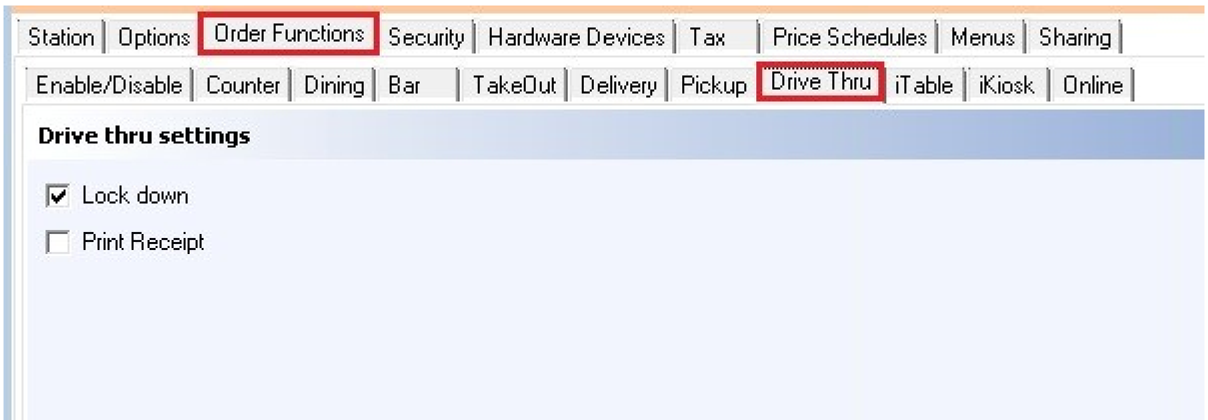
Show counter orders	If checked, you will see any Counter orders that were sent, rather than closed, in Pickup mode.
Show takeout orders	If checked, you will see any TakeOut orders that were sent, rather than closed, in Pickup mode.
Show drive thru orders	If checked, you will see any Drive Thru orders that were sent in Pickup mode.
Sort pickup order by	You can select one of the following "Sort pickup order by" options form the drop-down: Check date/time ascending Check date/time descending

Display filter	Used in a dual drive through scenario.

19.3.8 Drive Thru

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **Drive Thru** tab.

Drive Thru



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

Lock down	If checked, once you enter Drive Thru mode, the system will stay in Drive Thru mode until another mode is selected.
Print Receipt	If checked, you will get a receipt for each transaction rung in Drive Thru mode.

19.3.9 iTable

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **iTable** tab.

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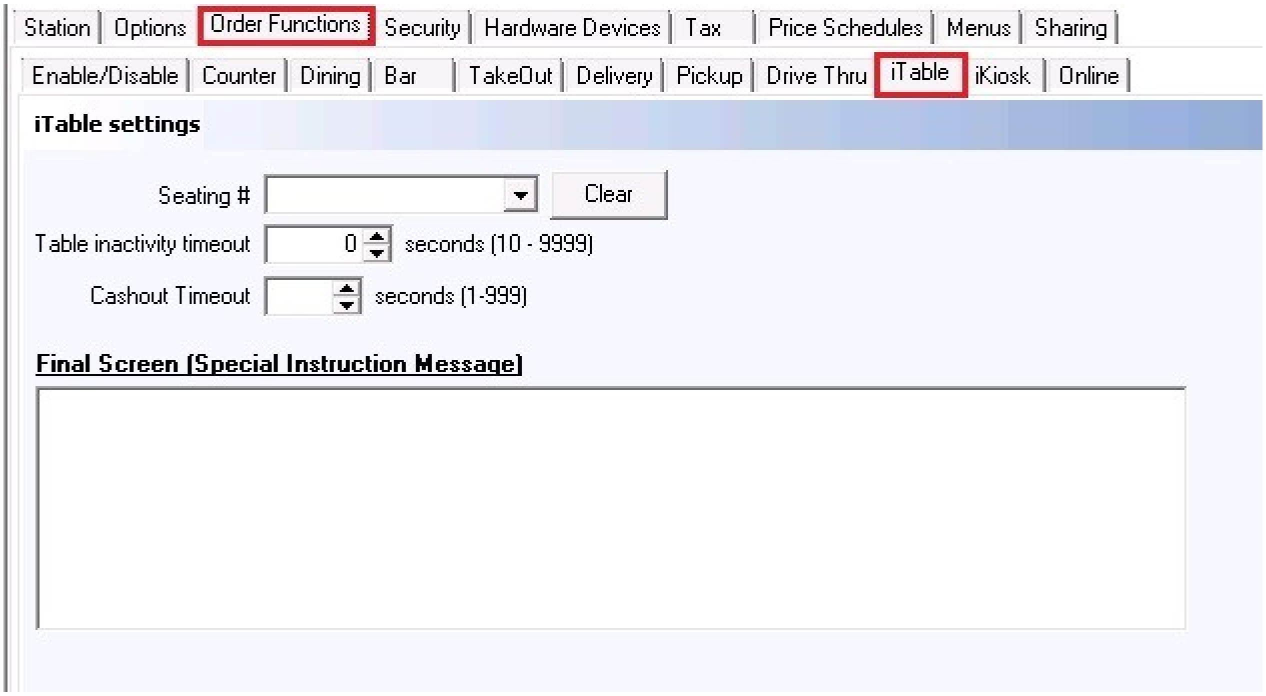
iTable



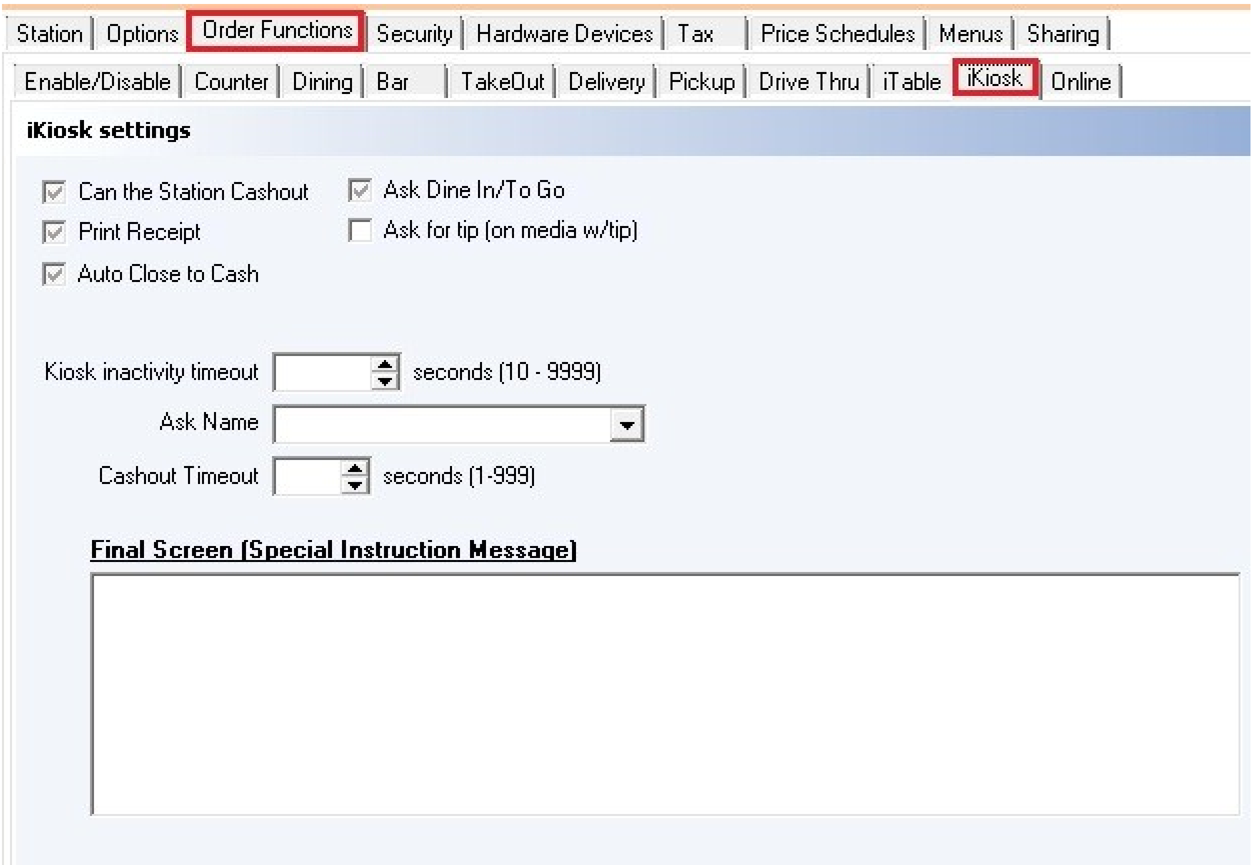
First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

Seating #	Enter the table number where this iTable device (highlighted above) will be located.
Table inactivity timeout	Enter the amount of time this device should go unused, in seconds, before the device reverts to the welcome screen.
Cashout Timeout	Enter the number of seconds that you wish the station to stay on the cashout screen before it times out.
Final Screen	If you wish the screen to display a final message, enter it here.

19.3.10 iKiosk

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **Kiosk** tab.

iKiosk



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

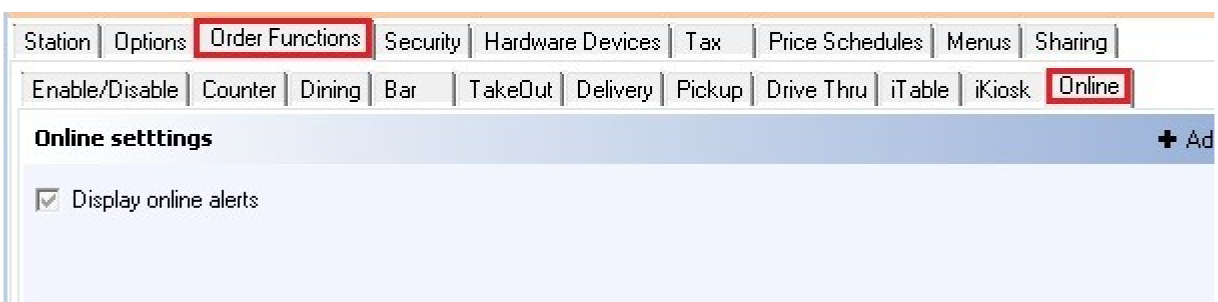
Can the Station Cashout	If checked, you will be able to cash out from the kiosk.
Print Receipt	If checked, you will be able to print a receipt from the kiosk, providing you have the station set up to print properly. (To learn more about setting up printing, see **Printers/Coursing**).
Auto Close to Cash	This should most likely be left unchecked but is available for special meta payment situations; automatically closes as a cash payment.
Ask Dine In/To Go	If checked, the system will ask if the order is dine in or to go with each transaction.

Ask for tip (on media w/tip)	If checked, you will be asked for a tip when cashing out to a credit card at the iKiosk.
Kiosk inactivity timeout	Enter the number of seconds that you wish the station to stay active before it times out.
Ask Name	Your options from the drop down are: Ask name - you will be prompted for customer name Don't ask for a name - you will not be prompted for a customer name
Cashout Timeout	Enter the number of seconds that you wish the station to stay on the cashout screen before it times out.
Final Screen	If you wish the screen to display a final message (e.g., Please pay at the cashier station), enter it here.

19.3.11 Online

Under the **Hardware** section click on **Stations**. Select the **Order Functions** tab, then select the **Online** tab.

Online



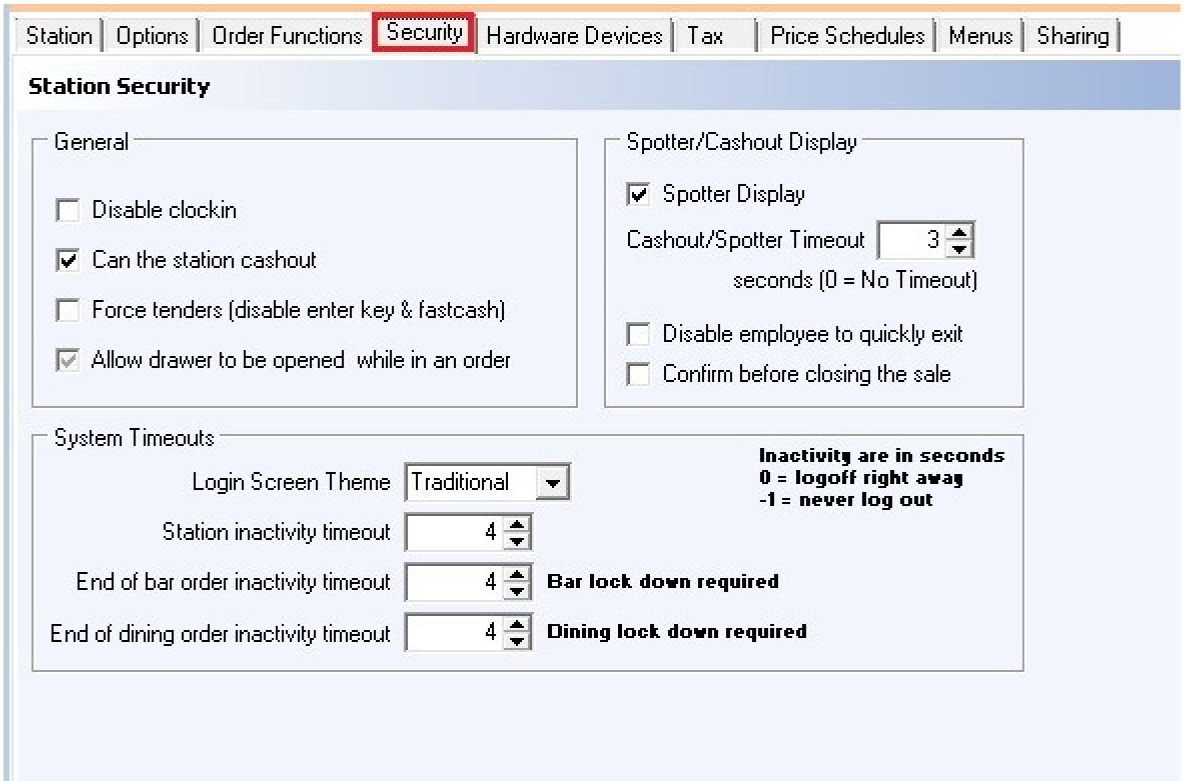
First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

Display online alerts	If checked, an alert will appear on the screen of this workstation any time an online order is placed. This is used in conjunction with online ordering.

19.4 Security Tab

Under the **Hardware** section click on **Stations**. Select the **Security** tab.

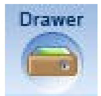
Security



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

General:

Disable clockin	Disables employees from being able to clock in on specific stations. This can help an owner or manager keep track of payroll by forcing them to clock in or out on a station that is in plain view.
Can the station cashout	If this option is not checked you will not be able to cash out at that station; you will only be able to take orders. So check this option if you want to be able to cash out at the highlighted station.
Force tenders (disable enter key & fastcash)	Forces employees to enter an exact tender amount. They will not be able to cashout simply by hitting the Enter button. For example, if the customer hands them a $20.00 for a check total of $19.24, they must enter "$20.00" in SoftTouch. The FastCash key will also be disabled.

Allow drawer to be opened while in an order	If checked, you will be able to open the cash drawer (see SoftTouch button below) using the "No Sale" button while in the middle of the order. Used most often to make change for a customer while in counter mode.  ***Note**: The restaurant needs to be aware that this can cause security issues if the drawer can be opened in the middle of an order.

System Timeouts

Login Screen Theme	You can change login screen theme: traditional or black.
Station inactivity timeout	Set the time (in seconds) when the system will go to the login screen after an order when on the main (chalkboard) screen.
End of bar order inactivity timeout	Sets the time (in seconds) when the system will go to the login screen after an order when in Bar mode.
End of dining order inactivity timeout	Sets the time (in seconds) when the system will go to the login screen after an order when in Dining mode.

Spotter/Cashout Display

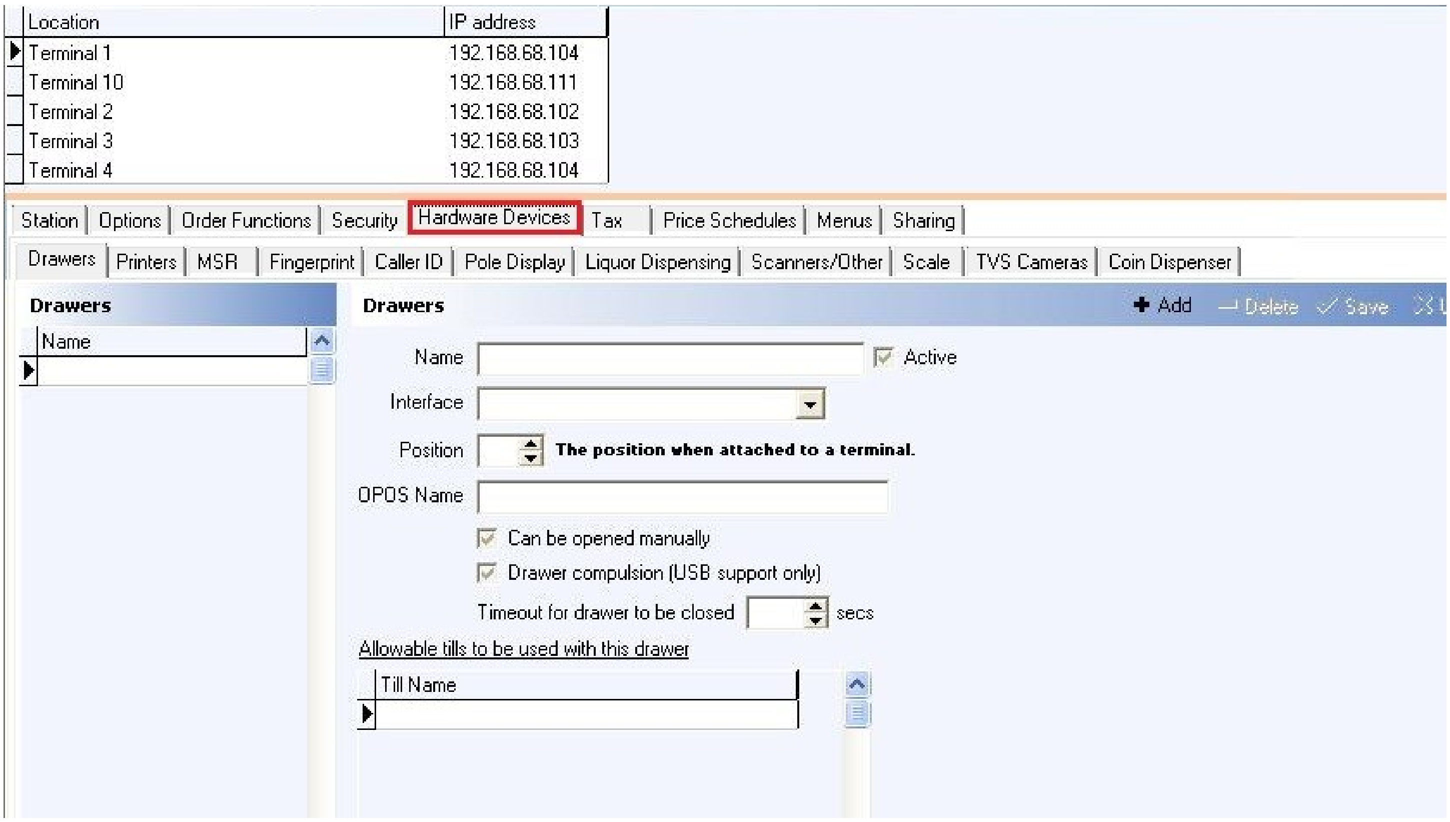
Spotter Display	If checked, you will see a Spotter Display when orders are cashed out, that will display the Total of the check and the Change due to the customer in a very large print so a manager can spot check orders.
Cashout/Spotter Timeout	Allows you to specify the time (in seconds) after a check is cashed out before you will be automatically returned to the floor layout or chalkboard.

Disable employee to quickly exit	If checked, you will not have access to the **Yes** button to quickly exit the Cashout Spotter screen. The screen will stay on for the specified number of seconds and then the system will automatically exit the Cashout Spotter screen.
Confirm before closing the sale	If checked, you will need to press Yes or No to verify the amount tendered on the Cashout screen.

19.5 Hardware Devices

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab.

Hardware



Hardware explanations include the following:

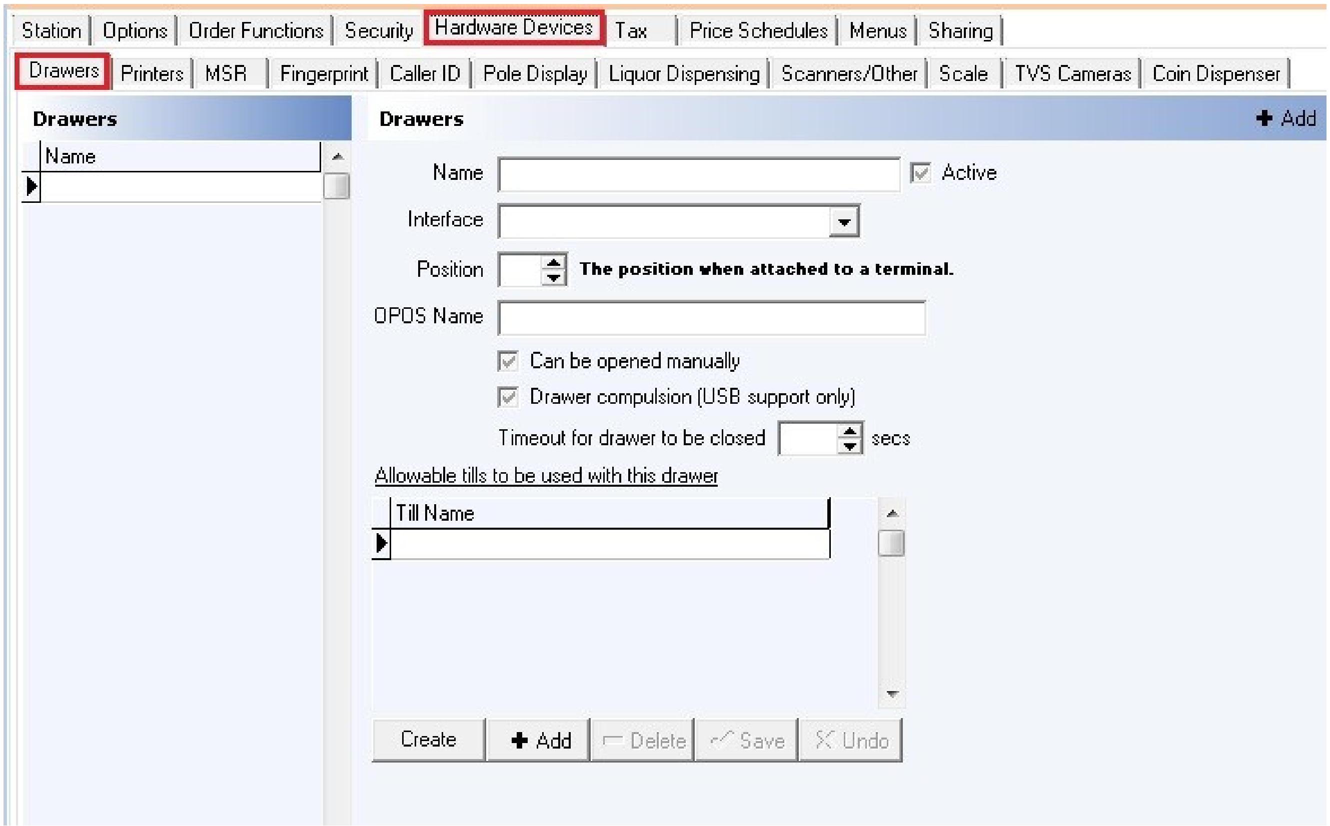
1. Drawers
2. Printers
3. MSR
4. Fingerprint
5. Caller_ID
6. Pole_Display
7. Liquor_Dispensing
8. Scanners/Other
9. Scale
10. TVS_Cameras

11. [Coin Dispenser]

19.5.1 Drawers

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then select the **Drawers** tab.

Drawers



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

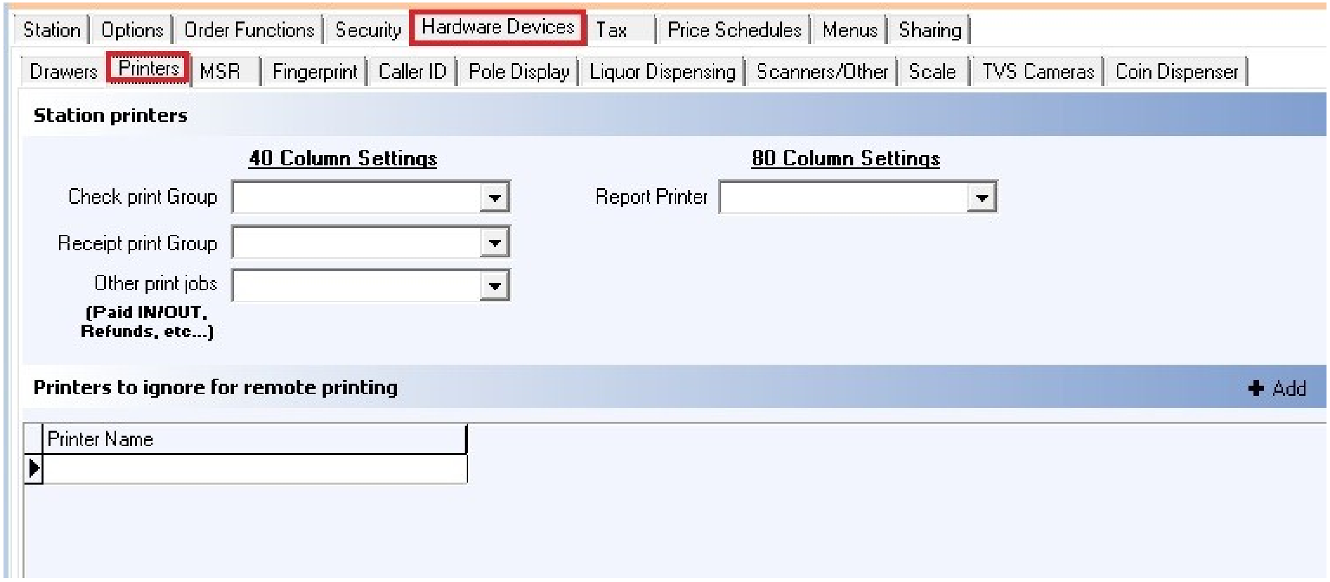
Name	You will enter the name of the cash drawer in this field. If you have 2 cash drawers, you may want to name them Cash Drawer 1 and Cash Drawer 2. To add additional drawers, use the **Add** button above, in the blue bar. The name can be entered in the list of Drawer names on the left or in the blank field on the right.
Interface	You can select one of the following Interfaces: No Interface Printer Interface OPOS Interface M-S Cash Drawer USB Interface

Position	If you have more than one cash drawer attached to a workstation, you can select position 1, 2, 3 or 4 depending on where the cash drawer is plugged in.
OPOS Name	If this is an OPOS drawer, enter the OPOS name here.
Can be opened manually	If checked, you will be able to perform a No Sale (opening the drawer between sales) from this workstation.
Drawer compulsion (USB support only)	How With this option selected, you must close the drawer before you can ring a new order. You need a USB drawer from MS Cash Drawer for this to work.
Timeout for drawer to be closed	How many seconds the station should wait before displaying a message for the employee to close the drawer.
Allowable tills to be used with this drawer	Clicking on the space below **Till Name** will activate a drop-down from which you can select a till that will be used with the highlighted cash drawer. To add another till, use the **Add** button below this section. To add a till that is not on the list, press the **Create** button, but you may need to go to the Banks applet to adjust its settings. Another option is just to create a new till using the Banks applet and then return here, where it will now appear on the drop-down list.

19.5.2 Printers

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then select the **Printers** tab.

Printers



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

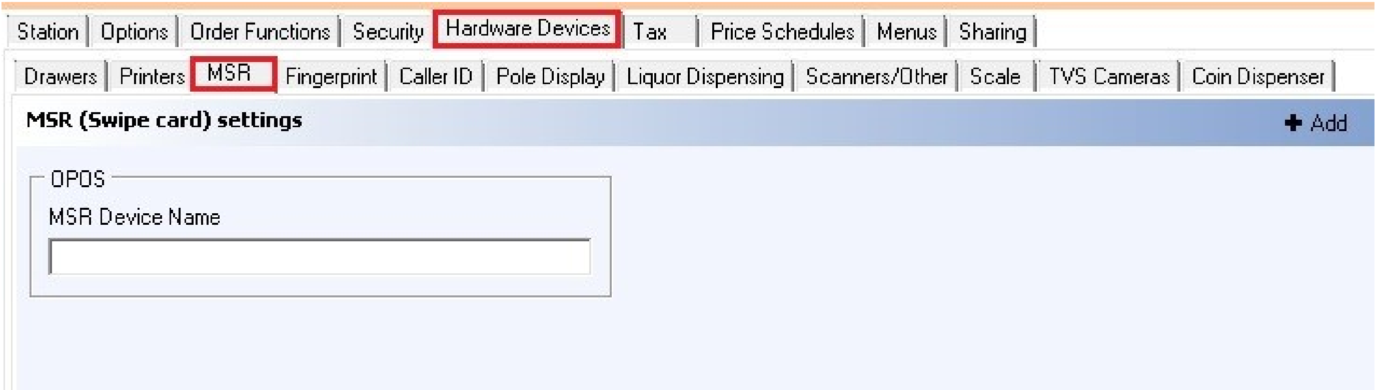
Check Print Group	From the drop-down list of printers set up in Windows on the selected station, select the printer you wish to print the 40 column guest check.
Receipt Print Group	From the drop-down list of printers set up in Windows on the selected station, select the printer you wish to print the 40 column receipt.
Other Print Jobs	From the drop-down list of printers set up in Windows on the selected station, select the printer you wish to print all other print jobs.
Report Printer	From the drop-down list of printers set up in Windows on the selected station, select the printer you wish to print the 80 column reports.
Printers to ignore for remote printing	You can opt to have the selected station ignore remote printing to a particular remote printer. This is useful if you have a bar remote printer and you wish drinks to send to the bar remote printer when servers ring up from a server station, but not have drinks print to the bar remote printer when the bartender rings up drinks from a bar station. To ignore multiple printers for remote printing, use the **Add** button and select additional printers.

For more information on setting up printing, see **Printers/Coursing**.

19.5.3 MSR

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then s elect the **MSR** tab.

MSR



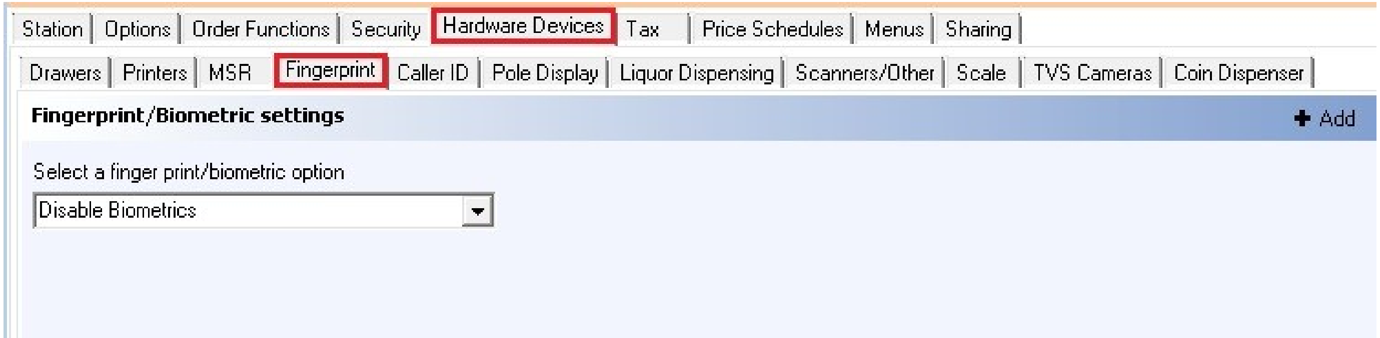
First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

If you are using an OPOS MSR, enter the OPOS name here.

19.5.4 Fingerprint

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then s elect the **Fingerprint** tab.

Fingerprint



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

You can select from the following options:

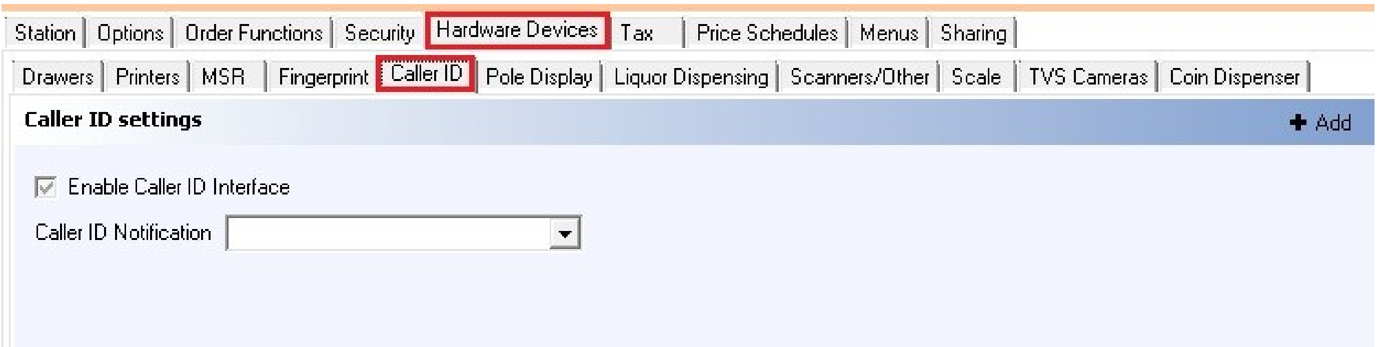
Disable Biometrics - if selected, fingerprint readers will not work
Enable Biometrics Globally - if selected, fingerprint readers will work for ringing sales as well as time clock and override functions
Enable Biometrics for Time Clocks Only - if selected, fingerprint readers will work for time clock only

Enable Biometrics for Overrides Only - if selected, fingerprint readers will work for overrides only
Enable Biometrics for Overrides & Time Clocks Only - if selected, fingerprint readers will work for time clock and override functions

19.5.5 Caller ID

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then select the **Caller ID** tab.

Caller ID



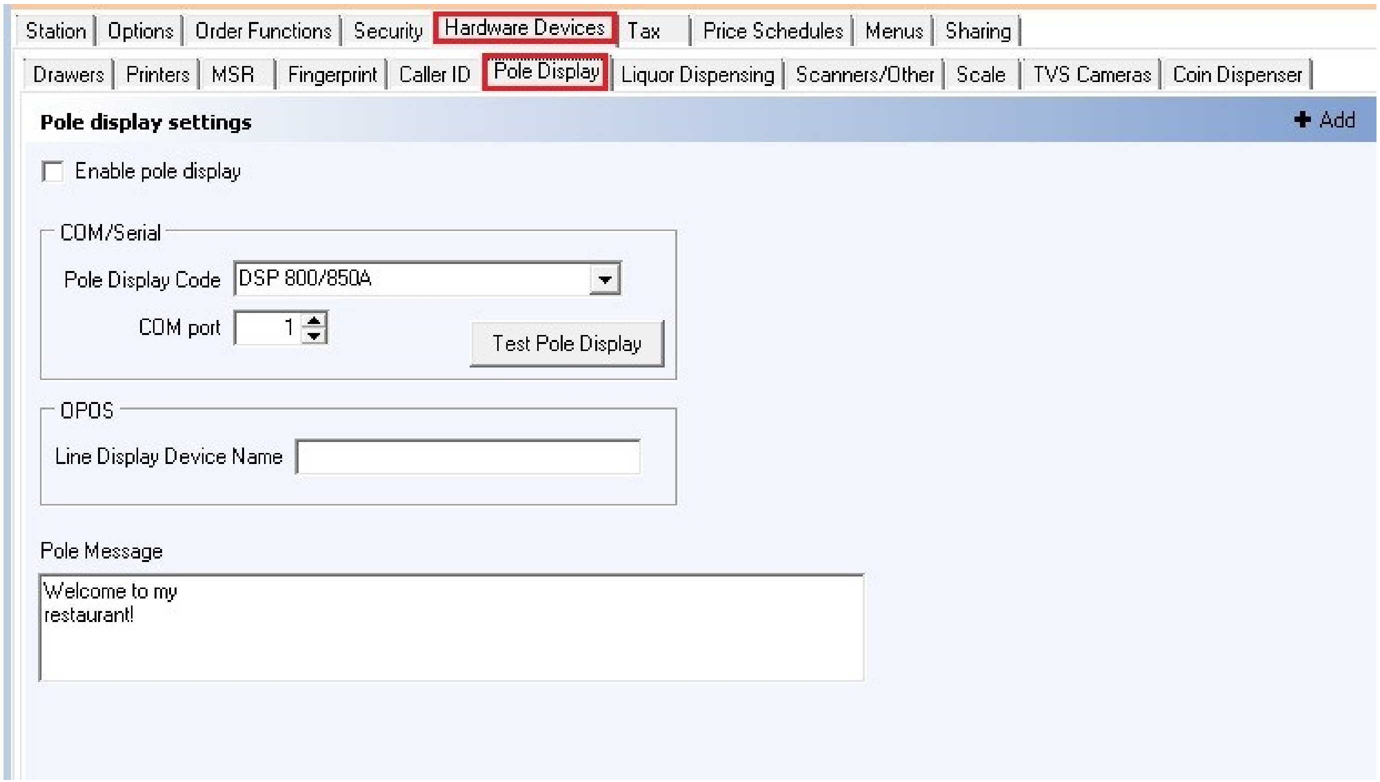
First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

Enable Caller ID Interface	This box must be checked for Caller ID to work on this workstation.
Caller ID Notification	You can select from the following options: No notification - if selected, you will not be notified when a call comes in Popup notification - if selected, you will get a popup notification with the customer's name and phone when a call comes in

19.5.6 Pole Display

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then select the **Pole Display** tab.

Pole Display



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

- Assign Pole Display -

Enable pole display	If checked, the pole display is enabled. To disable, simply uncheck the check box.
Pole Display Code	From the drop-down menu choose a pole display. For pole displays to show up here, you have to set them up using the **Pole Display** applet.
COM port	Specify the COM port that pole display is connected to on the workstation.
OPOS	This is used for NCR machines that employ OPOS drivers to display. Leave blank if using a normal serial pole display.
Pole Message	Enter the message to be displayed when pole display is idle.

19.5.7 Liquor Dispensing

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then s elect the **Liquor Dispensing** tab.

Liquor Dispensing

Liquor Dispensing Interface

This is where you configure your liquor dispensing settings. We currently use the Berg "Basic" interface, so to ensure compatibility check with your manufacturer that they also use the standard Berg "Basic" interface.

First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

- **Serial Interface** (Berg "basic" specifications) -

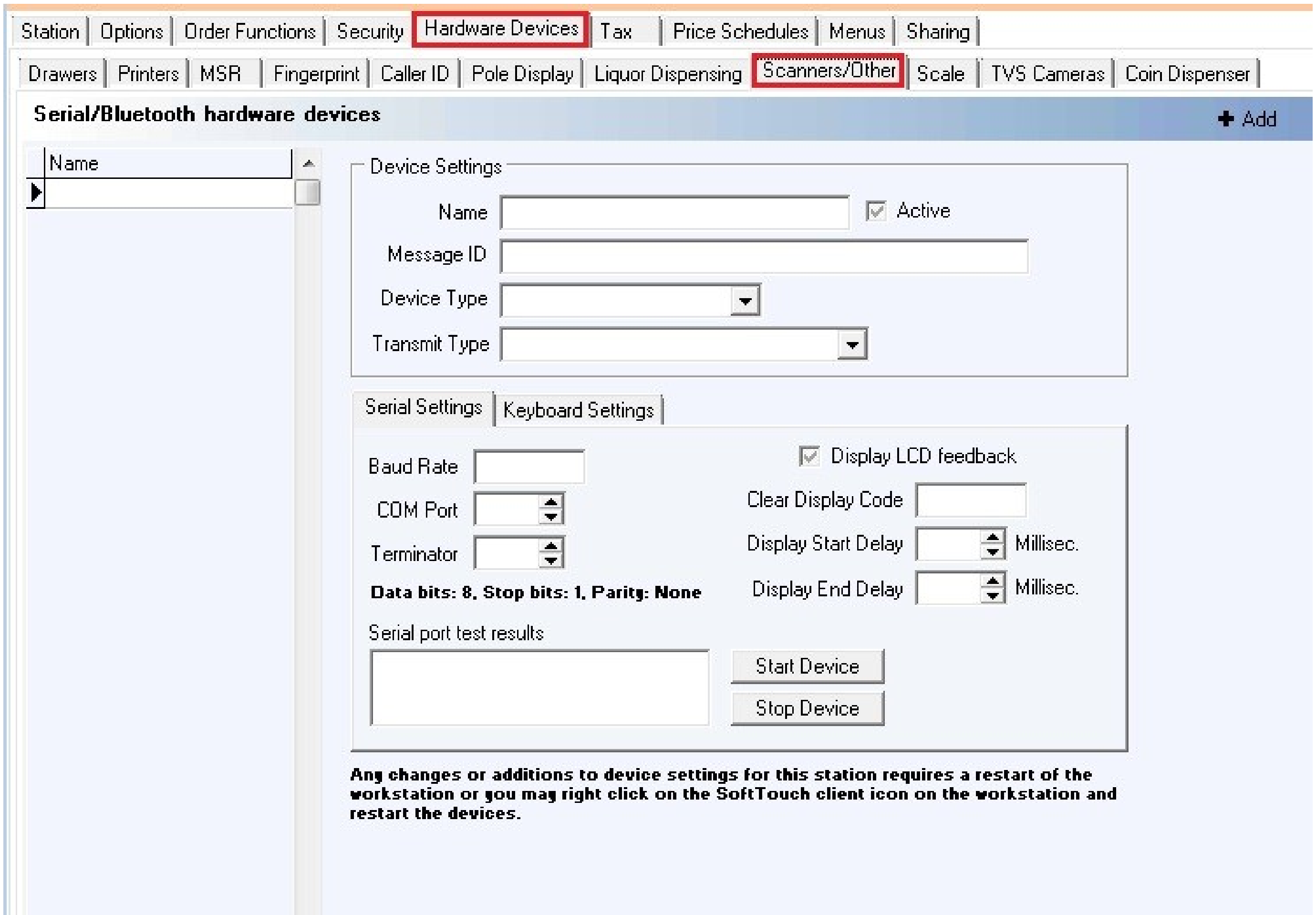
Check the **Enable liquor dispensing** box if you are connecting a liquor dispensing unit and want SoftTouch to interact with it.

COM Port	This is the COM port used on the computer.
Baud Rate	This is the speed of data transfer (typically 9600).
Parity	This is typically set to None.
Data Bits	This is typically set to 8.
Stop Bits	This is typically set to 1.

19.5.8 Scanners/Other

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then s elect the **Scanners/Other** tab.

Scanners/Other



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

Name	This is the name of the device at the station. You can name it whatever you want, typing the name into either the space in the list on the left or the blank field on the right. To add more device names, use the **Add** button.
Active	This box must be checked in order for the selected device to be active.

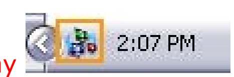
Message ID	Used in conjunction with the Paging/Alert system. This is the message to be displayed on the server's pager when a chef scans a barcode to tell them to come pick up the food. This will tell the server WHERE to go to get the food. Put something like "Chef Station 1" or "Chef Station 2." If you only have one place where the servers pick up the food, then this can be left blank.
Device Type	This is type of device you are setting up: Serial Bluetooth Keyboard USB or PS/2 type scanners should be set to Keyboard.
Transmit Type	**Front End Code Mode** - With this option you can: • Look up tickets in System > Overview • Assign deliveries to a driver • Automatic Item scanning • Look up tickets in the Pickup section • Pickup checks while on the Dining or Bar seating layouts **Back End Mode** - This mode is designed to be used in conjunction with a pager system so that servers will be alerted when the chef has finished making food. A scanner set to "Back End Mode" would be placed in the kitchen with the Chefs. • Chef will scan an order in the kitchen when food is ready so that the server will be paged. • Server will scan the order when they pick up the food and bring it to the table. This marks the food as "served" so that they will stop being paged. **Convert to Keyboard Data** - Anything coming through the serial port will get converted to keyboard data. **Coaster Mode Only** - Use this mode if the restaurant is using coasters only and not pagers. The coasters are given to customers and are called by scanning a bar code on the kitchen ticket when the customer's food is ready. **Pager Mode Only** - Use this mode if you are using employee pagers, but not coasters.

- Serial Settings -

If you are using a keyboard device, you can ignore these settings.

Baud Rate	This is the speed of data transfer (typically 9600).
COM Port	This is the serial communication port.
Terminator	Terminating signal (typically 13).
Display LCD feedback	When checked, displays feedback text to a scanner with an LCD display.
Clear Display code	Display codes for the LCD. Refer to your manufacturer's manual for this code. Must be in decimal format.
Display Start Delay	Number of milliseconds to wait before displaying LCD feedback after a scan. This is useful if the scanner has a default message after a scan and you need to wait until that message is cleared before displaying feedback.
Display End Delay	Number of milliseconds to wait before clearing the LCD feedback.

You can test a serial device by pressing the Start Device button, then scanning a barcode of some kind. Any data passed through the serial port will show up in the **Serial port test results** window. If no data is showing, check to make sure your com port assignment is correct. When you are finished testing, click the Stop Device button.

***NOTE:** You must exit the softclient.exe which you will find in the system tray 

while testing the scanner using the 'Start Device' and 'Stop Device' buttons. Once you are finished, restart softclient.exe. It can be found in the SoftTouch folder on the C drive or in your start menu programs under SoftTouch. **Also, after making any changes to the scanner settings, you must exit and restart the SoftClient.**

Keyboard Settings:

If you are using a serial device, you can ignore these settings.

Prefix	The prefix that is programmed into your scanner. This field requires an Ascii code. For example, if your prefix is a an Ampersand (&), that would correspond to a 38 in Ascii code. For instructions on programming a prefix into your scanner, refer to the manufacturer's user manual.
Suffix	The suffix that is programmed into your scanner. This field requires an Ascii code. For example, if your prefix is an asterisk (*), that would correspond to a 42 in Ascii code. For instructions on programming a suffix into your scanner, refer to the manufacturer's user manual.
Allow Keystrokes	Don't use; leave unchecked.

***NOTE:** If you are using a PS/2 or USB "keyboard wedge" barcode scanner, then there are certain characters you should avoid for the prefix and suffix. The reason for this is because there are certain characters that may conflict with characters read from magnetic swipe card readers.

The following characters are what is recommended for either a prefix or suffix.

ASCII Code	Character Value
126	~
42	*
35	#

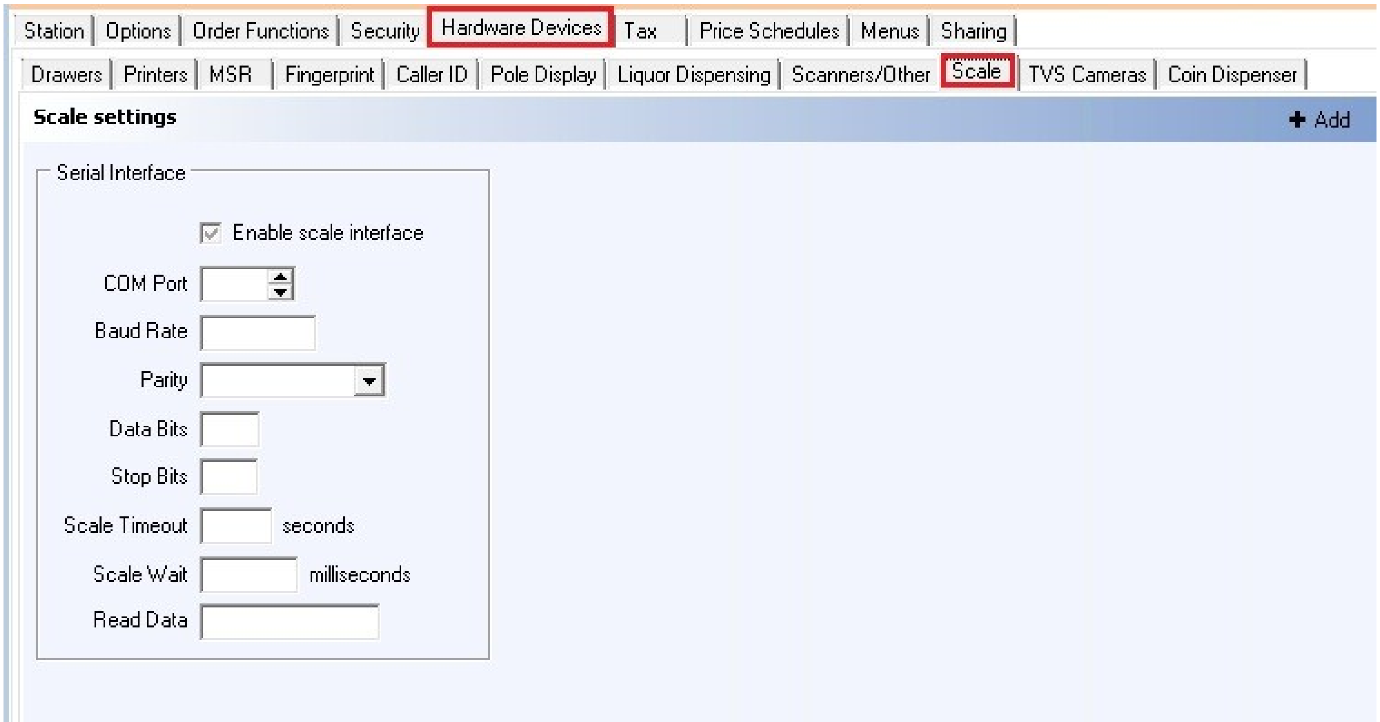
Do NOT use the following characters for the prefix or suffix of your barcode scanner (they may conflict with swiping credit cards):

ASCII Code	Character Value
37	%
59	;
94	^
63	?
47	/
36	$
61	=

19.5.9 Scale

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then s elect the **Scale** tab.

Scale



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

Enable Scale Interface	Check this on if you have a scale hooked up to the station that you would like to have enabled. ***Note:** Remember, ALL SCALES must use NCI Serial Protocol!
COM Port	Specify the COM port that pole display is connected to on the terminal.
Baud Rate	This is the speed of data transfer. ***Note:** To get this information you would have to look at the set-up guide booklet that came with the scale.
Parity	This is typically set to None, but check the set-up guide for the scale before you set it to none.

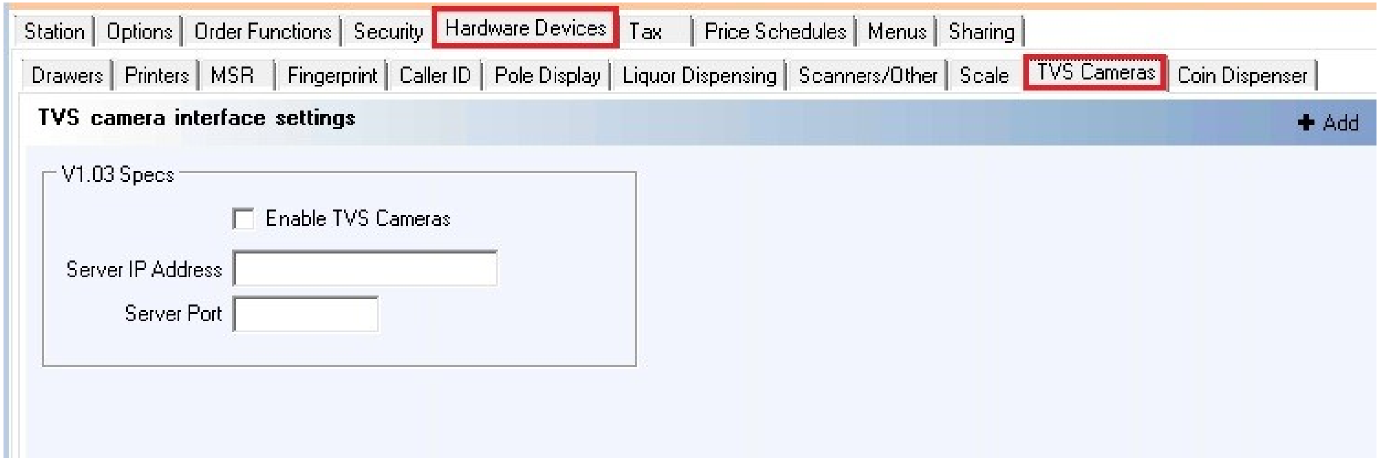
Data Bits	This is typically set to 8, but check the set-up guide for the scale before you set it to 8.
Stop Bits	This is typically set to 1, but check the set-up guide for the scale before you set it to 1.
Scale Timeout (seconds)	Use the Scale Timeout to set how long the item being weighed can sit on the scale before it is timed out. Keep in mind this goes by seconds.
Scale Wait (milliseconds)	Use the Scale Wait to set the amount of time the readings from the scale show up in the POS system before the pop-up box is closed. Keep in mind this goes by milliseconds.
Read Data	Used internally.

19.5.10 TVs Cameras

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then s elect the **TVS Cameras** tab.

TVs Cameras

SoftTouch can export transaction text to TVS security cameras. The text can then be overlayed on top of the video at the time of the transaction. Any TVS camera interface should work as long as it supports TVS V1.03 specifications. Talon DVR is recommended (www.possmi.com).



First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

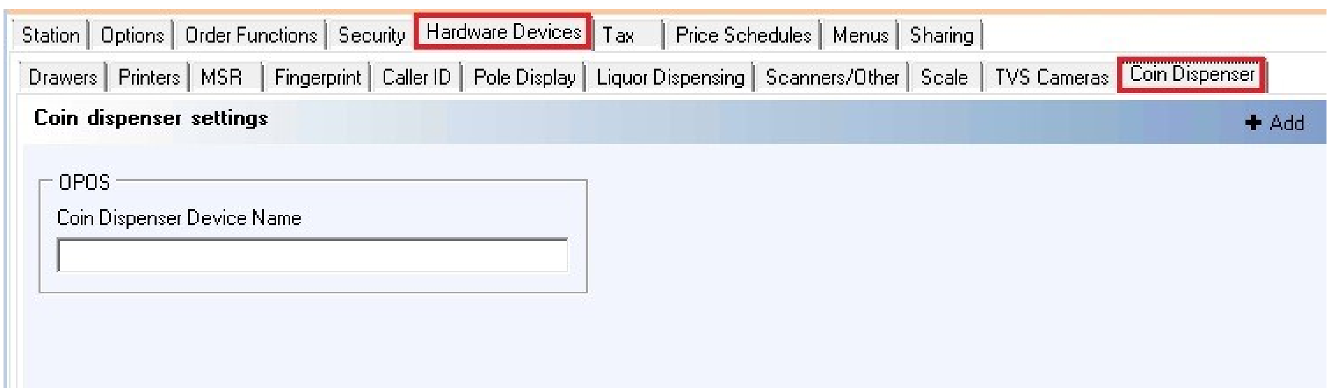
TVS Settings

Enable TVS Cameras	This allows communications with the TVS cameras.
Server IP Address	This is the address of the TVS server.
Server Port	This is the port number open for communication to the TVS server.

19.5.11 Coin Dispenser

Under the **Hardware** section click on **Stations**. Select the **Hardware** tab, then s elect the **Coin Dispenser** tab.

Coin Dispenser



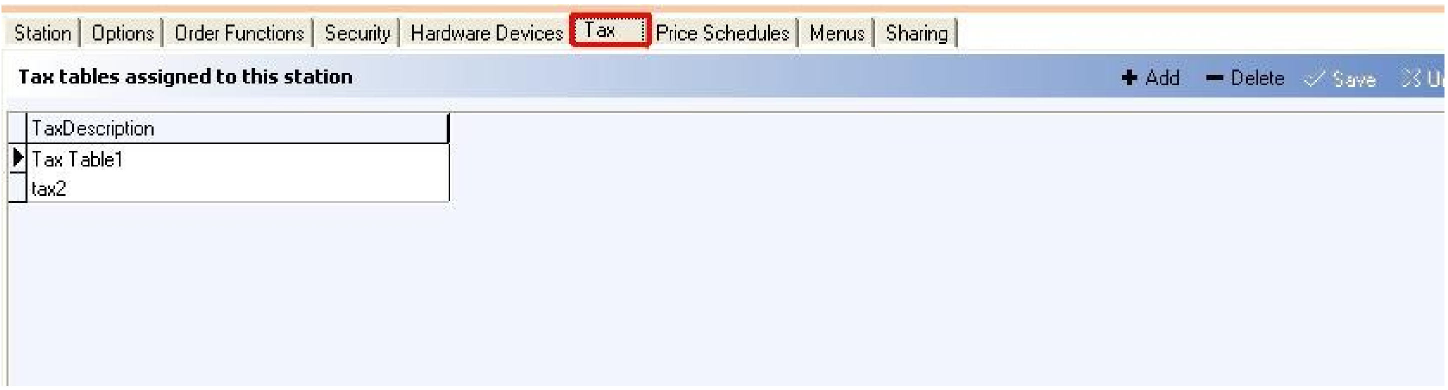
First select the station by highlighting it from the **Station list** part of the screen. This is the station you will be making changes to.

If you are using an OPOS Coin Dispenser, enter the OPOS name here.

19.6 Tax Tab

Under the **Hardware** section click on **Stations**. Select the **Tax** tab.

Tax



Here you specify which tax table will be used at the currently selected station. If you do not add a tax to the station, the station will not charge tax, even if the items being ordered on that station have a tax assigned.

To set up a tax table so it is available from the drop-down list, go to **Financial->Tax Table**.

***Note:** You can add multiple taxes per station if necessary. Use the 

button to do so.

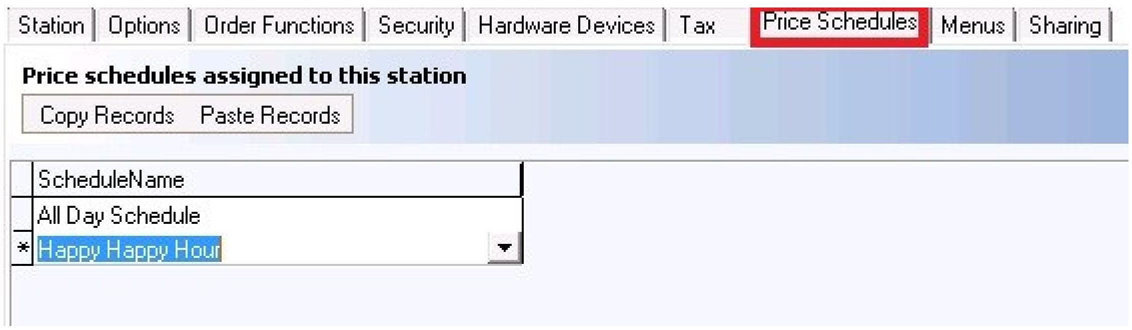
***Note:** If none of your items are non-taxable, you do not have to create a tax table or assign any to a station.

***Note:** If you set up a tax table and do not assign it to ANY workstations, the system has a fail-safe built in that will assign tax to ALL stations. If you have the tax assigned to only one workstation, it will only be applied at the one workstation and none of the others.

19.7 Price Schedules Tab

Under the **Hardware** section click on **Stations**. Select the **Price Schedules** tab.

Price Schedules



Price schedules assigned to this station

1. Select a station from the **Station list** part of the screen.

2. Click in the white space under **ScheduleName** for the drop-down arrow to show up.

3. Click the drop-down arrow and you will see all the Schedules you have created. Choose the desired price schedule.

2. Click the ✚ Add button to assign additional price schedules to this station.

You have to add the schedules that are pertinent to this station. If you do not know then add all the schedules.

If you need to create schedules so that they will show up in the drop-down list, go to **General->Scheduling->System Schedules**.

- Copy Price Schedules -

When this is finished you may copy these price schedules to other workstations.

1. Press and hold Ctrl key on your keyboard while clicking on the price schedules you wish to copy. The selected ones will be highlighted now.

2. Click the Copy Records button.

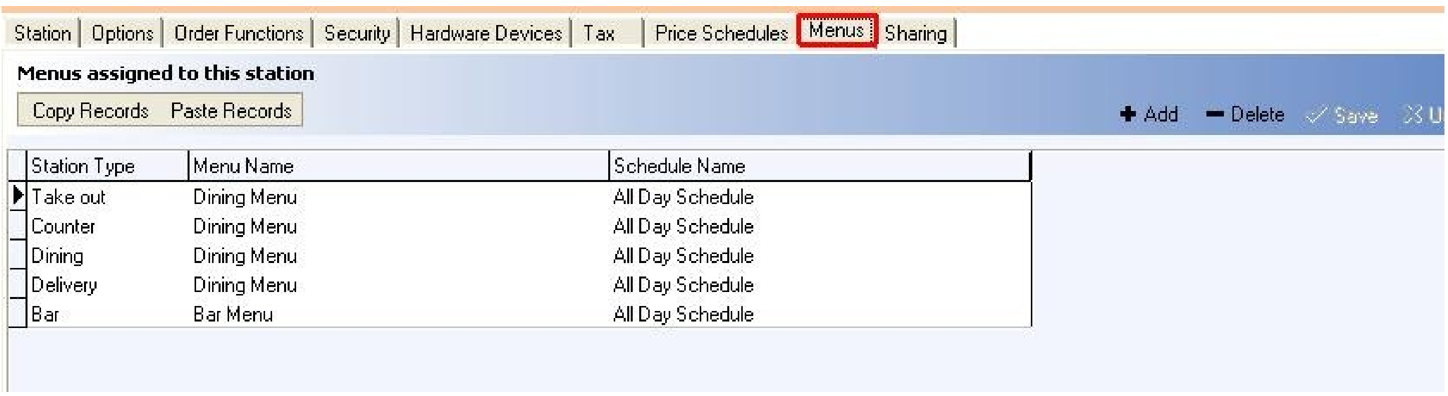
3. Select another workstation from the **Station list** part of the screen and under **Price Schedules** click the Paste Records button.

You have now copied the selected price schedules to another station.

19.8 Menus Tab

Under the **Hardware** section click on **Stations**. Select the **Menus** tab.

Menus



Here you assign menus and their schedules to the currently selected station.

- Assign Printers -

Step 1.

Select a station from the **Station list** part of the screen.

Step 2.

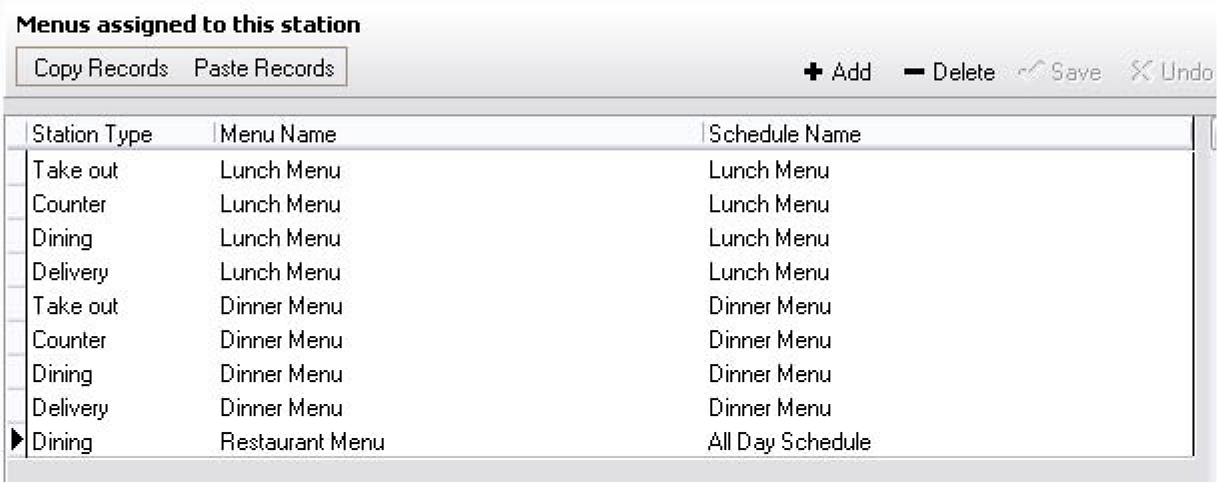
Under the **Station Type** column click in the white space. Then click the drop-down arrow and choose a Station Type the menu you are about to assign will be accessible from.

Step 3.

Choose the menu name by clicking in the white space under the **Menu Name** column and using the drop-down list. You created menu names under **Item Builder->Main Menus**.

Step 4.

Under **Schedule Name** click in the white space and from the drop-down menu you will see all the schedules you created in **Scheduling->System Schedules**. Choose a schedule for that menu. This is the time that this menu is available. See image below:



Station Type	Menu Name	Schedule Name
Take out	Lunch Menu	Lunch Menu
Counter	Lunch Menu	Lunch Menu
Dining	Lunch Menu	Lunch Menu
Delivery	Lunch Menu	Lunch Menu
Take out	Dinner Menu	Dinner Menu
Counter	Dinner Menu	Dinner Menu
Dining	Dinner Menu	Dinner Menu
Delivery	Dinner Menu	Dinner Menu
Dining	Restaurant Menu	All Day Schedule

Step 5.

You must continue linking menus to all station types that you will be using (example: Take Out, Counter, Delivery, Bar).

Click the + Add button and repeat the steps above for all station types and menus needed for this workstation.

-Copy Menus -

You can copy this to other Stations/Terminals.

1. Press and hold Ctrl key on your keyboard while clicking on all the station types you wish to copy. The selected ones will be highlighted now.

2. Click the Copy Records button.

3. Select another workstation from the **Station list** and under **Menus** click the Paste Records button.

You have now copied the selected menus to another station.

19.9 Sharing Tab

Under the **Hardware** section click on **Employees**. Select the **Sharing** tab.

Station Sharing

Station sharing is used when you want to grant certain access from one station to another.

When this option is used, the staff using the station that is listed in the Station Name field will have specified access to that station (Cash out only or Full Access) and both of the terminals will be responsible for the drawer total.

***Note:** This is not the same as the option "Pickup all employee checks" under Employee Tab/Security setup, which allows access to every employee's checks. Station sharing is used more often in a cashier situation.

Example: In the image above, you see that we added Terminal 1 to the selected workstation and gave it "Cash out only" access. What this does is enable a user from the selected workstation to cash out orders entered at Terminal 1. If we were to grant Full Access here, then a user from the selected workstation would be able to edit the checks entered at Terminal 1 as well as cash them out.

- Add Station Sharing -

Click the white spaces under **Station Name** and **Access** to activate the drop-down lists and make your selections.

Use the  button to specify additional station sharing arrangements.

Click the  button when you are finished.

- Delete Station Sharing -

To delete, select a shared Station Name and click the  button. Click "OK" to the confirmation dialog ("Delete record?").

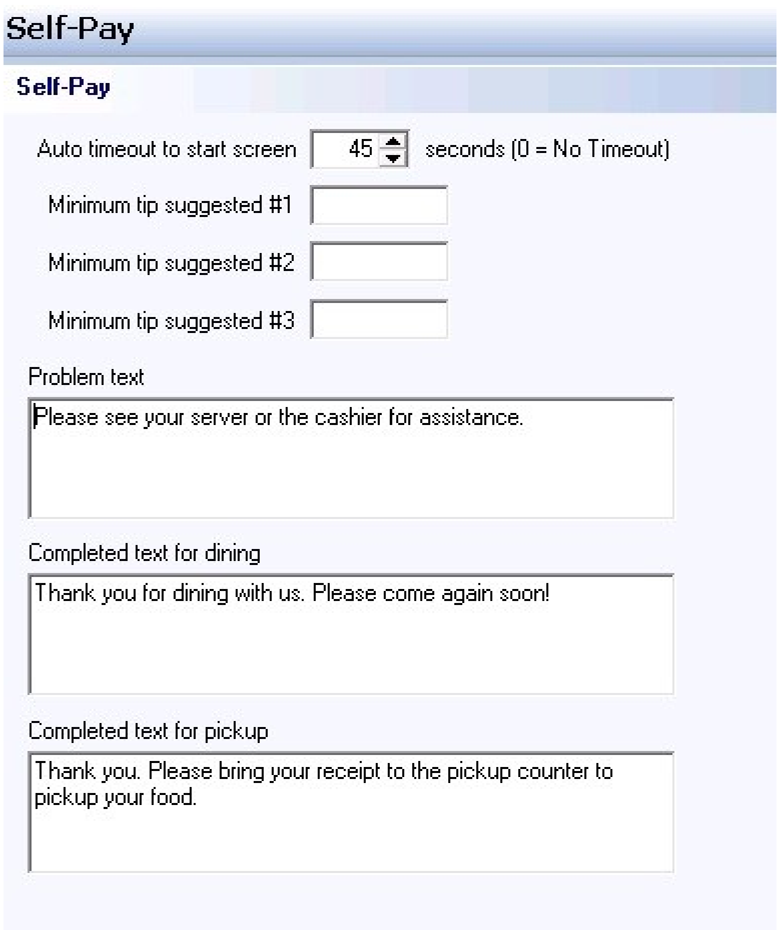
Part XX

Self-Pay

Part 20 Self-Pay

Under the **Hardware** section click on **Self-Pay**.

Self-Pay



Self-Pay setup:

Auto timeout to start screen	Amount of time (in seconds) that will be allowed to pass before a message pops up to ask the customer if he/she needs more time. If they do not reply then it will abort the customer's cashout progress and go back to the main screen.
Minimum Tip Suggested #1	You may enter a number to represent a suggested gratuity. If you wish to suggest a 20% gratuity, for example, enter 20 here.
Minimum Tip Suggested #2	You may enter a number to represent a second suggested gratuity. If you wish to suggest a second gratuity of 18%, for example, enter 18 here.
Minimum Tip Suggested #3	You may enter a number to represent a third suggested gratuity. If you wish to suggest a third gratuity of 15%, for example, enter 15 here.
Problem text	Enter the text you would like to appear on screen when the user sees a problem with their order and presses the "I see a problem" button.
Completed text for dining	This text will appear upon completion of paying for a dining order.
Completed text for pickup	This text will appear upon completion of paying for a pickup order.

***NOTE:** Upon purchasing a Self-Pay machine, complete setup instructions will be included.

Part XXI

Printers/Coursing

Part 21 Printers/Coursing

Under the **Hardware** section click on **Printers/Coursing**.

Printers/Coursing

Printer Setup holds the following settings:

1. Printer Settings

2. Print Codes

3. Add Printers

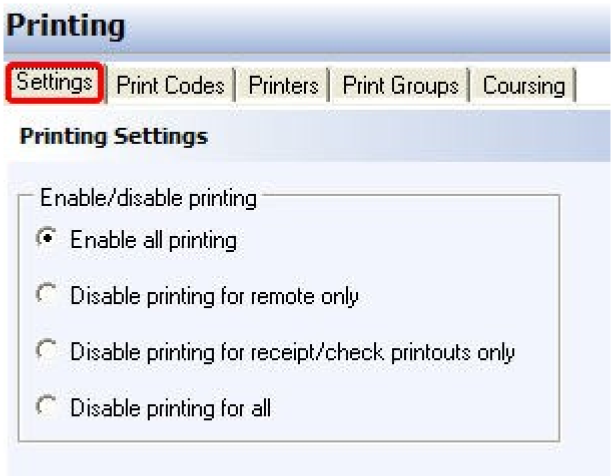
4. Create Print Groups, Assign Printer to Print Group

5. Coursing

21.1 Settings Tab

Under the **Hardware** section click on **Printers/Coursing**. Click on the **Settings** tab.

Settings



- Printing Settings -

Enable all printing	Enables all kitchen and receipt printing.
Disable printing for remote only	Disables all of the kitchen items printing.
Disable printing for receipt/check printouts only	Disables all receipt printing, but enables kitchen tickets.
Disable printing for all	Disables all printing.

- Default Printer -

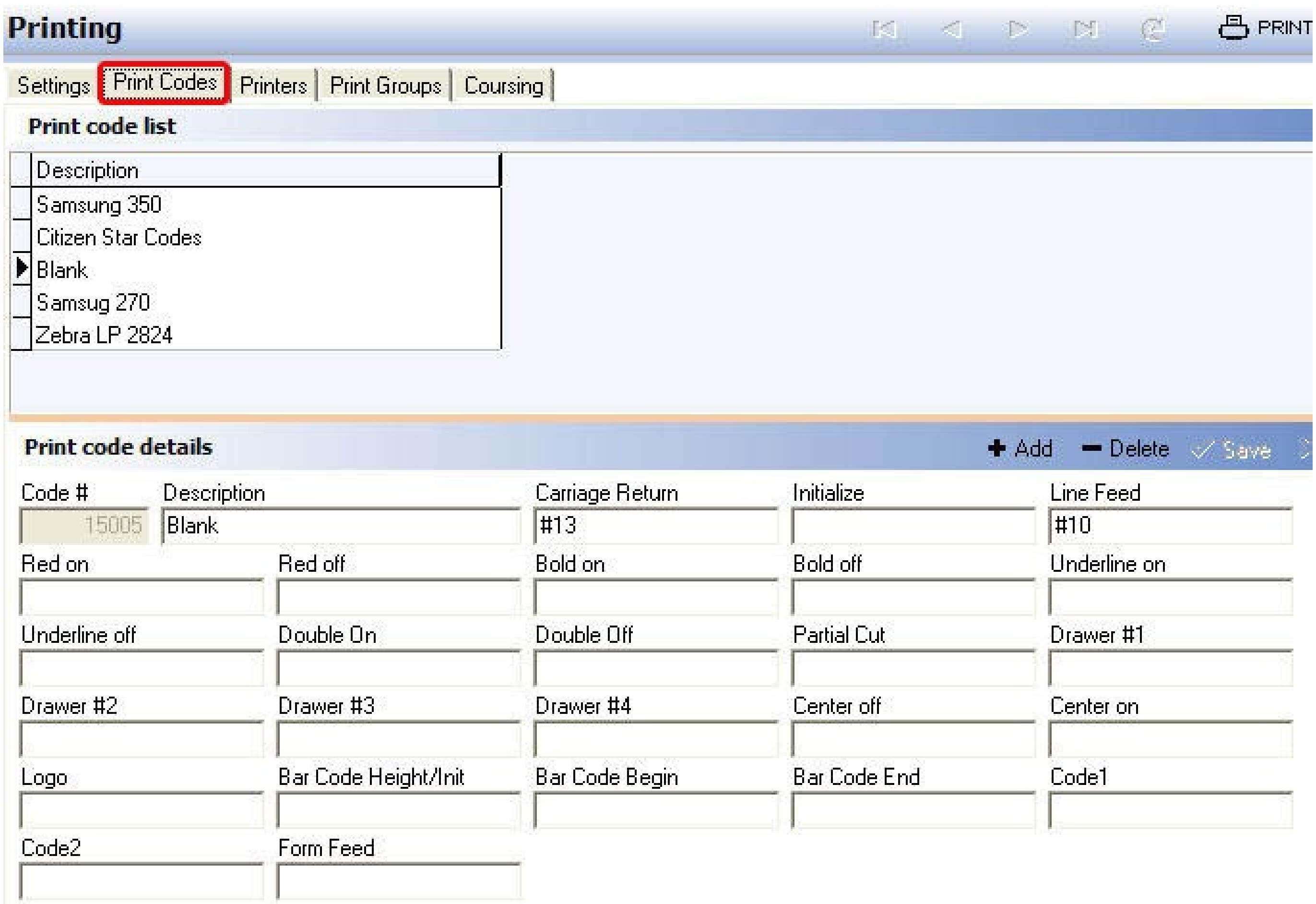
You will need to select the default printer that this workstation is using from the drop-down list. The printer will need to be set up in Windows before you will see it in the drop-down. This should be done from each workstation where you select the printer that will be used for that workstation.

1. Select the printer from the drop-down list.
2. Press the **Set as Default Printer** button.

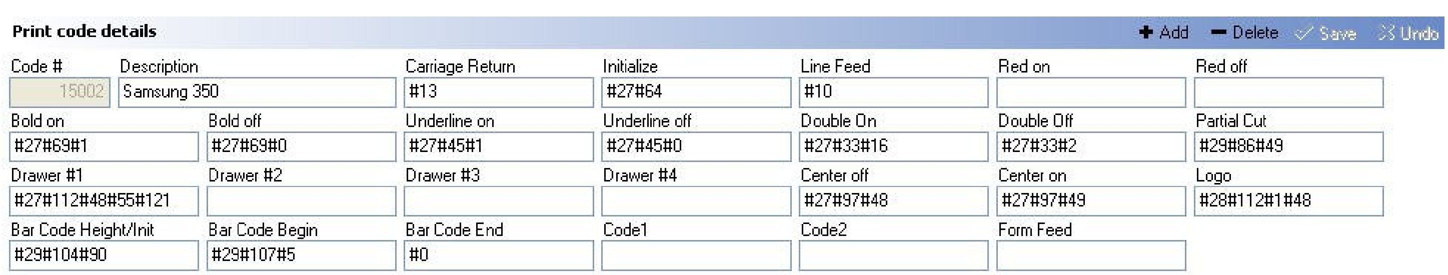
21.2 Print Codes Tab

Under the **Hardware** section click on **Printers/Coursing**. Select the **Print Codes** tab.

Print Codes



Several print codes come predefined with the installation of **SoftTouch.**
However, if you have a different printer you must enter its codes here. You will need to find those printer codes from the manual that came with that printer.



***Note:** The Samsung 350 codes will work with the Epson TM88 III and the Samsung 270 codes will work with the Epson U220.

-Add Print Code -

In the **Print Code Details** part of the screen click the 

button and fill out the fields below according to your printer's manual starting from giving it a description in the top portion of the screen.

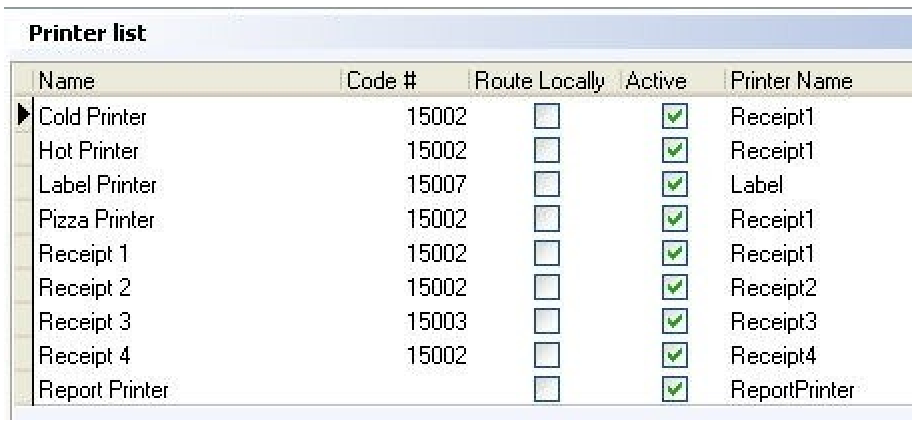
21.3 Printers Tab

Under the **Hardware** section click on **Printers/Coursing**. Click on the **Printers** tab.

Here you add all of your printers on the network, give them names and enter their details.

Printer List

Printers that you add are displayed on the **Printer list** part of the screen.

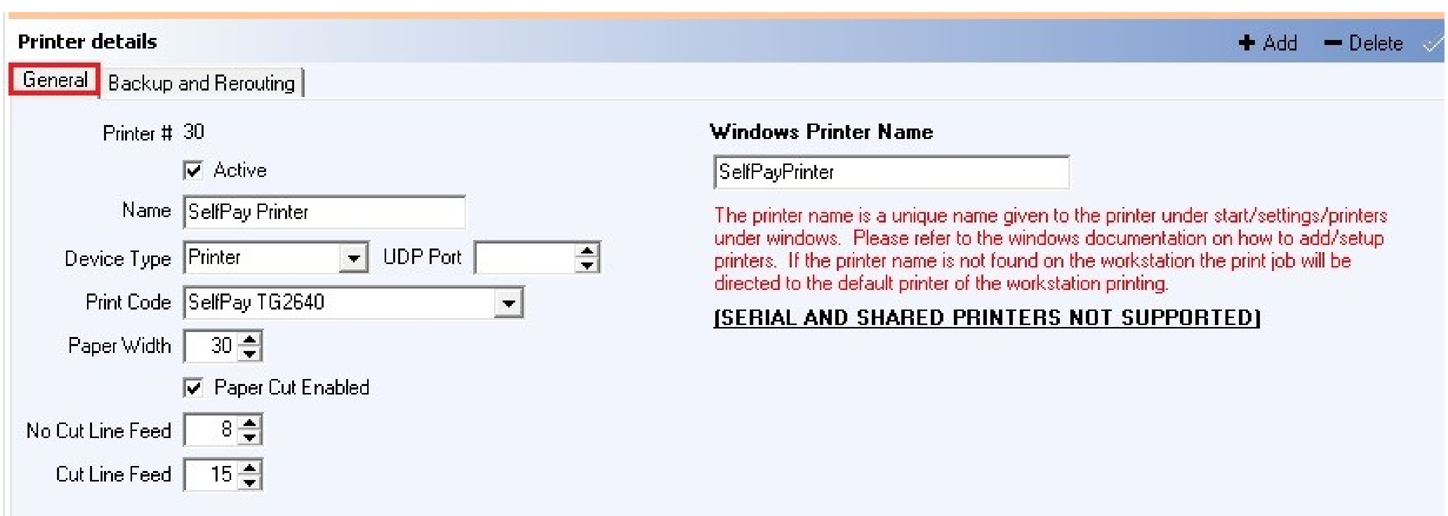


Printer list

Name	Code #	Route Locally	Active	Printer Name
Cold Printer	15002	☐	☑	Receipt1
Hot Printer	15002	☐	☑	Receipt1
Label Printer	15007	☐	☑	Label
Pizza Printer	15002	☐	☑	Receipt1
Receipt 1	15002	☐	☑	Receipt1
Receipt 2	15002	☐	☑	Receipt2
Receipt 3	15003	☐	☑	Receipt3
Receipt 4	15002	☐	☑	Receipt4
Report Printer		☐	☑	ReportPrinter

Printer Details

On the **Printer Details** part of the screen, under the **General** tab, you can add printers and enter their details.



- Add Printer -

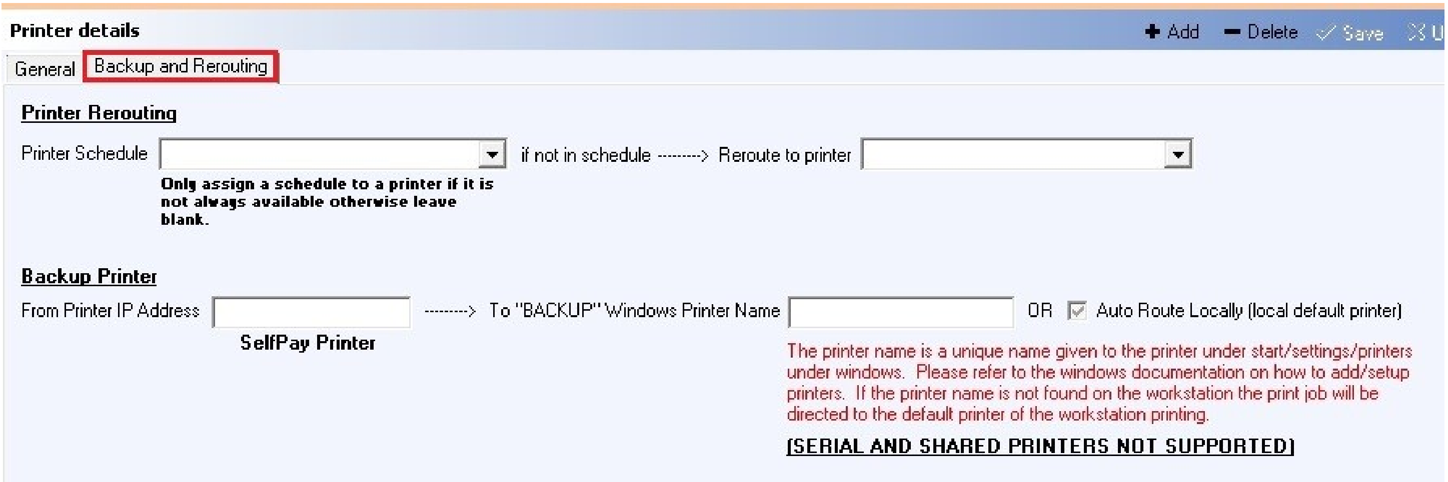
To add a printer click the  button in the **Printer details** part of the screen and fill out the fields:

- General Printer Details -

Active	This printer will not be active unless this box is checked.
Name	Enter the name you want to call this particular printer.
Device Type	Select from Printer or UDP.
UDP Port	Enter the UDP port this printer is attached to.
Print Code	Depending on your printer model, a choice of: • Samsung/Epson Codes • Citizen Star Codes However, if you have a different printer you must enter its codes in the **Print Codes Tab** (see **Printer Setup->Print Codes tab**).
Paper Width	If you are using 40 column printers, you will want to enter a number between 32 and 40, depending on the size of the margins you wish to have on either side of the printouts.
Paper Cut Enabled	If this option is checked, each check/receipt will be cut.
No Cut Line Feed	This is the number of carriage returns (blank lines) added to the end of the print job for no-cut printers (typically set 8).
Cut Line Feed	This is the number of carriage returns (blank lines) added to the end of the print job for cut printers (typically set to 4).
Windows Printer Name	This is the name of the printer that is set up in Windows (see instructions on finding the printer name below).

Backup and Rerouting

On the **Printer Details** part of the screen, under the **Backup and Rerouting** tab, you have the option to add additional details to the selected printer.



- Printer Rerouting -

Printer Schedule	Allows a schedule to be assigned to the printer. The printer will only work during the schedule you assign to it. When the schedule is not in effect then the print jobs will be redirected to the "Backup" printer. See "Backup" Printer Name below.
Reroute to printer	If you have chosen a printer schedule for this printer, then you also have the option of choosing a printer to reroute the jobs to when the schedule is not in effect by choosing a printer from this drop down box. Leave this field blank if the "Printer Schedule" field is blank.

- Backup Printer -

The next three options all work together for an "**Auto Rerouting**" feature. Only Ethernet or IP based printers are supported for this function.	
From Printer IP Address	This is the physical IP address of the network printer. This field is not required to get the printer to work, but it is required if you want to use the "**Auto Reroute**" feature. SoftTouch will ping the IP address that is entered here to see if it gets a response before sending a print job to it. If it doesn't get a response from the printer, then the print job will be re-routed using either a "Backup" printer name, OR it can be rerouted locally. *Leave this field blank for local receipt printers.*

To "BACKUP" Printer Name	This feature is used to automatically re-route print jobs to another network printer, when the original printer fails. If your network printer is not working, just turn it off and jobs will be sent to this "Backup" printer until the original printer is fixed. (this Printer Name will also be the Windows name for the printer) Do not use this option if you have checked "Auto Route Locally" (below). *Leave this field blank for local receipt printers.*
Auto Route Locally (local default printer)	Automatically reroutes to the local printer of the station that took the order if there is no response from the IP address entered above. If this box is checked, simply turning off the network printer will trigger jobs to be re-routed. (in the event your network printer breaks, you can use your local printer). Do not use this option if you have selected a "Backup" printer name (above). *Leave this field unchecked for local receipt printers.*

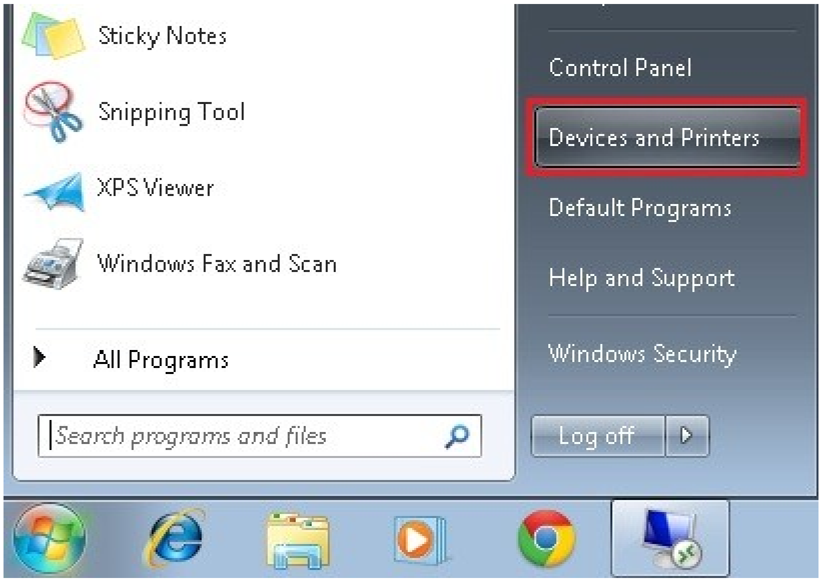
- Finding the Printer Name -

This is the name of the printer under Windows.

To find out what it is:

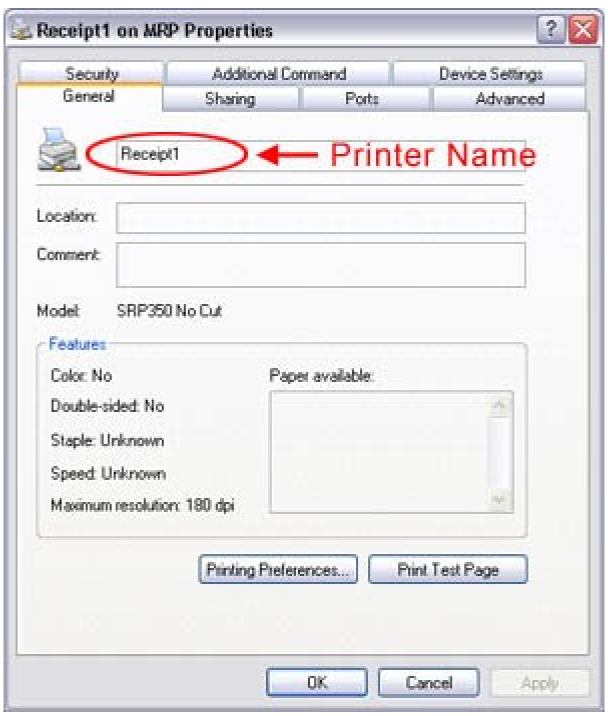
Step 1. Click the Start menu/Settings/Printers and Faxes. See image:

Different versions of Windows might call for slightly different paths. For example, you might have to click the Start menu then go to Devices and Printers. See image:



A window with available printers on the network will show up.

Step 2. Right click on the printer you would like to use for the one currently being configured and choose Properties from the menu that shows up. The Printer Properties window will show up, and under General tab you will find the name of the printer. See image:



This will be the name you would enter as the **Windows Printer Name** under **Printer Details**.

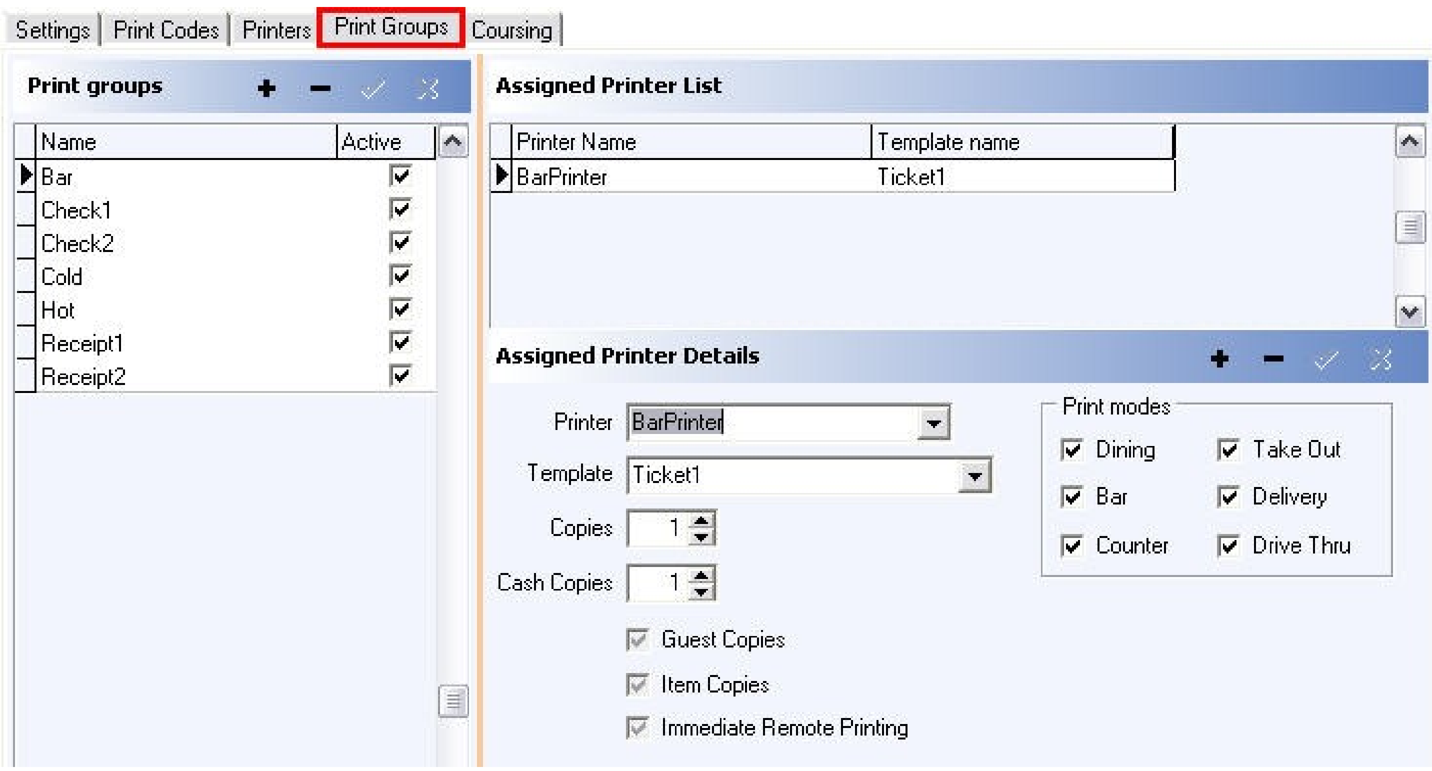
21.4 Print Groups Tab

Under the **Hardware** section click on **Printers/Coursing**. Click on the **Print Groups** tab.

Print Groups

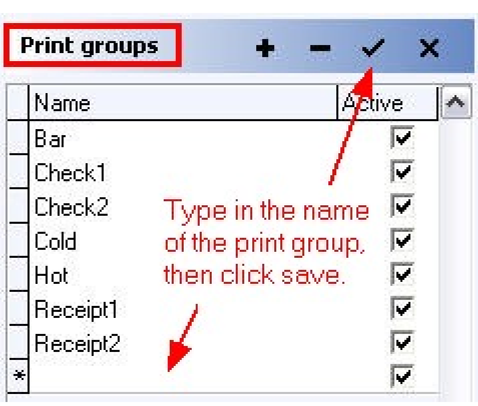
Here you have the ability to group printers. You need to assign each printer to at least 1 print group because items in your menu are assigned to print groups.

Also, the local receipt printers should have two groups...one for the checks, and another for the receipts.



Create Print Group

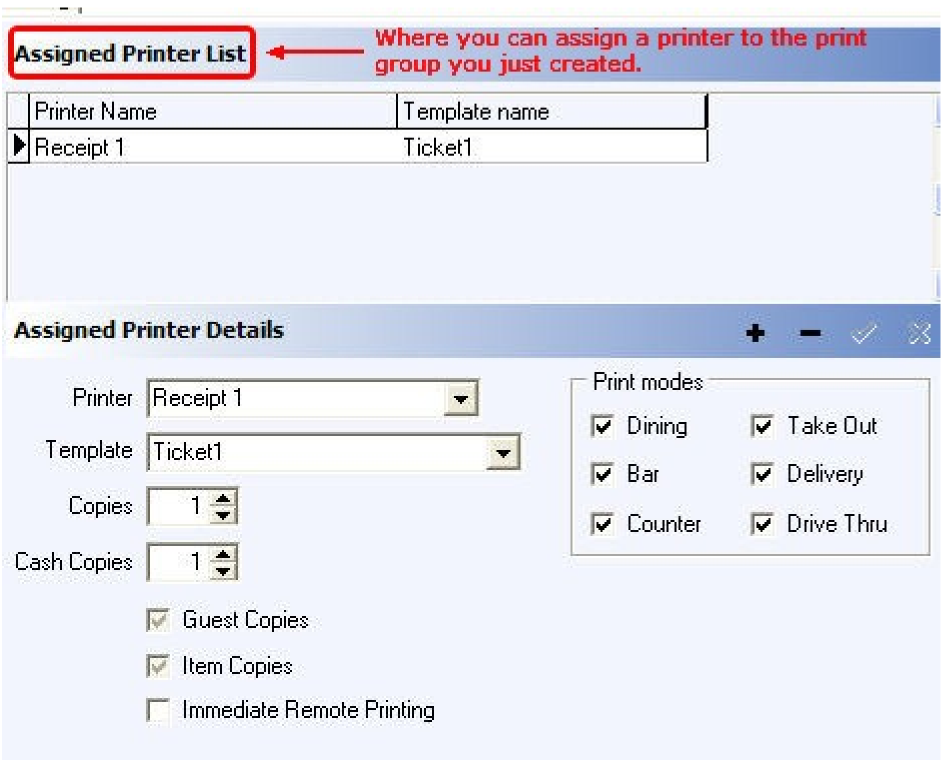
On the **Print Groups** part of the screen click the ✚ sign and in the blank field marked with the * type in the name for the Group. Then click the ✓ Save button. See image below for help:



- Assign Printer(s) to Print Group -

Highlight the print group you've just created or the print group to which you wish to assign printers. In the **Assigned Printer List** and **Details** part of the screen click the **+** sign and click the blank area under **Printer Name** for the drop-down arrow to display. Then use the drop-down menu to choose a printer.

***Note:** You can have more than one printer in a group. You may need to do this when setting up a Label printer so that you can have Labels print at the same time the regular tickets print. You would just add the label printer to your "Hot" group or "Cold" group, whatever the case may be.



Printer	Choose a printer from the drop-down menu that you would like to have assigned to the print group you have selected.
Template	Choose a remote template for your kitchen groups and a receipt or check template for your receipt or check groups.
Copies	Number of credit card receipts that will print. This is usually set to 2 for receipt printers and 1 for everything else.
Cash Copies	Number of receipts that will print for cash transactions.
Guest Copies	If checked, if there are 3 guests at a table, you will get 3 copies of the receipt. This overrides what you have set in Copies and Cash Copies.

Item Copies	Used for Label printers. Prints an equal number of labels as there are items on the check, so you can have a label for each pizza box.
Immediate Remote Printing	If you would like items in an order to be sent to the kitchen while you are still placing the order (i.e., before you have hit the "send" button) enable this option. The items will be sent to the kitchen as they are rung in. This works best if using a Kitchen Display system instead of printers.
Print Modes	In this area you can choose the Modes/Functions for which you would like the printer to work. **Example:** You may only want the labels to print when the order is taken from the Delivery or Takeout modes, so you would only enable those options, and leave the other modes unchecked.

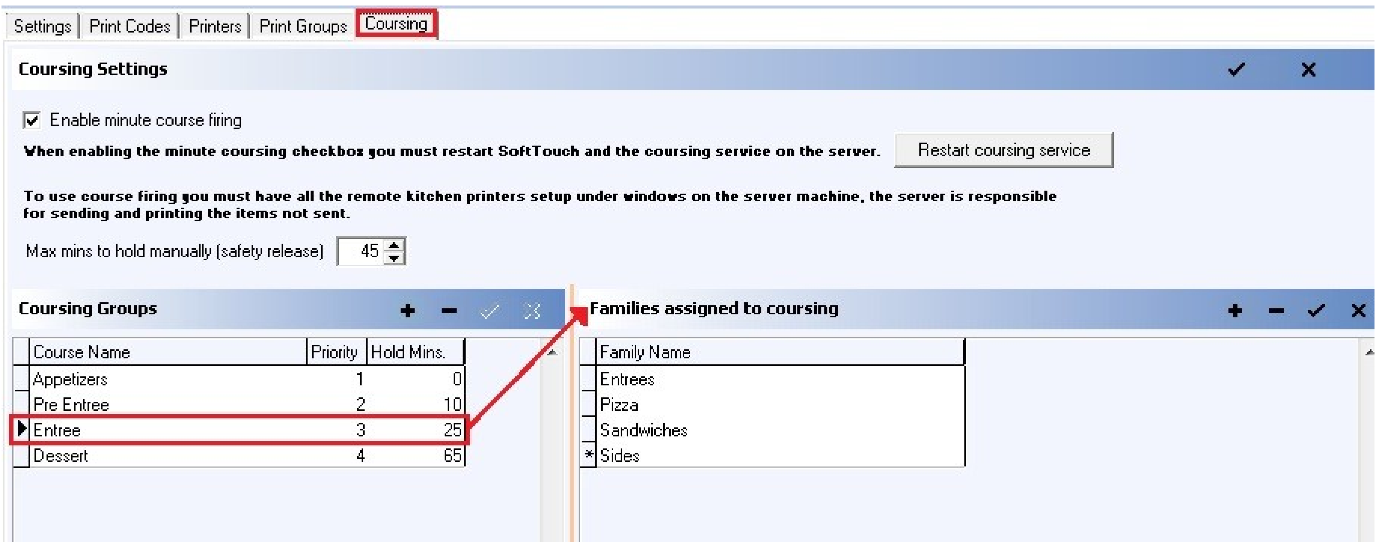
21.5 Coursing

Under the **Hardware** section click on **Printers/Coursing**. Click on the **Coursing** tab.

Coursing

This is where you set up your courses and firing times.

There are several things that can be configured in this section: course names, priorities, hold times, and the families associated with the specific course names.



Create Coursing Groups

In the **Coursing Groups** part of the screen click the **+** sign and in the blank field marked with the * type in the name for the Coursing Group. Click the Save button after you have entered all details.

Course Name	Allows you to create a course name, like Appetizers, Entrees, etc.
Priority	Allows you to set a priority for what group you would want to print 1st, 2nd, 3rd, etc.
Hold Mins	Sets the number of minutes to hold course before firing order to the kitchen.

Family Name	You must assign which families are part of each coursing group. With the correct **Coursing Group** selected, click the plus sign in the blue bar to the right of **Families assigned to coursing** and select the family name(s) you want to add from the drop-down under **Family Name**. For example, you would assign the Appetizers family to the "Appetizers" coursing group. You would assign the Salad family and Soup family to the "Pre-Entree" coursing group.

Enable minute course firing allows you to have the master/server computer automatically fire courses to the kitchen at the specified times.

NOTE: You can leave this option unchecked and all courses will print at the same time, with each course listed separately on the kitchen ticket.

When first checking on **Enable minute course firing**, you must press the **Restart Coursing Service** button. This will restart SoftTouch and the course firing service.

Max mins to hold manually (safety release) enables the master/server computer to automatically fire all items that have not been sent after the specified amount of time.

Example: In the image above, the maximum time before automatically firing all items is 45 minutes. That means that if a server orders items, but does not fire them or holds them, they will be fired to the kitchen automatically after 45 minutes has elapsed.

The same rules apply to adding Courses and Families as in the rest of the program.

Part XXI

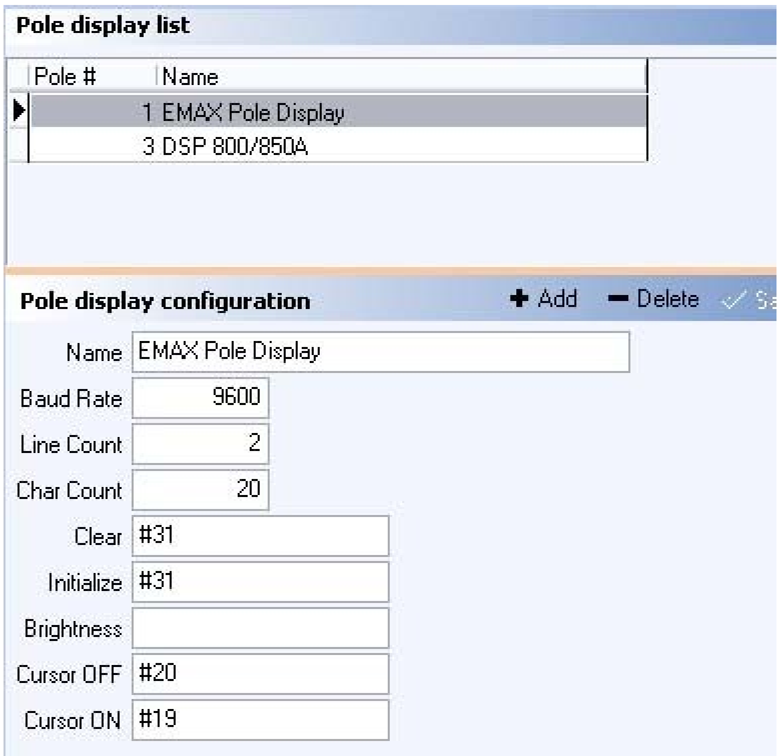
Pole Display

Part 22 Pole Display

Under the **Hardware** section click on **Pole Display**.

Pole Display

Here you add your pole display(s) and configure their settings.



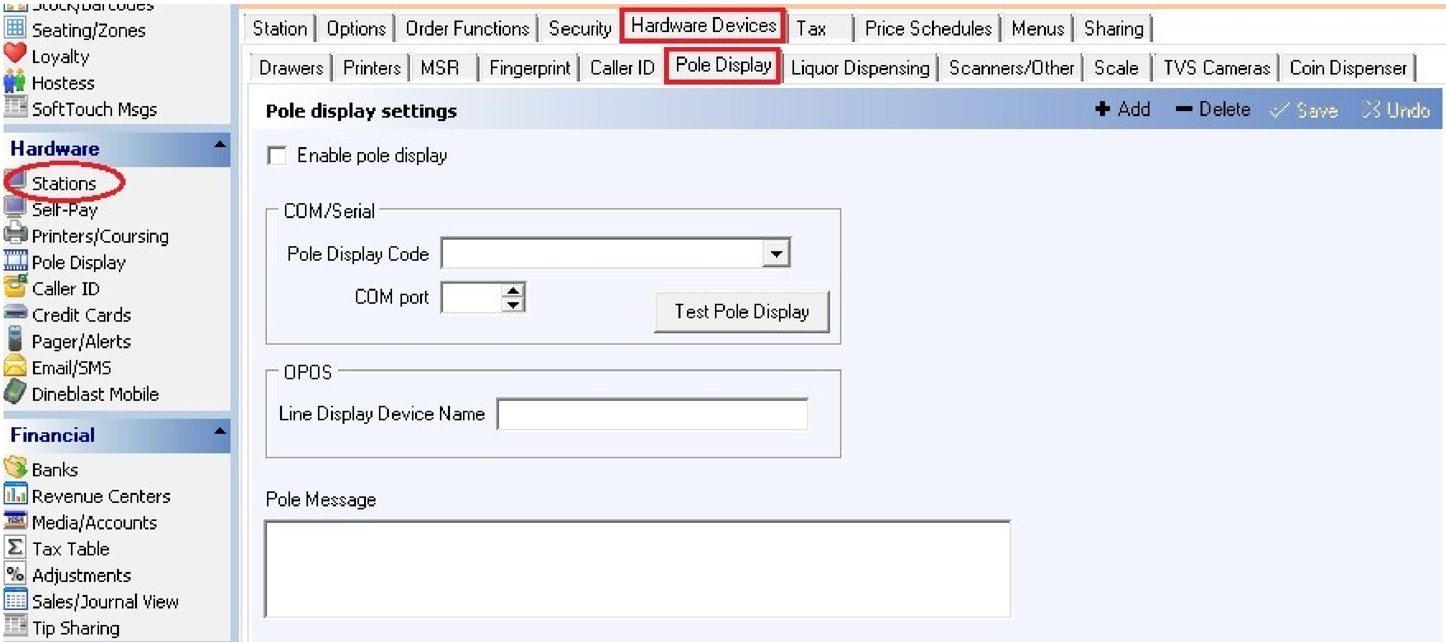
- Add Pole Display -

Step 1. In the **Pole display configuration** part of the screen click the ✚ Add button and fill out the fields below.

Name	Enter a name/title for the pole display that you can easily identify it by.

Baud Rate	Please, refer to your pole display's specifications manual for this value
Line Count	Enter the number of lines to display (normally it is 2 lines). Refer to your pole display's specifications manual.
Char Count	Enter the number of characters to display. Refer to your pole display's specifications manual for that number.
Clear	Please refer to your pole display's specifications manual for the special value number.
Initialize	Please refer to your pole display's specifications manual for the special value number.
Brightness	Please refer to your pole display's specifications manual for the special value number.
Cursor OFF	Please refer to your pole display's specifications manual for the special value number.
Cursor ON	Please refer to your pole display's specifications manual for the special value number.

Step 2. Now you need to assign Pole Display to a station. Go to **Stations->Hardware Devices->Pole Display**. Make sure you highlight from the **Station list** (at the top of the screen) the station for which the pole display is physically connected, then check the **Enable pole display** checkbox and from the drop-down menus choose the **Pole Display Code** and the **COM port**. See image:


Seating/Zones
Loyalty
Hostess
SoftTouch Msgs
Hardware
Stations
Self-Pay
Printers/Coursing
Pole Display
Caller ID
Credit Cards
Pager/Alerts
Email/SMS
Dineblast Mobile
Financial
Banks
Revenue Centers
Media/Accounts
Tax Table
Adjustments
Sales/Journal View
Tip Sharing
Station
Options
Order Functions
Security
Hardware Devices
Tax
Price Schedules
Menus
Sharing
Drawers
Printers
MSR
Fingerprint
Caller ID
Pole Display
Liquor Dispensing
Scanners/Other
Scale
TVS Cameras
Coin Dispenser
Pole display settings
Add
Delete
Save
Undo
Enable pole display
COM/Serial
Pole Display Code
COM port
Test Pole Display
OPOS
Line Display Device Name
Pole Message

Part XXII

Caller ID

Part 23 Caller ID

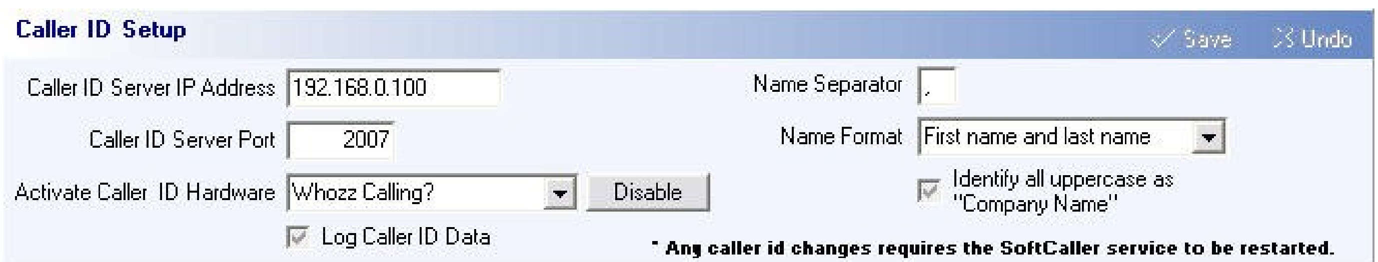
Under the **Hardware** section click on **Caller ID**.

Caller ID

In the Caller ID applet you set up your caller ID configuration.

SoftTouch comes pre-defined with configuration for two types of caller ID hardware - **Whozz Calling?** and **TELComp**.
But you can add your own custom Caller ID hardware configurations.

- Caller ID Setup -



Under the **Caller ID Setup** screen fill out the following:

Caller ID Server IP Address	The IP of the master/server terminal. (Note: A workstation can be designated as the Caller ID master terminal, but that machine must run the software provided at the SoftTouch website in order to run.)
Caller ID Server Port	Caller ID server port. Leave as 2007 in most cases.
Activate Caller ID Hardware	From the drop-down menu choose the hardware you are using. If your Caller ID hardware is not on the list, enter it in the **CallerID Hardware** part of the screen using the instructions below, then come back here to specify it. You can deactivate it using the **Disable** button.

Log Caller ID Data	If you want to log the Caller ID data make sure to check this option. A lot of useful info can be logged such as when the phone rang, how long it took before it was answered, hang up time etc.
Name Separator	If your caller ID system uses a comma to separate the first and last name, enter a comma in here. If a space is used to separate the first and last name, just put a space in this field.
Name Format	Choose whether the first name or the last name comes first.
Identify all uppercase as "Company Name"	Some Caller ID systems report the company name as all uppercase. If this is true with your system, then enable this option. If there are other things that have all uppercase besides the company name, then do not enable this option.

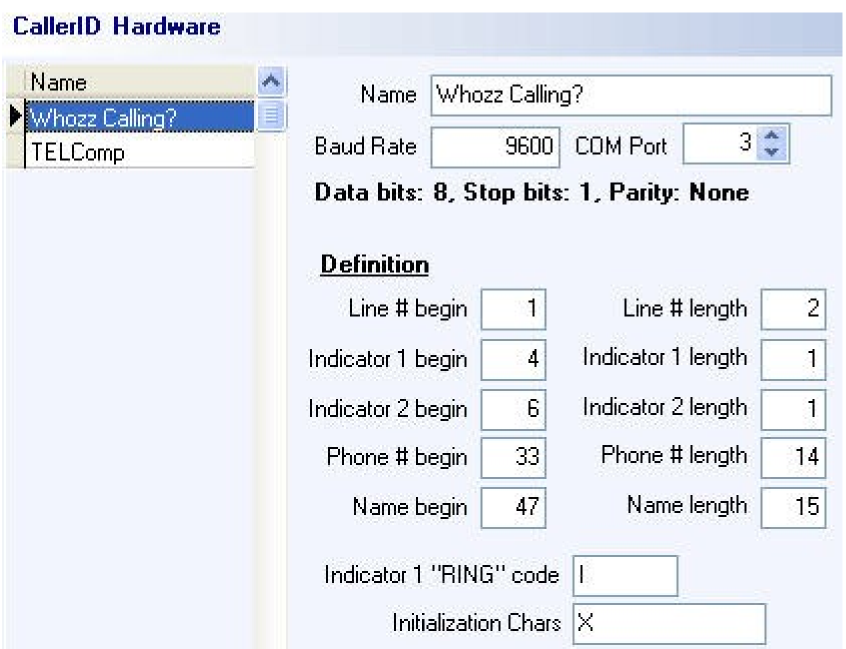
- Add Caller ID Hardware -

Under the **CallerID Hardware** portion of the screen click the 

button and enter the name of your CallerID Hardware in the Name field. Fill out all the other fields (see image below) by referring to your Caller ID's technical manual.

If you're using one of the default Caller ID systems, then the only thing you will need to change in their setup is the COM port setting to match the COM port that it is plugged into.

***Note**: Below are the default settings when SoftTouch is first installed. They might not be the same for your Caller ID system.



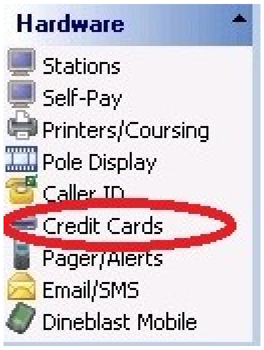
Part XXIV

Credit Cards

Part 24 Credit Cards

Under the **Hardware** section click on **Credit Cards**.

Credit Card



Credit Card Setup holds the following settings:

1. Credit Card Settings

2. Unresolved Transactions (Reconciliations)

3. Credit Card Transactions

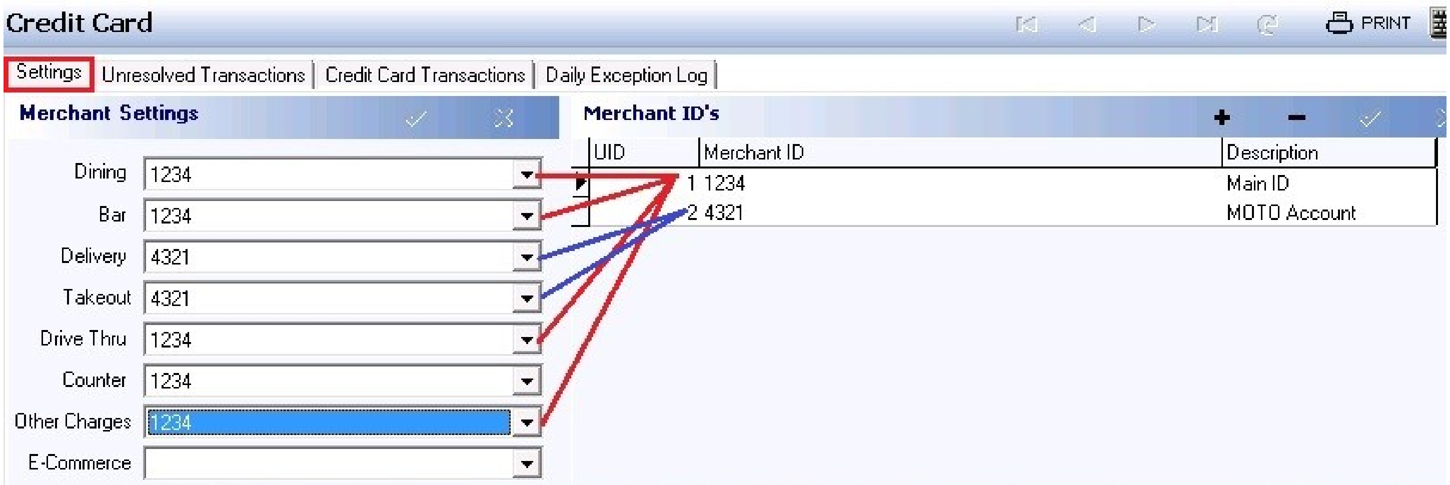
4. Daily Exception Log

24.1 Settings Tab

Under the **Hardware** section click on **Credit Cards**. Click on the **Settings tab**.

Settings Tab

Here you enter credit card settings.



Step 1: Merchant ID's

Click the plus sign to add numerous Merchant IDs, filling out the fields in this area for each.

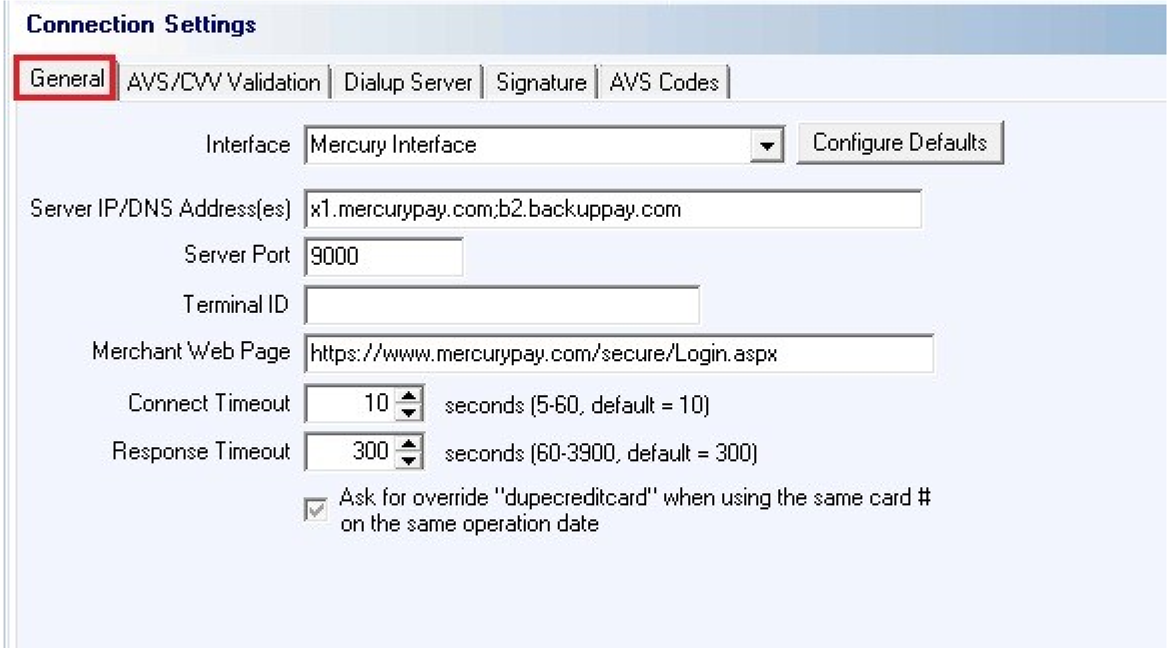
UID	Unique Identifier to help you distinguish between accounts. This number will print on customer receipts to help you determine which account to refund if needed.
Merchant ID	Obtain this number from your merchant (company that processes your credit card transactions).
Description	Enter a description for the account.

Step 2: Merchant Settings

Select the proper merchant account to use for each mode. These will show up in the drop-down list after you added them to the **Merchant ID's** list on the right side of the screen.

Step 3: Credit Card Connection Settings

- General -



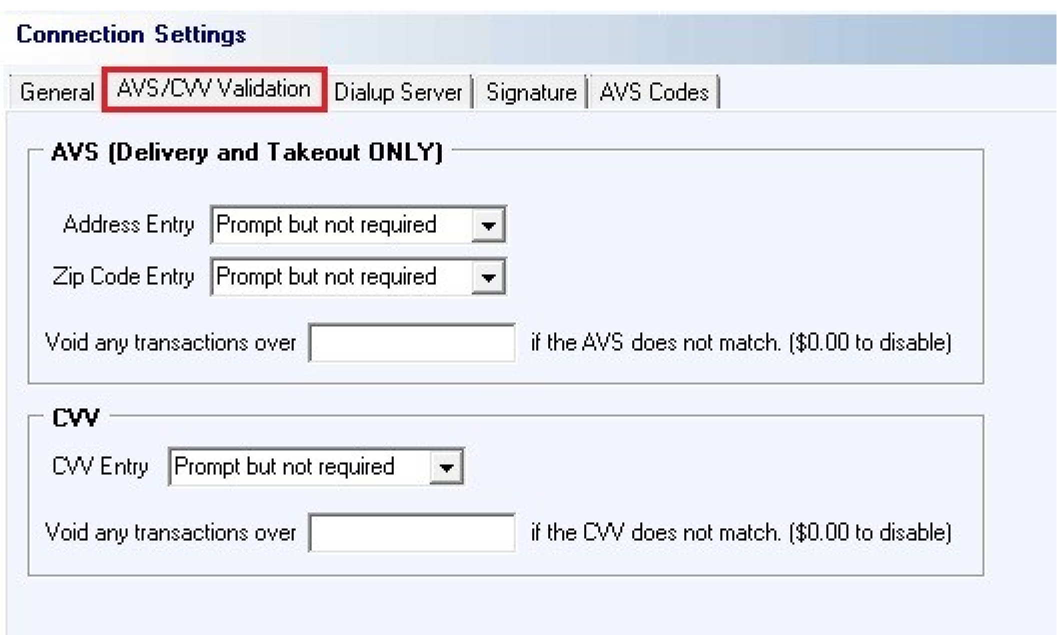
Interface	**Datacap NetEPay/DialEPay Interface** - Select this option if using NetEPay or DialEPay software from Datacap. **Mercury Interface** - Select this option if connecting to Mercury. **Sterling Store Server Interface** - Select this option if connecting to Sterling **SoftTouch CC Interface** - For future use
Configure Defaults	Press this button after choosing an **Interface**.
Server IP/DNS Address(es)	**For NETePay or DIALePay:** Enter the IP address of the terminal where the merchant's credit card software interface is installed. **For Mercury Payment Systems:** Enter the server IP address that they gave you. If you selected the Mercury Interface and hit Configure Defaults, then this should already be filled in. Just verify it matches the addresses from Mercury. ***Note:** if more than one IP address was provided to you, separate them by a semicolon with no spacing in between.
Server Port	Enter credit card's merchant server port number
Terminal ID	Enter the Terminal ID if needed. Usually only needed for Sterling interface.

Merchant Web Page	You may enter the internet web page address to your credit card merchant. For example: Mercury Payment Systems allows their customers to login and look up their transactions so you can enter the web address here and access the login page directly from the browser in SoftTouch.
Connect Timeout	This is the amount of time (in seconds) that the system will wait when trying to connect to the merchant to process the credit card. If it cannot connect within the allotted time, a timeout error message will be displayed.
Response Timeout	This is the amount of time (in seconds) that the system will wait when waiting to receive a response from the merchant after sending them the credit card info. If it does not receive a response within the allotted time, a timeout error message will be displayed.
Ask for override "dupecreditcard"	With this box checked on, if the same credit card is used more than once on the same operation date, an override will be required. Security item "dupecreditcard" can be found and assigned to certain groups/jobs under **Security**.

- AVS /CVV Validation -

When a credit card is used as payment, these options allow you to use the address verification system (AVS) and/or CVV security code for the credit card holder's added security.

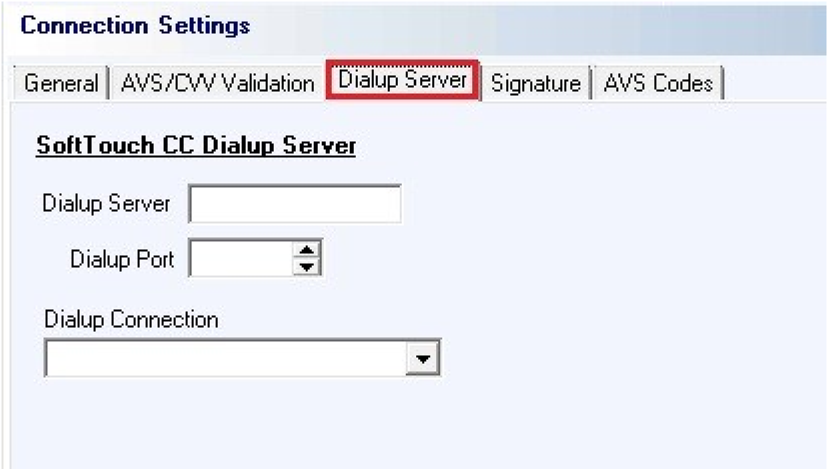
AVS is used only for Delivery and Takeout orders.



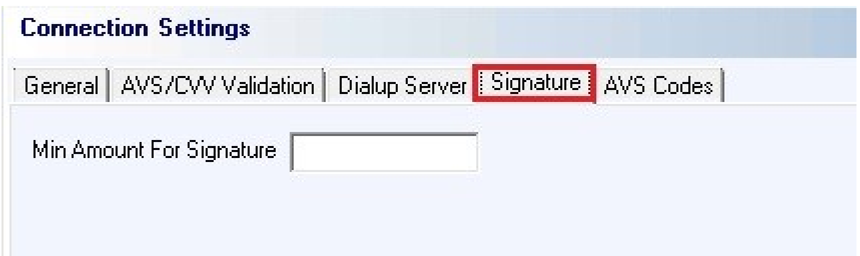
Address Entry	There are three options: Prompt but not required - it will ask for an address but not require it Required on 1st entry - address required Do not prompt - it will not ask for an address
Zip Code Entry	There are three options: Prompt but not required - it will ask for a zip code but not require it Required on 1st entry - zip code required Do not prompt - it will not ask for a zip code
Void any transactions over ____ if the AVS does not match	For any transactions over the dollar amount you enter here, the transaction will not go through if the AVS is not correct. ***Note:** Setting this to $0 disables this feature, meaning <u>no</u> transactions will be voided if the CVV is wrong. (To void <u>all</u> transactions if the CVV is wrong, you would set this to $0.01.)
CVV Entry	There are three options: Prompt but not required - it will ask for the CVV but not require it Required on 1st entry - CVV required Do not prompt - it will not ask for a CVV
Void any transactions over ____ if the CVV does not match	For any transactions over the dollar amount you enter here, the transaction will not go through if the CVV is not correct. ***Note:** Setting this to $0 disables this feature, meaning <u>no</u> transactions will be voided if the CVV is wrong. (To void <u>all</u> transactions if the CVV is wrong, you would set this to $0.01.)

- Dialup Server -

This tab is designed for future use.


Connection Settings
General
AVS/CVV Validation
Dialup Server
Signature
AVS Codes
SoftTouch CC Dialup Server
Dialup Server
Dialup Port
Dialup Connection

- Signature -

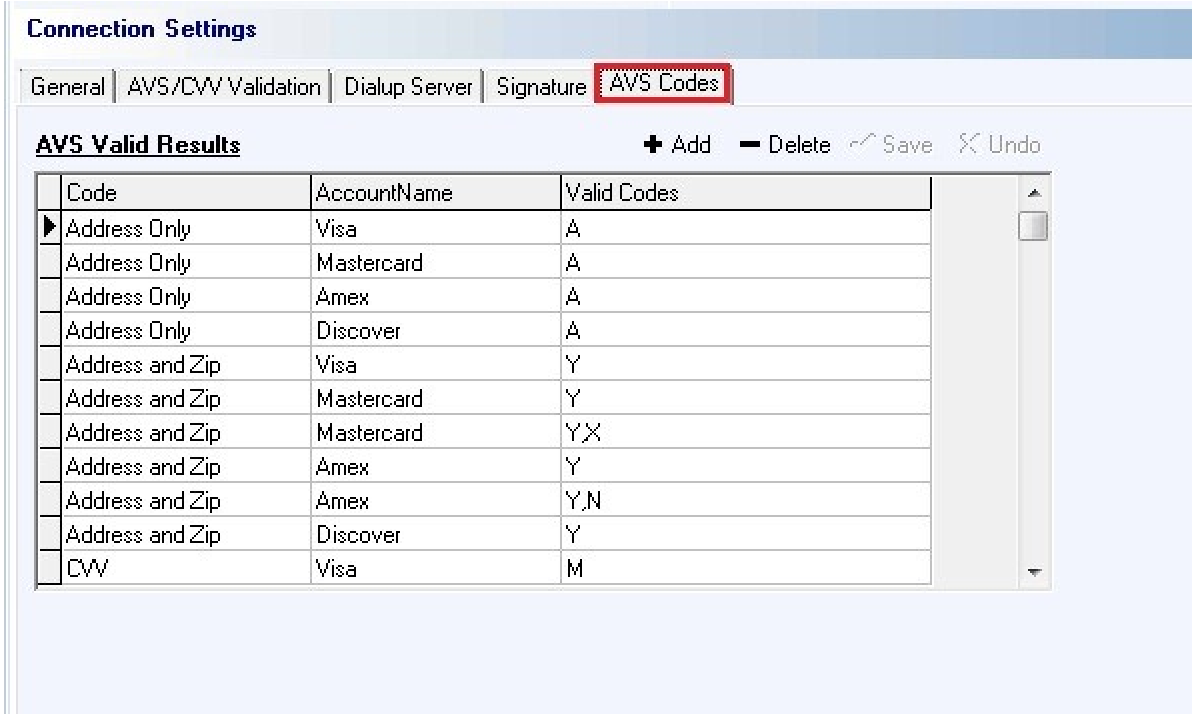

Connection Settings
General
AVS/CVV Validation
Dialup Server
Signature
AVS Codes
Min Amount For Signature

Min Amount for Signature	Enter the minimum amount required for a signature. If you enter $20.00 here, any orders below $20.00 will not require a signature. In order for this to work properly, you must customize your Tip template as follows: • Go to **Administration->Template Screen** (from the gray toolbar at the top of BackOffice). • Select the "Tip" template from the list. • For each signature line you will see something that looks like this: <ifcredit> <cr> <cr> X ____ <cr> <endif> <cr> • Customize it so that it looks like this instead (adding the <ifsignature> and <endif> tags): <ifcredit> <cr> <cr> <ifsignature> X ____ <cr> <endif> <endif> <cr> • The signature line may be in three different places within the Tip template, so you will have to make the change for each line.

- AVS Codes -

If you use AVS/CVV validation, this section lists the codes your providers return when the address, zip code, and/or CVV is/are correct. Some codes will already be listed here by default, but you should verify with your provider that these are correct.

Use the **Add** button to add additional codes. Click in the blank fields under **Code** and **AccountName** and use the drop-down menus to fill in these fields. Click in the blank field under Valid Codes and type in the code(s). You can also click on fields that have already been filled out if you want to change them.



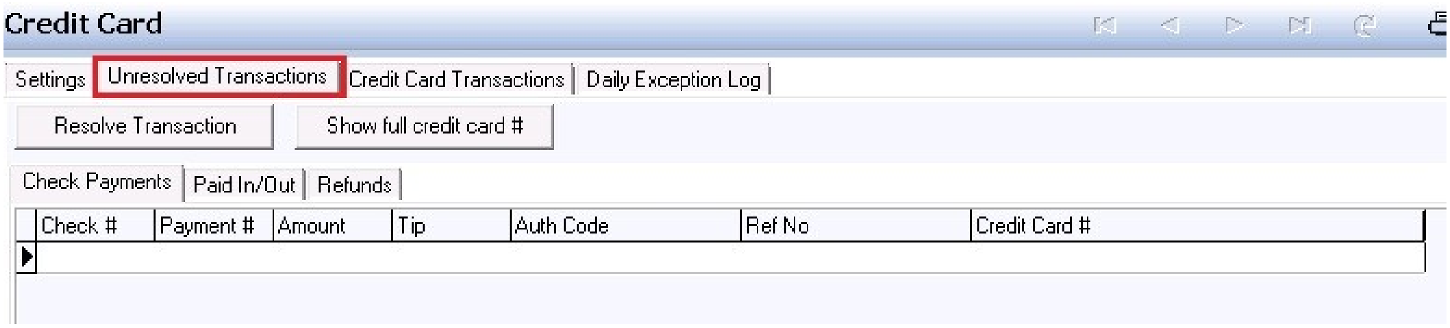
Step 4. Enable Credit Cards on each station

Go to Stations->Options (under Hardware) and enable the "Credit Card Interface" option for each station.

24.2 Unresolved Transactions Tab

Under the **Hardware** section click on **Credit Cards**. Click on the **Unresolved Transactions** tab.

Unresolved Transactions



Here is where your credit card transactions and check payments are being tracked. You might never use this, but it's a good thing to have and in the example below we will explain why.

Every time you process a credit card, the information is sent to your merchant for its authorization. It is then sent back to you, flagged as authorized or not authorized, so you can complete a transaction by accepting or declining the card.

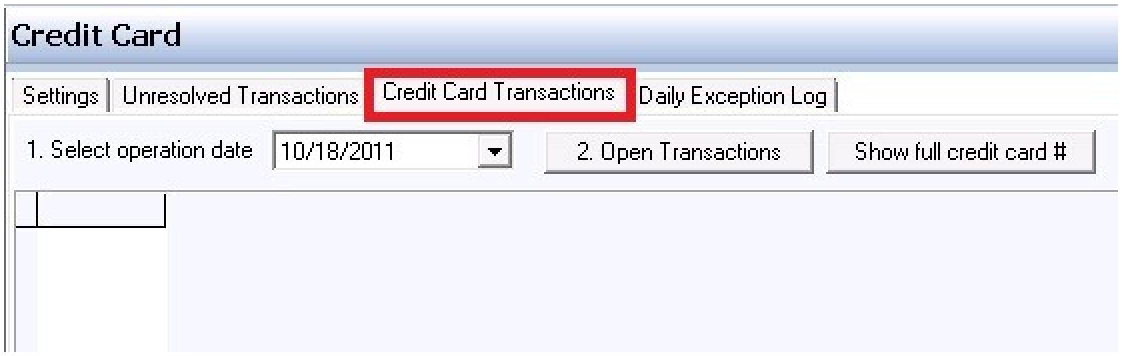
But what if in the middle of the credit card authorization process you lose electricity or internet connectivity before the information is sent back to you? You don't know whether the transaction went through or not. **SoftTouch** will not let you exit the system if you have unreconciled transaction(s). You can go to this screen, find the transaction which got interrupted and either reconcile the transaction or delete it.

> ***Note**: This is the area where you would reconcile any Mercury Gift Card transactions that might have encountered problems during the sale. You will know this when you try to Z out at the end of business. The message will read "You have x Paid IN/OUT not reconciled." Confirm with your merchant that the transactions did post and then reconcile them from here. Now you can Z out for the night.

24.3 Credit Card Transactions Tab

Under the **Hardware** section click on **Credit Cards**. Click on the **Credit Card Transactions** Tab.

Credit Card Transactions



1. This is for when you want to just view credit card transactions from a particular date.

2. This will also show you current open transactions if you choose the button **Open Transactions**.

3. The **Show Full Credit Card #** button will only show full credit card numbers for transactions rung on today's Operation date. Once the Z has been run, the credit cards will be purged and only the last four digits will show.

24.4 Daily Exception Log

Under the **Hardware** section click on **Credit Cards**. Click on the **Daily Exception Log** Tab.

Daily Exception Log

This section is designed to display any credit card errors.

Part XXV

Pager/Alerts

Part 25 Pager/Alerts

Under the **Hardware** section click on **Pagers/Alerts**.

Pager/Alerts

Pager/Alerts holds the following settings:

1. Activations

2. Alert List

3. Table Alert Buttons

4. Pager and Coaster Hardware

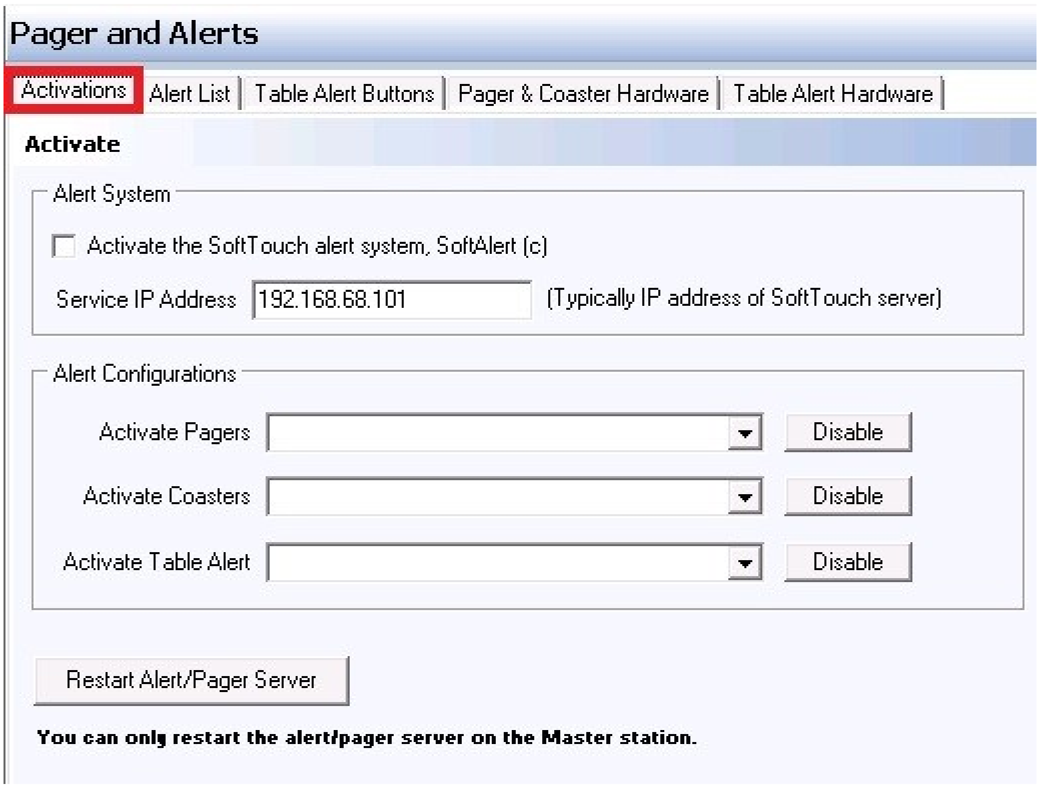
5. Table Alert Hardware

25.1 Activations

Under the **Hardware** section click on **Pagers/Alerts**. Click on the **Activations** tab.

Activations

The following section is where you activate various Pager/Alert systems.



Activate the SoftTouch alert system, SoftAlert ©	Enables the SoftTouch alert system.
IP Address of the server	The IP address of the computer where the pager system is plugged into.
Activate Pagers	This is where you choose the pager hardware you're using (you must press the Disable button to deactivate).
Activate Coaster Alert	This is where you choose the Coaster Alert hardware you're using (you must press the Disable button to deactivate).

Activate Table Alert	This is where you choose the Table Alert hardware you're using (you must press the Disable button to deactivate).
Restart Alert/Pager Server	Pressing this button allows you to reset the pager service (use only if the alerts do not seem to be working properly or if you have just made changes to any of the alert settings). Note: You can only restart the alert/pager server on the server.

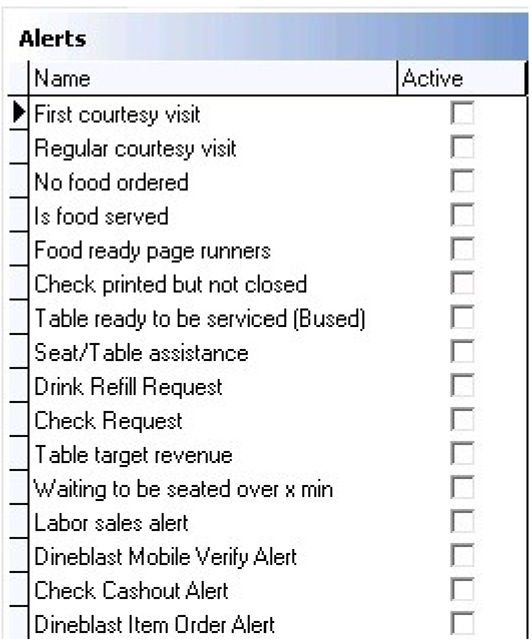
25.2 Alert List Tab

Under the **Hardware** section click on **Pagers/Alerts**. Click on the **Alert List** tab.

Alerts

This is the area where you set up all of the alert messages and set timers for each alert and its time to resend.

This is strictly for choosing which alert you want to edit. This is where you can quickly see which alerts are active.
All changes must be made in the Alert Details section described next. The arrow next to the alert name will show you which one is selected (which one you are editing).



- Alert Descriptions -

First courtesy visit	Alerts a server that a new party has been seated and they need to be greeted.
Regular courtesy visit	Alerts the server to perform a regular courtesy visit to a table after the party has been seated for a specified period of time.
No food ordered	Alerts a server or manager after a specified period time after a party has been seated if they have not yet ordered anything.
Is food served	Alerts the server or manager if the food has not yet been served after a specified period of time for any particular table.

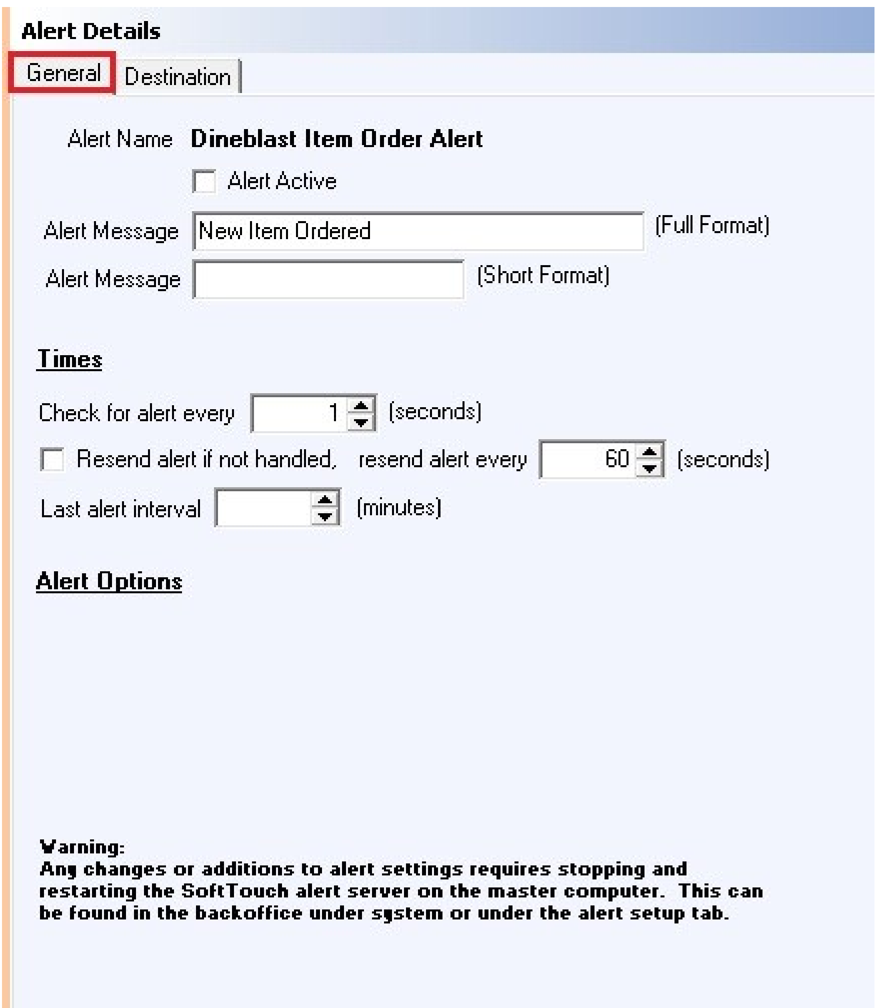
Food ready page runners	Alerts the server and/or food runners that the food is ready to be delivered to a table. This alert will automatically display where to pick up the food and where the food is to be delivered.
Check printed but not closed	Alerts the server or manager that a check has been printed but not closed after a specified period of time
Table ready to be serviced (Bused)	Alerts the bus boys and/or servers that a table is ready to be bused and displays the table number. ****Important Note:** For the bus boy to be alerted you have to first check on "enable table bus" located under the hostess section.
Seat/Table assistance	This alert can be initiated by the party sitting at the seat or table by pushing a button on a Hoscom wireless table alert system.
Check Request	This alert can also be initiated by the party sitting at a table by pushing a button at their table when they are ready for the check.
Drink Refill Request	This is an alert that can be initiated by the party by pushing a button at their table. This alert remembers all the drinks that were ordered and will display them on the server's pager so he/she will know what to bring to the table.
Table target revenue	This will alert a manager or server that a table is falling below expected revenue. This alert is fully customizable. For example, you can specify that you may want to have $9.00 per guest for every 45 min. If after 45 min the table is below this target, the alert will fire.
Waiting to be seated over x min	This will alert a manager that a party has been waiting for a specified period of time.
Labor sales alert	Alerts the manager when their labor costs begin to exceed a certain preset percentage of sales. This will allow the manager to keep control of labor costs and send people home when there is not enough revenue to justify them being there.
Dineblast Mobile Verify Alert	Reserved for future use with orders placed through Dineblast Mobile.

Check Cash Out Alert	Designed for the Self Pay unit.
Dineblast Item Order Alert	Reserved for future use with orders placed through Dineblast Mobile.

- Alert Details -

Under the Alert Details section fill out the information under the **General** and **Destination** tabs.

General



Alert Active	This box sets the alert to active.

Alert Message (Full Format)	This message will appear when the alert is viewed on a full screen and can be longer than the short format message. It can be the same as the short format message if it is kept short.
Alert Message (Short Format)	This message will be sent to pagers. Keep this short to fit on a small screen. It can be the same as the full format message if it is short enough.
Check for alert every ____ (seconds)	Set how often you would like the selected alert to be checked for (in seconds).
Resend alert if not handled, resend alert every ____ (seconds)	You must place a check in the Resend box if you want continuous messages to be sent until the message is cleared in **SoftTouch**. Set the time in seconds after which you want the next message to be sent to the pager.
Last alert interval	This is the time in **minutes** that you want to continue to send messages. The system will quit sending after this amount of time expires.

Destination

Alert employee via pager system	If this box is checked, alerts will be sent to employees. If unchecked, this will allow only managers to receive the alerts.
Send employee alert to print group	If you would like employee alerts to print, select the print group here. For information on setting up print groups, see Printers/Coursing->Print Groups Tab.
Send to manager after	Select how many alerts the employee should receive before the manager is alerted.
Send to manager HTML console after	Select how many alerts the employee should receive before the master display is alerted. The master display can be found in **SoftTouch** by going to System then Alert View.
Alert manager via pager system	This box allows you to send the selected alert to a master pager.

Alert manager via email (sms supported via cell provider email gateway)	This box allows you to send master pages to a mobile phone or PDA via email or sms.
Send manager alert to print group	If you would like the manager alerts to print, select the print group here. For information on setting up print groups, see **Printers/Coursing->Print Groups Tab**.

Warnings

Please read these warnings carefully.

Warning:
Any changes or additions to alert settings requires stopping and restarting the SoftTouch alert server on the master computer. This can be found in the BackOffice under system or under the alert setup tab.

Warning:
Since SMS messages may cost money to send and receive, it is crucial that wireless operators incorporate some security measures into the SMS-to-email gateway to prevent spam. As a result, you cannot send more than 10 messages in a short period of time (typically several minutes) via the gateway.

25.3 Table Alert Tab

Under the **Hardware** section click on **Pagers/Alerts**. Click on the **Table Alert Buttons** tab.

Table Alert Buttons

Step 1: Assign Button Configurations

This is where you will assign a function to each button on the unit. So if there are 4 buttons, you will need to assign a function to all four of those buttons.

Under the Button Configuration, use the plus (+) button to add buttons and click the blank space under each column to fill out the following:

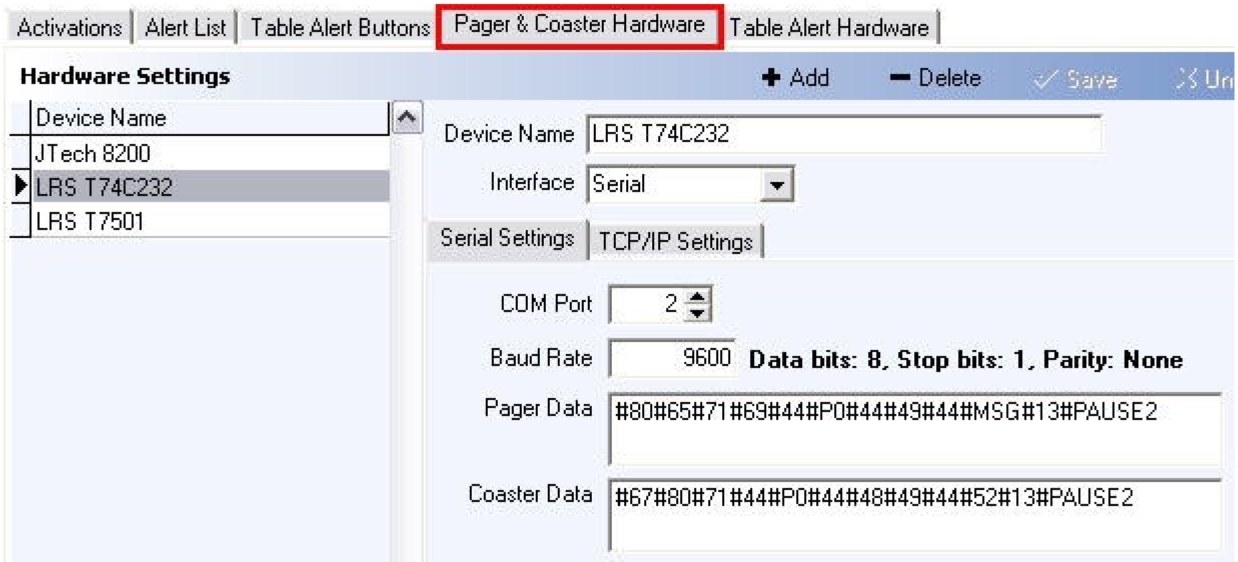
Button Name	Give the button a name.
Button #	This is the button number that gets sent from the device when pressing a button. For a 5 button system the buttons might be numbered 1,2,3,4,5, or they may go in reverse, 5,4,3,2,1.
Button Function	This is where you enter the alert the button triggers and the display of the button.

25.4 Pager & Coaster Hardware Tab

Under the **Hardware** section click on **Pagers/Alerts**. Click on the **Pager & Coaster Hardware** tab.

Pager & Coaster Hardware Setup

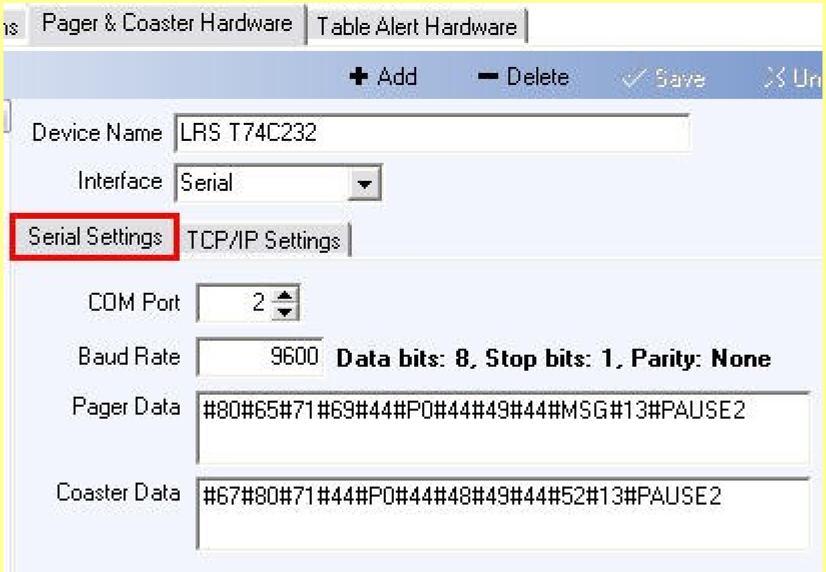
Under the Pager & Coaster Hardware section fill out the following:



Under the **Pager Hardware Settings** fill out the following:

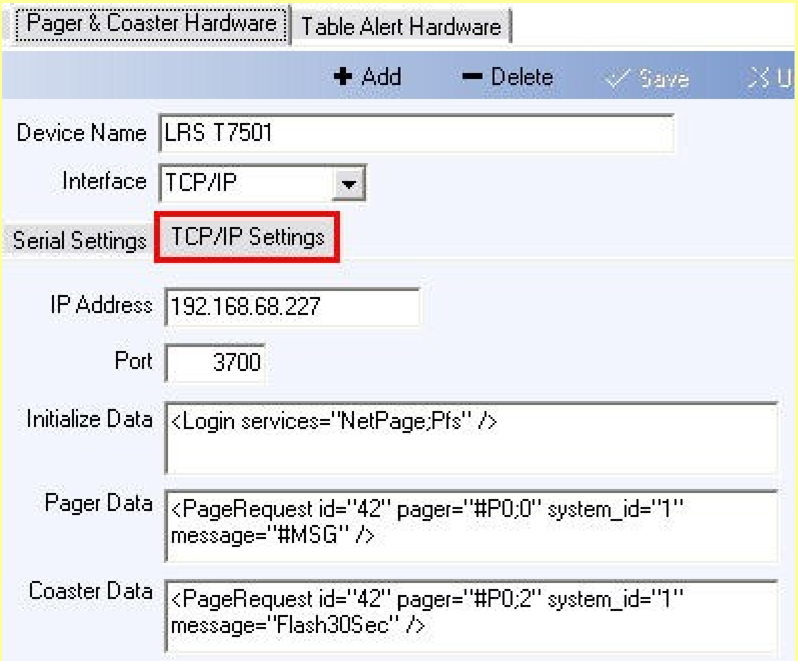
Device Name	Enter the manufacturer name and model number of device
Interface	Choose the correct interface. **Serial:** Choose this if your device connects through a serial (COM) port. **TCP/IP:** Choose this option if your device connects over the network and has it's own IP address.

SERIAL SETTINGS - (ignore if you're using a TCP/IP device)



COM Port	This is the port that is used for pager communications.
Baud Rate	This is the speed required to send the messages.
Pager Format	This is the code to ensure that messages are delivered properly to pagers (do not change defaults unless instructed to by a SoftTouch technician).
Coaster Format	This is the code to ensure that messages are delivered properly to coasters (do not change defaults unless instructed to by a SoftTouch technician).

TCP/IP SETTINGS - (ignore if you're using a Serial device)



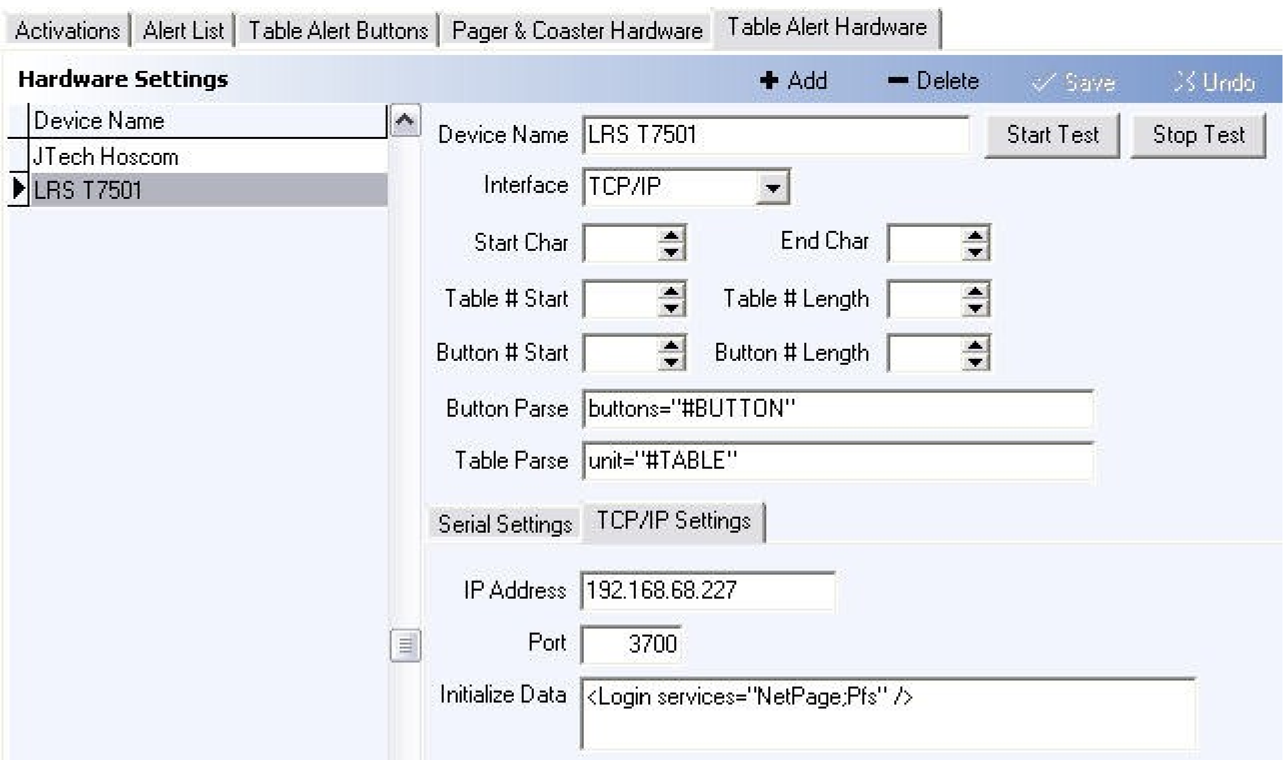
IP Address	IP address of the device. For instructions on setting the IP for the device itself, refer to your manufacturer's manual.
Port	Enter the port on which the device communicates.
Initialize Data	This is the code to ensure that messages are delivered properly (do not change defaults unless instructed to by a SoftTouch technician).
Pager Format	This is the code to ensure that messages are delivered properly to pagers (do not change defaults unless instructed to by a SoftTouch technician).
Coaster Format	This is the code to ensure that messages are delivered properly to coasters (do not change defaults unless instructed to by a SoftTouch technician).

25.5 Table Alert Hardware Tab

Under the **Hardware** section click on **Pagers/Alerts**. Click on the **Table Alert Hardware** tab.

Table Alert Hardware Setup

Under Table Alert Settings section fill out the following:



Device Name	This is where you enter the name of the device you are using. Enter the manufacturer brand and model number.
Start Test / Stop Test Buttons	Press the **Start Test** button and then try pressing some buttons on the Table Alert Device to see if data can be successfully received. Once you are finished testing, press the **Stop Test** button. **Note:** The settings below must be properly configured before attempting to test.
Interface	Choose the correct interface. **Serial:** Choose this if your device connects through a serial (COM) port. **TCP/IP:** Choose this option if your device connects over the network and has its own IP address.

Start Char	This is the position of the starting character for table alert messages.
End Char	This is the position of the ending character for table alert messages.
Table # Start	This is the position of the start of the table number in the message.
Table # Length	This is the total length of the table number in the message.
Button # Start	This is the position of the start of the button number in the message.
Button # Length	This is the total length of the button number in the message.
Button Parse	The code entered here tells SoftTouch what button on the device was pressed. This code ensures that messages are delivered properly (do not change defaults unless instructed to by a SoftTouch technician).
Table Parse	The code entered here tells SoftTouch what table the signal is coming from. This code ensures that messages are delivered properly (do not change defaults unless instructed to by a SoftTouch technician).
SERIAL SETTINGS Tab - (ignore if you're using a TCP/IP device)	
COM Port	This is the communications port being utilized by the device.
Baud Rate	This is the speed setting for communications to take place.
TCP/IP SETTINGS Tab - (ignore if you're using a Serial device)	
IP Address	IP address of the device. For instructions on setting the IP for the device itself, refer to your manufacturer's manual.
Port	Enter the port on which the device communicates.

Initialize Data	This is the code to ensure that messages are delivered properly (do not change defaults unless instructed to by a SoftTouch technician).

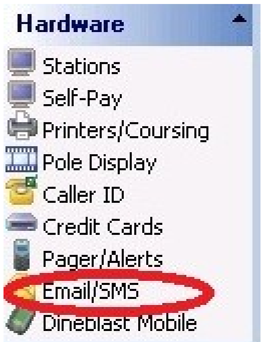
Part XXV

Email/SMS

Part 26 Email/SMS

Under the **Hardware** section click on **Email/Sms**.

Email/SMS



Email/SMS Server Settings

****WARNING**:** Charges and/or Fees may apply for texting by the cellphone company.

The Email/SMS settings can be used to send alerts to managers and/or employees. It can be used to send any of the alerts in the Pager/Alerts area of BackOffice by enabling the “Alert manager via email (sms)” option (see **Pager/Alerts->Alert List Tab**).

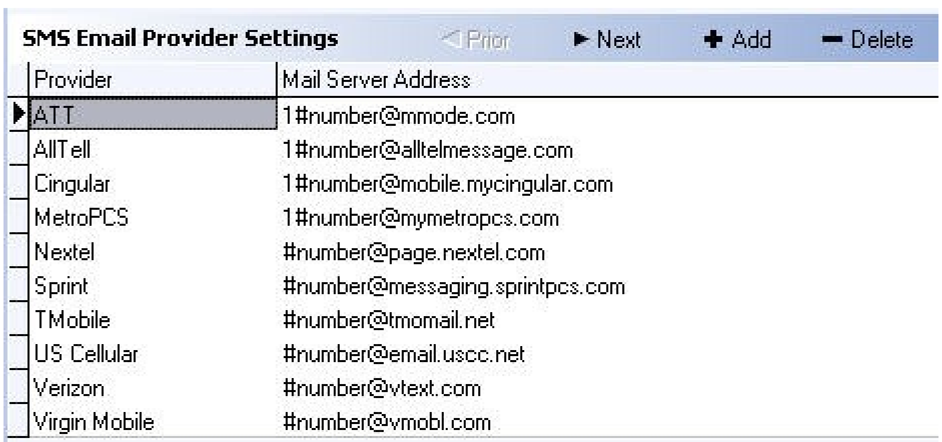
***Note:** The Email/SMS option is really designed to be used only by managers, not by individual employees.

Only the alerts that are available in the system can get sent to the cell phones.

*Note: You cannot send custom text messages to the cellphones. You can only send alerts from the available options in the pager list under Pager/Alerts (see **Pager/Alerts->Alert List Tab**).

SMTP Server	Your Internet provider's SMTP mail server address. **Example:** *smtp.YOURPROVIDER.com*

SMTP Port	Your Internet provider's SMTP port.
SMTP Username	Username of your SMTP account.
SMTP Password	Password for your SMTP account.
SMTP Sender Email	This is the email address that messages to customers or employees will appear to be from.
Send test message	Sends a test message to ensure the SMTP settings are correct.



Provider	Mail Server Address
ATT	1#number@mmode.com
AllTell	1#number@alltelmessage.com
Cingular	1#number@mobile.mycingular.com
MetroPCS	1#number@mymetropcs.com
Nextel	#number@page.nextel.com
Sprint	#number@messaging.sprintpcs.com
TMobile	#number@tmomail.net
US Cellular	#number@email.uscc.net
Verizon	#number@vtext.com
Virgin Mobile	#number@vmobl.com

1. The **SMS Email Provider Settings** refer to the proper format to send an SMS message to a phone. The "number" portion refers to the phone number that the message will be sent to.

2. Alerts from the Pager/Alerts section can also be sent to cell phones for employees with master alerts enabled by entering their phone number in the **Employees->Alerts/Email/SMS** section.

***Note:** This section can be used in conjunction with the Hostess program so people can give their cell phone number when they put themselves on the waiting list; when their table is ready, a text message would be sent to them.

***Note: THE MAIL SERVER ADDRESS MAY BE CHANGED AT ANY TIME BY THE CELLULAR PROVIDER. YOU MAY NEED TO CHECK WITH THE CELLULAR PROVIDER IF A PARTICULAR CARRIER DOES NOT WORK.**

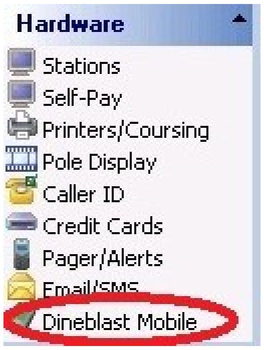
Part XV

Dineblast Mobile

Part 27 Dineblast Mobile

Under the **Hardware** section click on **Dineblast Mobile.**

Dineblast Mobile



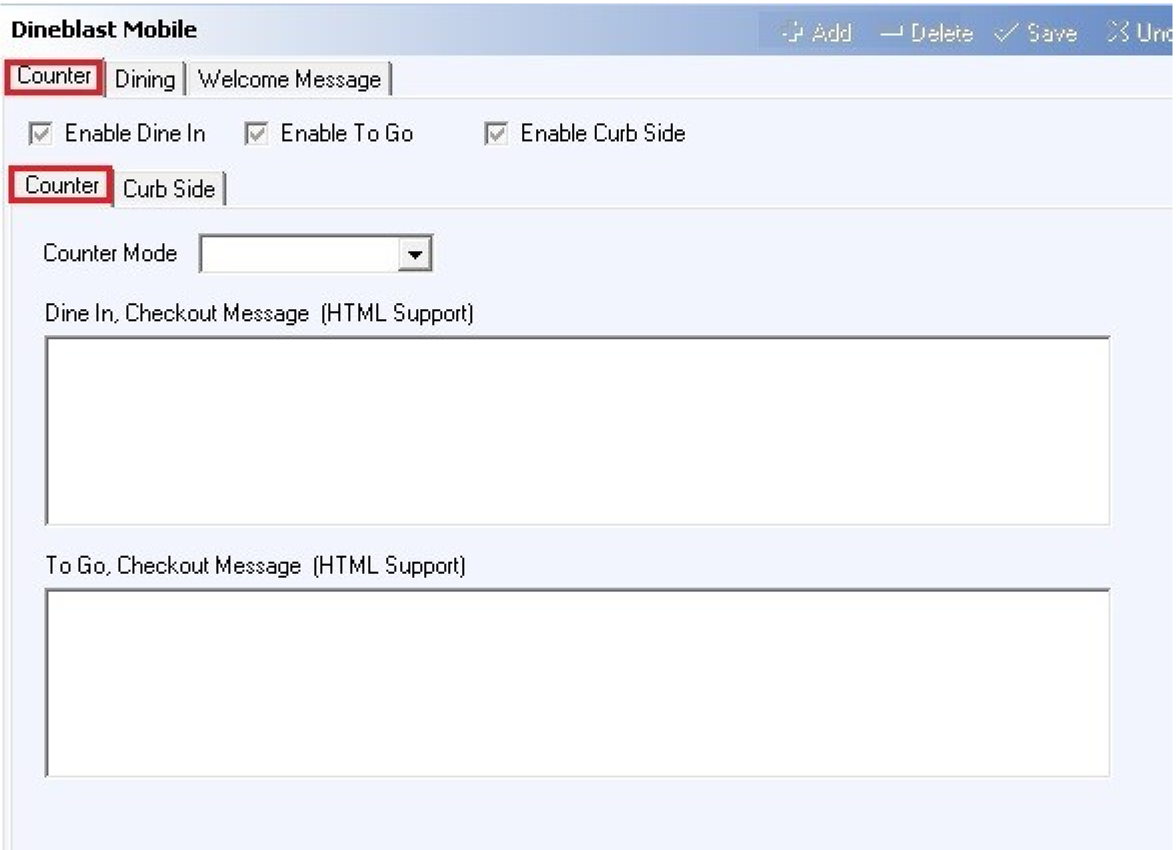
This section is reserved for future use.

27.1 Counter Tab

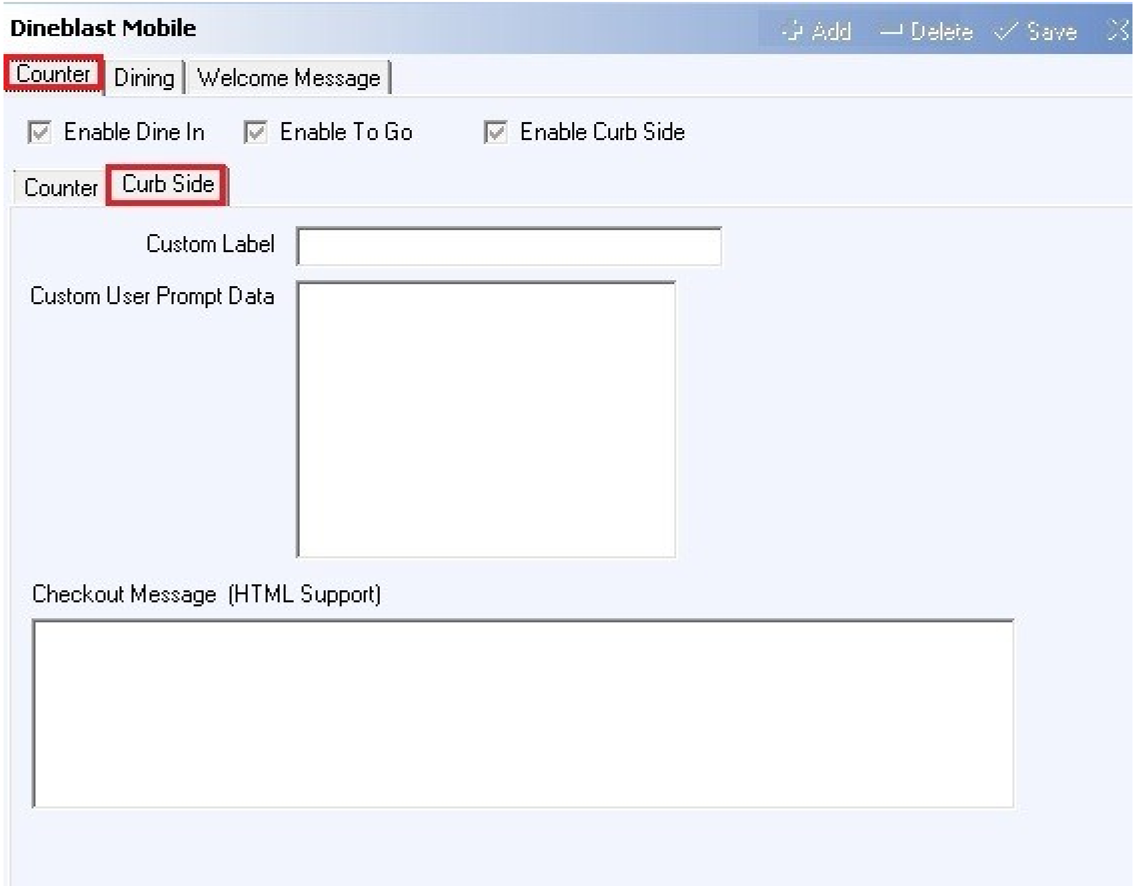
Under the **Hardware** section click on **Dineblast Mobile**. Click on the **Counter** tab.

This section is reserved for future use.

Counter



Curb Side

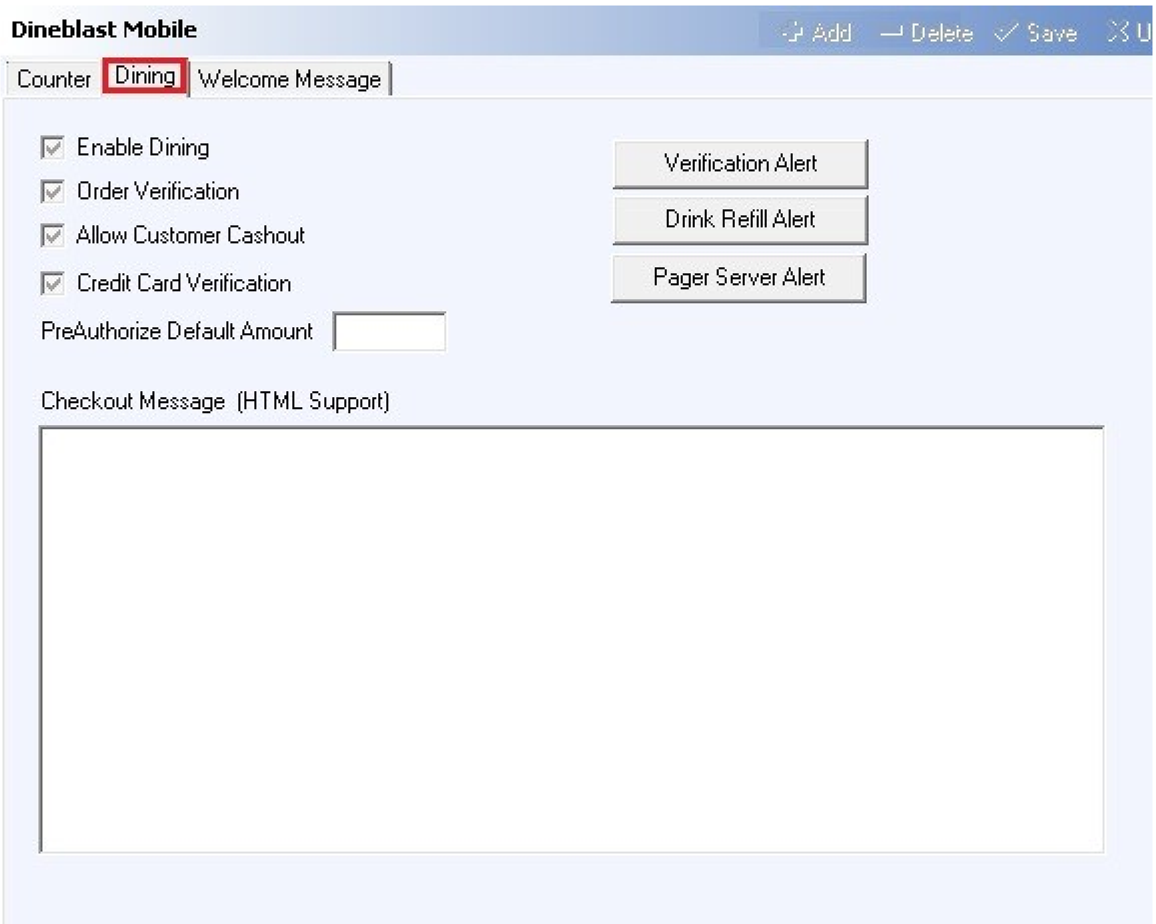

Dineblast Mobile
Add
Delete
Save
Counter
Dining
Welcome Message
Enable Dine In
Enable To Go
Enable Curb Side
Counter
Curb Side
Custom Label
Custom User Prompt Data
Checkout Message (HTML Support)

27.2 Dining Tab

Under the **Hardware** section click on **Dineblast Mobile**. Click on the **Dining** tab.

This section is reserved for future use.

Dining

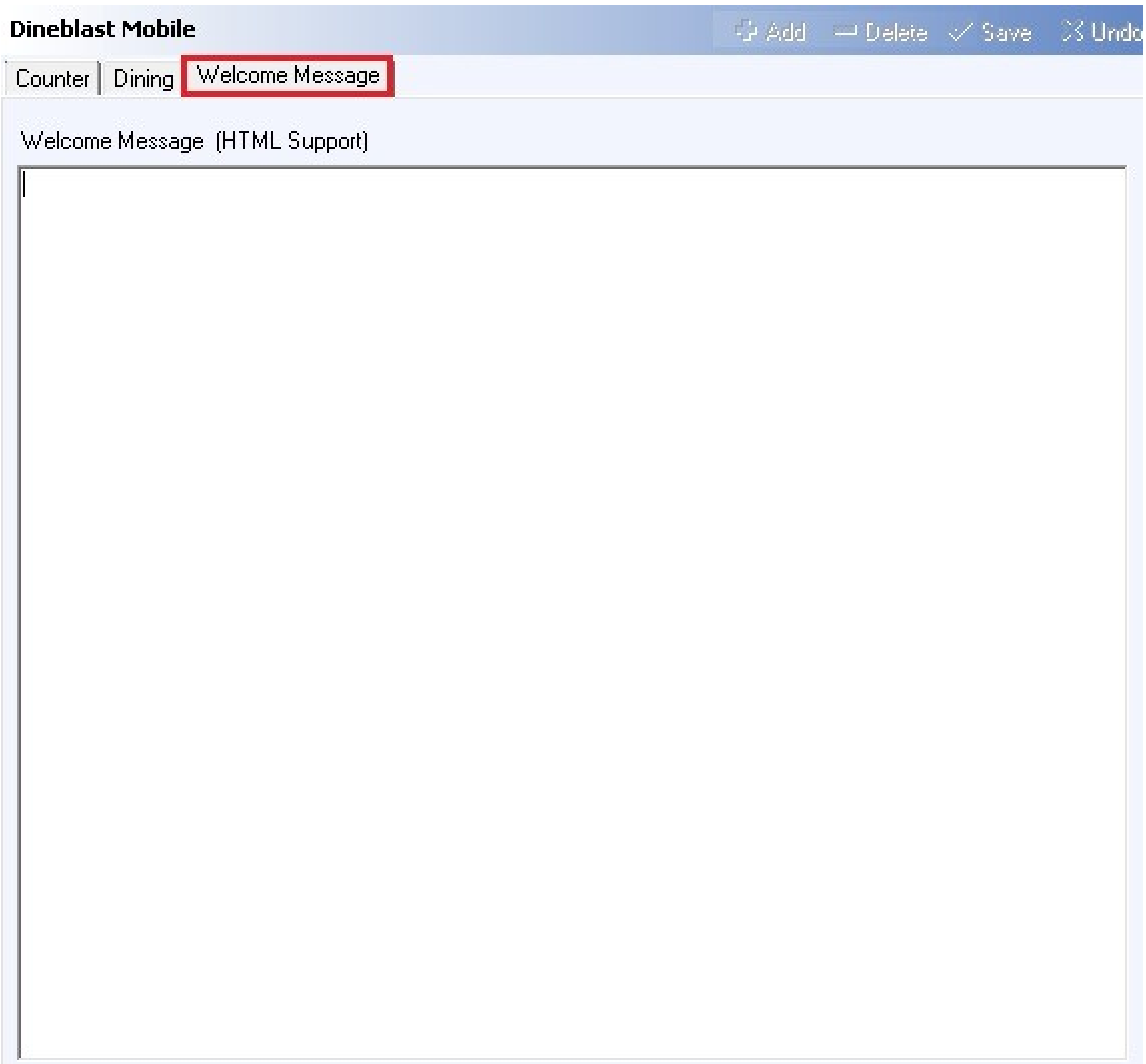


27.3 Welcome Message Tab

Under the **Hardware** section click on **Dineblast Mobile**. Click on the **Welcome Message** tab.

This section is reserved for future use.

Welcome Message



Part XVI

Financial Section

Part 28 Financial Section

The **Financial** section.

The Financial section contains the following:

1. Banks

2. Revenue Centers

3. Media/Accounts

4. Tax Table

5. Adjustments

6. Sales/Journal View

7. Tip Sharing

Part XXIX

Banks

Part 29 Banks

Under the **Financial** section click on **Banks.**

Banks

Banks includes the following tabs:

1. Banks (which covers tills, pockets, and store)

4. Default Banks

29.1 Banks

Under the **Financial** section click on **Banks**, then click the **Banks** tab**.**

Banks explanation includes the following:

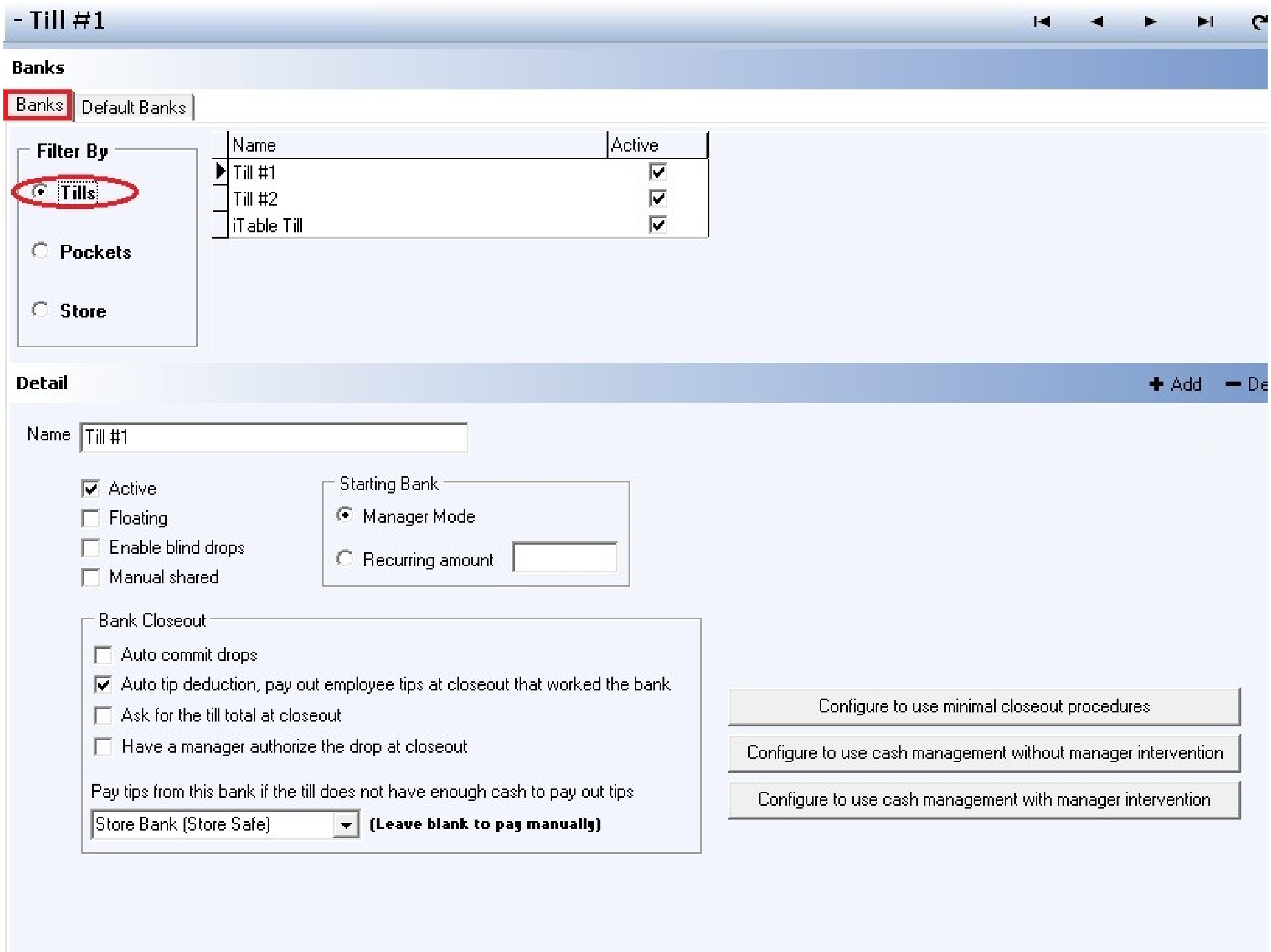
1. Tills
2. Pockets
3. Store

Tills	A Till is created for Cash Drawers. You may use more than 1 till for a Cash Drawer (Station 1 AM Till, Station 2 PM Till, etc.)
Pockets	A Pocket is used for servers that are banking themselves and make change out of their pocket.
Store	A Store is created for all store safes.

29.1.1 Tills

Under the **Financial** section click on **Banks**, click the **Banks** tab, and then click the **Filter By/Tills** radio button.

Tills



Press the **Add** button to add a new till, and fill in the information in the **Detail** section regarding that till:

Name	Decide on a name that describes this till and enter it in this field.
Active	Select this option to make the till active.

Floating	This allows this till to be used in multiple drawers. This way if an employee moves from one workstation to another, they can take their till with them to the new workstation and retain responsibility for the cash collected in this till. DO NOT USE AND THE **MANUAL SHARED** OPTION AT THE SAME TIME.
Enable Blind Drops	If this option is not selected, when a till is closed, you will get a dialog box that tells you what should be in the till and asks you what is actually in the till when it is counted. If there is a variance, you can enter an over/under reason to explain the difference. If this option is selected, when a till is closed the employee closing the till will be asked how much money is in the drawer without being shown the expected amount. IF YOU HAVE A RECURRING AMOUNT SET FOR THIS TILL, COUNT ALL THE MONEY IN THE TILL, **INCLUDING** THE STARTING BANK.
Manual Shared	Select this option if more than one employee will be using the drawer. DO NOT USE THIS OPTION AND THE **FLOATING** OPTION AT THE SAME TIME.
Manager Mode	Select this option if the starting amount for this till is different every day and the manager will transfer the starting amount from the Store Safe to this till before the till is used each day. If you use manager mode and do not enter a starting bank before the shift, the system will think the till has no money in it and you will not be able to do paid outs or tips paid until the user of this till collects enough cash to cover the paid out or tips paid.
Recurring amount	If the starting amount that this till is opened with is the same amount every day, you can enter that amount here.
Auto commit drops	This prevents modifications (such as forgotten tips) from being entered after closeout.

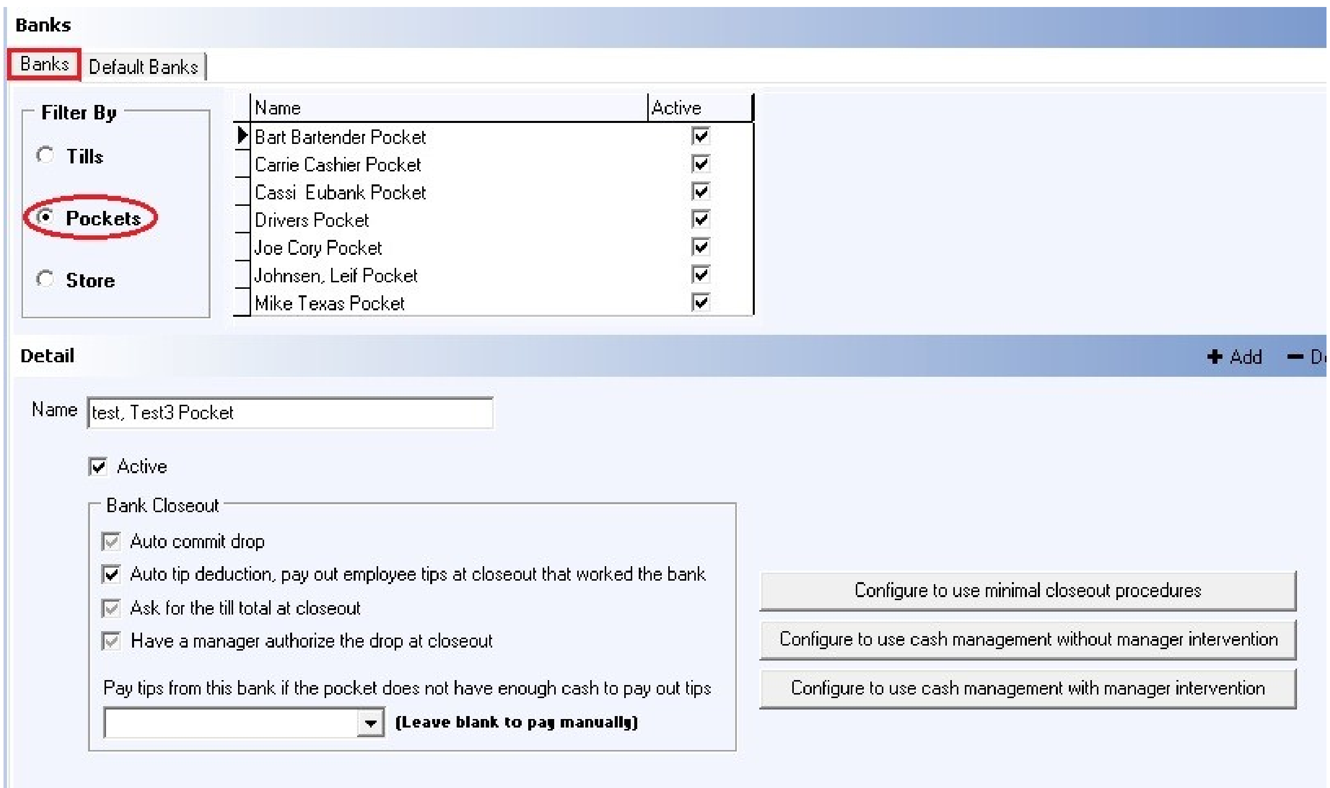
Auto tip deduction, pay out employee tips at closeout that worked the bank	The employee takes cash for charge tips from that till as part of the closeout process. If, on the other hand, charge tips are to be withheld and then paid with the paycheck, this box should not be checked and tips owed from the house would be given manually.
Ask for the till total at closeout	The employee closing out is required to count the money in the till and enter that total. This will compare the reported total to the expected total to determine if the till is over or under and by how much.
Have a manager authorize the drop at closeout	The manager must accept the employee's closeout, meaning the manager sees how much the till is over or under by before the employee is able to complete closing out.
Pay tips from this bank if the till does not have enough cash to pay out tips	Select the bank from the drop-down that tips should be paid from if the selected till does not have enough cash to pay out tips.
Configure to use minimal closeout procedures	This option will change your settings so that the following option is checked on: • Auto tip deduction, pay out employee tips at closeout that worked the bank
Configure to use cash management without manager intervention	This option will change your settings so that the following options are checked on: • Auto tip deduction, pay out employee tips at closeout that worked the bank • Ask for the till total at closeout

Configure to use cash managem ent with manager interventi on	This option will change your settings so that the following options are checked on: • Auto tip deduction, pay out employee tips at closeout that worked the bank • Ask for the till total at closeout • Have a manager authorize the drop at closeout

29.1.2 Pockets

Under the **Financial** section click on **Banks**, select the **Banks** tab, and then click the **Filter By/Pockets** radio button.

Pockets



Press the **Add** button to add a new pocket, and fill in the information in the **Detail** section regarding that pocket:

Name	Decide on a name that describes this pocket and enter it in this field. You will want to include the name of the employee using this pocket.
Active	Select this option to make the pocket active.

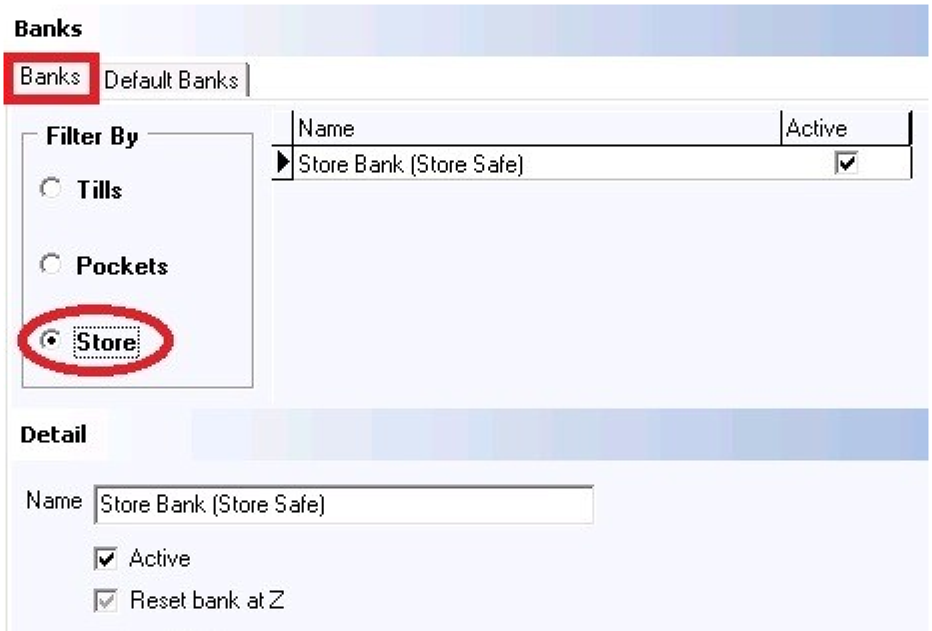
Auto commit drop	This prevents modifications (such as forgotten tips) from being entered after closeout.
Auto tip deduction, pay out employee tips at closeout that worked the bank	The employee takes cash for charge tips from that pocket as part of the closeout process. If, on the other hand, charge tips are to be withheld and then paid with the paycheck, this box should not be checked and tips owed from the house would be given manually.
Ask for the till total at closeout	The employee closing out is required to count the money in the pocket and enter that total. This will compare the reported total to the expected total to determine if the till is over or under and by how much.
Have a manager authorize the drop at closeout	The manager must accept the employee's closeout, meaning the manager sees how much the pocket is over or under by before the employee is able to complete closing out.
Pay tips from this bank if the pocket does not have enough cash to pay out tips	Select the bank from the drop-down that tips should be paid from if the selected pocket does not have enough cash to pay out tips.
Configure to use minimal closeout procedures	This option will change your settings so that the following option is checked on: • Auto tip deduction, pay out employee tips at closeout that worked the bank

Configure to use cash management without manager intervention	This option will change your settings so that the following options are checked on: • Auto tip deduction, pay out employee tips at closeout that worked the bank • Ask for the till total at closeout
Configure to use cash management with manager intervention	This option will change your settings so that the following options are checked on: • Auto tip deduction, pay out employee tips at closeout that worked the bank • Ask for the till total at closeout • Have a manager authorize the drop at closeout

29.1.3 Store

Under the **Financial** section click on **Banks**, click the **Banks** tab, and then click the **Filter By/Store** radio button.

Store



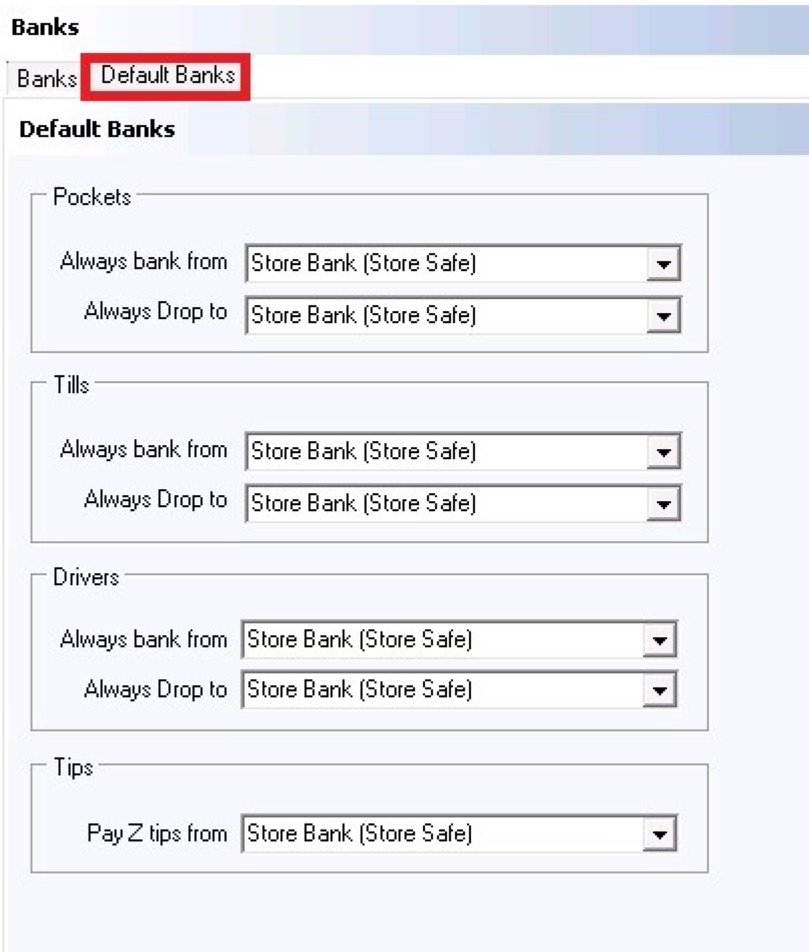
Press the **Add** button to add a new store, and fill in the information in the **Detail** section regarding that store:

Name	Decide on a name that describes this store and enter it in this field.
Active	Select this option to make the store active.
Reset at Z	Select this option if you wish to reset this bank (safe) when you Z out.

29.2 Default Banks

Under the **Financial** section click on **Banks,** then click the **Default Banks** tab.

Default Banks



Pockets - Always bank from	If the store provides the money a server will make change from, select the bank where these funds will be taken from.
Pockets - Always drop to	Select from the drop down the bank where the money that an employee with a pocket turns in when they close their shift will go.

Tills - Always bank from	If you have a daily recurring amount set as a starting bank, or if a manager enters in the starting amount for each till daily, select from the drop down where this money should be taken from. Although this is the default for where the starting amount will come from, if a manager is entering the amount daily, they can change where the money is coming from as they do the procedure.
Tills - Always drop to	Select from the drop down the bank where the money that an employee with a till turns in when they close their shift and till will go.
Drivers - Always bank from	If the store provides the money a driver will make change from, enter the bank where these funds will be taken from.
Drivers - Always drop to	Select from the drop down the bank where the money that a driver turns in when they close their shift will go.
Tips - Pay Z tips from	When the amount that an employee earns in charged tips is greater than the cash they collected, they will need to be paid the difference. Select from the drop down where you will pay the additional tips earned from.

Part XXX

Revenue Centers

Part 30 Revenue Centers

Under the **Financial** section click on **Revenue Centers.**

Revenue Centers

A **Revenue Center** is a group of stations that are in a unique area. Restaurant and Bar are the two most commonly used Revenue Centers.

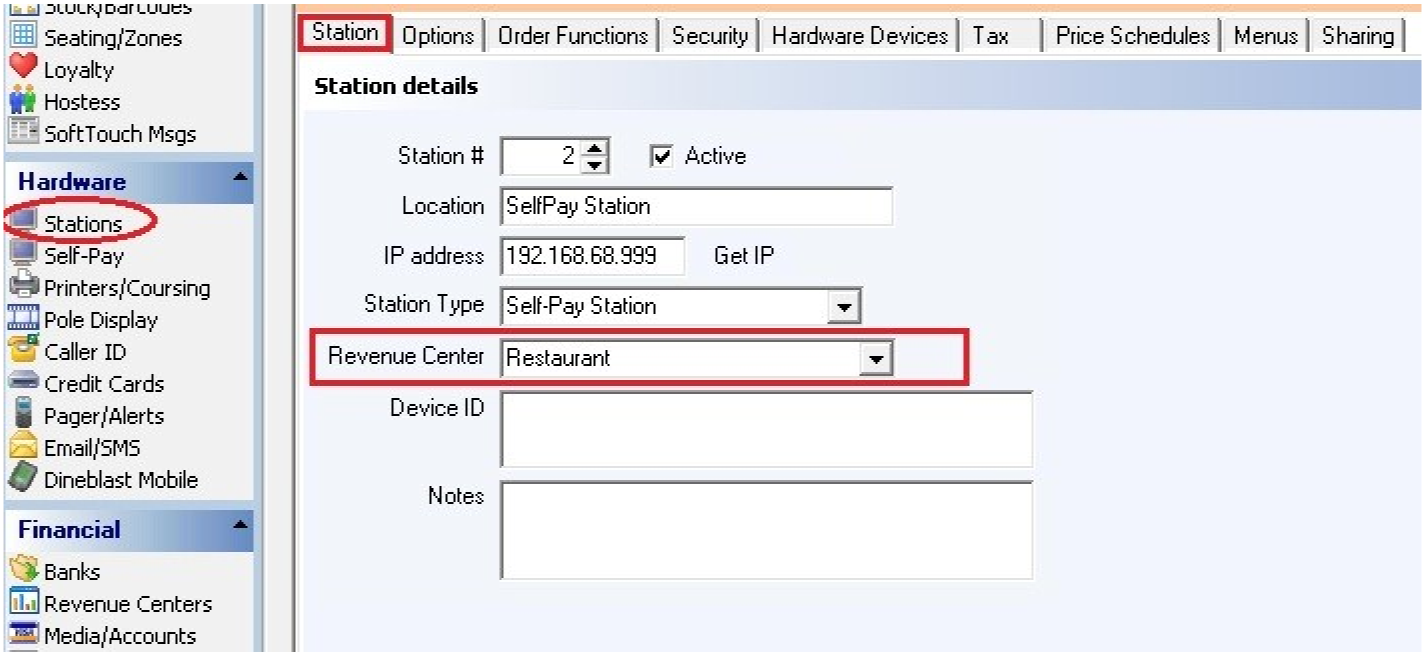
Here you do nothing more than create groups for your stations. Click the **Add** button and then click the newly created space under **Name** to enter a name for that center.

This will be useful when you run the Revenue Center Reports to see which Revenue Center gave you more profit.

Example: Terminal 1 and Terminal 2 can be linked to the Bar Revenue Center and Terminal 3 and Terminal 4 can be linked to the Restaurant Revenue Center.

See image below:

Revenue Centers created in the Revenue Center list are assigned to **Stations** under the Hardware section in the Stations setup screen (see **Hardware->Stations**). See the image below as a reminder of how you assign a revenue center to a station:


Stock/Barcodes
Seating/Zones
Loyalty
Hostess
SoftTouch Msgs
Hardware
Stations
Self-Pay
Printers/Coursing
Pole Display
Caller ID
Credit Cards
Pager/Alerts
Email/SMS
Dineblast Mobile
Financial
Banks
Revenue Centers
Media/Accounts
Station
Options
Order Functions
Security
Hardware Devices
Tax
Price Schedules
Menus
Sharing
Station details
Station #
2
Active
Location
SelfPay Station
IP address
192.168.68.999
Get IP
Station Type
Self-Pay Station
Revenue Center
Restaurant
Device ID
Notes

Part XX

Media/Accounts

Part 31 Media/Accounts

Under the **Financial** section click on **Media/Accounts**.

Media/Accounts Setup holds the following settings:

1. Create Media and Account Groups

2. Create and Manage Member Accounts or Card Accounts

31.1 Account Groups Tab

Under the **Financial** section click on **Media/Accounts**. Click on the **Account Groups** tab.

Media/Account List

Here you setup your **Media**:

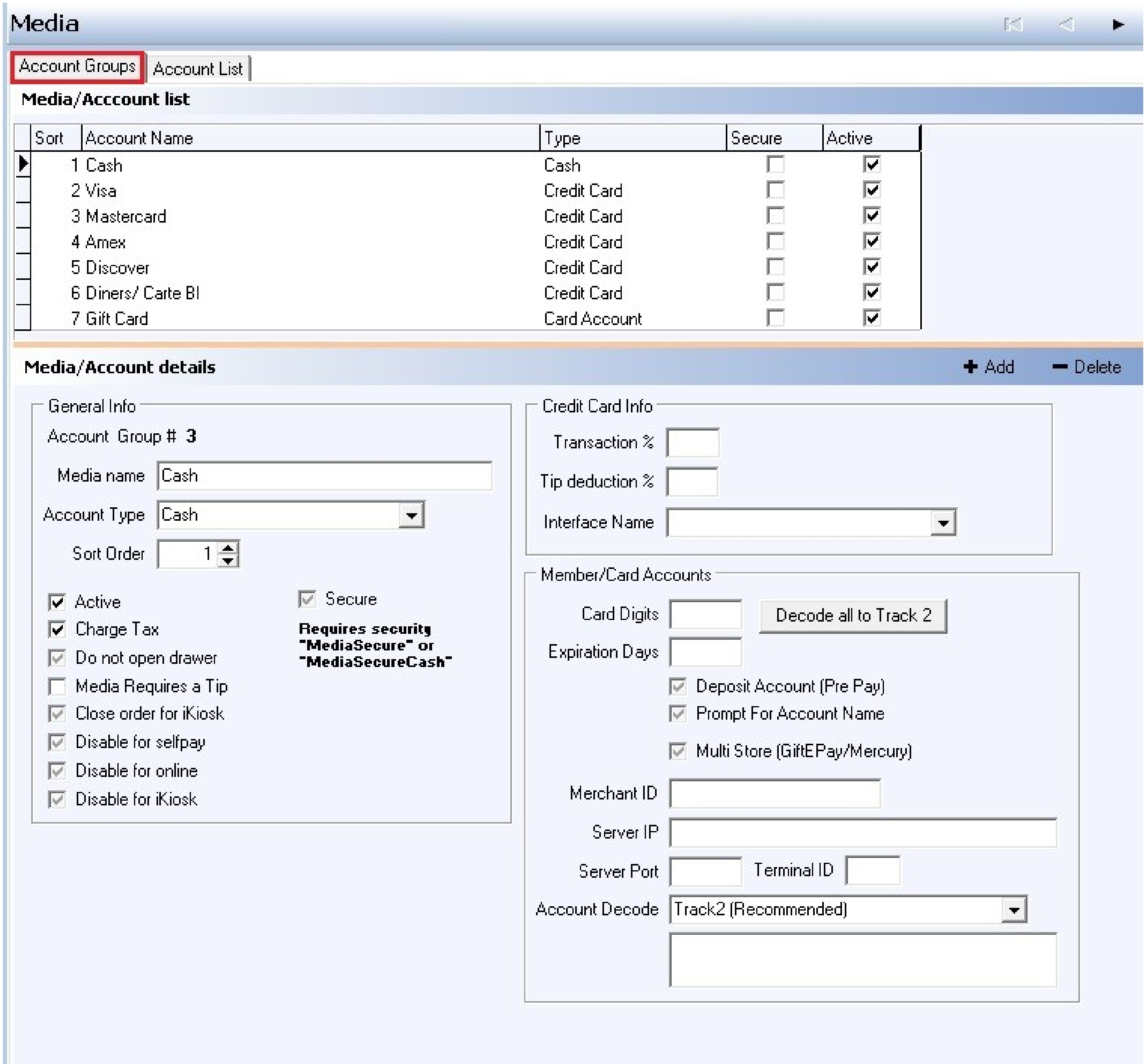
- Credit Cards (Visa, AMEX, MasterCard, Discover etc.)
- Cash/checks
- Coupons
- **Member Accounts** and **Gift Cards**

- Add Media -

In the Media Details part of the screen click the 

button, fill out the fields and check the appropriate check boxes.

***Note:** when you do a new install of SoftTouch, most media types such as credit cards and cash are already set up. Little or no changes should need to be made to these media types.



- General Info -

Media Name	Enter a name/title for the media.

Account Type	Choose what type of media it is. • for cash - Cash • for checks - Cash • for credit/debit card - Credit Card • for check comp - House Charge • for house account - Member Account • for gift card - Card Account • for coupon - Coupon • for Bitcoin - Bitcoin **Explanation:** House Account holds account members in it and therefore it's account type is called Member Account.
Sort Order	Allows to set the display order of payment types in the SoftTouch cash out screen.
Active	If checked, the media becomes active.
Charge Tax	If checked, tax will be charged (provided the items on the check are taxable and the station has the tax assigned to it).
Do not open drawer	This option prevents the cash drawer from opening on this type of tender. **Example:** You may not need to open the drawer on a credit card tender. Preventing it from opening enables greater security.
Media Requires a Tip	If checked, a tip will be required to be entered when this media type is used in the Dining, Bar, or Delivery modes. This is usually turned on for credit cards. You also have the option to turn this on for gift cards and member accounts. **Note:** Multi-store gift cards do not support tips.
Close Order for iKiosk	If checked, you will be able to close a check from an iKiosk station using the selected tender.
Disable for selfpay	If checked, disables the option for the media selected from the list to be used with the Selfpay machine.

Disable for online	Prevents people from using the selected media online. **Example:** If the restaurant does not want cash as a payment type for online, they would put a check mark in this box.
Disable for iKiosk	Prevents people from using the selected media at the iKiosk. **Example:** If the restaurant does not want cash as a payment type at their iKiosk, they would put a check mark in this box.
Secure	If checked, only a manager can perform the operation as long as the manager's security group in the **BackOffice** under Security settings (see **Security**) has a **MediaSecure** or **MediaSecureCash** security item keyword in it.

- Credit Card Info -

Transaction %	The credit card company deducts a percentage off of a check called a transaction fee. This fee is calculated from the whole check including the server's tips. Specify the transaction charge percentage required by the credit card company here. ***Note:** This setting has no bearing on the program. It is merely a reference point.
Tip Deduction %	Some restaurants want the server to pay the transaction fee when they receive tips on credit cards. If that's the case, specify the percentage here (usually it is the same as Transaction %). If this is set then in the Server Report the transaction fee will be deducted from the server's charge tips.
Interface Name	Choose an appropriate interface name for the credit card (Visa to Visa, American Express to AMEX etc.). This may already be set up for you on a new install.

- Member/Card Accounts -

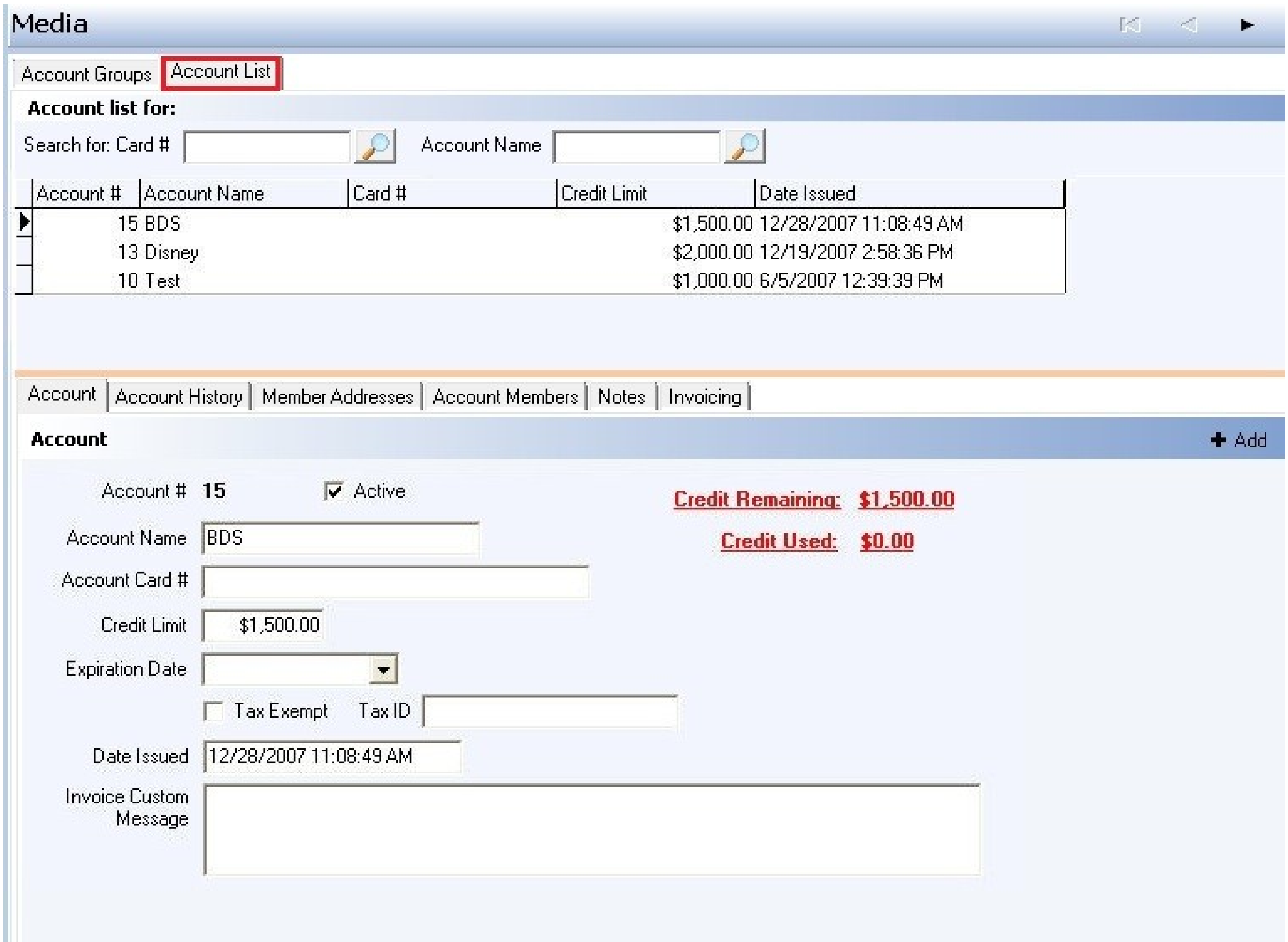
Card Digits	This can be used to set up gift cards that all start with the same first two or three digits. When you get gift cards made, it is best to have the manufacturer make the first two or three digits on each account number the same. Such as this: 774033, 774034, 774035 In the example above, "77" is the first two digits of every account number, so you can put 77 into the Card Digits field. Now when you go to cash out an order, you can simply swipe the gift card as soon as you enter the cash out screen and the system will automatically recognize that you're swiping a gift card. ***Note:** If you do not set up the Card Digits field, you would have to select the gift card media in the SoftTouch Cashout screen, hit enter, and then swipe the card.
Expiration Days	The default number of days after which a card account expires starting from the day it was issued. **Explanation:** When you create a card account in SoftTouch this default number is used to set the expiration date for the card. If you wish to extend the expiration date of the card account, do that from the actual account details screen under the Account List tab (see Media/Accounts->Account List Tab).
Decode all to Track 2	This button will decode all accounts in the chosen media type so that the beginning and end codes get stripped off. This only needs to be used when older versions of SoftTouch did not have support for track 2, so the account number would end up having the full track data as the account number, such as this, ;7765481=0? The Decode all to Track 2 button will strip out everything but the actual account number, so all that's left is 7765481. If you have your gift cards encoded with Track 2 format (ex: ;7765481=0?) and you are using SoftTouch version 4.4 or higher, then you will never need to touch this button.
Deposit Account (Pre Pay)	If the restaurant gets money in advance for the account then check this option. **Example:** A Gift Card would be a deposit (pre-paid) account.
Prompt For Account Name	If selected, you will be asked to select an account name when using this tender.

Multi Store (GiftEPay/Mercury)	This option allows gift cards to be used at multiple locations that use the same merchant.
Merchant ID	This is used in conjunction with the above item. It is your merchant ID.
Server IP	This is the merchant's server IP. Obtain this from your gift card merchant.
Server Port	This is the server port. It is the same as in the credit card configuration (see **Hardware->Credit Cards->Settings Tab**).
Terminal ID	This is the merchant's Terminal ID (might only be required if setting up gift cards through Sterling).
Account Decode	Internal use.

31.2 Account List Tab

Under the **Financial** section click on **Media/Accounts**. Click on the **Account List** tab.

Account List



Here you set up Member Accounts and assign members to them, enter member addresses, view account history, create invoices etc. You can also create Gift Cards here in the BackOffice, but you would normally do it in the SoftTouch front end.

1. Account

2. Account History

3. Member Addresses

4. Account Members

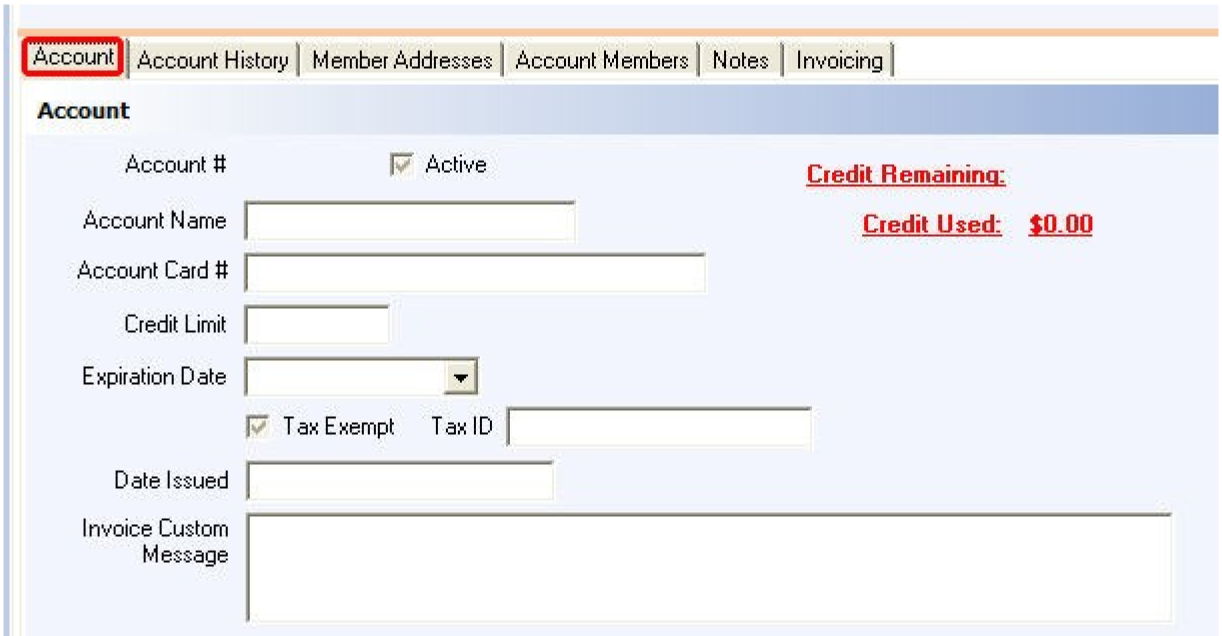
5. Notes

6. Invoicing

31.2.1 Account Tab

Under the **Financial** section click on **Media/Accounts**. Click on the **Account List** tab. Select the **Account** tab.

Account



Add A Member Account:

Step 1. First click on the Account Groups tab and under Media/Accounts then select the member account media into which you'll be adding this Member account.

Step 2. Now select the **Account List** tab.

Step 3. Click the 

button.

Step 4. In the fields in the **Account** section enter the Member Account details:

Account Name	Usually an account is tied to a business name which then has account members tied underneath it. Here you would put the Business's name.
Account Card #	**For Member Accounts**, you do not need to enter anything here. Card numbers can be entered on the actual members of the account instead so each member of the account can have their own card. Card numbers for members are entered from the Customers area in BackOffice (see **Customers->Customer List Tab**). **For Card Accounts**, this is where the card number goes. Usually Card Accounts (Gift Cards) are created from the front end, so this field will get filled in for you when they are created.

Credit Limit	This is the amount the Account will be able to spend before you send them an invoice. Each time a member of the account makes a purchase on the account, the number will be subtracted from this number until it reaches $0. Once it reaches $0 the Account can no longer be used until the account is reconciled or you add monetary value to the card.
Expiration Date	Optional to have a date the Account will expire.
Tax Exempt	Check this on if the Account is Tax-Exempt, but make sure to also fill out the Tax ID section for tax purposes. A tax exempt certificate should be kept on file for all tax exempt accounts.
Tax ID	If a company is tax exempt you would need the company or person's Tax ID number placed within this section.
Date Issued	The date the new account has been created.
Invoice Custom Message	A personalized message that would go on the invoice that is sent to the customer.

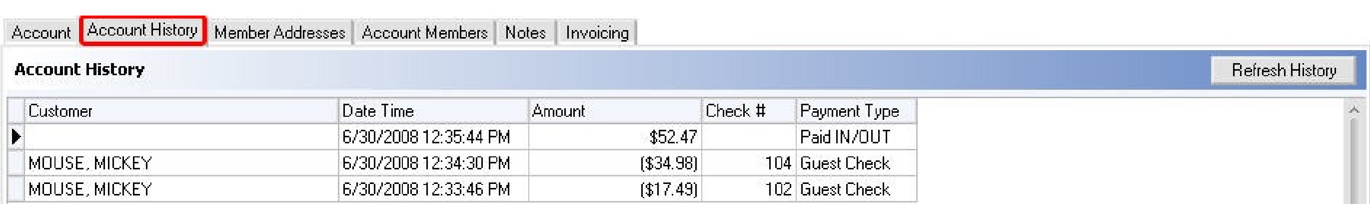
31.2.2 Account History Tab

Under the **Financial** section click on **Media/Accounts**. Click on the **Account List** tab. Select the **Account History** tab.

Account History

In the lower part of the screen select the Account History tab.

Here you can view the transaction history of the Member Account or a Gift Card.



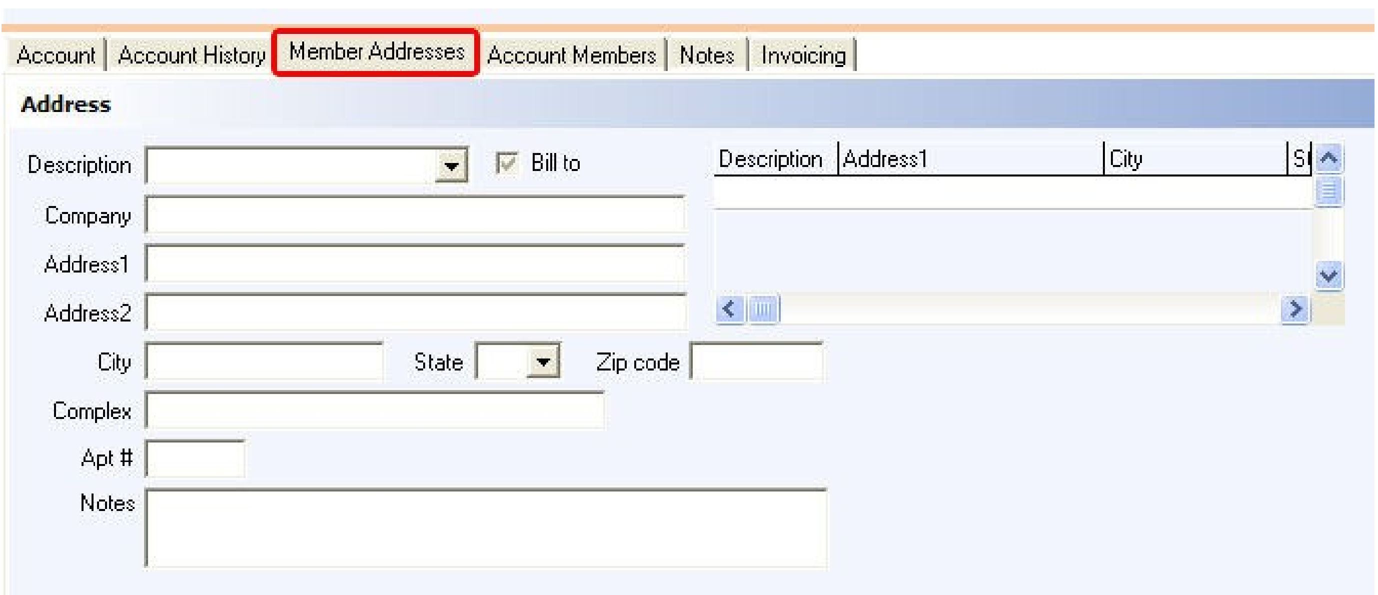
Customer	The customer or member of the account that performed the transaction.

Date Time	The date and time on which the check was closed out.
Amount	Total amount of the check (including tax).
Check #	Tells you what the check number is for the customer. This is helpful to find the check if necessary.
Payment Type	Lets you know what type of transaction it was.
Refresh History	If you just charged a check to an account and you would like to make sure it was received, you can click the "refresh history" option and anything that has been recently added to the account, such as a check that was just cashed out, will appear.

31.2.3 Member Addresses Tab

Under the **Financial** section click on **Media/Accounts**. Click on the **Account List** tab. Select the **Member Addresses** tab.

Member Addresses



Here you can enter multiple addresses for the account holder and specify which address is the Bill To address by checking the **Bill to** option.

Push the **Add** button then enter the Description (a name to distinguish it from other addresses) and other needed information in the fields on the left.

Clicking on / highlighting different address lines in the scrolling box on the right allows you to switch between the selected member's different addresses.

31.2.4 Account Members Tab

Under the **Financial** section click on **Media/Accounts**. Click on the **Account List** tab. Select the **Account Members** tab.

Account Members

Here you add people known as the Account Members to a Member Account.

In the Account List box higher on the screen, select/highlight the account you want to add members to. Then, in the lower portion of the screen, click the **Add** button and use the drop-down to select the customer you want to add to the highlighted account.

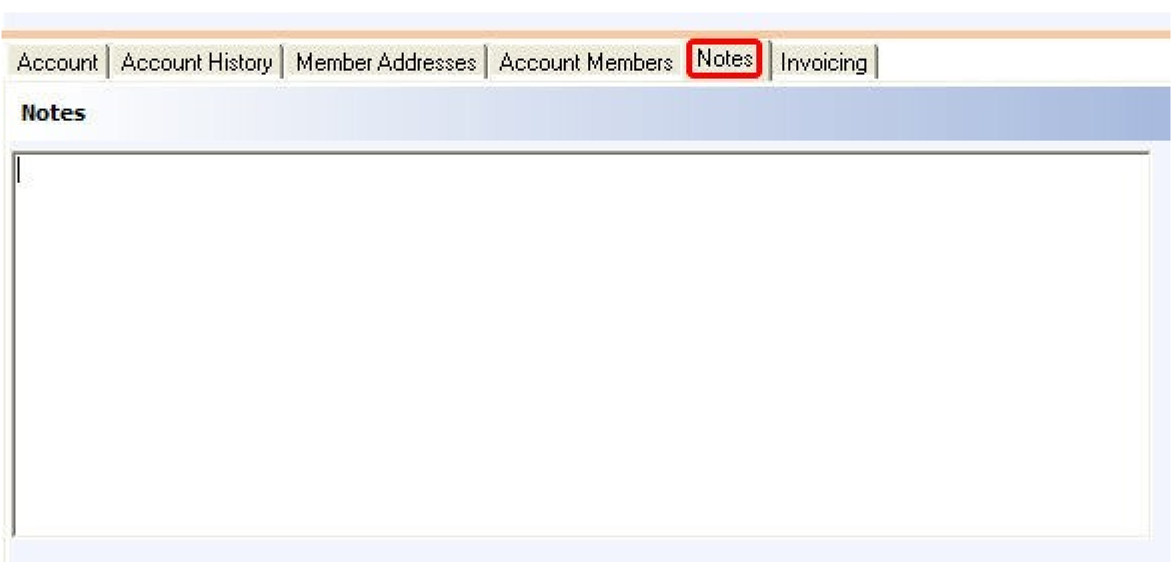
Account Members are derived from your customer database. If you don't see the person that you want to add in the drop-down list, enter that person as a customer first, then come back here and add them to the account. For additional information on how to add customers, see Customers.

Remember: You are adding members to whichever account is selected/highlighted in the **Account List** box higher on the screen.

31.2.5 Notes Tab

Under the **Financial** section click on **Media/Accounts**. Click on the **Account List** tab. Select the **Notes** tab.

Notes



Here you can enter notes specific to the account. This is for your personal use. Notes are viewable in the BackOffice only; they do not show up or get printed anywhere.

31.2.6 Invoicing Tab

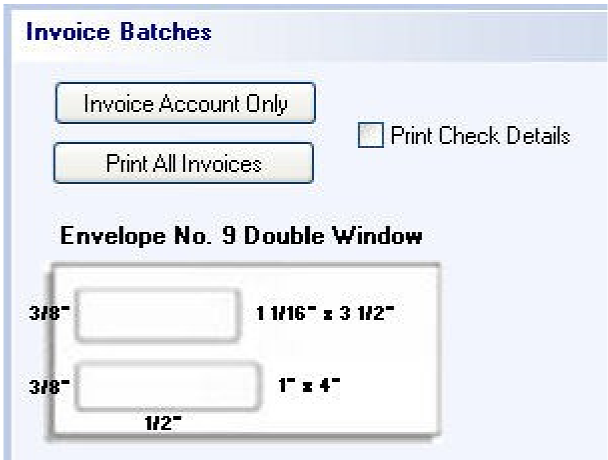
Under the **Financial** section click on **Media/Accounts**. Click on the **Account List** tab. Select the **Invoicing** tab.

Invoicing

Here you can print account invoices.

- Print Invoice(s) -

1. First click on the Account Groups tab and under **Media/Accounts list** part of the screen select the account media that you need.
2. Now click on the Account List tab.
3. Select the account name for which you want to print the invoice.
4. Print an invoice using the options shown below.



Invoice Account Only	Prints the invoice only for the account name that you have selected (on the top portion of the screen, the one that has a pointing arrow on the left side).
Print All Invoices	Prints all the invoices for the Account Media that you currently have selected under the Account Groups tab.
Print Check Details	Checking this box allows you to print out all details for all checks, including table number, items ordered, etc.

Part XX

Tax Table

Part 32 Tax Table

Under the **Financial** section click on **Tax Table**.

*****BE SURE TO CHECK THE CURRENT TAX RATE FOR YOUR STATE AND COUNTY. BELOW ARE EXAMPLES AND ARE NOT A SUBSTITUTE FOR OBTAINING AND USING THE LATEST TAX RATES THAT SHOULD BE CHARGED IN YOUR AREA.**

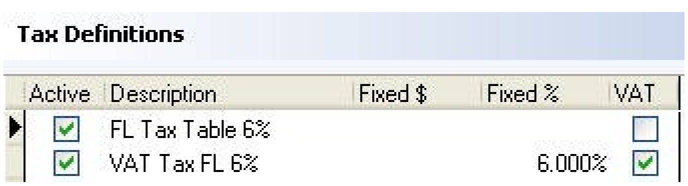
Tax Definitions

Here you add a tax table and specify a Fixed amount or Fixed percentage for it.

Note that you can add as many tax tables as is necessary for your locale.

After clicking the **Add** button or selecting an existing tax you wish to edit, fields can be filled in either here or in the **Tax Definition Detail** section.

In the **Fixed %** column, percent signs are added automatically after you finish.



Tax Definitions

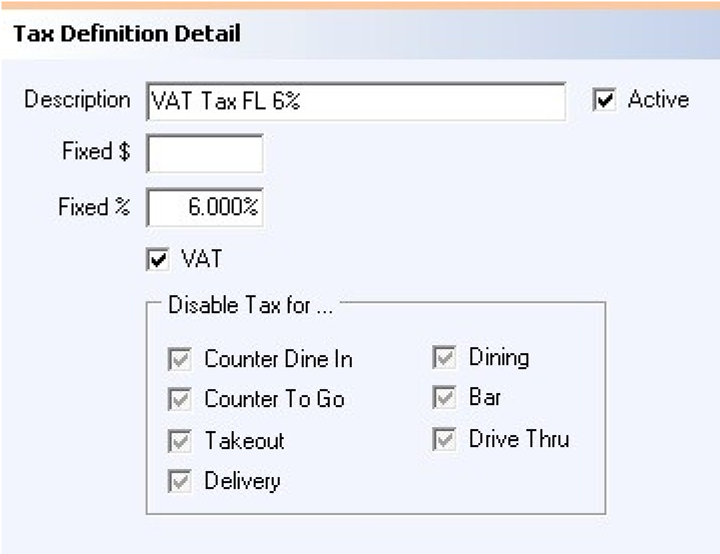
Active	Description	Fixed $	Fixed %	VAT
☑	FL Tax Table 6%			☐
☑	VAT Tax FL 6%		6.000%	☑

Above is an example set for a variable percentage of 6%. It has breakpoints that need to be entered in order for tax to be calculated correctly. Florida is one such state that employs this type of sales tax.

Tax Definition Detail

In addition to taxes definitions being added/edited in the **Tax Definitions** section, they can be added/edited here. Click the **Add** button or select from **Tax Definitions** the Tax you wish to edit before filling in the fields.

This section has the added feature of disabling this specific tax for certain kinds of orders, such as dine in, takeout, delivery, etc.

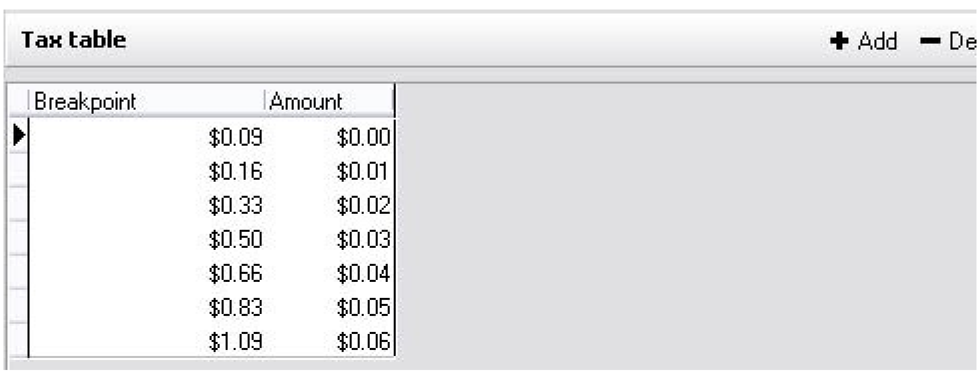


Tax Table

Here you add breakpoints for your tax table.

First, make sure that under **Tax Definitions** the tax you want to add breakpoints to is selected. Next, click the **Add** button in the **Tax table** section and then click in the boxes under **Breakpoint** and **Amount** to type the appropriate amounts. The dollar sign will be added automatically when you finish.

The following image is an example of exactly how the Florida tax rate breaks down.



Breakpoint	Amount
$0.09	$0.00
$0.16	$0.01
$0.33	$0.02
$0.50	$0.03
$0.66	$0.04
$0.83	$0.05
$1.09	$0.06

Above is an example of a Florida tax table, $0.09 being the first breakpoint where tax is charged and $1.09 being the breakpoint where the tax table is repeated. Some counties have different tax tables in Florida and other states.

***Note:** Be aware of these tables if a flat rate tax is NOT used in your county.

IT IS THE DEALER'S RESPONSIBILITY TO CHECK THE CURRENT TAX RATE FOR YOUR STATE.

VAT Tax

Some counties and/or states also incorporate a VAT (Value Added Tax). This can be set to a fixed percentage rate and then check on the VAT checkbox for that rate. The box must be checked on for it to take effect.

*Note: VAT tax is primarily used for liquor sales and is backed out of certain sales reports to make reporting and paying taxes very easy.

- To Set Up Value Added Tax -

Step 1.

Use the information above to create a new definition / tax table for Value Added Tax. Check the VAT field on.

Step 2.

Apply the VAT sales tax to all the items you would like to. To do this, go to **Item Builder** (under **General)** , click the **Menu & Rule Builder** tab, click the red **Items** button, click on an item, click the **Tax** tab on the bottom right, and use the drop down under **Tax Table** to attach the VAT tax. For the price of these items, enter what the price would be including the tax. This is done via the **Pricing** tab on the bottom right when an item is selected. (See **Item Builder->Items->Assign Family, Attach Price...and Tax**.)

Step 3.

You can put a check in the box next to the "**Apply VAT on bar orders only**" if you want the VAT only to apply for the Bar.

***Note:** If you order the same items while in Dining or any other mode with the “Apply VAT on bar orders only” checked on, the tax will act as a regular tax instead of VAT. This also holds true if an order is taken in the Bar mode and then moved from a seat in the bar to a table in dining. Once you go to the Dining mode and pick up this check that was moved, you will see that the tax is being applied as a regular tax instead of VAT.

2. Go to **System->Rounding**. In the **Round to Nearest** field, you can enter a sufficient amount to ensure you will not have to deal with unwanted change. Choose Round to nearest +/- in the Round Calculation field.

***Note:** Rounding needs to be enabled because when you order multiple items that have VAT, the tax is calculated on the subtotal of all these items together, not each one individually. Therefore, the final price may need to be rounded by a few pennies from time to time so that the final price comes out to an even dollar amount when there are multiple VAT items on a check.

Step 4.

You can Disable VAT when food items are present. Go to **Item Builder** (under **General**) and click on the **Departments** tab. Under the **Families** section choose "**Disable VAT**" for the food families. (See **Item Builder->Departments**.)

***Note:** If you check this box for any particular family, any time something from that family is added to a check, the entire check will change to normal tax. All items that have VAT will be disabled and those items will be charged with regular or 'add-on' tax instead.

Step 5.

Go to **Stations** (under **Hardware**), go to the **Tax** tab and add the VAT tax to all stations that need it. If you do not add the tax here it will not be charged.

See **Hardware->Stations** if you need assistance creating stations or adding taxes to them.

Example of How Value Added Tax will Look on your check:

Value Added Tax is calculated on an item by item basis. The whole tax applied to a check is calculated on the subtotal of the whole check, not on the individual items. This means when you set an item's price to be $1.00 (including tax) and the price of the item without VAT would be $0.94, the system is calculating the total of the check, not the price of the one item.

Example: Place an item in the system with a price of $1.00 with VAT checked on for the tax. Turn system rounding off if you have it on. The $1.00 is including the .06 cents of tax. Now go to the POS (front end) and ring in that item with the price of $1.00. The first item's total would be $1.00. Now add the same item a second time. Now the check is $1.99 instead of $2.00. This is because the system is calculating what the tax would be on the real price of the item (0.94 cents) rather than the price of the item with the VAT. Therefore the total price of two items at 0.94 cents would be $1.88, not $2.00. This means the tax that is calculated would end up being 11 cents instead of 12 cents on the item, therefore bringing the total to $1.99 instead of to $2.00. So this is why rounding usually needs to be enabled.

Part XXI

Adjustments

Part 33 Adjustments

Under the **Financial** section click on **Adjustments**.

Adjustments

Adjustments Setup holds the following settings:

1. Maximum Adjustments Allowed

2. Create Adjustments

3. Adjustment Reasons

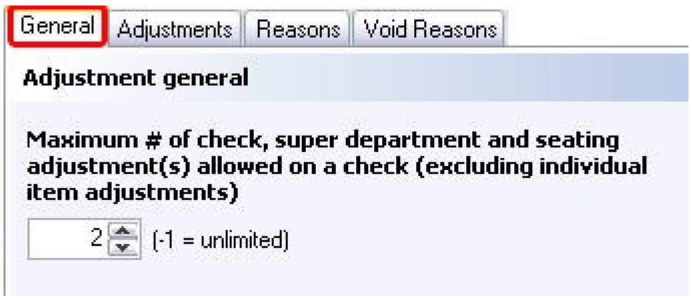
4. Void Reasons

33.1 General Tab

Under the **Financial** section click on **Adjustments**. Select the **General** tab.

General

Here you specify the maximum number of adjustments allowed per check.



***Note:** -1 value allows unlimited adjustments.

***Note:** This setting does not include Item Adjustments.

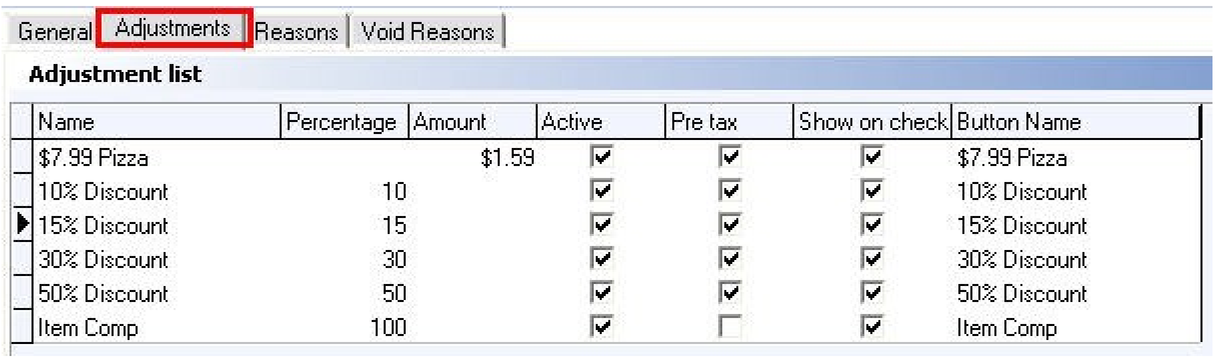
33.2 Adjustments Tab

Under the **Financial** section click on **Adjustments**. Select the **Adjustments** tab.

Adjustment List

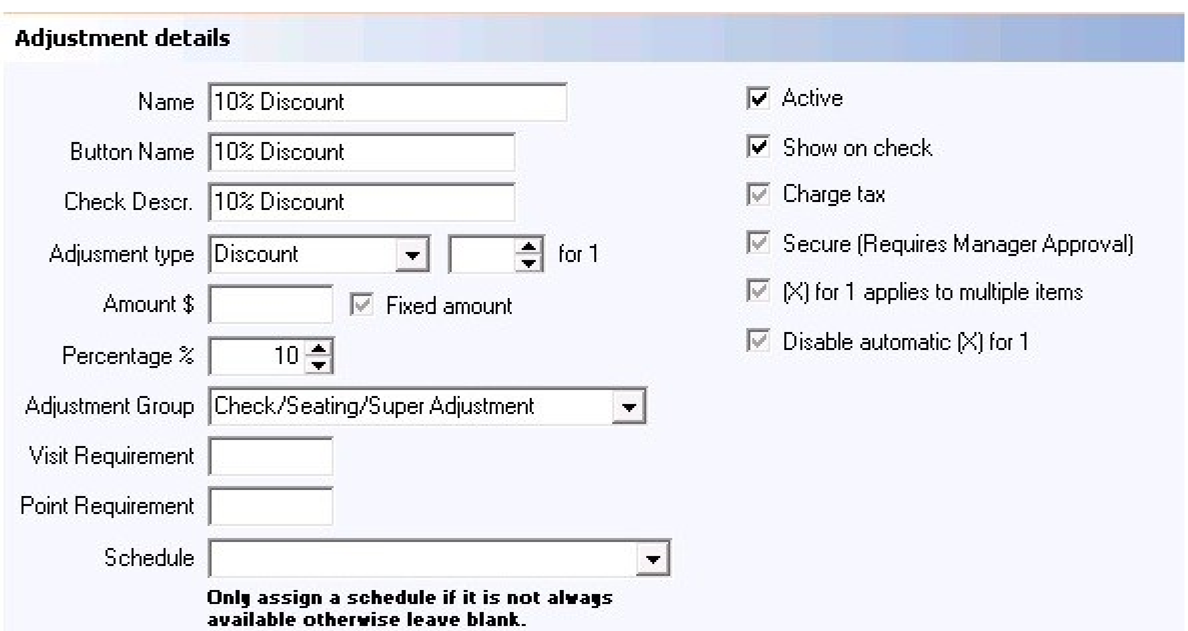
Here you define your adjustments.

Adjustments that you add show up under the **Adjustment list**.



- Add Adjustment -

In the **Adjustment details** part of the screen click the Add button, fill out the fields and check the appropriate check boxes below.



Name	Enter name for the adjustment.
Button Name	Text that shows on the button in SoftTouch.

Check Descr.	Text for adjustment to be explained on the printed check.
Adjustment Type	Choose what kind of adjustment it will be. Choice of: • Discount • Surcharge • Comp • (X) for 1 (eg. 2 for 1)
____ for 1	Used with (X) for 1 adjustments to specify value for (X).
Amount $	The adjustment will subtract the dollar amount you plug in. Use either this OR a percentage, not both.
Fixed Amount	The adjustment will change the price to the dollar amount you enter here. This is particularly useful for items with multiple price schedules. If a pizza is $7 for lunch but $8 for dinner and you want to have an adjustment to make the pizza $6, you could enter $6 here and check on the Fixed amount option. Whatever you apply this adjustment to will then become $6. This also enables you to have an adjustment like this: "Buy one Pizza, get the second for $4.99." You would enter $4.99 here and check on the Fixed amount option. Then you can apply this adjustment to the second pizza when it's ordered.
Percentage %	The adjustment will subtract the percentage amount you plug in. Use either this OR an Amount $, not both.

Adjustment Group	Choose the group an adjustment will be applied to. **Check/Seat/Super Adjustment** - Adjustment can be applied to the whole check, to a single seat on the check, or to a single super department on the check (allows you to discount food but not liquor, for example). (See **Item Builder->Departments** to learn how to set up departments.) **Item Adjustment** - Adjustment only works on items that have this adjustment specifically assigned to them in BackOffice. (See **Item Builder->Items->Assign Family**... to learn how to add an adjustment to an item.) **Global Item Adjustment** - Adjustment can be applied to any item on a check without having to specifically assign it to an item in BackOffice beforehand.
Visit Requirement	Number of loyalty visits required for this adjustment to take effect. When this adjustment is used, the number of visits specified here will be deducted from the loyalty account that is assigned to the check. (See **Loyalty** to learn how to view and use a customer's loyalty information.)
Point Requirement	Number of loyalty points required for this adjustment to take effect. When this adjustment is used, the number of points specified here will be deducted from the loyalty account that is assigned to the check.
Schedule	Enter the schedule that this adjustment should apply to (only if it is for special schedules, otherwise leave blank). Schedules must be created before they appear on this drop-down. See **Scheduling->Add Schedule** to learn how to do this.
Active	Checked by default; uncheck to deactivate the adjustment.
Show On Check	If checked, the adjustment will be shown on the check.
Charge Tax	If checked, the tax will be calculated on the price before the discount is applied. If unchecked, the tax will be calculated on the price after the discount is applied.

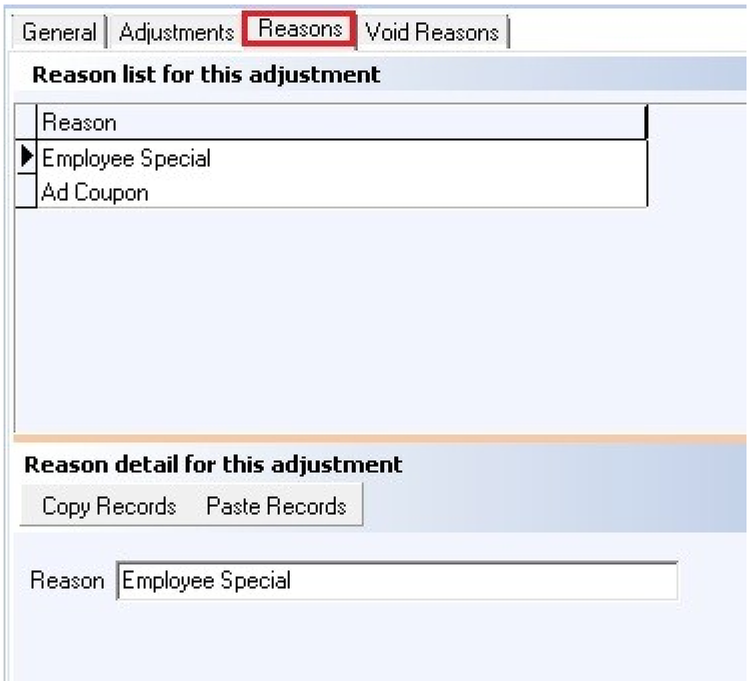
Secure (Requires Manager Approval)	If checked, manager's verification will be required.
(X) for 1 applies to multiple items	You can use an (X) for 1 (e.g., 2 for 1) on different items, not just the same item (e.g., You can have a 2 for 1 on any entree: buy a steak dinner, get a chicken dinner free. The lower priced item will be free.) In order for the (X) for one adjustment to work, you would assign it under the Adjustments tab for all the items it would affect. **Example:** You may create a discount that says buy one appetizer and get one appetizer free, or even program it to get the second at 50% off by entering 50% in the percentage field instead of 100%.
Disable automatic (X) for 1	If you have a 2 for 1 discount, or any buy x number and get 1 free discount, if you do not want the discount to automatically be applied during the time specified in the schedule, select this box. The 2 for 1 or other discount can still be used, but an employee would have to tell the system to apply the discount to the check.

33.3 Reasons Tab

Under the **Financial** section click on **Adjustments**. Select the **Reasons** tab.

Reasons

Here you may enter reasons for your adjustments.



- Add Adjustment Reason -

First select an adjustment you want to add reason(s) to by going to the **Adjustment list** under the **Adjustments** tab and selecting one. Now click the Reasons Tab. In the **Reason detail for this adjustment** part of the screen click the 

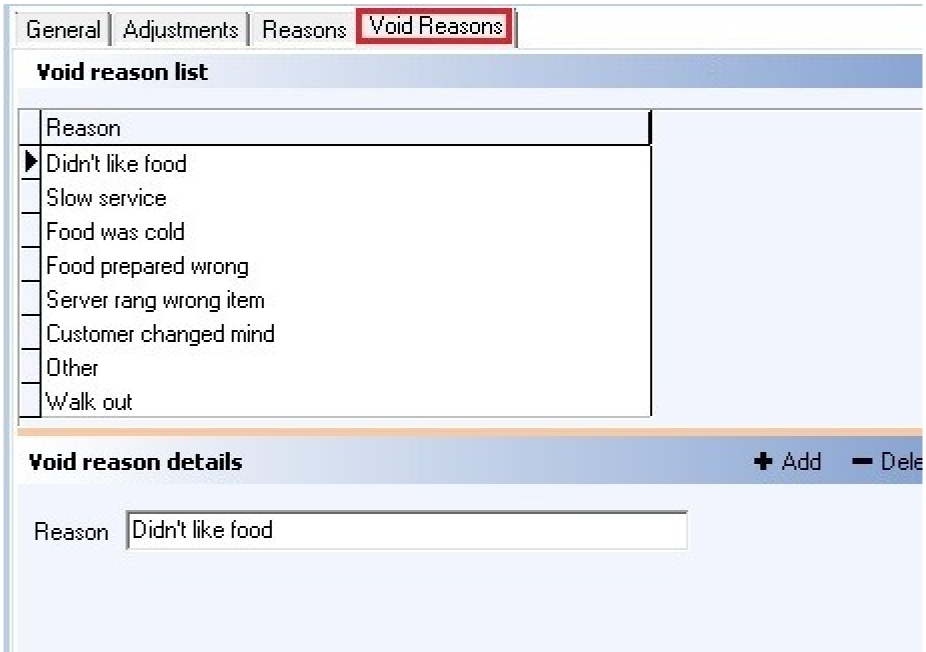
button and type in the adjustment reason.

33.4 Void Reasons Tab

Under the **Financial** section click on **Adjustments**. Select the **Void Reasons** tab.

Void Reasons

Here you define reasons for the orders that get voided in the POS system.



- Add Void Reason -

In the **Void reason details** part of the screen click the 

button and type in the void reason. When you void an item in **SoftTouch**, this list will be displayed so a reason can be selected.

Part XXI

Sales/Journal View

Part 34 Sales/Journal View

Under the **Financial** section click on **Sales/Journal View**.

Sales can be accessed in Sales or Journal view:

1. Sales

2. Journal

34.1 Sales

Under the **Financial** section click on **Sales/Journal View**.

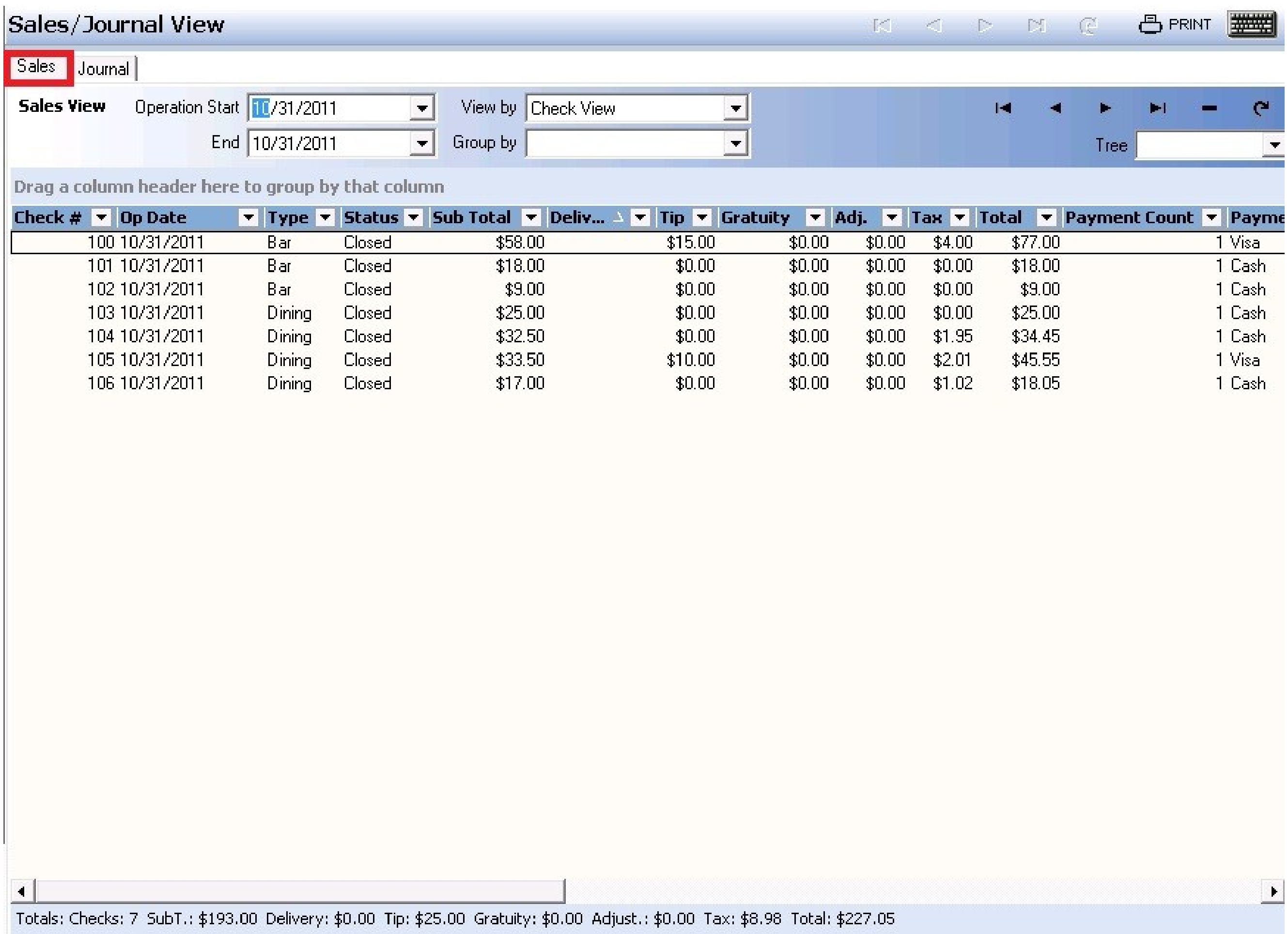
Sales View

The sales view portion of **BackOffice** gives you information about the transactions rung up throughout a day. You can select a date(s) to view transactions for and narrow your search even further with the **View by** and **Group by** options.

Operation Start	Select the starting date that you wish to view transactions for.
End	Select the ending date that you wish to view transactions for.
View by	You have the option to view transactions by Check View, Super Department View, Department View or Family View. The system will default to Check View.
Group by	You have the option to sort transactions by Adjustments, Cashed out by, Check #, Check Print Time, Closed, Date/Time, Delivery, Gratuity, Guest #, Op Date, Owner, Payment, Payment $, Payment Count, Payment Tip, Seating, Status, Subtotal, Tax, Tax Exempt, Tip, Total, Type, Void, and Void Reason.

The system will fill in today's date by default. You get a lot of information about each transaction. In addition to the information shown below, if you scroll to the right you will also see Payment Tip, Owner, Cashout by, Date/Time, Closed, Guest #, Check Print Time, Seating, Tax Exempt, Void, and Void Reason.

At the bottom of the screen you will get totals for number of checks, a subtotal amount, any delivery charges, tips, gratuities, adjustments, tax and total collected information.



Check #	Op Date	Type	Status	Sub Total	Deliv...	Tip	Gratuity	Adj.	Tax	Total	Payment Count	Payme
100	10/31/2011	Bar	Closed	$58.00		$15.00	$0.00	$0.00	$4.00	$77.00	1	Visa
101	10/31/2011	Bar	Closed	$18.00		$0.00	$0.00	$0.00	$0.00	$18.00	1	Cash
102	10/31/2011	Bar	Closed	$9.00		$0.00	$0.00	$0.00	$0.00	$9.00	1	Cash
103	10/31/2011	Dining	Closed	$25.00		$0.00	$0.00	$0.00	$0.00	$25.00	1	Cash
104	10/31/2011	Dining	Closed	$32.50		$0.00	$0.00	$0.00	$1.95	$34.45	1	Cash
105	10/31/2011	Dining	Closed	$33.50		$10.00	$0.00	$0.00	$2.01	$45.55	1	Visa
106	10/31/2011	Dining	Closed	$17.00		$0.00	$0.00	$0.00	$1.02	$18.05	1	Cash

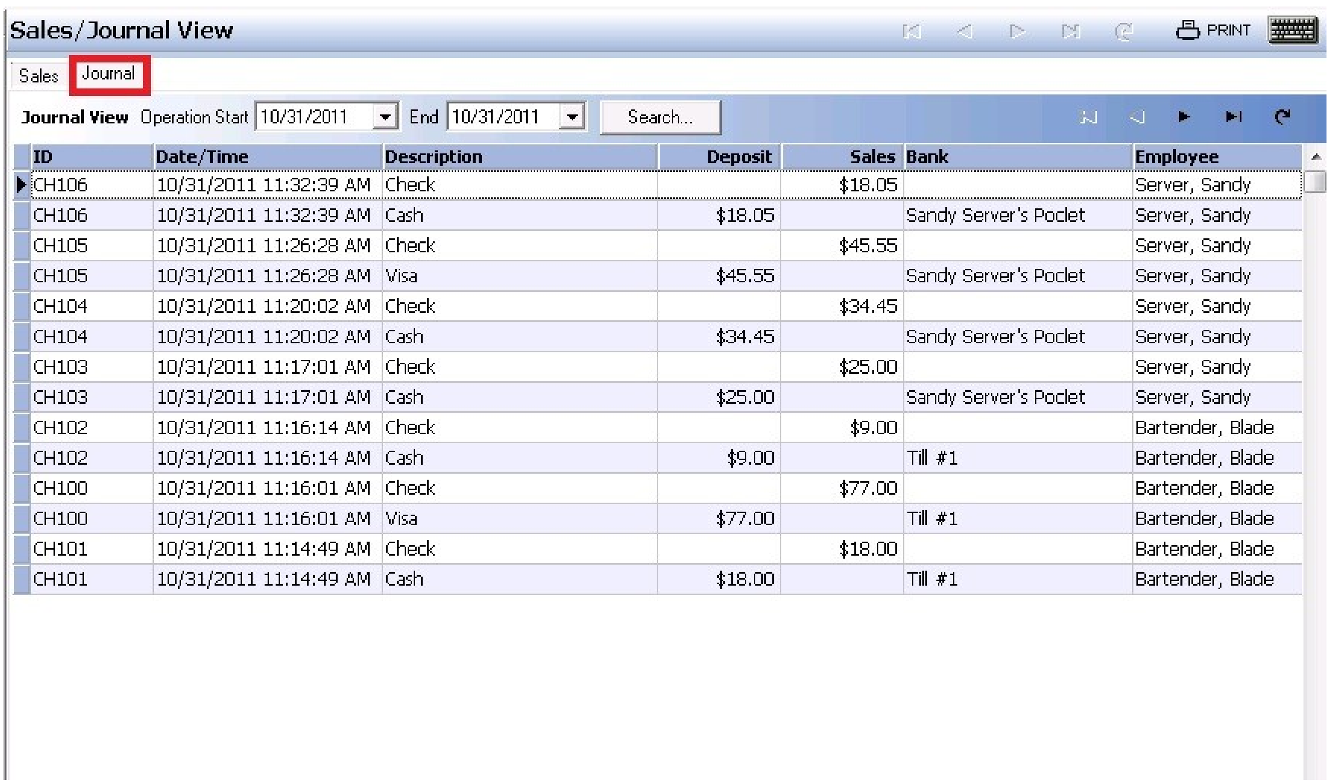
34.2 Journal

Under the **Financial** section click on **Sales/Journal View**. Click on the **Journal** tab.

Journal View

The journal view portion of **BackOffice** gives you information about the transactions rung up throughout a day. You will see 2 entries for each transaction. The first shows the amount of the sale and the second shows what bank the money collected was deposited to.

Enter the Operation Start and End dates and click **Search** to see transaction information falling between those dates.



ID	Date/Time	Description	Deposit	Sales	Bank	Employee
CH106	10/31/2011 11:32:39 AM	Check		$18.05		Server, Sandy
CH106	10/31/2011 11:32:39 AM	Cash	$18.05		Sandy Server's Poclet	Server, Sandy
CH105	10/31/2011 11:26:28 AM	Check		$45.55		Server, Sandy
CH105	10/31/2011 11:26:28 AM	Visa	$45.55		Sandy Server's Poclet	Server, Sandy
CH104	10/31/2011 11:20:02 AM	Check		$34.45		Server, Sandy
CH104	10/31/2011 11:20:02 AM	Cash	$34.45		Sandy Server's Poclet	Server, Sandy
CH103	10/31/2011 11:17:01 AM	Check		$25.00		Server, Sandy
CH103	10/31/2011 11:17:01 AM	Cash	$25.00		Sandy Server's Poclet	Server, Sandy
CH102	10/31/2011 11:16:14 AM	Check		$9.00		Bartender, Blade
CH102	10/31/2011 11:16:14 AM	Cash	$9.00		Till #1	Bartender, Blade
CH100	10/31/2011 11:16:01 AM	Check		$77.00		Bartender, Blade
CH100	10/31/2011 11:16:01 AM	Visa	$77.00		Till #1	Bartender, Blade
CH101	10/31/2011 11:14:49 AM	Check		$18.00		Bartender, Blade
CH101	10/31/2011 11:14:49 AM	Cash	$18.00		Till #1	Bartender, Blade

Part XX

Tip Sharing

Part 35 Tip Sharing

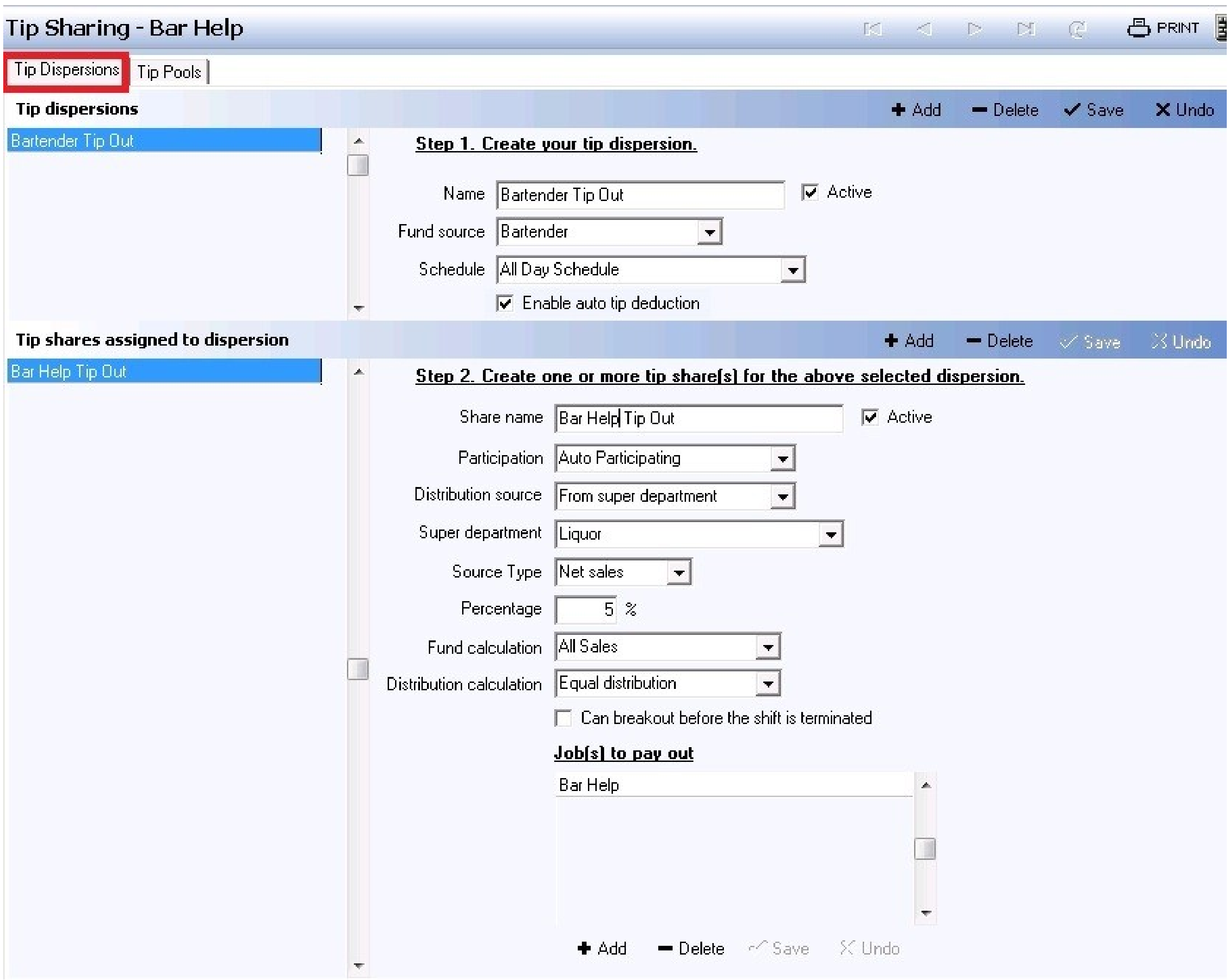
Under the **Financial** section click on **Tip Sharing**.

35.1 Tip Dispersions

Under the **Financial** section click on **Tip Sharing**. Then click the **Tip Dispersions** tab.

Tip Dispersions

The tip dispersions area is where you can set up dispersions from one employee's sales or tips to be paid to another employee group. Examples are bartenders who may be paying out a percentage of liquor sales to a bar back who brings ice and restocks bottles when the bar is low on liquor. A server may pay a percentage of her tips to a busboy or food runner for helping with their tables.



Name	Select a name for this tip dispersion.
Active	Check this box if the tip dispersion should be active.

Fund Source	From the drop-down list, select the job that is giving a portion of their tips or sales to other employees that help them. Example: If a bartender is tipping out to the bar back a percentage of their sales, enter the bartender job in this field.
Schedule	If you only want tip dispersions to calculate during a certain period (e.g., if the bartenders only use bar backs during Happy Hour), select the schedule time from the drop-down. If this tip dispersion is to calculate at all times, make sure you select the all day schedule. To set up a schedule, go to the Scheduling section of the manual.
Enable auto tip deduction	If this box is checked, tips owed for tip dispersion will automatically be deducted from this employee's charge tip payout. If this box is not checked, tip dispersion will be recorded and reported but the employee will be responsible for manually distributing tips to those who are owed.
Share Name	You can create more than one group to be tipped. For example, the bartender may tip out a percentage of liquor sales to bar backs and a percentage of food sales to food runners. Enter a name to describe the group of employees receiving the tips.
Active	Check this box if the tip share should be active.
Participation	For Participation, you can select auto-participating or elective. • If you select auto-participating, when an employee clocks in and works as the job type you specified in **Job(s) to pay out** (last item on this chart), they will automatically be joined to this tip dispersion and the tip dispersions earned will calculate on their employee report. • If you select elective, when an employee clocks in and works as the job type specified in **Job(s) to pay out**, they will need to go to the Employee Screen on SoftTouch and manually join this tip dispersion group.

Distribution Source	For distribution source, you can select From sales, From super departments, From departments and From tips. • If you select From sales, you will not have a field asking for additional information about the distribution source. • If you select From super department, a field asking which super department will appear and require a selection. • If you select From department, a field asking which department will appear and require a selection. The super departments in this drop-down are what you created under **Item Builder->Departments**.
Source Type	• Net Sales - sales after adjustments • Gross Sales - all sales before adjustments are subtracted
Percentage	What percentage should be paid out.
Fund Calculation	• All Sales - The amount to be tipped out will be calculated on all sales the employee clocking in with this job group rings up. • Weighted -The amount being tipped will be calculated on sales rung while recipients of this dispersion are clocked in.
Distribution Calculation	• Equal Distribution - All funds accumulated for this dispersion group will be equally distributed among all employees clocked in under the job group specified. • Weighted Distribution - Funds will be distributed depending on number of hours worked by each employee. For example, if there is $60 in this fund and Busboy A worked 4 hours and Busboy B worked 2 hours, Busboy A worked 66% of total hours worked and will receive $40 (66% of the total) while Busboy B worked 33% of the total hours and will receive $20 (33% of the total).
Can breakout before the shift is terminated	Check this is employees of this group can end their participation in the pool before they close their shift.
Job(s) to pay out	Select the job group that is to participate in this dispersion and receive tip dispersions.

If an employee group is going to pay out more than one job group, press the **+Add** button in the lower half of he screen to enter a second job to be paid out. The second job can be paid out a different percent and have different criteria.

For example: A bartender pays out a percentage of liquor sales to bar backs who get ice and restock for them. They also pay out a percentage of food sales to food runners.

35.2 Tip Pools

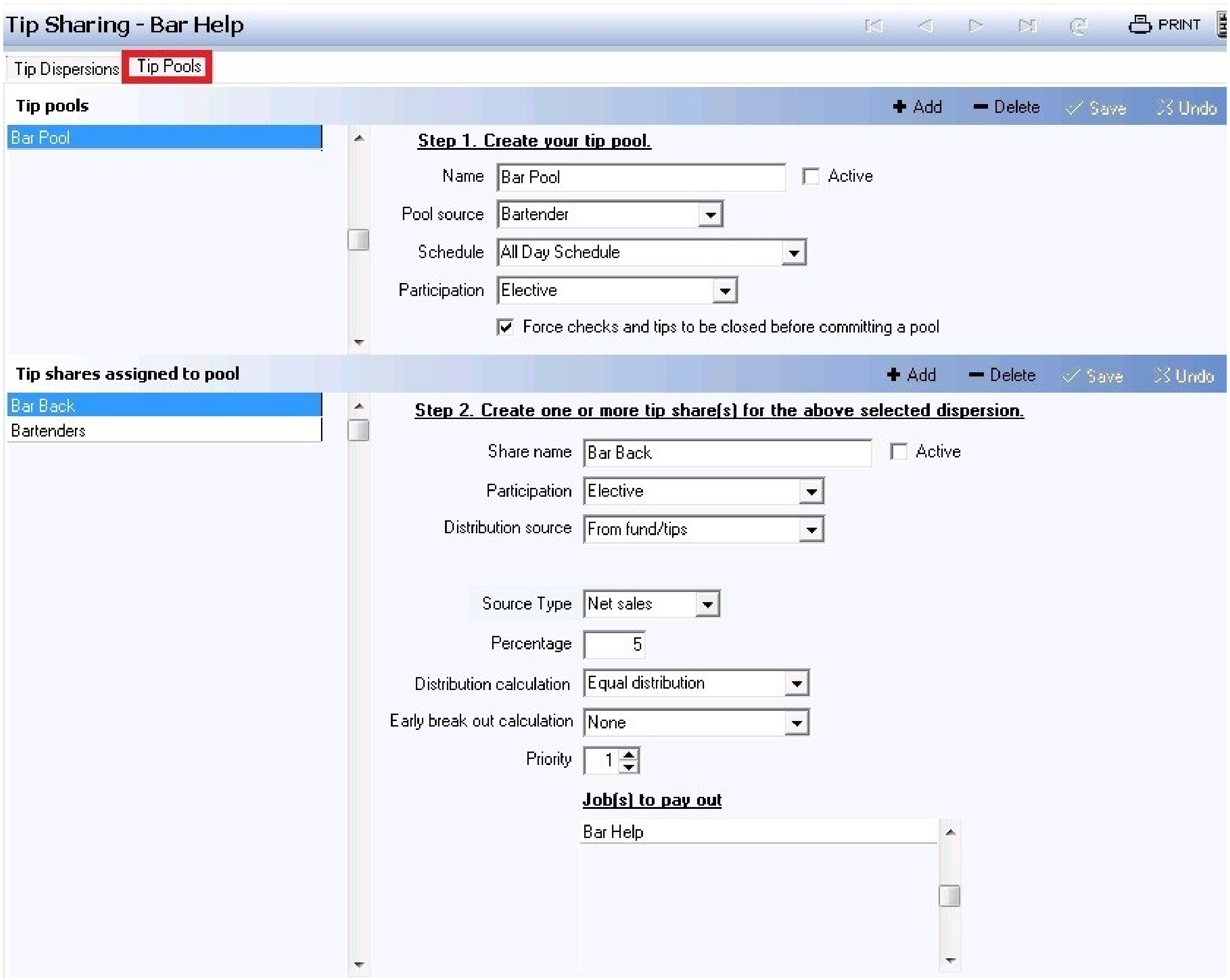
Under the **Financial** section click on **Tip Sharing**. Click on the **Tip Pools** tab.

Tip Pools

The tip pools area is where you can set up pools, where a group of employees all contribute their tips into one pool and divide the tips when the pool is over and is committed.

You may set the pool up to be divided among one group of employees. For example, all bartenders contribute to this pool and they divide the tips when the pool has ended and is committed.

You may also set the pool so one group of employees is tipped out and the balance of the pool is divided among a second group of employees. For example, you may want to have a bar pool that tips out bar backs 3% of liquor sales and the balance in the pool is divided among the bartenders that worked the pool.



Name	Select a name for this tip dispersion.
Active	Check this box if the tip dispersion should be active.
Pool Source	From the drop-down list, select the job that is giving a portion of their tips or sales to other employees that help them. For example, if a bartender is tipping out to the bar back a percentage of their sales, enter the bartender job in this field.
Schedule	If you only want tip dispersions to calculate during a certain period (e.g., if the bartenders only use bar backs during Happy Hour), select the schedule time from the drop-down. If this tip dispersion is to calculate at all times, make sure you select the all day schedule. To set up a schedule, go to the Scheduling section of the manual.
Participation	For Participation, you can select auto-participating or elective. • If you select auto-participating, when an employee clocks in and works as the job type specified in **Job(s) to pay out** (the last item on this chart), he or she will automatically be joined to this tip dispersion and the tip dispersions earned will calculate on their employee report. • If you select elective, when an employee clocks in and works as the job type specified in **Job(s) to pay out**, they will need to go to the Employee Screen on SoftTouch and manually join this tip dispersion group.
Force checks and tips to be closed before committing a pool	Check this box if you want to make sure all checks are closed and tips added before a tip pool can be committed. If a check is closed and a tip is added after a pool is committed, it will not be added to the pool.
Share Name	You can create more than one group to be tipped. For example, the bartender may tip out a percentage of liquor sales to bar backs and a percentage of food sales to food runners. Enter a name to describe the group of employees receiving the tips.

Active	Check this box if the tip dispersion for this group should be active.
Participation	For Participation, you can select auto-participating or elective. ● If you select auto-participating, when an employee clocks in and works as the job type specified in **Job(s) to pay out** (the last item on this chart), he or she will automatically be joined to this tip dispersion and the tip dispersions earned will calculate on their employee report. ● If you select elective, when an employee clocks in and works as the job type specified in **Job(s) to pay out**, he or she will need to go to the Employee Screen and join this tip dispersion group.
Distribution Source	For distribution source, you can select From sales, From super departments, From departments and From fund/tips. ● If you select From sales, you will not have a field asking for additional information about the distribution source. ● If you select From super department, a field asking which super department will appear and need to be filled out. The super departments in this drop-down are what you created under **Item Builder->Departments**. ● If you select From department, a field asking which department will appear and need to be filled out. The departments in this drop-down are what you created under **Item Builder->Departments**. ● If you select From fund/tips, you will not have a field asking for additional information about the distribution source.
Source Type	● Net Sales - sales after adjustments ● Gross Sales - all sales before adjustments are subtracted
Percentage	The percentage of the tip dispersion that should be paid out to this group. **If you only have one group to be paid, you will enter 100 as the percentage.** **If you pay out a bar back group (or any other group of employees) and the bartenders (or any other group of employees) are paid afterward, you would enter 100 as the percentage for the last group. This is because the last group will split 100 percent of what is left in the pool.**

Distribution Calculation	• Equal Distribution - All funds accumulated for this dispersion group will be equally distributed among all employees clocked in under the job group specified to receive this tip dispersion. • Weighted Distribution - Funds will be distributed depending on number of hours worked by each employee. For example, if there is $60 in this fund and Busboy A worked 4 hours and Busboy B worked 2 hours, Busboy A worked 66% of total hours worked and will receive $40 (66% of the total) while Busboy B worked 33% of the total hours and will receive $20 (33% of the total).
Early Break Out Calculation	• Equal Distribution - If an employee breaks out of the pool early, they still get an equal share of the pool at the time it is committed. • Weighted Average - If an employee breaks out of the pool early, they get a percentage of their share based on the total hours they have worked versus the total hours worked by all employees in this job group. • None - Employees will not break out early.
Priority	Set what priority this payout has. If set to 1, this group will be paid first.
Job(s) to pay out	Select the job group that is to be paid the portion of the pool you just set up.

Part XXV

Miscellaneous

Part 36 Miscellaneous

The Miscellaneous section.

The Miscellaneous section contains the following:

1. Activations
2. Surveys
3. Receipt Template
4. Chalkboard/Specials
5. $ Paid/Quick Messages/Shifts
6. Jobs
7. Security
8. Reports
9. Database Maintenance
10. Monitor Stations
11. Import/Export

Part XXV

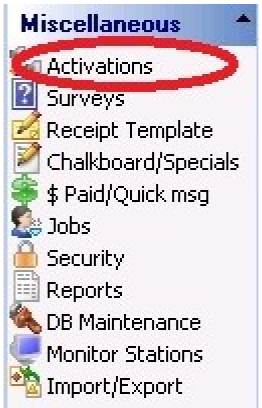
Activations

Part 37 Activations

Under the **Miscellaneous** Section click on the **Activations**.

CANNOT CHECK WHILE ON THE VIRTUAL MACHINE

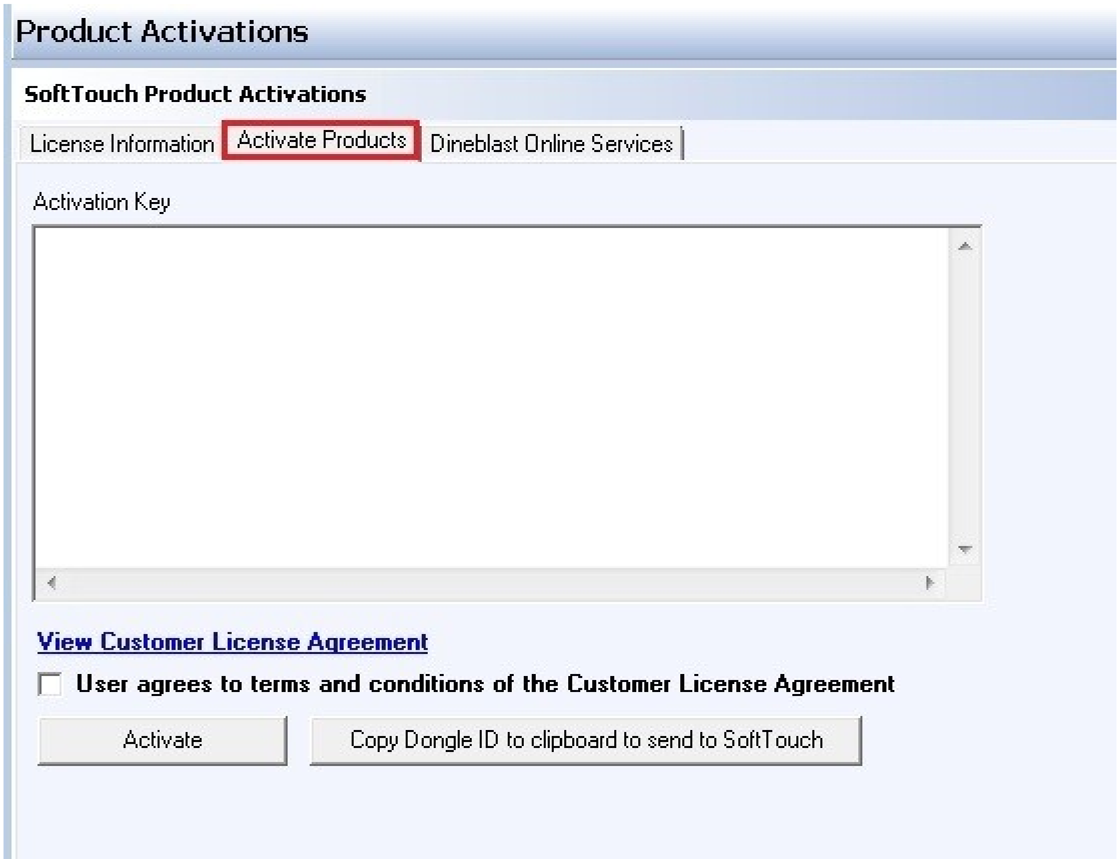
Activations



Note: The Activations area can only be accessed on the server by an employee with the proper security clearance for this area.

The License Information area shows dongle, dealer, and customer information as well as licensed products and product updates.

The Activate Products screen is where you enter activation keys to register SoftTouch products.



The Online Ordering Services are is strictly used by SoftTouch as part of setting up Online Ordering for the Restaurant.

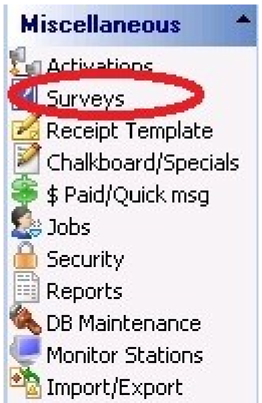
Part XXV

Surveys

Part 38 Surveys

Under the **Miscellaneous** Section click on the **Activations**.

Surveys



This section is reserved for future use.

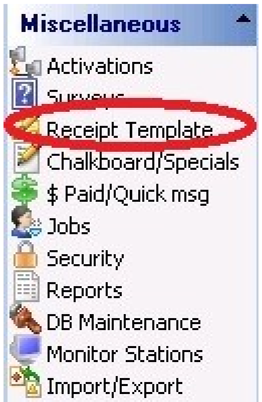
Part XXI

Receipt Template

Part 39 Receipt Template

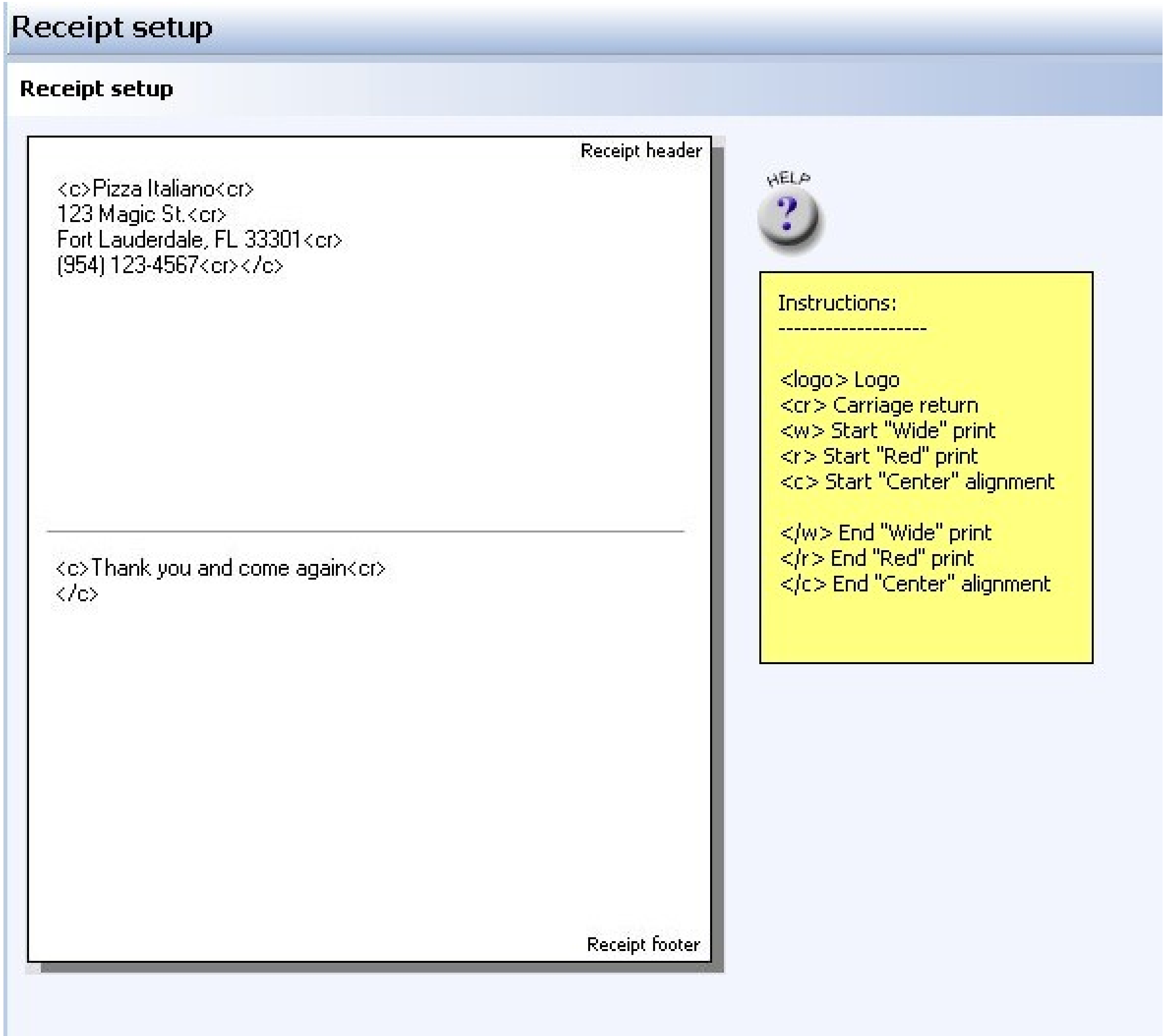
Under the **Miscellaneous** Section click on **Receipt Template**.

Receipt Template



Here you customize how your receipt header and footer are going to look. (If you need to alter other parts of the receipt, refer to **Administration->Template Screen**., noting that what you have entered here will appear simply as the <receiptheader> and <receiptfooter> tags there.)

You can type on the large white space and refer to the instructions on yellow. Further explanation follows on the chart below.



<logo>	Logo	Prints your logo. Refer to your printer's manual regarding how to load your logo. You may also need to enter that printer's codes, including the Logo code (see **Hardware->Printers/Coursing->Print Codes**).
<cr>	Carriage Return	Starts new line (equivalent to hitting Enter key on your keyboard).
<w>	Start Wide Print	Enter immediately before the start of text you want to be bold.
</w>	End Wide Print	Enter immediately after the end of text you want to be bold.
<r>	Start Red Print	Enter immediately before the start of text you want to be red.

</r>	End Red Print	Enter immediately after the end of text you want to be red.
<c>	Start Center Alignment	Enter immediately before the start of text you want to have middle alignment.
</c>	End Center Alignment	Enter immediately after the end of text you want to have middle alignment.

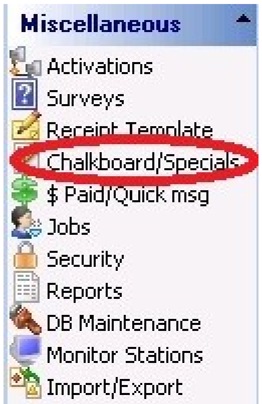
Part XX

Chalkboard/Specials

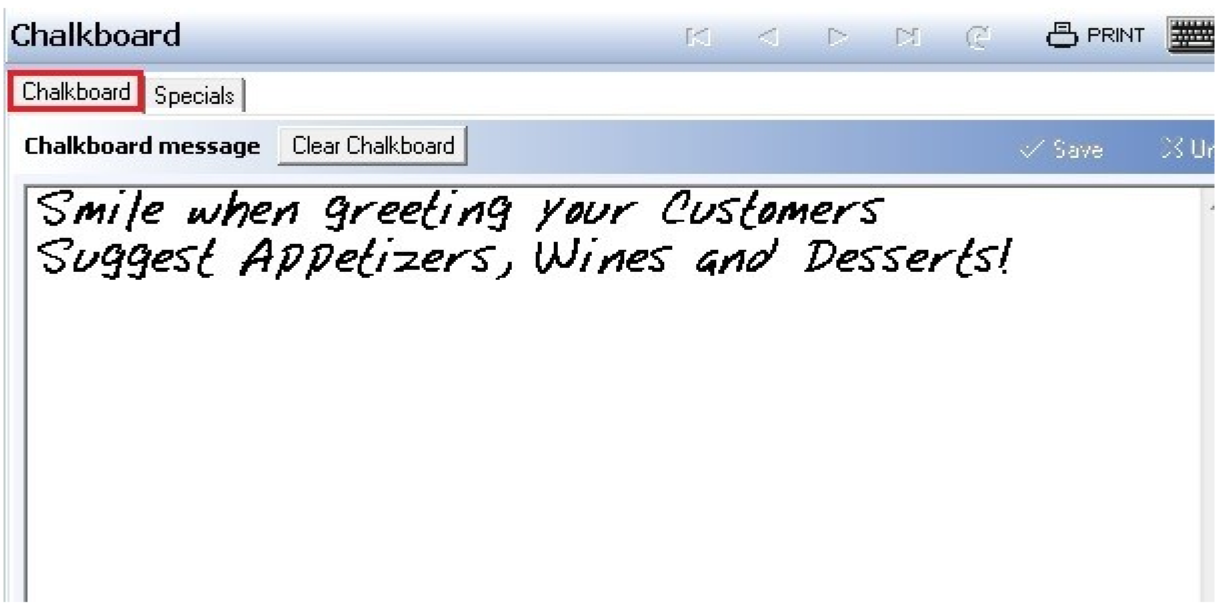
Part 40 Chalkboard/Specials

Under the **Miscellaneous** section click on **Chalkboard/Specials** to open Chalkboard and Specials messages setup screens.

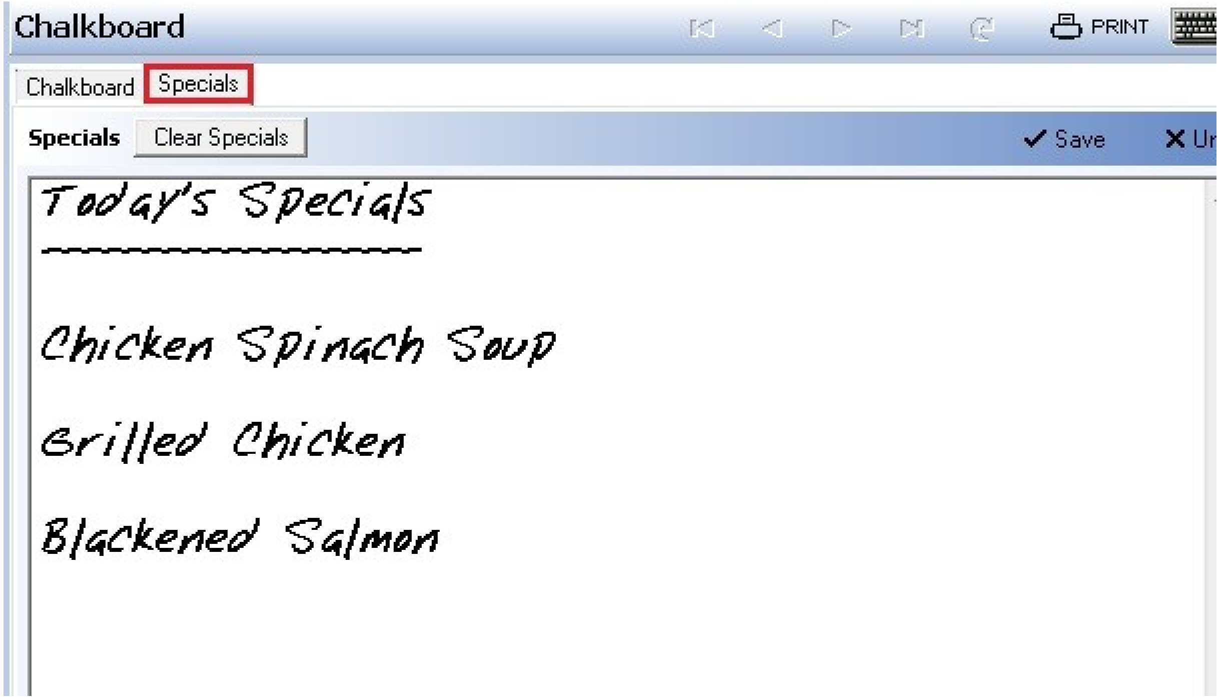
Chalkboard



When you click the **Chalkboard** tab, you may enter any information you wish to communicate to all employees as they clock in.



When you click the **Specials** tab, you may enter your daily specials (with their prices if you wish) as a reminder for employees to offer them to guests.



Click the ✓ Save button when you're finished.

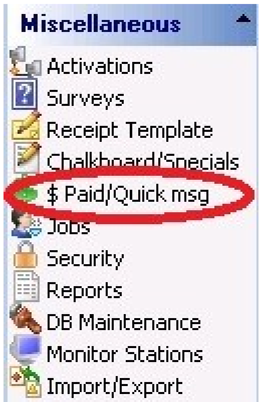
Part XX

$ Paid/Quick Msg

Part 41 $ Paid/Quick Msg

Under the **Miscellaneous** section click on **$ Paid/Quick Msg**.

$ Paid/Quick Msg



Here you can predefine messages that you quickly want to access to modify an item you are ringing up. You can also list reasons for Paid Ins/Paid Outs as well as list reasons that a drawer, pocket or any bank of money is over or under when counted at the end of the shift.

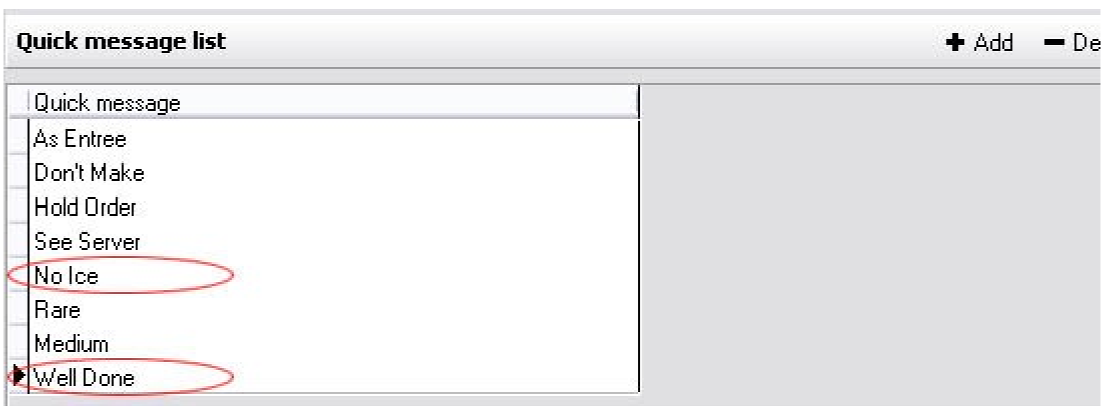
Quick message list

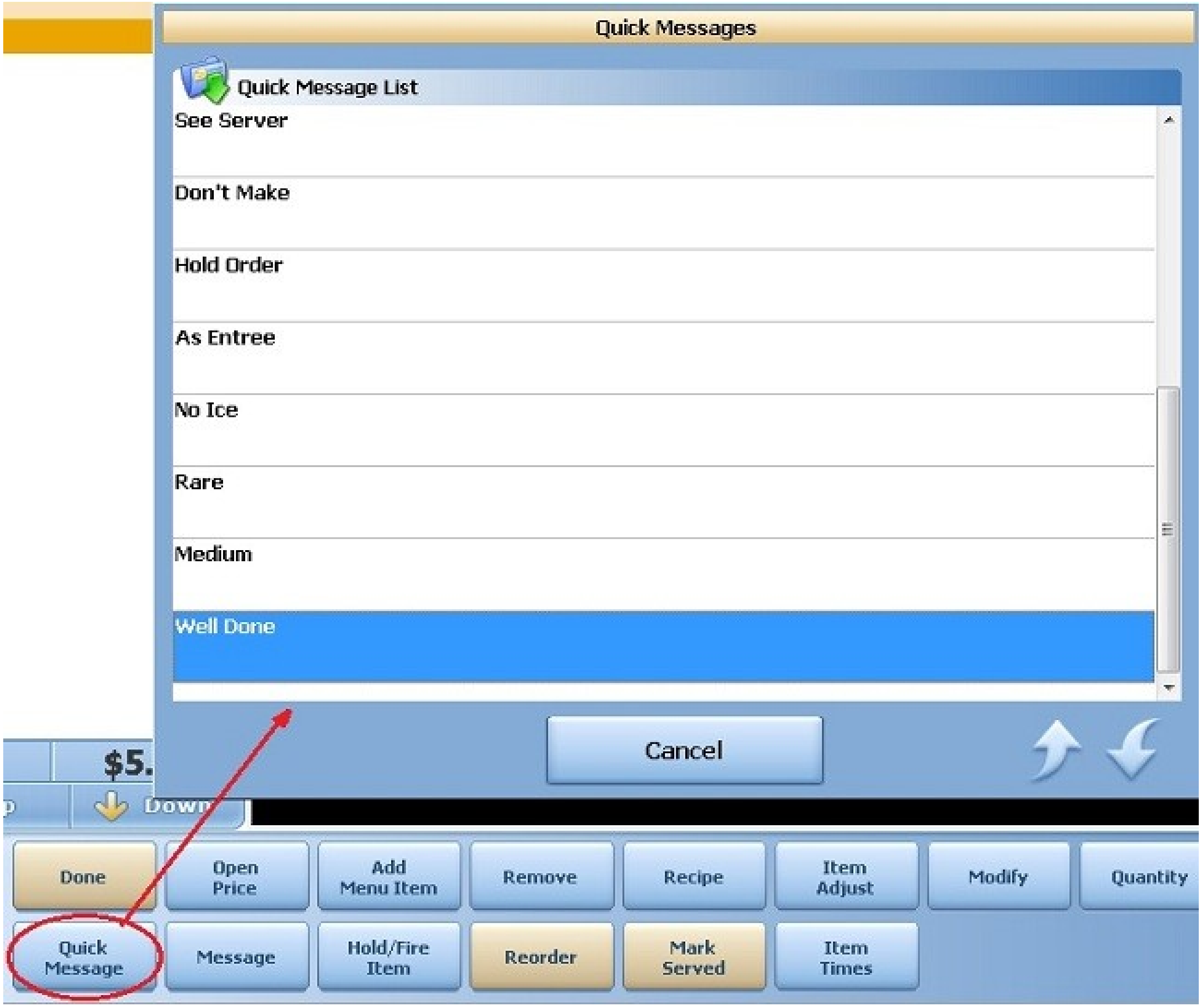
Access this section by clicking the **Quick Message List** tab.

Click the **Add** button and click in the new white space under Quick message to start typing a message that can be used when ringing up orders in **SoftTouch**.

> **Example:** A customer wants his steak well done and a drink with no ice. So if you predefine those two messages here an employee can simply choose the message with a press of a button in **SoftTouch** instead of entering it manually.

See images:





Over/Under Reasons

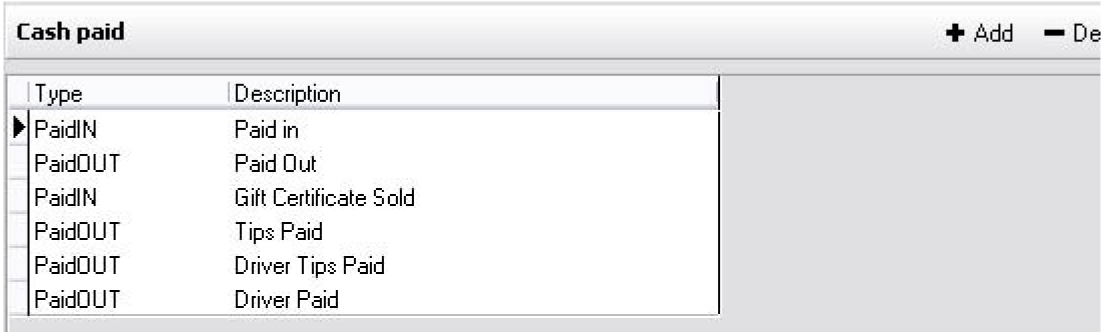
Access this section by clicking the **Over/Under Reasons** tab.

To create a list of reasons a drawer, pocket or any bank of money may be over or short when the money is counted at the end of a shift, click **Add**, type the name under reason and press the save button when done.

Cash Paid

Access this section by clicking the **Cash Paid** tab.

For Paid In/Paid Out, press **Add** and first select if this will be a Paid In or a Paid Out under type. Next type in the name of this Paid In or Paid Out under description. Save the information when complete.



Shift Descriptions

Access this section by clicking the **Shift Descriptions** tab.

Press the Add button, click the blank space under **Shifts**, and type in a shift name. Save when complete.

BackOffice lists All Day Shift, AM Shift, and PM Shift by default, but you can delete these or change the names as needed.

You can add these shifts to an employee's job (see **Employees->Job**).

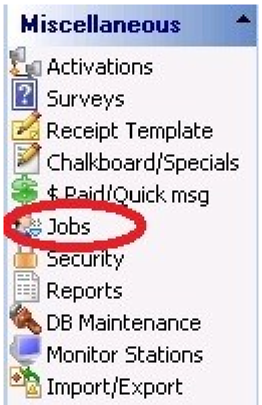
Part XXI

Jobs

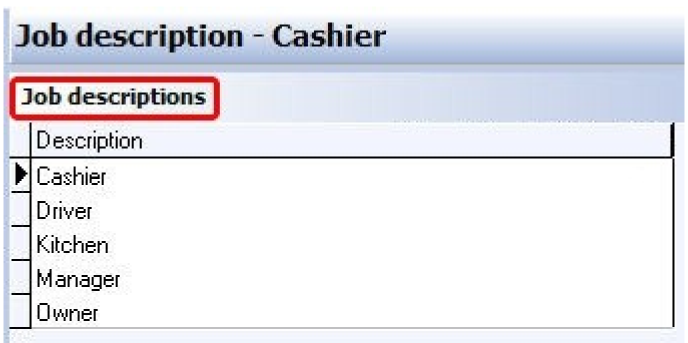
Part 42 Jobs

Under the **Miscellaneous** section click on **Jobs**.

Jobs

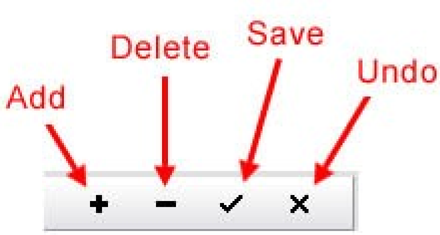


Here you create jobs and define what the system will require of employees when they are clocked in to this job group.



- Create a Job -

In the **Job Description** part of the screen click the **+** sign to add a job. See image:



In the **Job Description** field under the **Job Detail** tab, type in the name of the job. Click the **Save** button.

You have just created a job. To learn how to assign jobs to an employee, see **Employees->Jobs tab** (under General). To learn how to configure security depending on the job type, see **Security** (under Miscellaneous).

But we'll continue in this section by talking about some of the options you have to define this job.

1. Job Detail

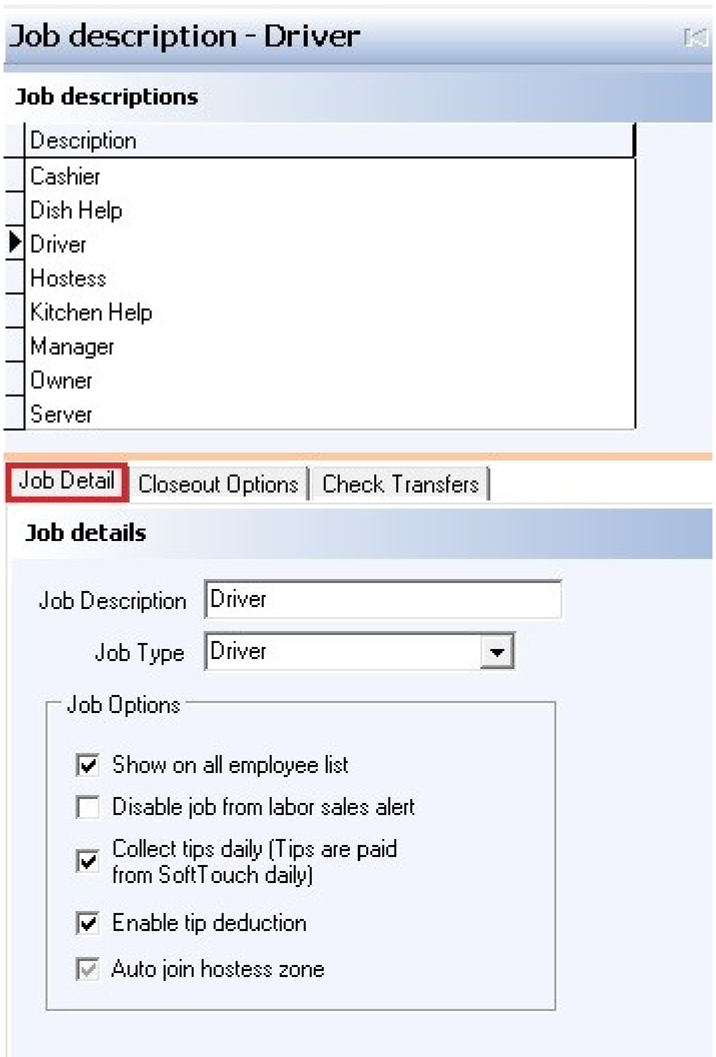
2. Closeout Options

2. Check Transfers

42.1 Job Detail Tab

Under the **Miscellaneous** section click on **Job/Tip Dispersion**. Click on the **Job Detail** tab.

Job Detail



- Job Details -

Here you define the setup for payroll specific items for each separate job. Remember that you are editing the details for whichever job description above has an arrow next to it.

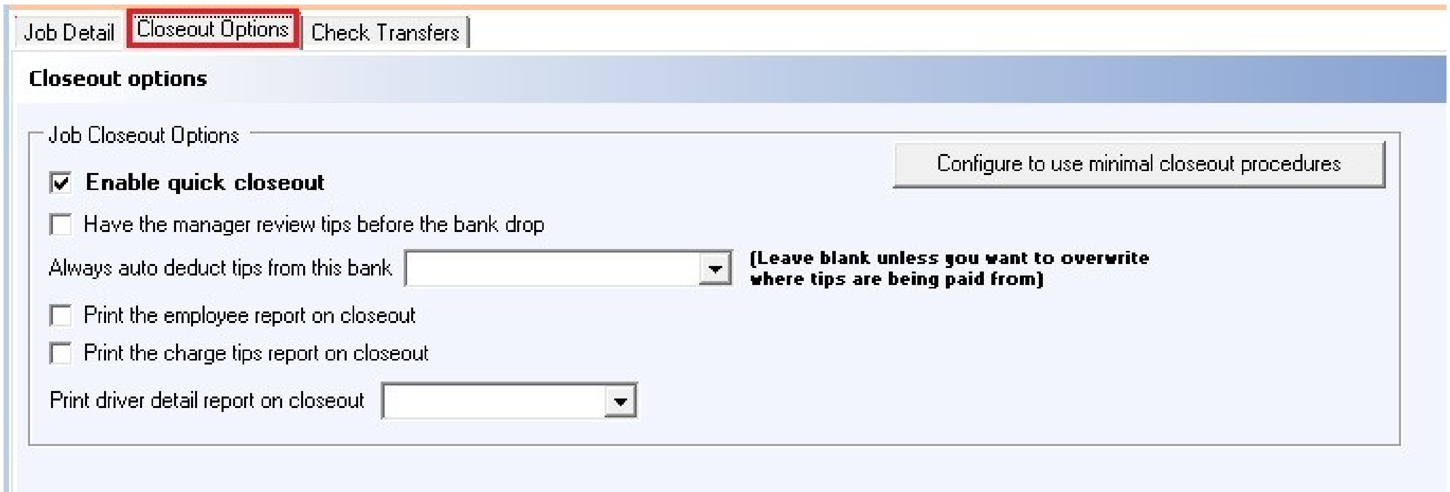
Job Description	You can name the job description whatever you would like. Normally people name it after the job they are defining for the other sections (ie. tip dispersion and check transfers).
Job Type	Select a job type for each job.

Show on all employee list	This checkbox allows these jobs to be viewed under the Change Employee button in the Employee area in SoftTouch and the Change Server button inside an order, when moving a check to a different employee. It is recommended that Managers and Owners not be checked to display in the list.
Disable job from labor sales alert	If checked, the job will not be factored in the calculation for the labor sales alert.
Collect tips daily	If checked, employees with this job will be able to collect tips daily when they close out rather than waiting to get paid with their paycheck.
Enable tip deduction	If checked, the system will handle tips for the selected job. If, on the other hand, tips should be withheld and given as part of the paycheck manually, disable this feature.
Auto join hostess zone	Checking this option will automatically assign servers to seating zones rather than zones needing to be assigned manually.

42.2 Closeout Options

Under the **Miscellaneous** section click on **Job/Tip Dispersion**. Click on the **Closeout Options** tab.

Closeout Options



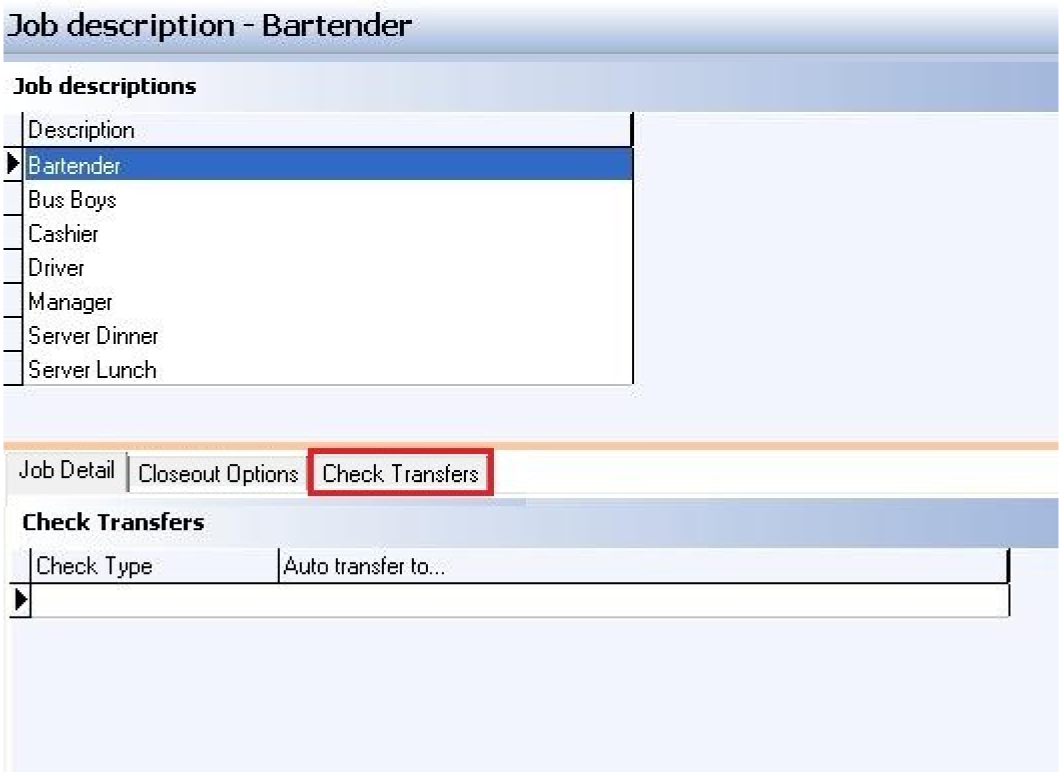
Enable quick closeout	This will move through the steps of closeout automatically, meaning that once a step is finished it will go right to the next step.
Have the manager review tips before the bank drop	The employee can closeout but the bank will not drop until the manager has reviewed tips. This feature can help prevent employee theft and mistakes (and increase customer trust) as an employee may have entered a higher charge tip than a customer wished to give. If this option is checked on, it can also be useful to enable the **Print charge tips report on closeout** option so that the server can bring that report to the manager to review the tips.
Always auto deduct tips from this bank	You can select a bank from the drop-down that all employees must go to at closeout to retrieve cash for their charge tips. This feature can help prevent employee theft and mistakes. Example: If you select the cashier's till, an employee closing out would receive a chit printed with the tip amount, bring it to the cashier, and then the cashier would give the server that cash amount.
Print the employee report on closeout	If checked, the employee report will automatically be printed when an employee with the selected job description closes out.

Print the charge tips report on closeout	If checked, the charge tips report will automatically be printed when an employee with the selected job description closes out. This can be particularly useful if a manager must review tips before the bank drop (the server can bring the report to the manager to review tips).
Print driver detail report on closeout	The driver detail report can automatically be printed when an employee with the selected job description closes out. It can be printed at 40 columns or 80 columns; or select "Disable" not to use this feature.
Configure to use minimal closeout procedures	This will change your settings to the following: • Enable quick closeout checked on • Print driver detail report on closeout set to Disable

42.3 Check Transfers Tab

Under the **Miscellaneous** section click on **Job/Tip Dispersion**. Click on the **Check Transfer** tab.

Check Transfers



Scenario 1 (Servers): Many restaurants allow servers to ring up sales in Delivery or Take-out mode, but they do not want these types of orders to count against their sales. Also, they may not want these sales to count when calculating the Tip Sales %. In addition, the servers must have no open checks in order to clock out and go home. So they used to have to get a manager to transfer the checks manually to another employee before they could go home. After a check has been transferred, it can be cashed out by either a manager or a cashier who has access to pick up other employees' checks. You can create a "Virtual" employee and have the checks automatically transferred to this employee as soon as the server sends them. Then they no longer belong to the server and a cashier or manager can cash those checks out.

Scenario 2 (Cashiers): You may also want to set up check transfers for cashiers as well. One possible reason for this is that the cashier will be able to go home if checks they rang up have not been cashed out yet. Cashiers will typically have all check types transferred to a "Virtual" employee.

To do this:

- First you will need to create a "Virtual" employee. Do this by just creating a new employee with the name of "Virtual." See Employees (under General) for instructions on creating an employee.
- Return to this Jobs area and the **Check Transfers** tab.
- From the upper list under **Job descriptions**, select the job you would like to set up a check transfer for.
- In the **Check Type** field, select a type from the drop down list.
- In the **Transfer Check To...** field, select the "Virtual" employee you created in the first step.
- Press **Add** if you want to repeat this process for other types of checks. You cannot set up two check transfers of the same check type under one employee's Check Transfers screen.

***Note:** This method will actually transfer the check to the virtual employee you specified when the check is sent. This 'virtual employee' does not have to be clocked in and does not have to have a drawer assigned. In a typical situation, a manager or cashier will cashout the checks assigned to this "virtual" employee.

Also, please note that the person who rang up the check is still accounted for on the kitchen printers. So if a chef has a question about an order, they will still know who took the order.

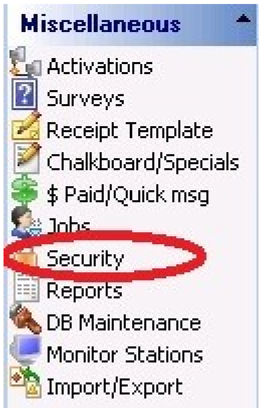
Part XXX

Security

Part 43 Security

Under the **Miscellaneous** section click on **Security**.

Security



Security explanation includes the following:

1. About Security

2. Add Security Group

3. Add Security Items to Security Group

4. Move Security Items

5. Delete Security Group/Item

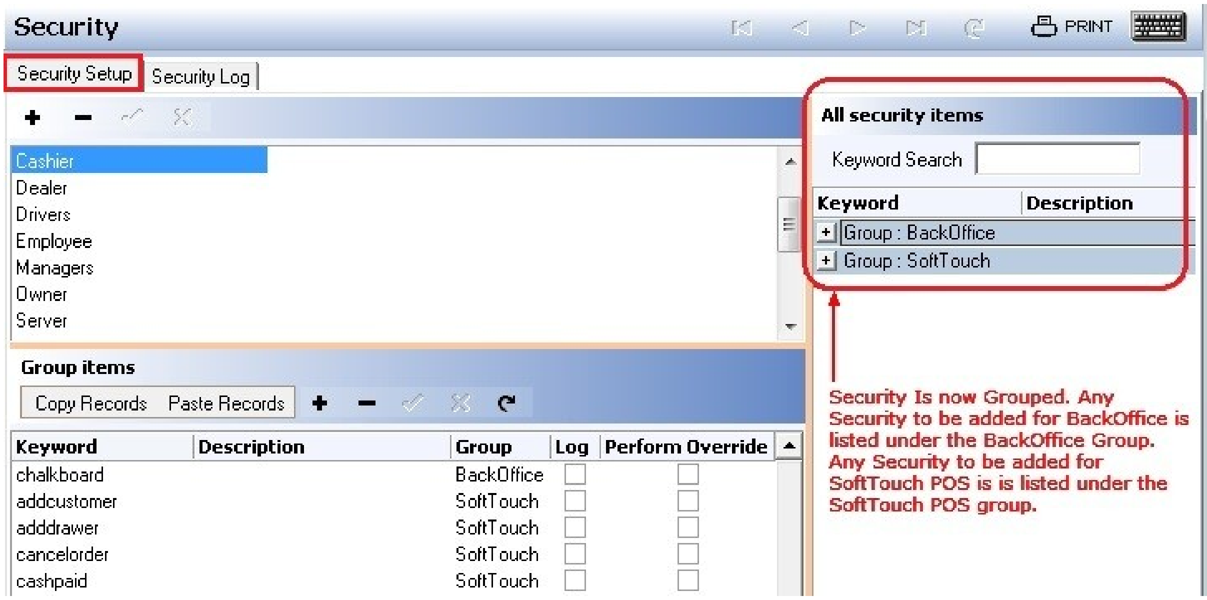
6. Security Log

43.1 About Security

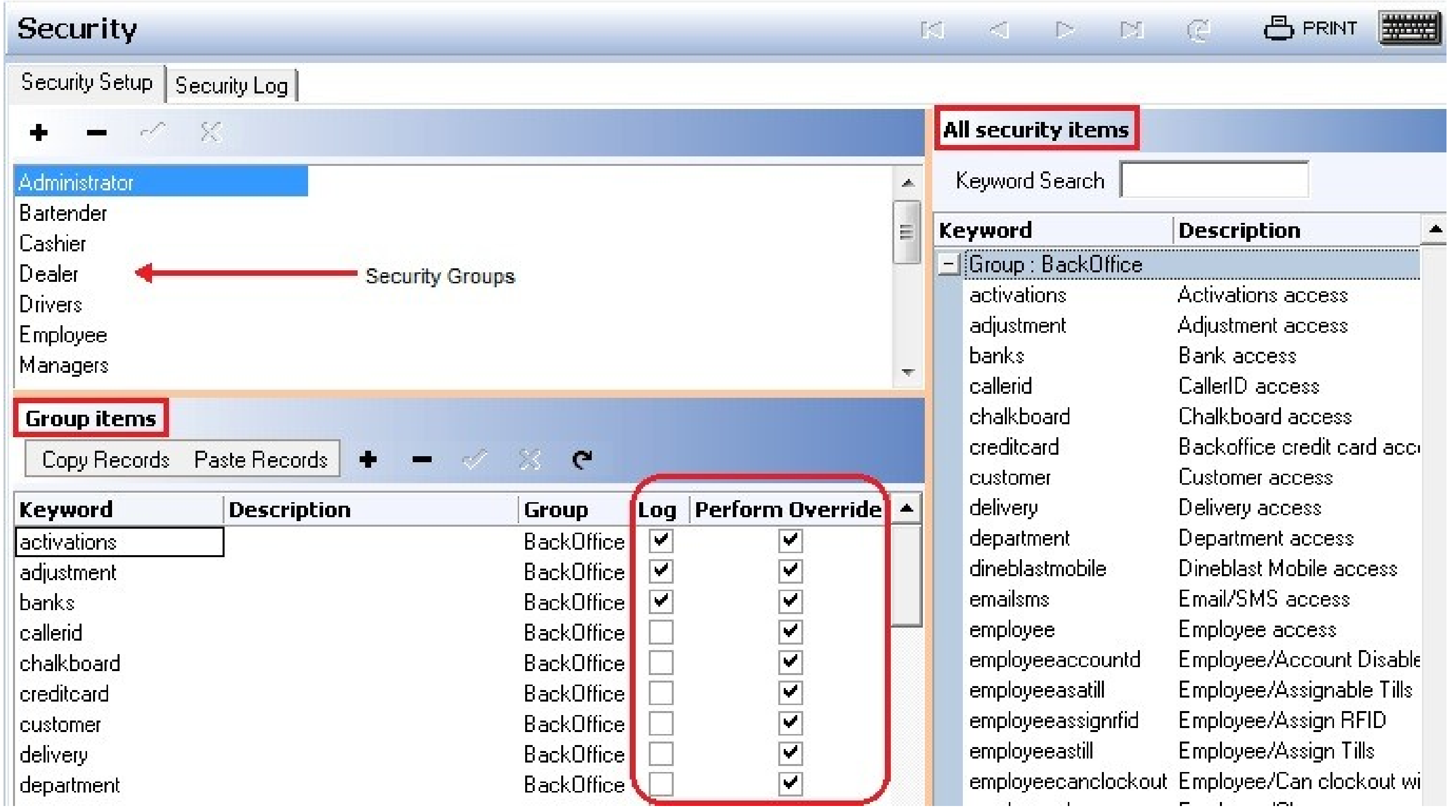
Under the **Miscellaneous** section click on **Security**. Click on the **Security Setup** tab.

Security Setup

Here you define security groups (normally by the job type). These security items let you specify which employee groups will have access to which actions. There are two areas of security items: **BackOffice** and **SoftTouch**.



In the upper left side of the screen you create **Security Groups** and in the lower left you see **Group Items** assigned to the highlighted group. On the right side of the screen you can see **All security items** that you will add to the security groups on the left.



You will also notice that there are two columns just to the right of the Group items: **Log** and **Perform Override**. These are self-customizable for each action for that security group.

- Log -

The **Log** column is used to track activity for the selected security action. Simply check the items you want to log and view them on the **Security Log** tab. This is great for logging and viewing suspicious activity. You can view this log by clicking on the **Security Log** tab.

- Override -

The **Override** column is used to grant override abilities for the security action selected. This means that an employee can use their login for override popups to let other employees into secure areas in the system.

> **Example:** A new server might have very limited security to control their activity. S/he will probably work with a more experienced, trusted employee who has greater liberties with security. When the new server needs to do a discount or take cash or some other security-related activity, the training server can use his/her login to override the activity.

This was implemented to reduce, if not eliminate, the abuse some servers or bartenders attempt to do to "cheat" the system. Let's say a less than reputable server gains access to a busser's login. The busser(s) have extremely limited security, but the server can use the busser's login to start a check and then use his/her login to override through the rest of the check process and cashout. Now s/he has effectively created a check and pocketed the cash, and the owner of the check is virtually untraceable.

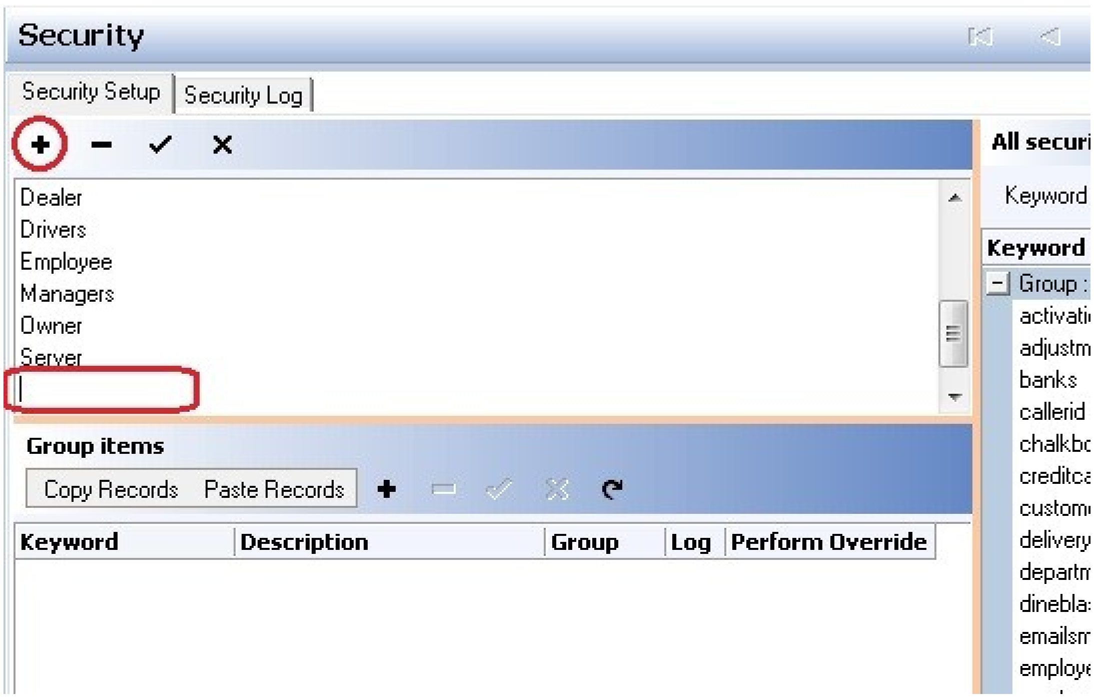
Now, with this security feature, you can reduce or remove all override ability to eradicate that type of activity. At the very least, you can log and view that activity and catch the thief.

43.2 Adding Security Group

Under the **Miscellaneous** section click on **Security**. Click on the **Security Setup** tab.

Add Security Group

In the upper left side of the screen click the button. A blank space with a cursor line will appear. Type in the name for this security group.



Then click the button to save it.

Change Name

A Security Group's name can be changed at any time. Highlight the Security Group name you would like to change and click on it. Once you have done this, just type in the new name for the Security Group, then save it.

43.3 Adding Security Item(s) to a Security Group

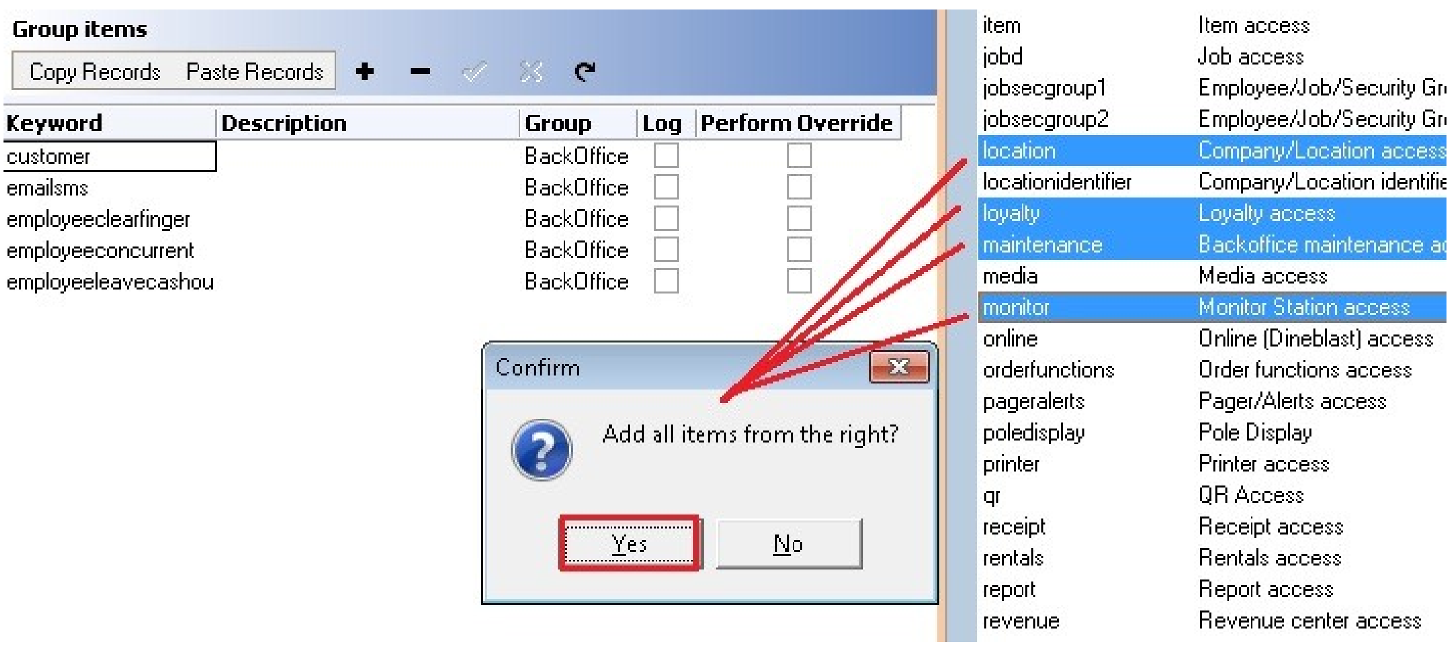
Under the **Miscellaneous** section click on **Security**. Click on the **Security Setup** tab.

Add Security Item(s) to a Security Group

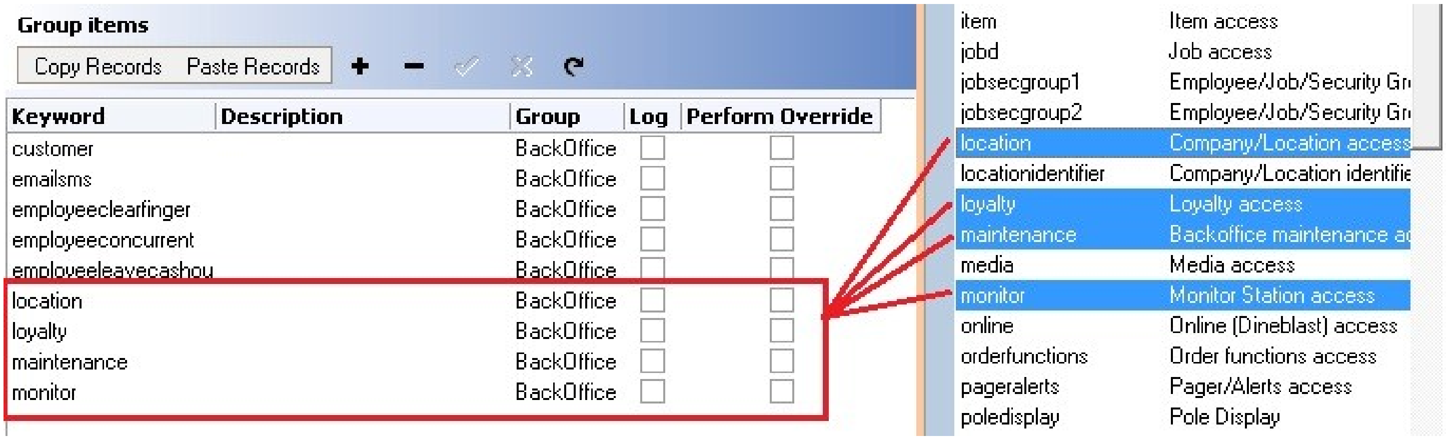
On the right side of the screen select the Security Item(s) you wish to add to the selected Security Group. To select more than one item, press and hold the Ctrl key on your keyboard and click on every item you wish to add.

After you have selected the Security Item(s) you wish to add to the Security Group, highlight the Security Group name in the upper left.

Next, click the + button in the Security group items toolbar in the middle left of the screen. Click "Yes" to the confirmation dialog that pops up ("Add all items from the right?). See image below:

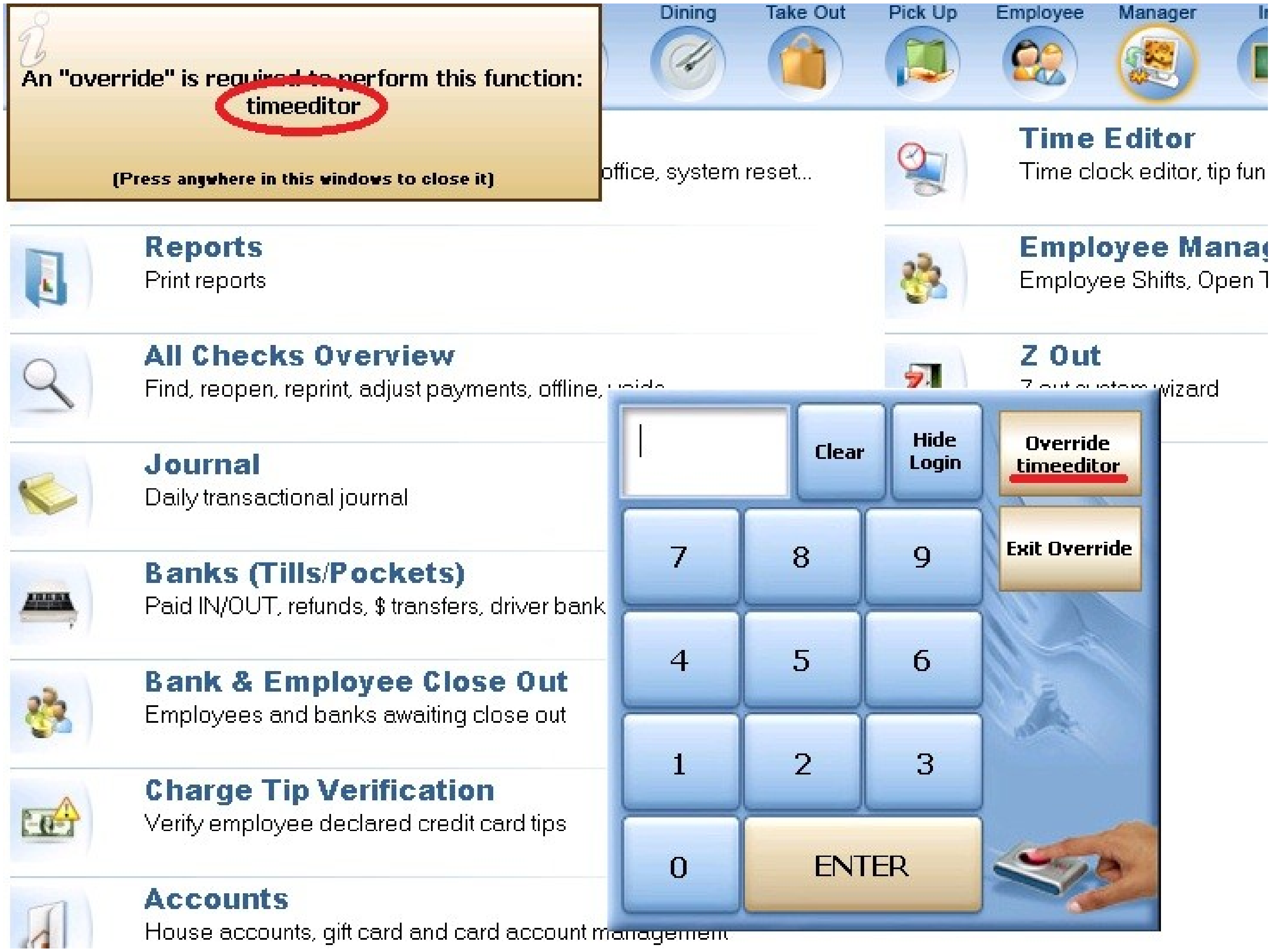


The Security Item(s) will now be listed in the Security Group you had selected. Remember to check **Log** and/or **Perform Override** where desired.

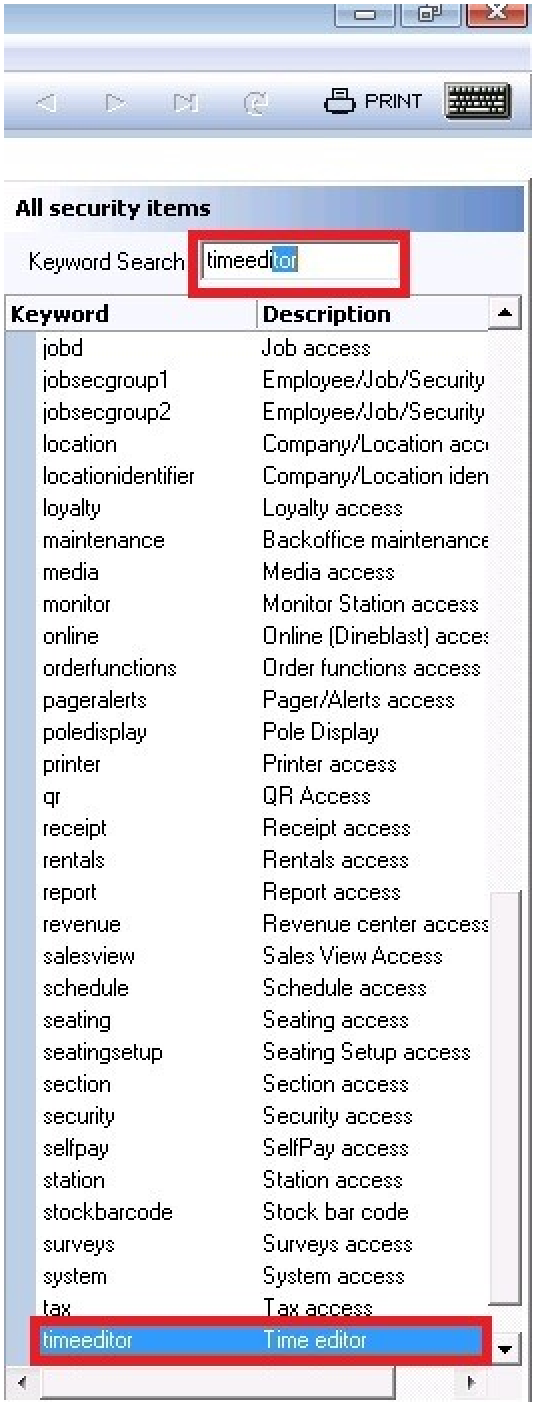


Determine Security Item(s) Name

If an employee is trying to perform an action that they are not authorized to do, you will see a message like the one below appear on the screen. The box in the top left will disappear after a few seconds, but the override keypad will remain. The name of the security item that would need to be added to the security group this employee belongs to is listed below the word **Override** on the top right button on the keypad. In this case, this employees security group does not have the timeeditor function tied to it.



You can type in the security item name shown above in the **Keyword Search** field as shown below.



Then, making sure you have the right Security Group highlighted, press the **+Add** button to add it to the existing privileges this employee security group has.

43.4 Copying Security Item(s)

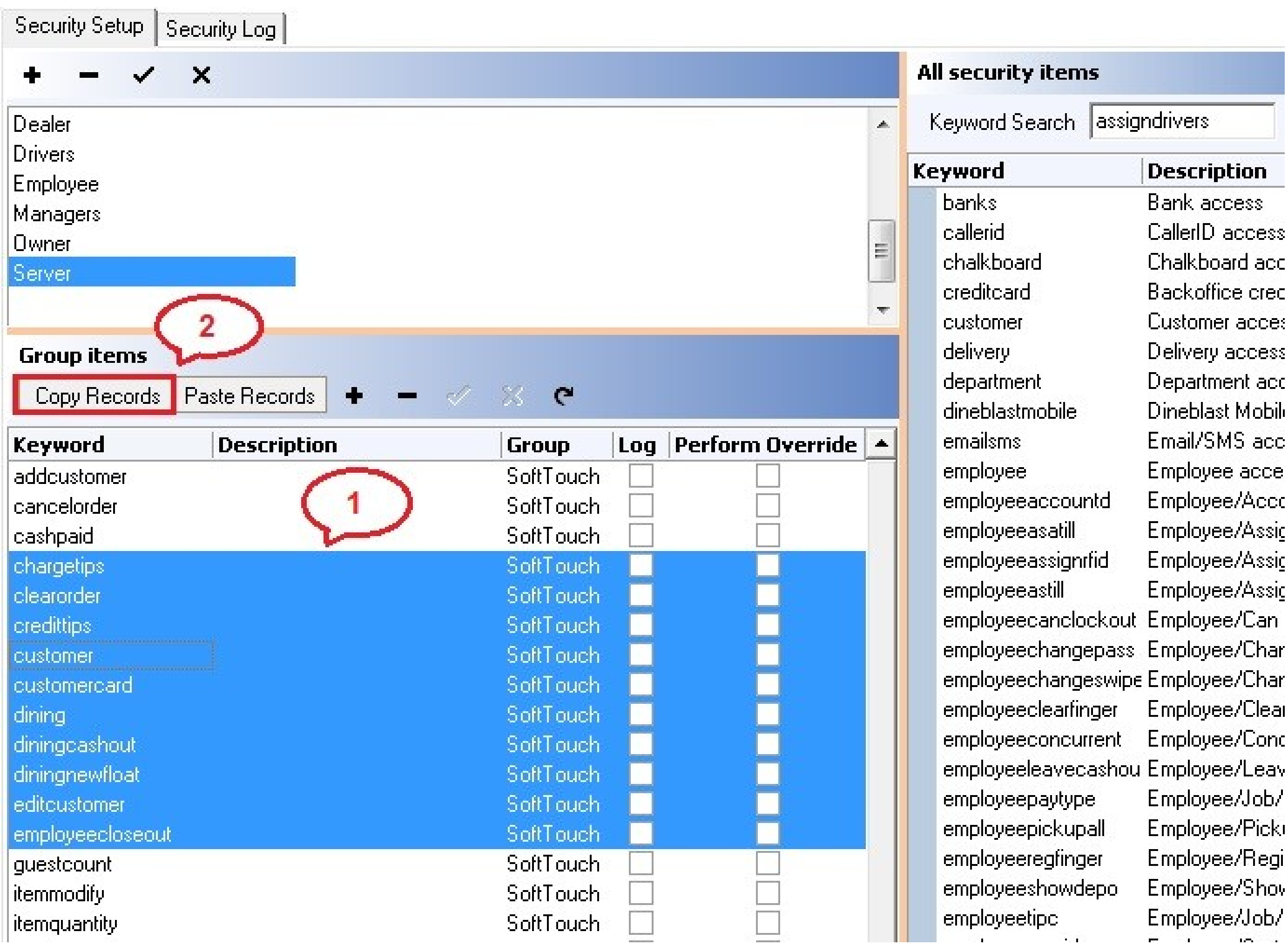
Under the **Miscellaneous** section click on **Security**. Click on the **Security Setup** tab.

You can copy Security Items from one Security Group into another. This is very useful if you want to make a new security group that is very similar to an existing security group.

Copy Security Item(s)

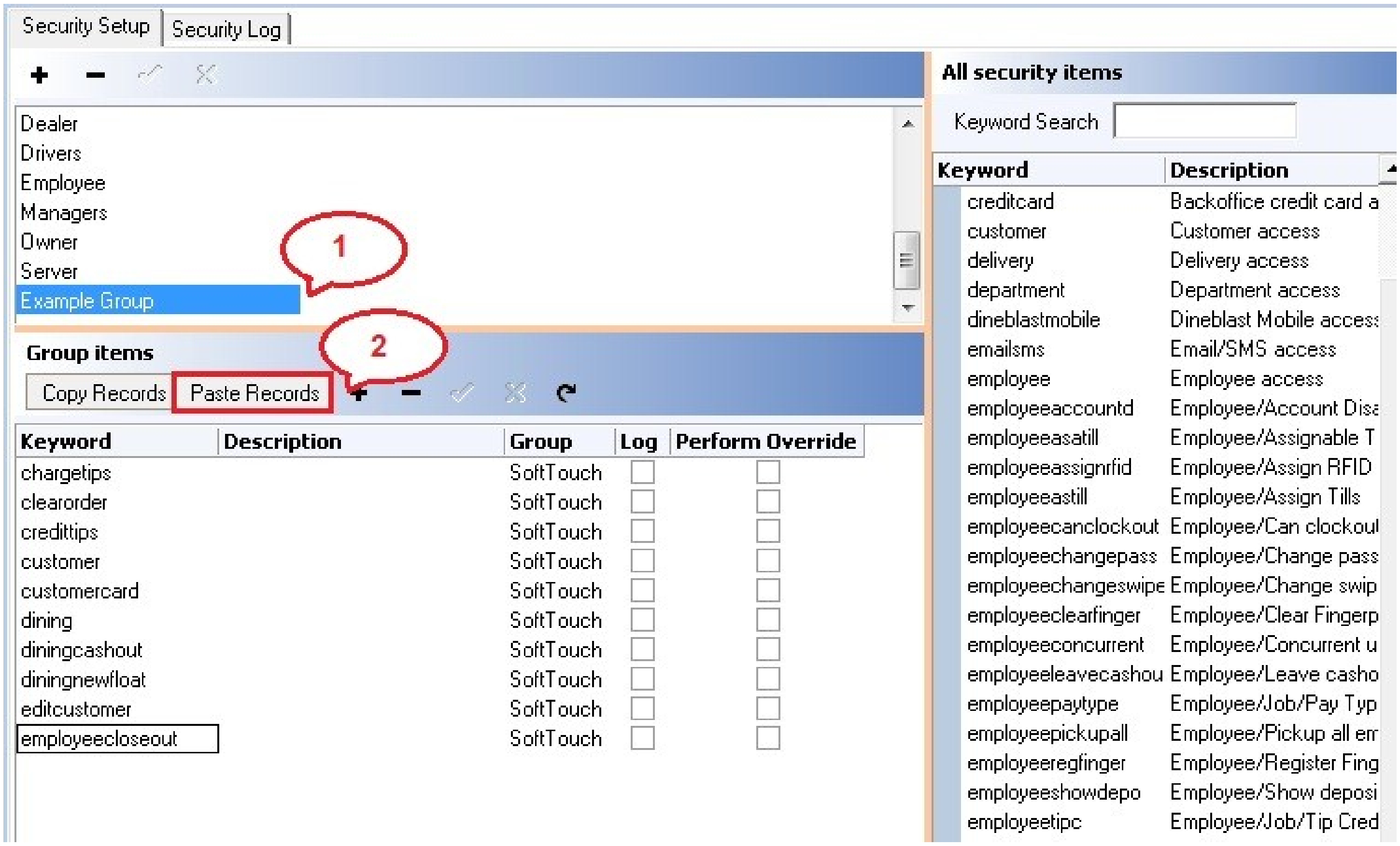
To copy an item highlight it first by clicking on it. To copy more than one item press and hold Ctrl key on your keyboard and highlight all necessary items. Then click the Copy Records button.

If you wish to copy all items from a group, you can press and hold the Shift key on your keyboard then select the first item in the list and, with the Shift button still depressed, select the last item in the list. All items in between the first and last item will be highlighted.



***Note:** Copy command always copies items from one location to another.

Next, highlight the Security Group you want to copy this item (or these items) to by clicking on its name. Then click the Paste Records button.

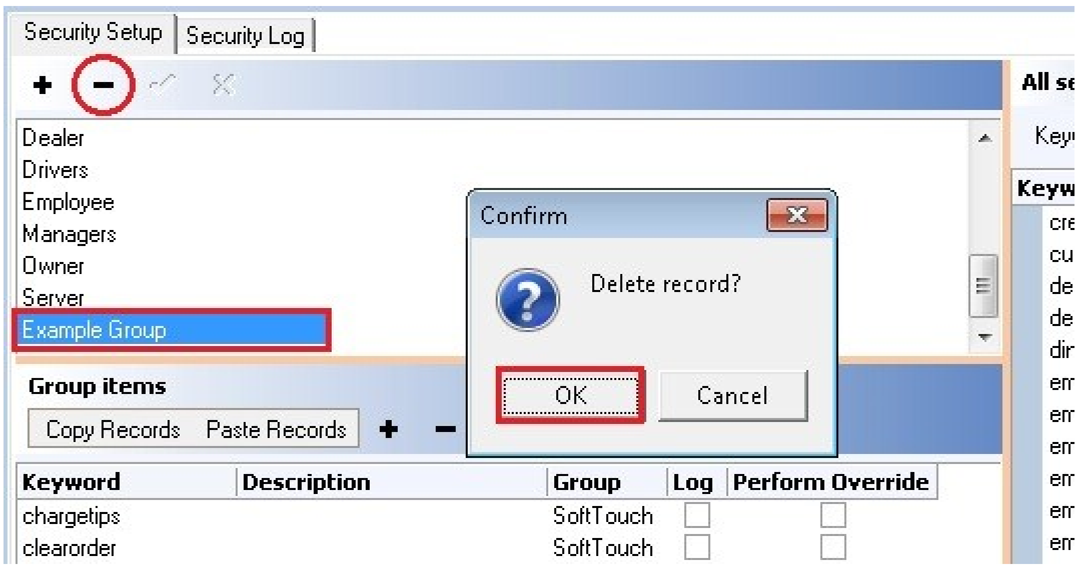

Security Setup
Security Log
Dealer
Drivers
Employee
Managers
Owner
Server
Example Group
1
2
Group items
Copy Records
Paste Records
Keyword
Description
Group
Log
Perform Override
chargetips
clearorder
credittips
customer
customercard
dining
diningcashout
diningnewfloat
editcustomer
employeecloseout
SoftTouch
All security items
Keyword Search
creditcard
customer
delivery
department
dineblastmobile
emailsms
employee
Backoffice credit card a
Customer access
Delivery access
Department access
Dineblast Mobile access
Email/SMS access
Employee access

43.5 Deleting Security Group/Item

Under the **Miscellaneous** section click on **Security**. Click on the **Security Setup** tab.

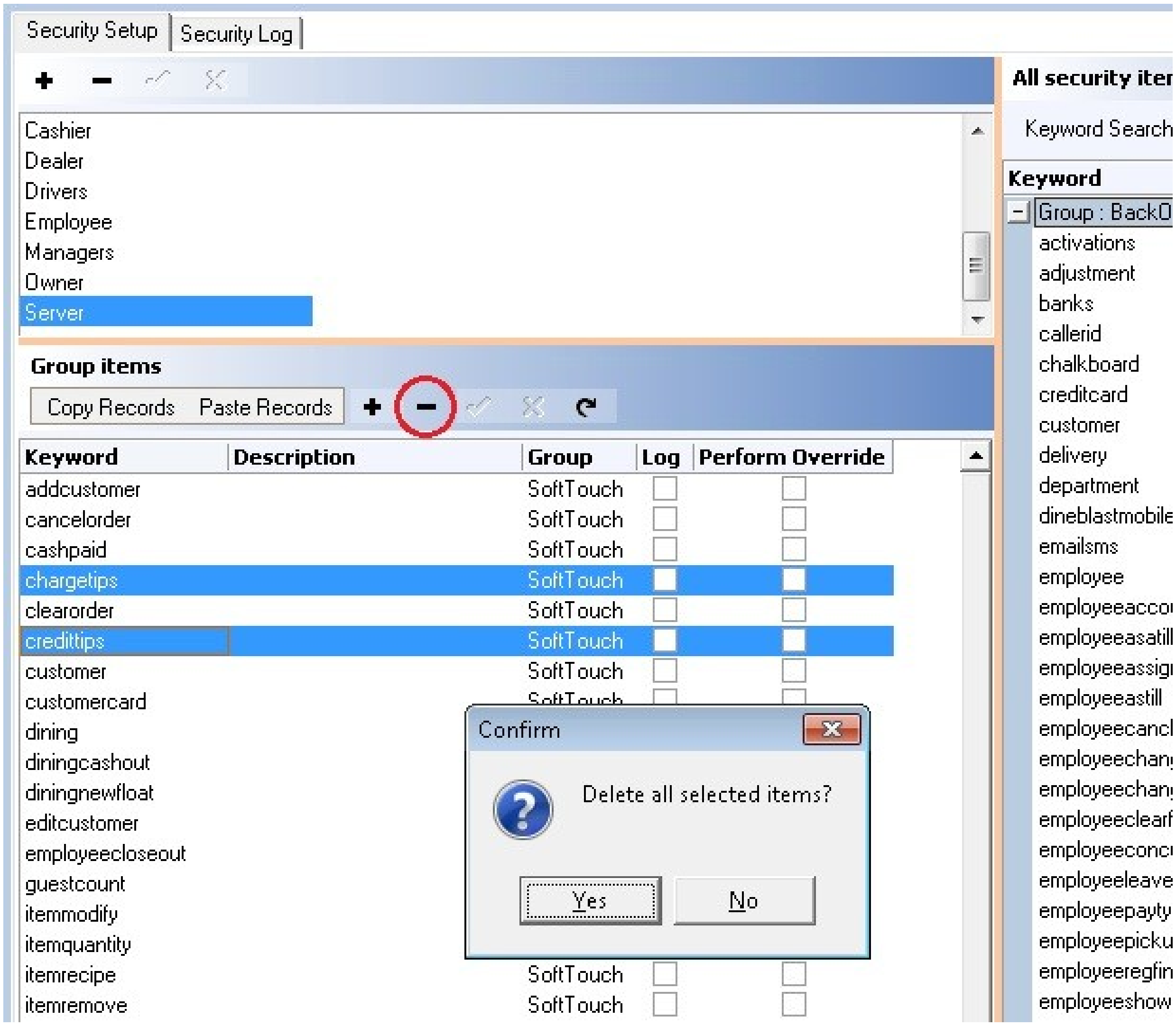
Delete A Security Group

Highlight the security group you want to delete by clicking on it, and then click the **−** button. Click "OK" to the confirmation dialog that pops up ("Delete record?"). This will delete the group and all the security items in it.



Delete A Security Item

Highlight a security item you wish to delete by clicking on it. If you wish to delete multiple items press and hold the Ctrl key on your keyboard and highlight the necessary items. Then click the **−** button and click "OK" to the confirmation dialog that pops up ("Delete all selected items?"). See image below:


Security Setup
Security Log
All security iter
Keyword Search
Keyword
Group : BackO
activations
adjustment
banks
callerid
chalkboard
creditcard
customer
delivery
department
dineblastmobile
emailsms
employee
Cashier
Dealer
Drivers
Employee
Managers
Owner
Server
Group items
Copy Records
Paste Records
Keyword
Description
Group
Log
Perform Override
addcustomer
SoftTouch
cancelorder
cashpaid
chargetips
clearorder
credittips
customer
customercard
dining
diningcashout
diningnewfloat
editcustomer
employeecloseout
guestcount
itemmodify
itemquantity
itemrecipe
itemremove
Confirm
Delete all selected items?
Yes
No

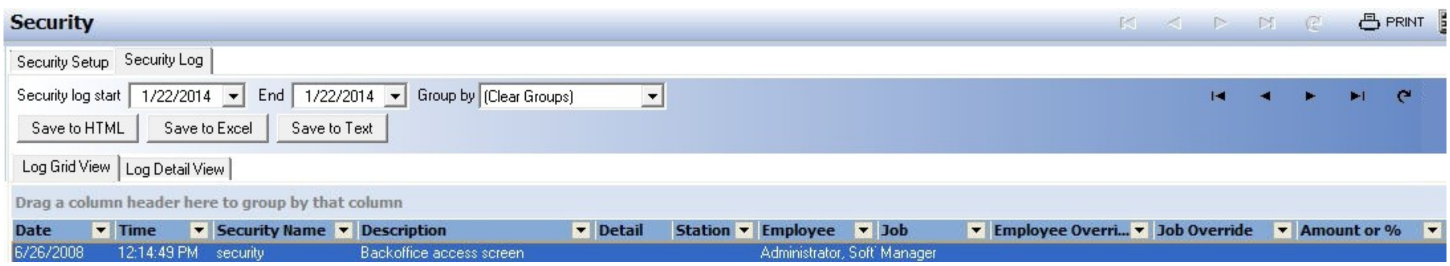
43.6 Security Log

Under the **Miscellaneous** section click on **Security**. Click on the **Security Log** tab.

Security Log

The security log shows the information for any security item that has been checked on for the "log" option under the security group items, beginning from when it was first checked on.

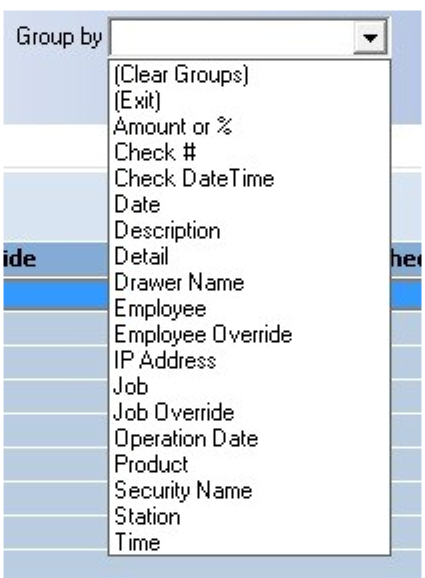
> **Example:** The security log is checked on for the Server security group for every time they clock in our out. This means the information will then be recorded and posted into the Security Log every time an employee that has the security group "server" clocks in or out.
>
> ***Note:** There are internal logs in the system that will always show.



Scroll the screen over to see the rest of the categories and information.

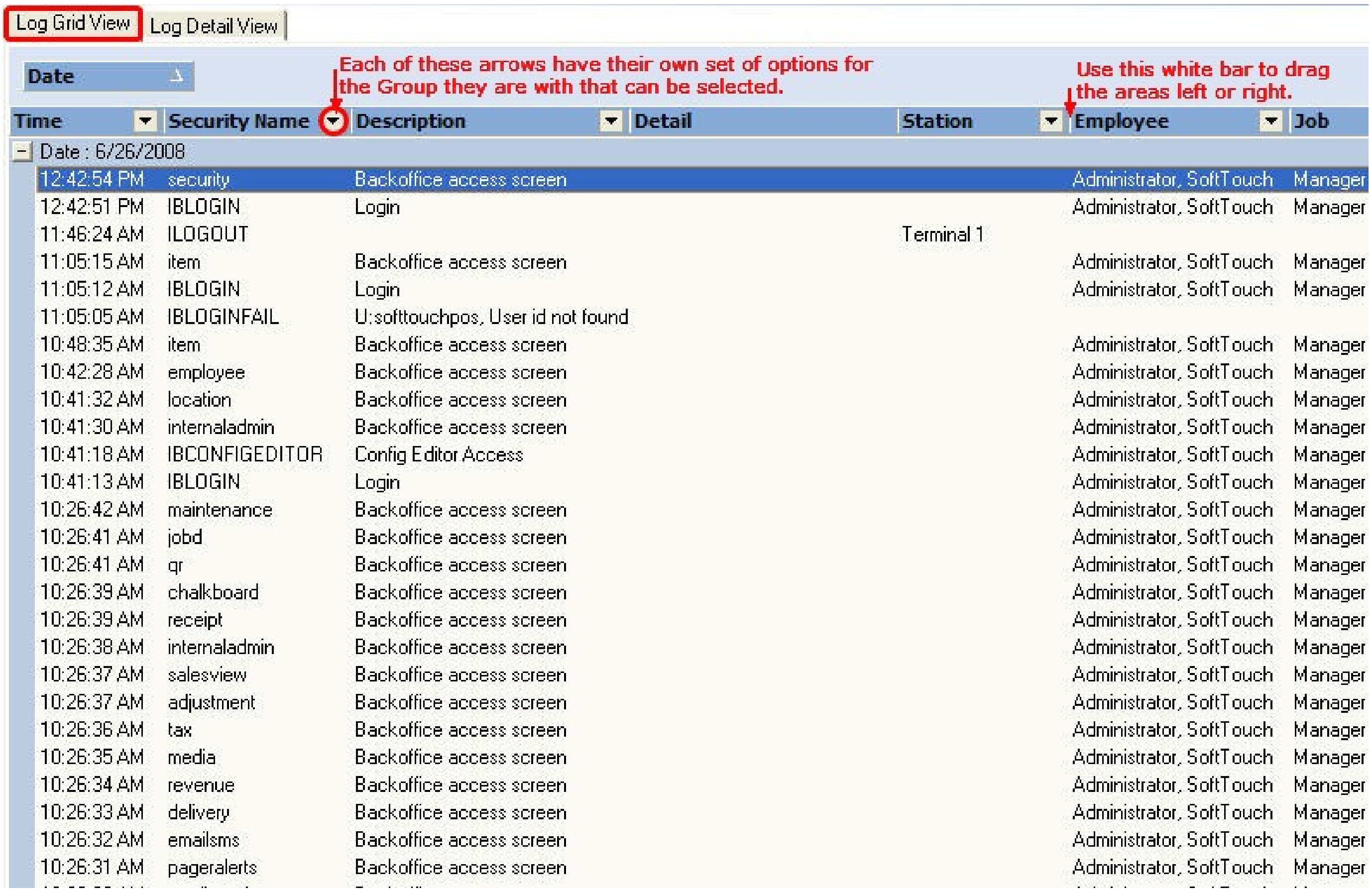
The Security log can be exported out of BackOffice as either an HTML, Excel, or Text document.

The Security Log can be sorted by a start to end date and can be grouped by various options.



- Log Grid View -

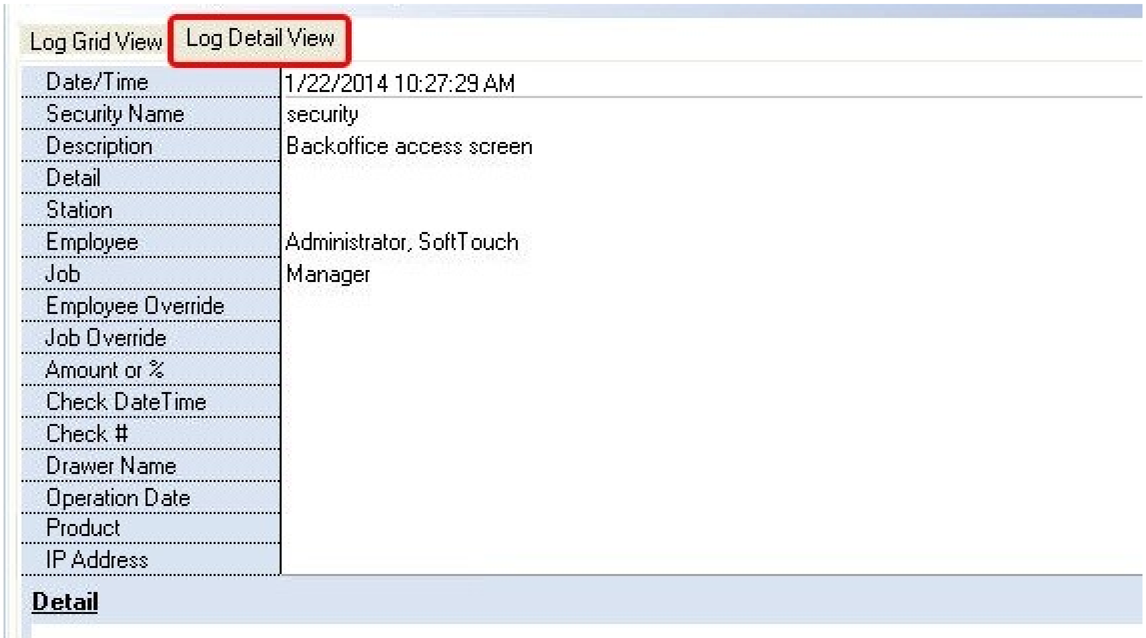
The Log Grid View is set up much like an excel document. You can expand the areas for which you want to be able to view all of the text (such as the "Description" if it is cut off) or shrink the areas you don't need to see or that have extra space so you can see more categories at once. Use the scroll bar at the bottom of the screen to view categories that are not currently visible.



Time	Security Name	Description	Detail	Station	Employee	Job
12:42:54 PM	security	Backoffice access screen			Administrator, SoftTouch	Manager
12:42:51 PM	IBLOGIN	Login			Administrator, SoftTouch	Manager
11:46:24 AM	ILOGOUT			Terminal 1		
11:05:15 AM	item	Backoffice access screen			Administrator, SoftTouch	Manager
11:05:12 AM	IBLOGIN	Login			Administrator, SoftTouch	Manager
11:05:05 AM	IBLOGINFAIL	U:softtouchpos, User id not found				
10:48:35 AM	item	Backoffice access screen			Administrator, SoftTouch	Manager
10:42:28 AM	employee	Backoffice access screen			Administrator, SoftTouch	Manager
10:41:32 AM	location	Backoffice access screen			Administrator, SoftTouch	Manager
10:41:30 AM	internaladmin	Backoffice access screen			Administrator, SoftTouch	Manager
10:41:18 AM	IBCONFIGEDITOR	Config Editor Access			Administrator, SoftTouch	Manager
10:41:13 AM	IBLOGIN	Login			Administrator, SoftTouch	Manager
10:26:42 AM	maintenance	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:41 AM	jobd	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:41 AM	qr	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:39 AM	chalkboard	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:39 AM	receipt	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:38 AM	internaladmin	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:37 AM	salesview	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:37 AM	adjustment	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:36 AM	tax	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:35 AM	media	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:34 AM	revenue	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:33 AM	delivery	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:32 AM	emailsms	Backoffice access screen			Administrator, SoftTouch	Manager
10:26:31 AM	pageralerts	Backoffice access screen			Administrator, SoftTouch	Manager

- Log Detail View -

The Log Detail View gives you a vertical detailed view of an item you have selected from the Log Grid View. Sometimes the **Detail** area at the bottom gives more information depending on the action having been logged.


Log Grid View
Log Detail View
Date/Time
1/22/2014 10:27:29 AM
Security Name
security
Description
Backoffice access screen
Detail
Station
Employee
Administrator, SoftTouch
Job
Manager
Employee Override
Job Override
Amount or %
Check DateTime
Check #
Drawer Name
Operation Date
Product
IP Address
Detail

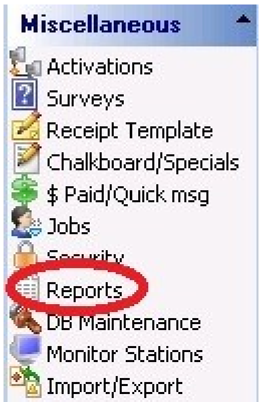
Part XX

Reports

Part 44 Reports

Under the **Miscellaneous** section click on **Reports**.

Reports



This section explains the following:

1. View, Configure, and Print Reports

2. Edit Reports

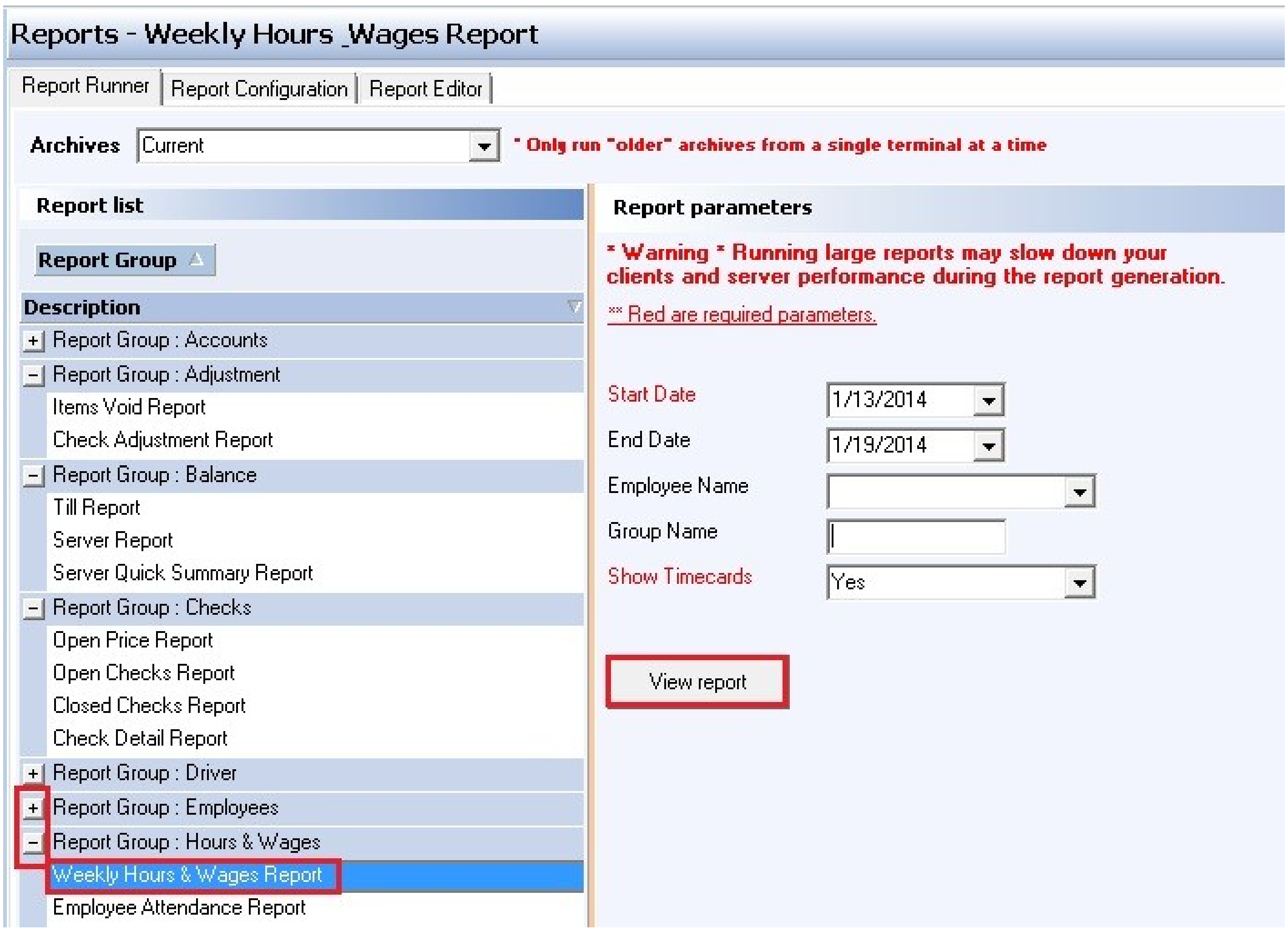
44.1 View, Configure, and Print Reports

Under the **Miscellaneous** section click on **Reports**. Click the **Report Runner** tab.

This section explains how to run, configure, and print reports.

- Run a Report -

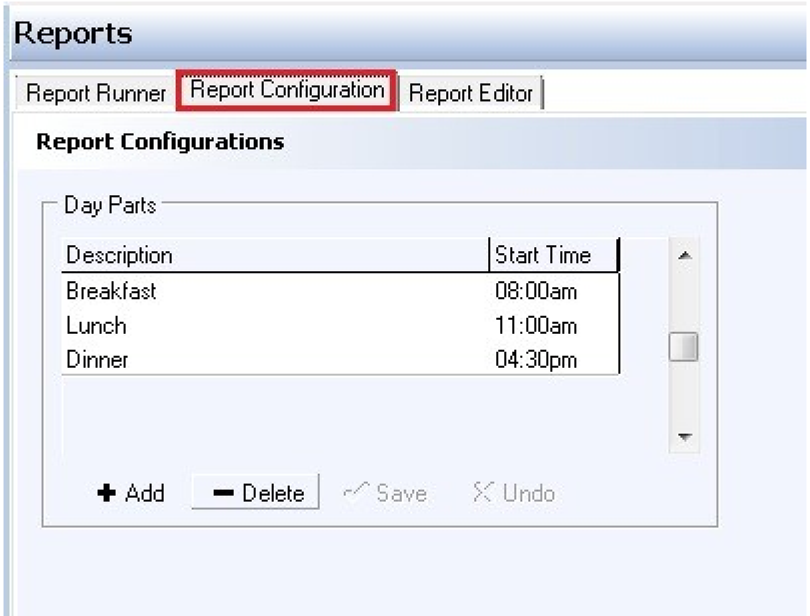
All reports are smartly grouped into separate sections. Click the plus sign of the desired group to show the reports in that group (or the minus sign to hide them again), and then click on the report you wish to view. On the right side of the screen, select its parameters. Then click the **View report** button.



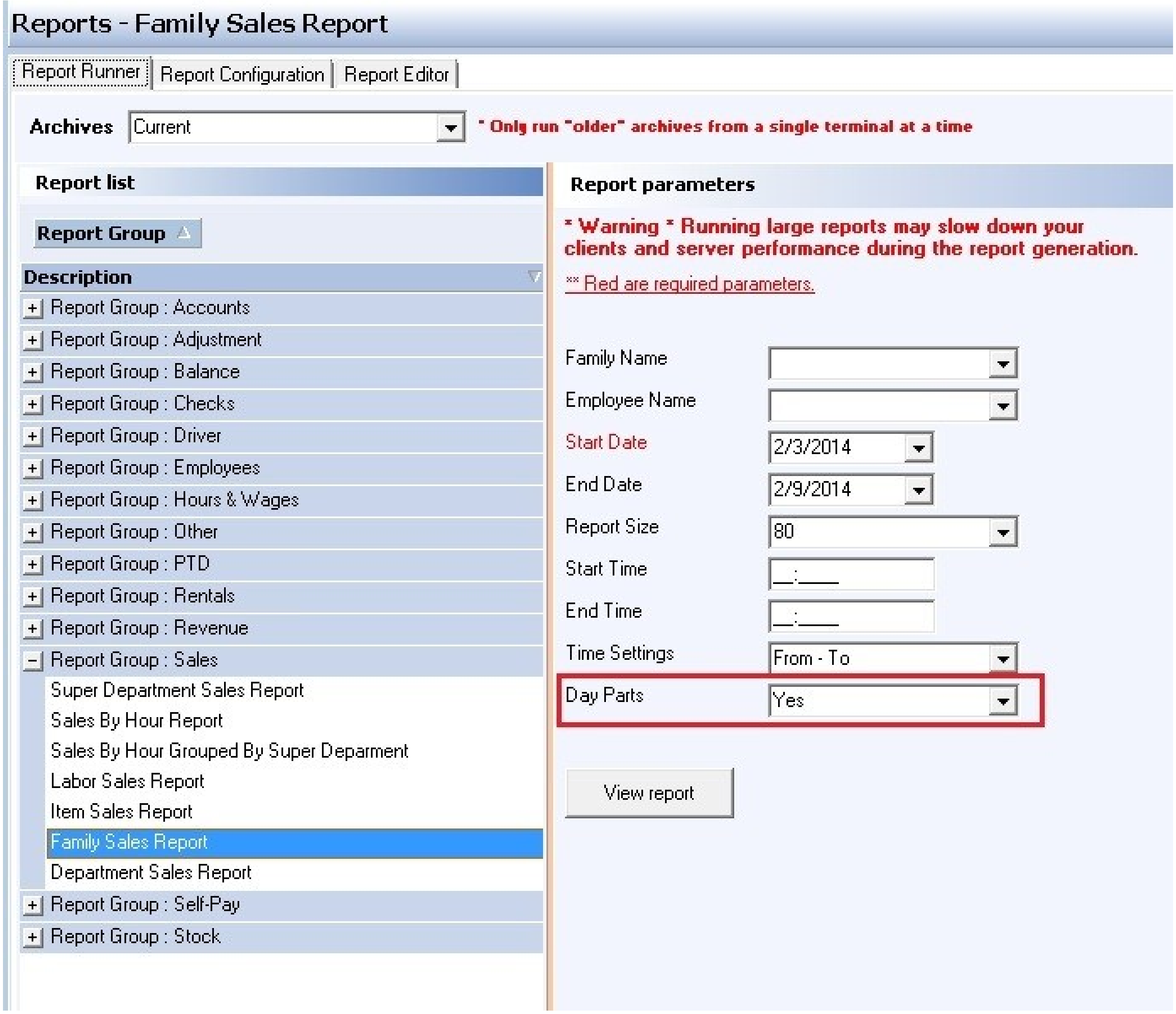
- Report Configuration -

Certain reports may benefit by setting up Day Parts. Do this by going to the **Report Configuration** tab.

Use the **Add** button and click in the blank field under **Description** to type in any name for a day part. Then click in the space under **Start Time** and begin typing the time at which that day part begins. You will notice that it will automatically fill in the time once you begin typing and you can click on each component (hours, minutes, and am/pm) to edit it.

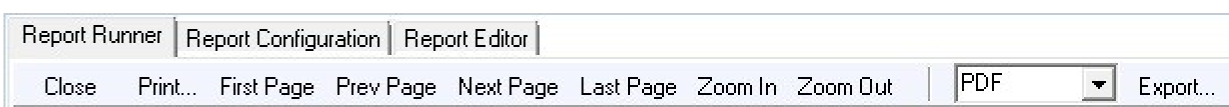


This can be used with the **Family Sales Report** and **Department Sales Report**. In order for the day parts you've entered to show on your report, change the **Day Parts** field to **Yes**.

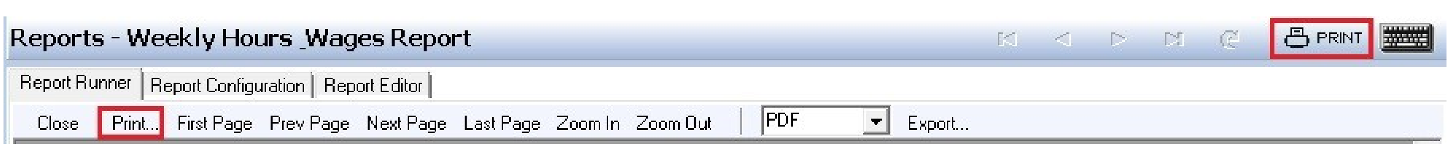


- Print a Report -

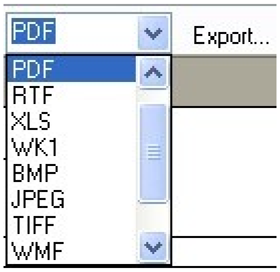
After you run a report, you may print it or view the next page or zoom in or out by clicking on the appropriate button.



To print, use the **Print...** button at the top left of the screen. If you use the **Print** button at the top right of the screen, you will print a screen shot rather than just the report.



The report can also be exported (and saved to the hard disk) by choosing the format and then clicking the **Export...** button.



44.2 Edit Reports

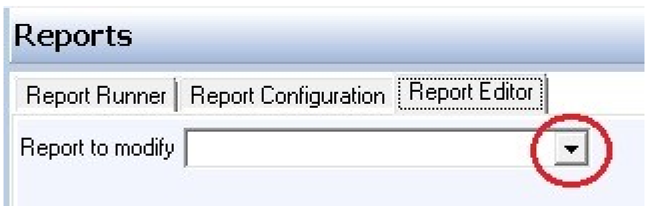
Under the **Miscellaneous** section click on **Reports**. Click the **Report Editor** tab.

You can use BackOffice to edit reports, including information they show you and where and how that information is displayed.

This section begins with the basics of editing reports, including selecting a report to modify, moving and resizing items on the grid, changing report settings, and understanding basic item properties.

- Select Report to Modify -

Use the **Report to modify** drop-down menu to select the report you would like to edit. See the image below:

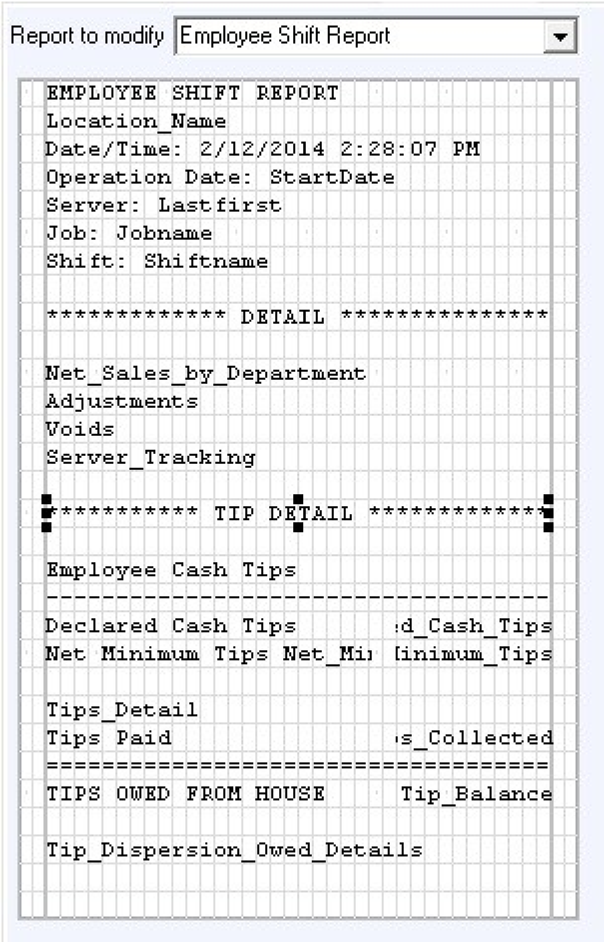


The reports currently available for modification are the reports most regularly used.

- Moving/Resizing Items on the Grid -

When you select a report to modify, that report will appear on a grid. One text character can appear per one square on the grid.

Click on a string of text to select that item. When it is selected, black dots will appear around the edges of that item. In the image below, "***********TIP DETAIL***********" has been selected.

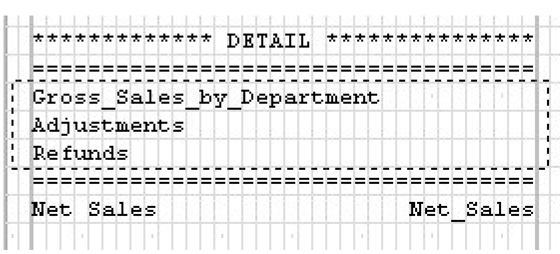


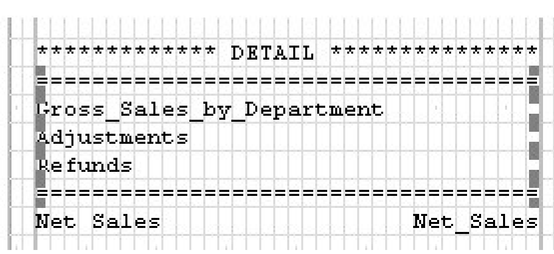
To change the size of the selected item, click and drag on any of the dots. When you move your cursor over one of the dots you will notice that it changes to a double-sided arrow indicating the directions clicking and dragging that dot will allow you to move the border of that item. The text may be cut off if the item's size is too small. If the item brings up a number or something other than what is shown, you just need to be sure there is enough space for whatever is actually going to show up on the report.

To move the selected item, click anywhere inside of the item (but not the dots) and drag to the desired location.

You can **delete an item** by selecting it and hitting Delete on your keyboard. You can also **delete multiple items at once** if you have clicked and dragged to create a dashed-line box around multiple items.

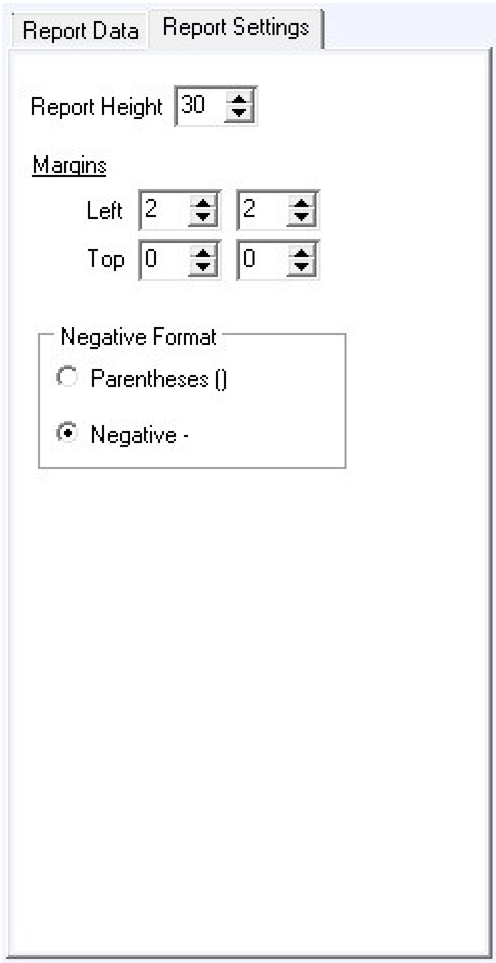
You can **select multiple items at once**. Click anywhere on the report and drag; this will form a box with a dashed line. Every item that passes into that dashed-line box will be selected. All selected items will have gray dots around the edges. You can then click anywhere in the middle and drag to **move all of these items**. Or you can press Delete on your keyboard to **delete all of these items**.





- Report Settings -

On the right side of the screen, the **Report Settings** tab allows you to make some basic format changes to the whole report.

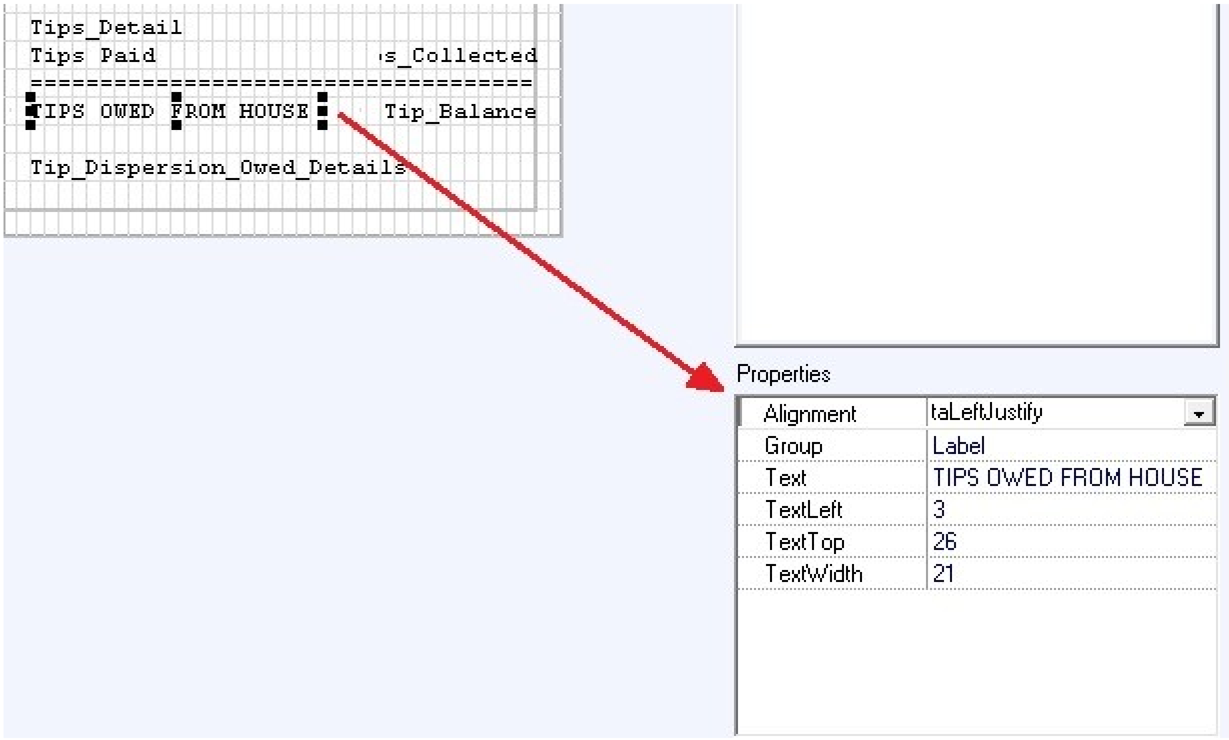


Report Height	This will change the number of squares that appear vertically (rows) on the report grid. ***Note:** You cannot change report width; it is set up for a 40-column printer.
Margins	When you increase the margins from 0, you will notice gray lines move inward from the outer edge of the report. Nothing will print outside of the margins, even if items appear there. **Left** - The first field will change the number of squares/columns on the left margin. The second field will change the number of squares/columns on the right margin. ***Note:** Some printers require left/right margins. **Top** - The first field will change the number of squares/rows on the top margin. The second field will change the number of squares/rows on the bottom margin.

Negative Format	This changes how negative numbers appear on the report - either with a negative sign or in parentheses.

- Item Properties -

When you select an item, its properties will display in the bottom right corner of the screen. In the following example, "TIPS OWED FROM HOUSE" is selected, so you can see (and change) its properties.



Different items will have different and additional types of properties (see **Add Report Data**), but here are the ones that are common to most:

Alignment	Select an alignment from the drop-down. This will affect where in the item the text is placed. **taCenter** - This will center the text. **taLeft** - This will make the text start on the left-most edge of the item. **taRight** - This will make the text end on the right-most edge of the item.
Group	This shows what group this item is part of. You cannot change the group. The five groups - Totals, Details, Data Items, Parameters, and Report Items (includes Calculation, Date/Time, Label/Text, and Separator Line) - are discussed next (see **Report Data**).

Description	This is the name of the item that shows up on the item on the report grid to let you know what it is but will not appear on the actual report (because the item retrieves changeable data and displays that data when you run the report).
TextLeft	This is the column number where this item begins. Changing this number will move the position of the entire item, not just the text.
TextTop	This is the row number where this item begins. Changing this number will move the position of the entire item, not just the text.
TextWidth	This is the number of columns this item occupies. Changing this number will change the width of the item by increasing or decreasing columns on the right-hand side of the item.

44.2.1 Add Report Data

Under the **Miscellaneous** section click on **Reports**.

Click the **Report Editor** tab.

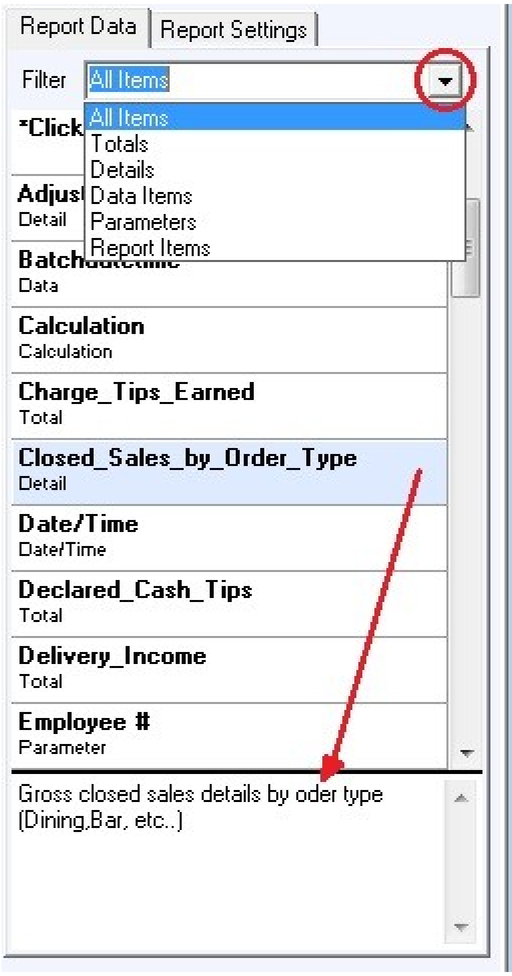
- Add Report Data -

On the right-hand side of the screen, click the **Report Data** tab. This is where you can pick items to add to your report.

To **add an item to the report**, simply click on one of the items listed to select it and then click on the report grid where you would like to add it.

The **Filter** drop-down allows you to narrow down the list to show only the items in a particular group. **All Items** shows all items in all groups. The groups are explained below. In each group, different items are available depending on which report you are editing.

When you select an item it will be highlighted blue and provide a basic description in the box on the bottom.

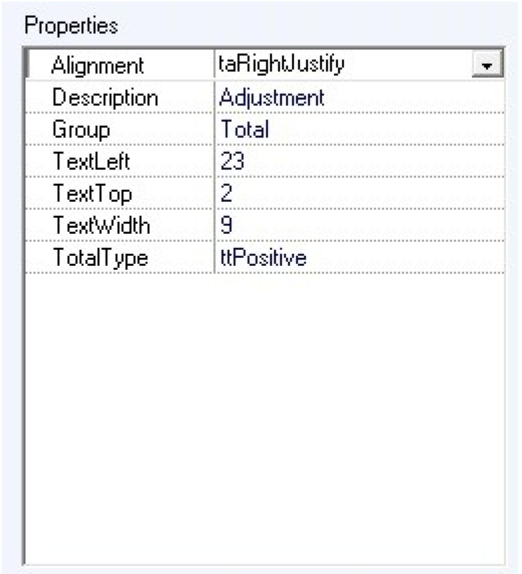


Let's look at each group. Remember, the items in each group have different properties, which can be viewed and changed in the bottom right corner of the screen when an item is selected. Basic properties common to most groups were discussed previously (see **Edit Reports**).

- Totals -

A total is generally going to be one number that is a total of data in your system.

Keep in mind that although these items have a description and show text on the report grid, all that will show on the actual report is a number. Depending on your needs, you may want to create a text label (discussed later in this section) on the report to say what that number is.



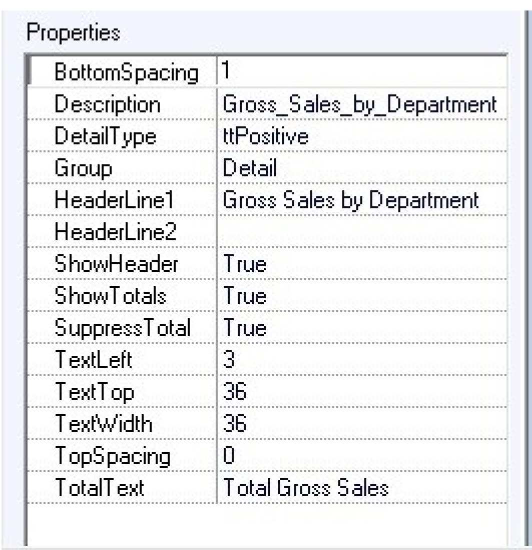
Properties

Alignment	taRightJustify
Description	Adjustment
Group	Total
TextLeft	23
TextTop	2
TextWidth	9
TotalType	ttPositive

TotalType	This option will determine whether the number displays as positive (select **ttPositive**) or negative (select **ttNegative**).

- Details -

Details are series of data pulled from your system. These often include both textual and numeric data. The item Gross_Sales_by_Department, for example, is going to use department names you created in BackOffice (under **Item Builder->Departments**) and numeric sales data.



Properties

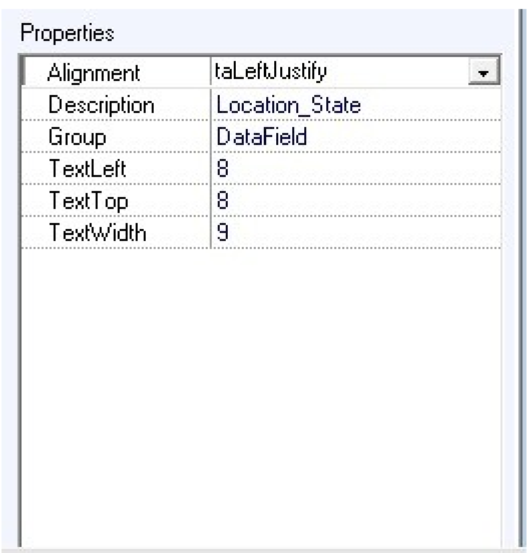
BottomSpacing	1
Description	Gross_Sales_by_Department
DetailType	ttPositive
Group	Detail
HeaderLine1	Gross Sales by Department
HeaderLine2	
ShowHeader	True
ShowTotals	True
SuppressTotal	True
TextLeft	3
TextTop	36
TextWidth	36
TopSpacing	0
TotalText	Total Gross Sales

HeaderLine1	Enter the text you want to display above the details. ***Note:** The advantage to a header line rather than a label/text item here is that these headers will only show if there is data and it shows up on the report.

HeaderLine2	Use this if you need a second header line of text to display above the details.
ShowHeader	**True** - The header will show up on the report. **False** - The header will not show up on the report.
ShowTotals	**True** - The total(s) of the details will be displayed. **False** - The total(s) of the details will not be displayed.
SuppressTotal	Reserved for future use.
TotalText	Enter the text you want to use as a label for the totals. This will only display if you have elected to show totals.

- Data Items -

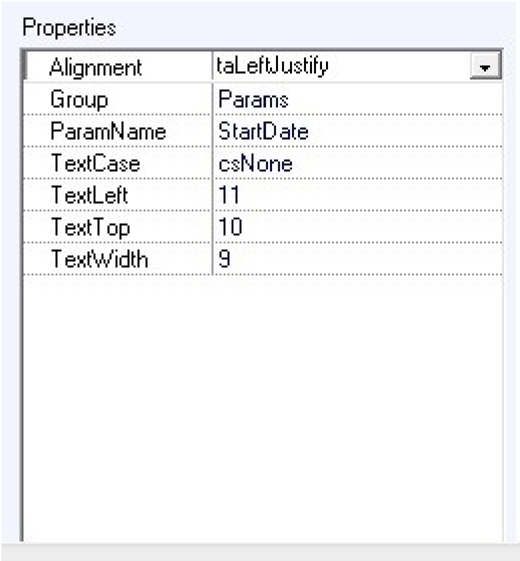
These are pieces of information such as address and name that pull information entered into your system.



Data Items do not have any unique properties.

- Parameters -

Parameters are based on the information you select when running a report. For example, before you run the Employee Shift Report, you are prompted to select an operation date, report size, employee name, employee job, and shift, so the items available in the Parameters group when editing the Employee Shift Report will show information you plugged in to these fields.



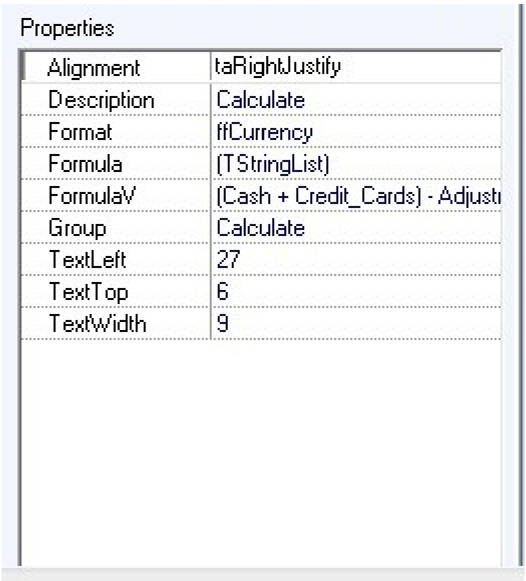
ParamName	This is like the **Description** for other groups (discussed under **Edit Reports**); it is the name of the parameter item and will not display on the actual report.
TextCase	Use this to change how the case of letters will appear **csLowerCase** - text will appear in lower case. **csNone** - Text will appear as entered in your system. **csUpperCase** - TEXT WILL APPEAR IN ALL CAPS.

- Report Items -

The same four report items are available for every report: Calculation, Date/Time, Label/Text, and Separator Line. Each of these is explained here.

Calculation

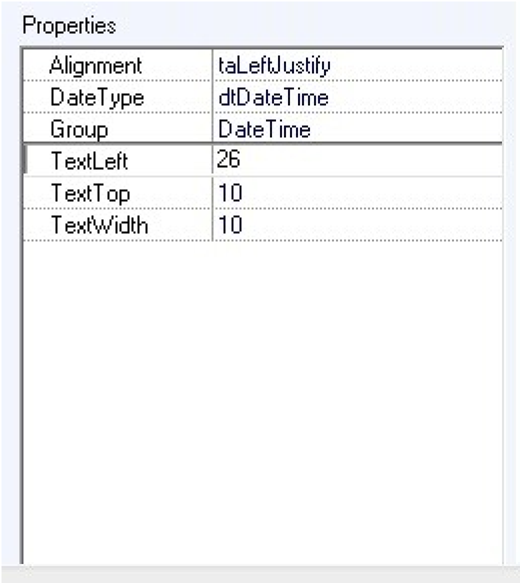
Use this feature to create your own calculation based on a formula you construct using items present in the report.



Format	**ffCurrency** - Use this if the result of the calculation is a currency; this will display a dollar sign. **ffNone** - Select this option if there should not be a dollar sign.
Formula	Click on the field here and a button with three dots will appear on the right. Click this button to open a dialog box where you will enter your formula.  This formula can include any item that appears on the report grid. For the formula to work, you must type the item exactly as it appears on the report grid, including capital letters and underscores. ***Note:** Make sure the item name you enter is the name of an item that shows a number on the report rather than a text label you created to accompany that number. You can use parentheses as needed. Keep in mind that most keyboards use an asterisk * for multiplication. Example: (Cash + Credit_Cards) - Adjustment Press Ok when you are finished. On the report, the result calculation will be displayed. Create a text label (discussed later in this section) if needed.
FormulaV	This shows the formula you entered.

Date/Time

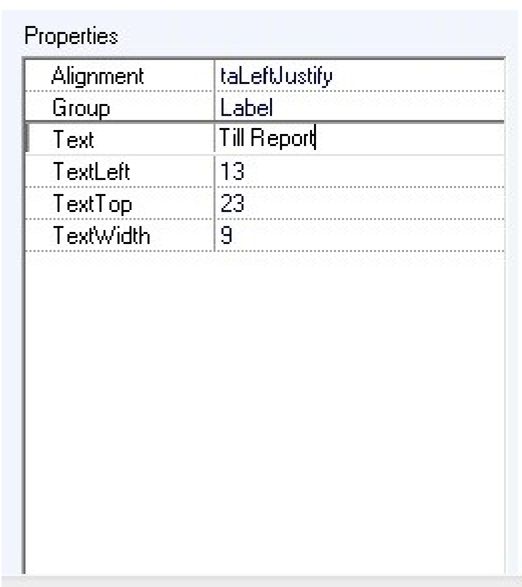
This item adds the date and/or time at which the report is run.



DateType	**dtDate** - This will show the date only. **dtDateTime** - This will show both the date and time. **dtTime** - This will show the time only.

Label/Text

This item adds exactly what you type in; it does not pull any data from your system but always shows exactly what you have typed on the report.

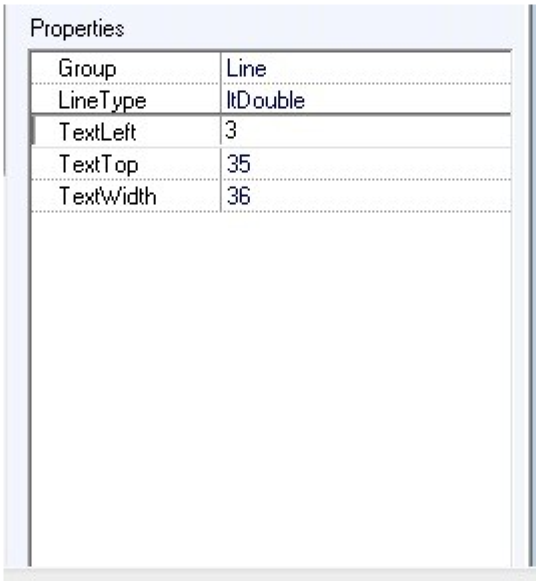


Text	This is where you enter exactly what you want to appear on the report.

Separator Line

This item adds a line if you want a line separating data.

When you click on the report to add it, it will automatically fit from the left margin to the right. If you adjust the report size after adding the line, you may then need to manually adjust the size of the line.



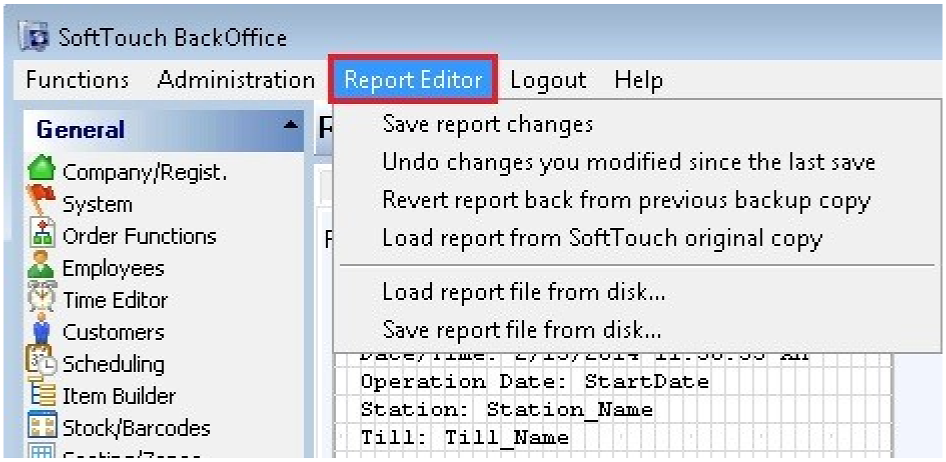
LineType	You can choose between a double line (**ltDouble**) or a single line (**ltSingle**). ***Note:** If you want to create some other sort of line, like a line of asterisks, you can create a Text Label and type out a line of asterisks.

44.2.2 Save, Load, Undo and Revert

Under the **Miscellaneous** section click on **Reports**. Click the **Report Editor** tab.

- Saving, Loading, Undoing, and Reverting Report Edits -

To save or load an edited report, revert back to other versions of a report, or undo changes to a report, select the **Report Editor** option from the gray toolbar at the top of the screen. (Other functions of this toolbar are discussed under **BackOffice Toolbar**.)



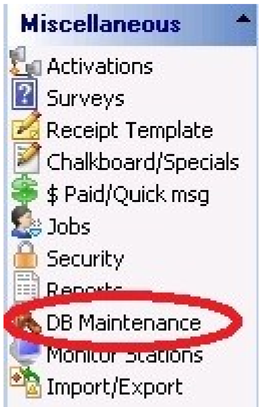
Save report changes	Select this option to save the changes you made to this report. ***Note:** If you close BackOffice in the middle of editing a report, changes will be saved.
Undo changes you modified since the last save	Select this option to undo all of the changes you made to this report since the last time you saved.
Revert report back from previous backup copy	If you saved changes to a report (perhaps you just saved it and didn't mean to), you can select this option to go back to the last version of the report you saved before these most recently saved changes.
Load report from SoftTouch original copy	Select this option to erase all of the changes you've ever made or saved to this report and revert back to the way the report originally was.
Load report file from disk	If a version of a report has been saved and you would like to access it, select this option to load that report file. This will open up a dialog box that allows you to browse for the file on your computer.
Save report file from disk	This allows you to save this version of the report as its own file. This will open up a dialog box that allows you to navigate to a location and create a name for this report file.

Part XXX

DB Maintenance

Part 45 DB Maintenance

Under the **Miscellaneous** section click on **DB Maintenance**.

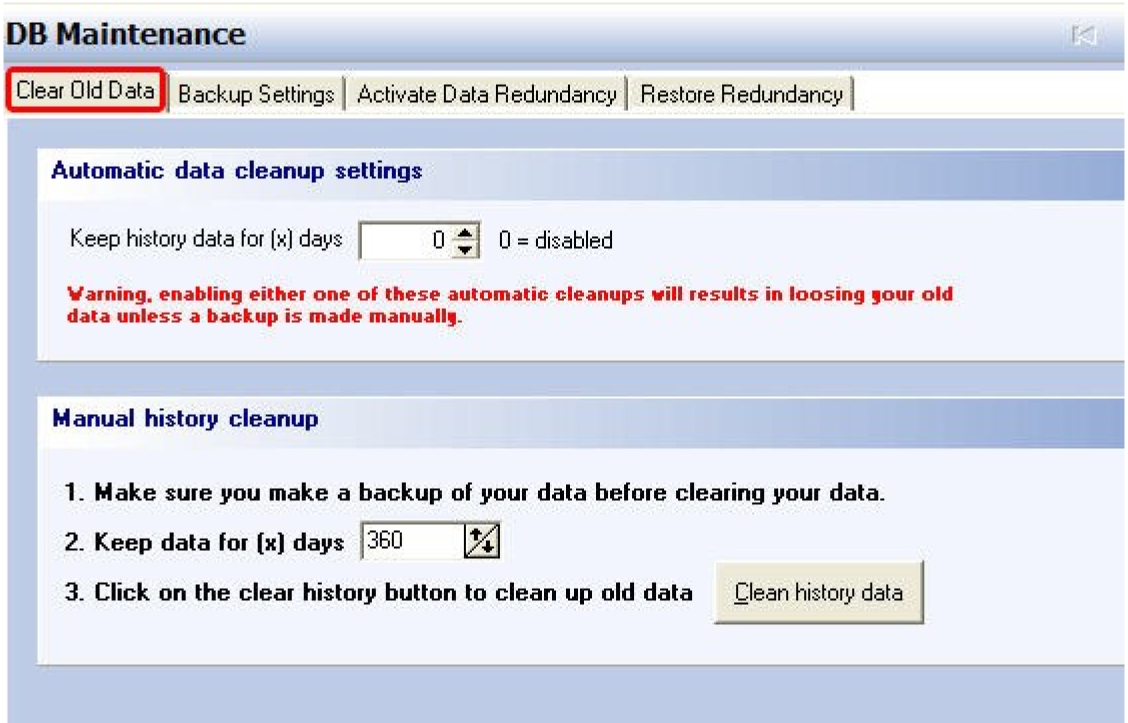


The **DB Maintenance** screen contains the following features:

1. Clear Old Data Tab
2. Backup Settings Tab
3. Activate Data Redundancy Tab
4. Restore Redundancy Tab

45.1 Clear Old Data Tab

Under the **Miscellaneous** section click on **DB Maintenance**. Select the **Clear Old Data** tab.



You can schedule automatic cleanup (removal) for your journal entries and system history or you can manually clear the journal and history. Typically this is set to 13 months or 396 days. By default it is set to 0 and no data is ever deleted, but this does present the possibility of creating a very large database over the course of a few years at a busy establishment.

- Automatic Data Cleanup Settings -

Keep history data for (x) days	Keeps the system history for the specified number of days. Everything prior to that is deleted. To disable enter 0.

REMEMBER: If you enable automatic data cleanup, manually back up your data if you didn't Z out.

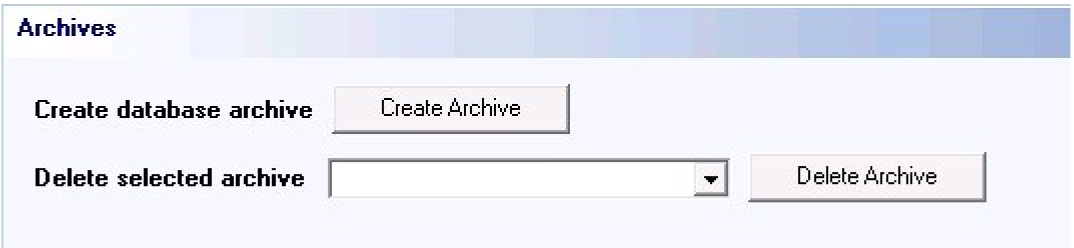
Manual History Cleanup

1. First back up your data before clearing the system history.

2. Specify the number of days you wish to keep in the system history (all sales data prior to the entered number of days gets deleted).

3. Click on the **Clear history data** button.

- Archives -



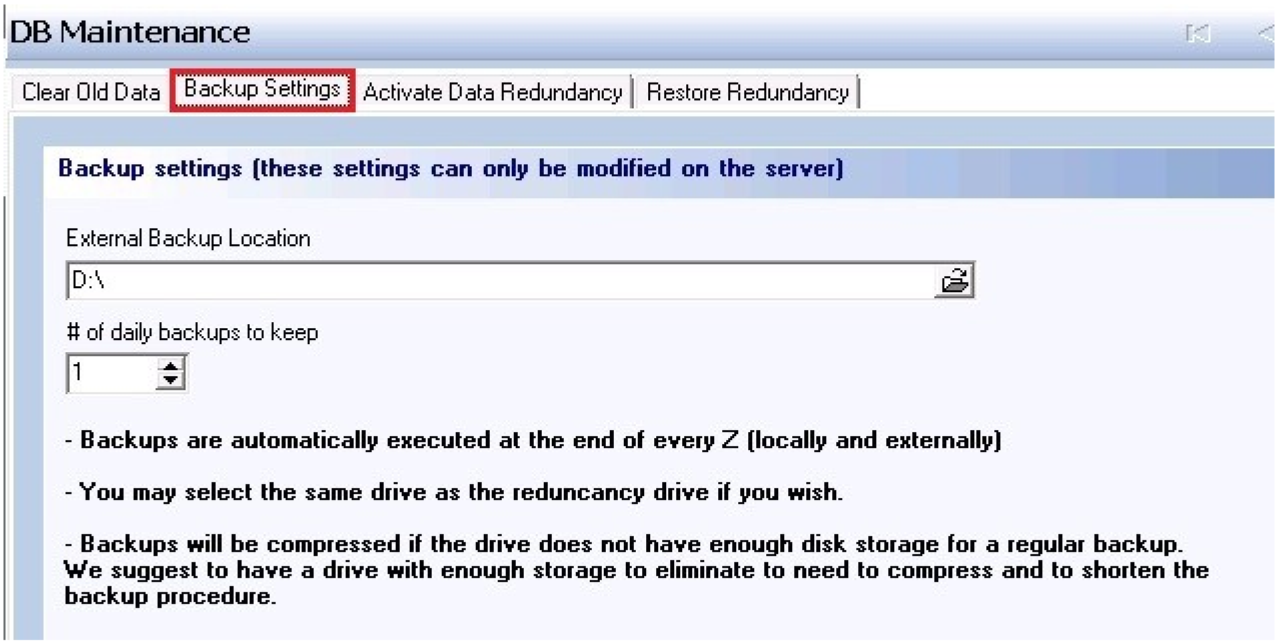
In versions 6.0 and later, you can create archives of historical data that can be retrieved in the future. This gives you a snap shot of what happened years ago without the need to use as much storage space and processing resources.

When you press the **Create Archive** button you will be asked "Are you are sure you want to archive your data?". Press "Yes" to continue. A dialog box saying "Archive Created" will appear letting you know when the archive process is complete. Press "OK."

If you have archived data, you can delete it by selecting the archive with the appropriate date and time stamp and then pressing the **Delete Archive** button.

45.2 Backup Settings Tab

Under the **Miscellaneous** section click on **DB Maintenance**. Select the **Backup Settings** tab.



Specify the location where you want the automatic backup to save the files (if you have the automatic backup enabled).

Under **External Backup Location**, use the open folder (browse) button to locate the drive and directory you want your database to backup to. (Most likely, it will be to the root of the external hard drive or compact flash drive.)

You may also select the number of daily backups you wish to keep.

45.3 Activate Data Redundancy Tab

Under the **Miscellaneous** section click on **DB Maintenance**. Select the **Activate Data Redundancy** tab.

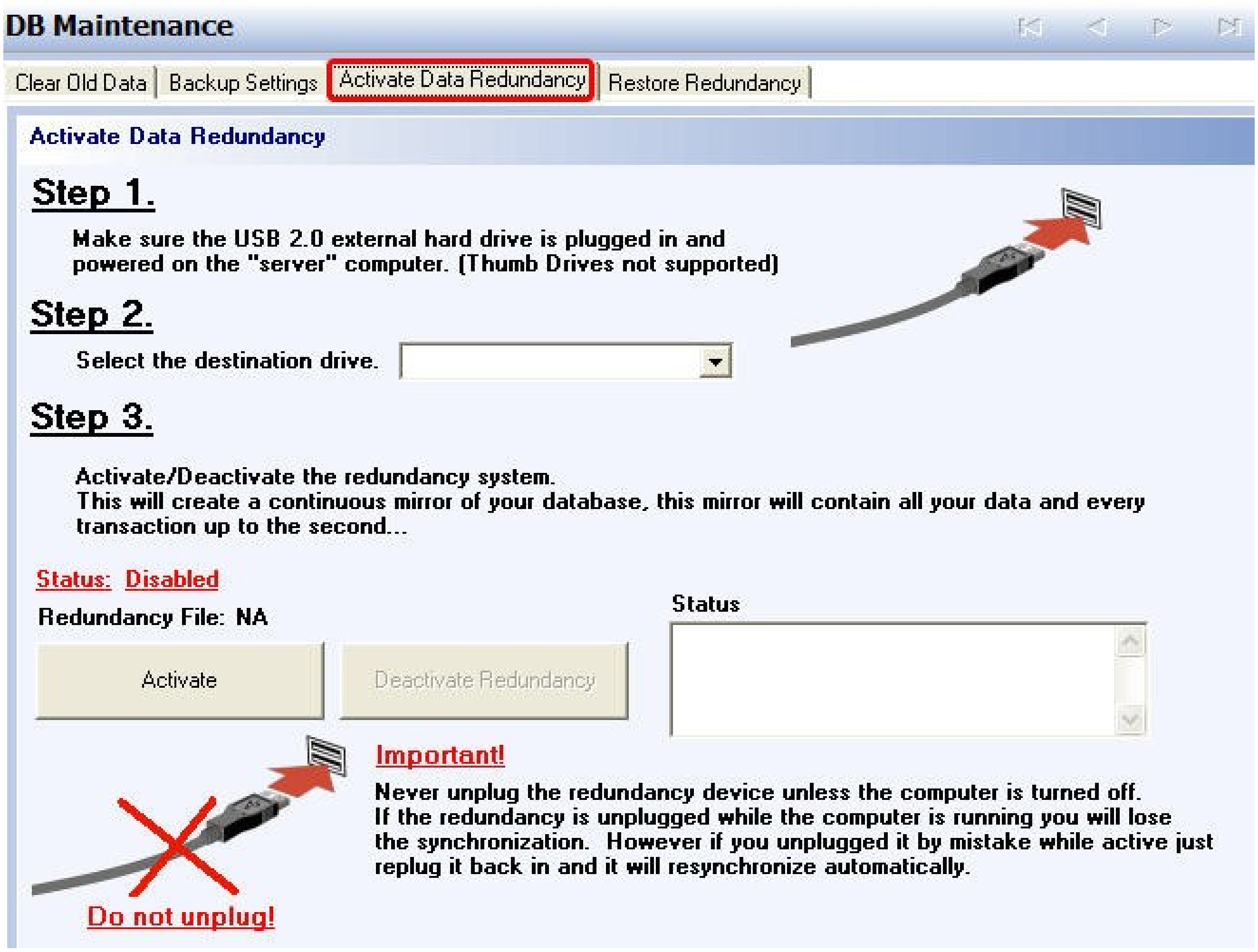
Activate Data Redundancy

Simply follow the steps laid out on the screen as shown.

For **Step 2**, when you drop down the arrow, only your external drive will appear, so choose it.

In **Step 3**, click the "Activate" button.

***Note:** You must use a **USB 2.0** external hard drive. (USB 1.1 will create unnecessary slowness on the server, since all data is being replicated to the external drive constantly.)

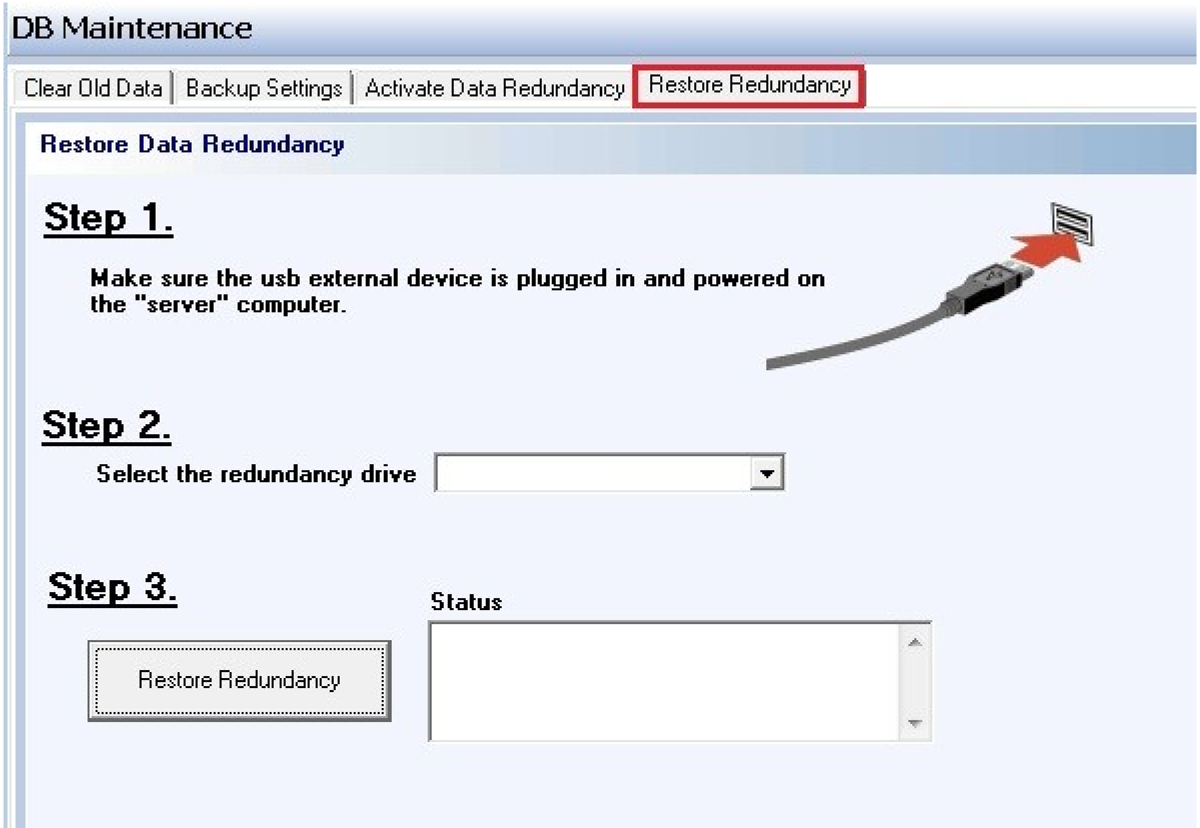


****IMPORTANT:** Once you activate the data redundancy, make sure to always have the redundancy external hard drive turned ON and connected to the server station at all times.

45.4 Restore Redundancy Tab

Under the **Miscellaneous** section click on **DB Maintenance**. Select the **Restore Redundancy** tab.

Here is where you restore the data redundancy after server repair or replacement.
Simply follow the directions on the screen as shown.

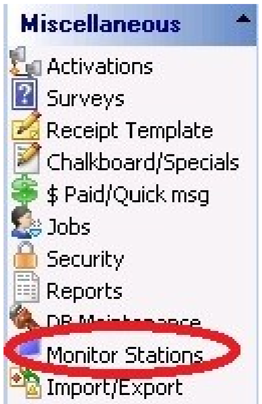


Part XX

Monitor Stations

Part 46 Monitor Stations

Under the **Miscellaneous** section click on **Monitor Stations**.

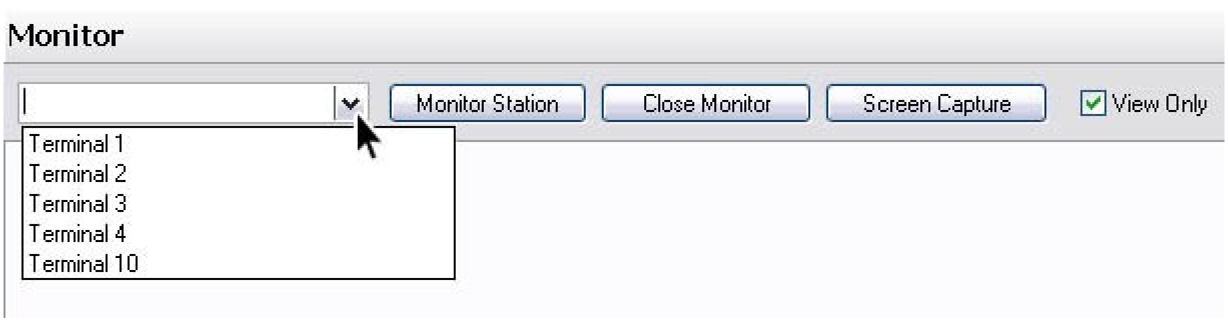


Here you can either monitor the activity (without performing any actions) on any of your stations in the restaurant or have full control over the chosen station from a remote location. You can monitor several stations simultaneously. You can even take a Screen Capture of the station you are monitoring, which is almost the same as if you were standing there at the station and taking a picture of the screen with your camera.

First you must physically go to the station you wish to monitor and press the Remote Session button from the General section of the Manager screen.

Monitor Station

Select the station you wish to monitor from the drop-down menu. Then click the **Monitor Station** button.



If the **View Only** check box is checked, you will only be able to watch (not control) the activity on the selected station, so any of the mouse movements on your own screen will not be reflected on the station's screen which is being monitored. However, if you wish to have control over the station as if you were actually there in person ringing up the orders etc., you must uncheck the **View Only** check box.

If, while monitoring, you see something happening on the screen that you would like to have a picture of, just click the **Screen Capture** button. A small dialog will be displayed confirming that the screen has been captured and that the file name is such-and-such.bmp Click "OK." The screen capture will be automatically saved in the SoftTouch installation directory.

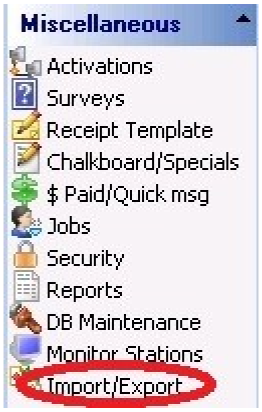
If you wish to stop monitoring a station, simply click the **Close Monitor** button.

Part XX

Import/Export

Part 47 Import/Export

Under the **Miscellaneous** section click on **Import/Export**.



Import/Export Screen contains the following features:

1. Import Tab

2. Export & Data Services Tab

47.1 Import tab

Under the **Miscellaneous** section click on **Import/Export**. Select the **Import** tab.

- Select the Import Tab -

NOTE: In order for the customer database to be imported properly into SoftTouch, it must meet the following conditions:

- It must be a CSV delimited file.
- The fields must be in the following order with no extra or missing fields; FirstName, LastName, Address1, Address2, City, State, ZipCode, Phone.

For example, a customer database would look similar to this if you were to open the file in Notepad:

John,Smith,100 Some Road,,Some City,FL,12345,123-456-7890
Jane,Doe,150 Other Road,Apt. 5,Other City,CA,54321,987-654-3210

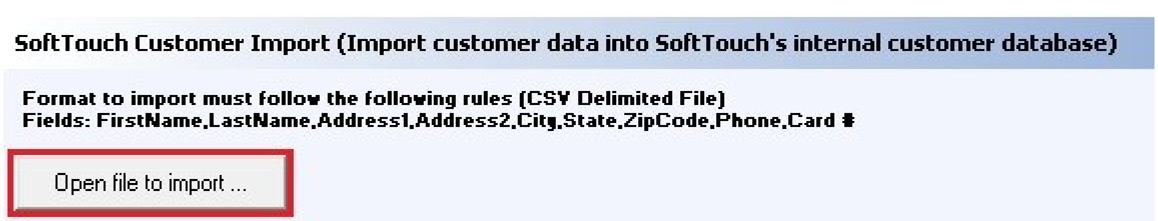
As you can see, John Smith has no Address2 field, but there is still a space there for it (notice the two commas between "Road" and "Some").

If your file doesn't have the fields in the correct places, you should be able to open the .csv file in Microsoft Excel and rearrange the columns into the correct order.

- To Rearrange the Columns in a .csv file (if needed) -

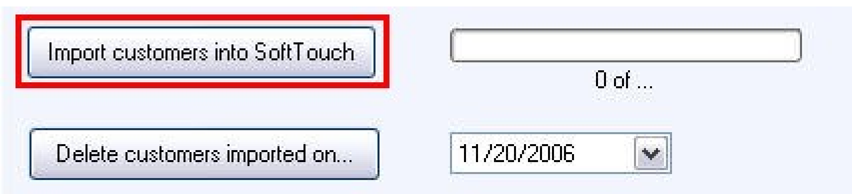
- Open your .csv file in Excel
- If your file is in this format - FirstName, LastName, Phone, Address1, Address2, City, State, ZipCode - you can see that the phone number is in the wrong place. We need to put it at the end.
- Once you have the file opened in Excel, click on the letter above the column that you need to move. In this case it would be the column, "C." This should highlight the entire column.
- Now all you need to do is move your mouse right over the border of where it's highlighted. Your mouse will turn into crossing arrows when you are in the right place. Then hold Shift and drag the whole column to the right until you're at then end where the phone number is supposed to be and let go.
- Now just save the file and make sure it's still in the .csv format.

- To Import a Customer File into SoftTouch -



- Click on the "**Open File to import...**" button
- Browse for your file, highlight it and click the "Open" button.
- You will see a preview of the first customer in the file.
- Click the **Next** button repeatedly to ensure that the customers will be imported properly and all of the fields are in the right places. If you see any fields out of place, do not import the file. You will need to rearrange the fields in your file before importing. See above for instructions.

- Once you are sure everything looks good, click the "**Import Customers into SoftTouch**" button.



- Click **OK** on the confirmation dialog. You will get another confirmation when the import has completed. Click OK for that as well.
- Close and re-open BackOffice and then go to **Customers** (under General) to ensure that the customers were imported. (See Customers if you need help navigating and using that area.)

The **Delete customers imported on...** button will delete customers that were imported on the date you specify using the drop-down next to it.

47.2 Export & Data Services tab

Under the **Miscellaneous** section click on **Import/Export**. Select the **Export & Data Services** tab.

1. Export and Data Service List - List of pre-configured exports.

2. Export Builder - Utility for creating your own custom exports.

3. Manual Export - Manual export feature from earlier versions of SoftTouch.

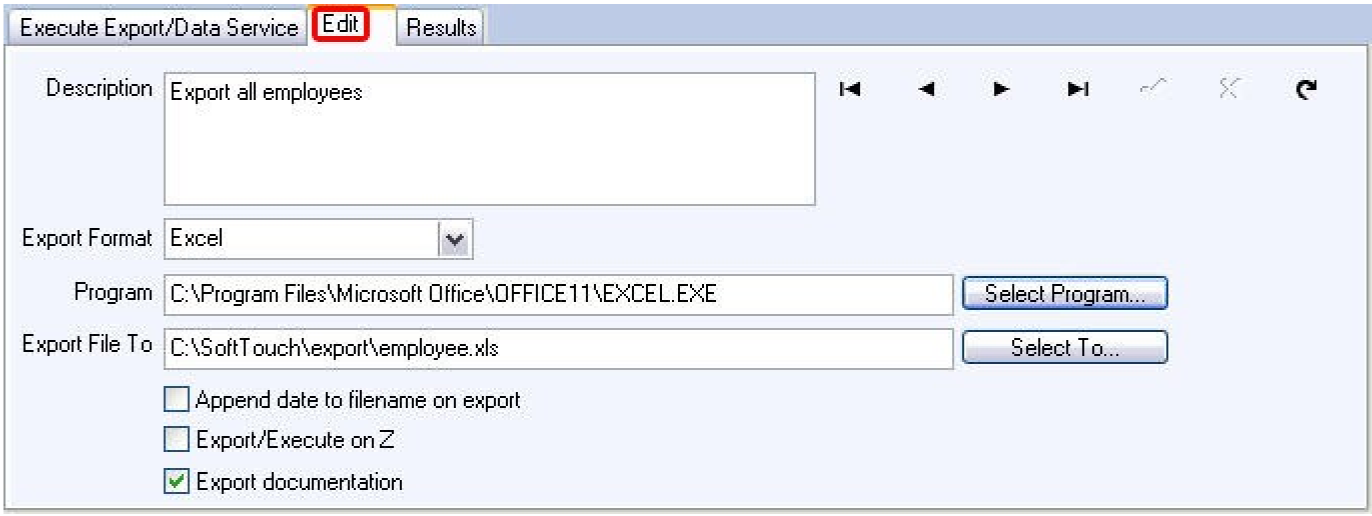
47.2.1 Export & Data Service List

Under the **Miscellaneous** section click on **Import/Export**. Select the **Export & Data Services** tab. Select the **Export & Data Service List** tab.

- Export & Data Services List Description -

Exports are grouped by categories. Expand the category by clicking the Plus (+) sign next to it, or use the minus (-) sign to collapse it. Select any export.

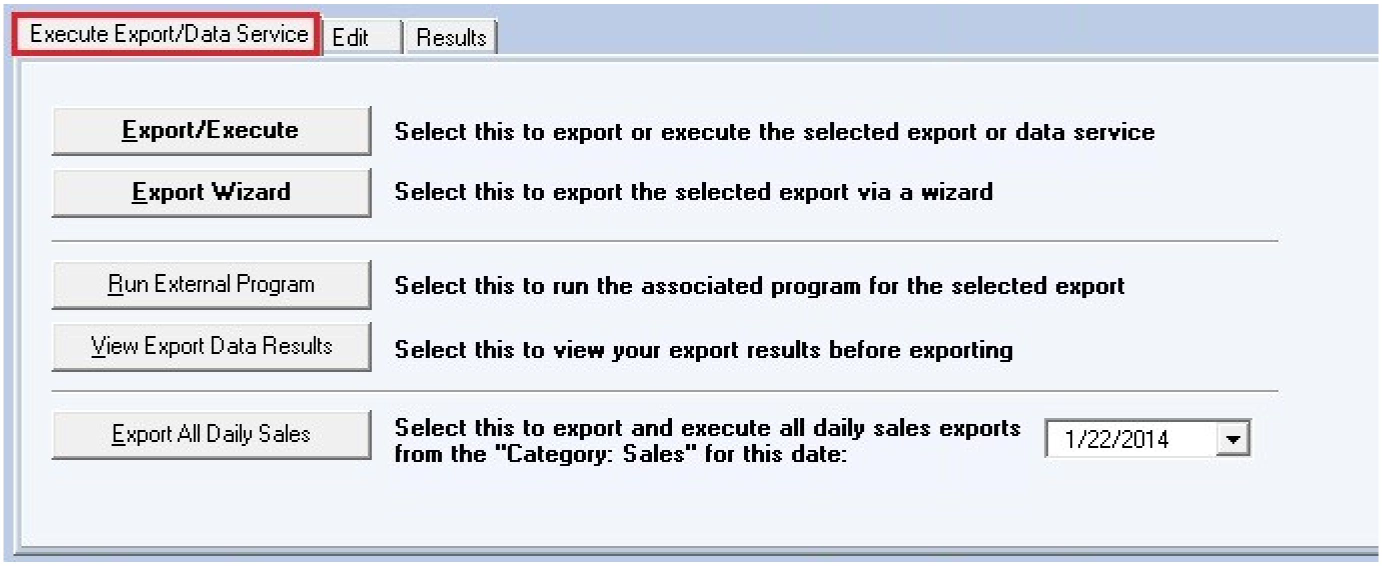
Click on the **Edit** tab. The **Edit** tab contains the export information for each individual export. This information can be set differently for each export.



Description	Description of the selected export.
Export Format	There are 5 different formats for exports; Acsii delimited, Dbase, XML, Access, or Excel. Choose the format you wish to export to.
Program	Windows path to the program you would like to use to open the export file with. Use the "**Select Program**" button to browse for the program. This field is optional. The "**Run External Program**" button on the Execute Export/Data Service tab will launch the program you enter here.
Export File To	Windows path to the export location. Use the "**Select To...**" button to browse for an appropriate directory.
Append date to filename on export	Adds the current date to the filename. For example, employee.xls will become employee11202006.xls if this option is checked.
Export/Execute on Z	The export will automatically run during the Z process if this option is checked.
Export documentation	Creates an html file with a description of each column in the exported data. This will be exported to the location specified in the "Export File To" field.

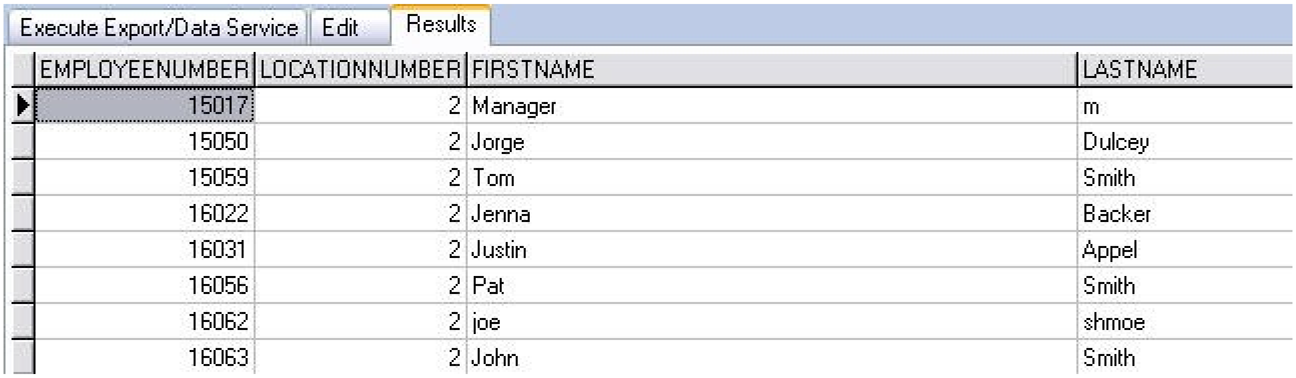
Once you are finished editing the settings for the export, click the save button.

Now, click on the **Execute Export/Data Service** tab.



Export/Execute	Exports or executes the selected export or data service.
Export Wizard	The wizard consists of 8 steps quick steps where you can specify details of how exactly you want your data exported. Just follow the steps.
Run External Program	Opens the external program that is specified in the **Program** field of the **Edit** tab.

<table>
<tr>
<td>View Export Data Results</td>
<td>
Allows you to preview the data before exporting. This button will bring you to the Results tab.



EMPLOYEENUMBER	LOCATIONNUMBER	FIRSTNAME	LASTNAME
15017	2	Manager	m
15050	2	Jorge	Dulcey
15059	2	Tom	Smith
16022	2	Jenna	Backer
16031	2	Justin	Appel
16056	2	Pat	Smith
16062	2	joe	shmoe
16063	2	John	Smith
</td>
</tr>
<tr>
<td>Export All Daily Sales</td>
<td>
Select a Date for which you would like to export all Daily Sales, then click on the "Export All Daily Sales" button.

This will automatically run all exports in the Sales and System Data categories.

The data in these exports is configured to work with Aspect Software.

*Note: You must have each individual export set up properly before exporting (i.e., Most important part of setting up the exports- if you want a report to export you must have the "Export Documentation" checked on).
</td>
</tr>
</table>

47.2.2 Export Builder

Under the **Miscellaneous** section click on **Import/Export**. Select the **Export & Data Service** tab. Select the **Export Builder** tab.

The Export Builder is designed for advanced users only with advanced knowledge of SQL databases. It is a very powerful tool that allows you to link data from different tables in the database. Because of the advanced nature of the Export Builder we cannot provide support for this feature.

47.2.3 Manual Export tab

Under the **Miscellaneous** section click on **Import/Export**. Select the **Export & Data Services** tab. Select the **Manual Export** tab.

All the data in SoftTouch is exportable (like Customers, Employees, Printers, Schedule Days and Times, Adjustments etc.). You have the ability to export different data into a variety of electronic formats or into a format used by SoftTouch.

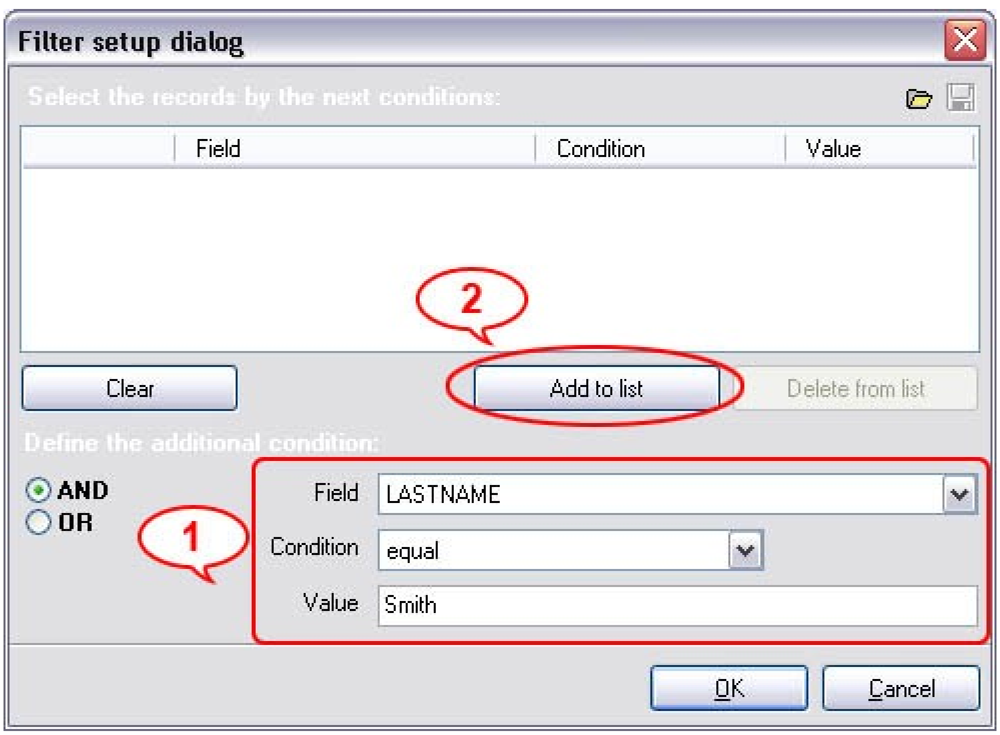
If you want, you can even filter data that's being exported using the **Filter Data** button.

For instance: You are exporting the Customers table and you wish to export only particular customers from that table.

- Export Data -

Step 1. First, select from the list the table/data you wish to export, and then click the **Open Table** button.

Step 2. If you don't want to filter the data, skip to Step 3. But if you wish to filter the data being exported click the **Filter Data** button and in the screen that shows up enter your filter values then click **Add to list**. For example: we want to export the customer whose last name is equal to Smith so we select and enter the appropriate filter settings. See image below:



Step 3. Next choose the export method. Click the **Export Wizard** button. The wizard consists of 8 quick steps where you can specify details of how exactly you want your data exported. Just follow the steps.

Part XX

BackOffice Toolbar

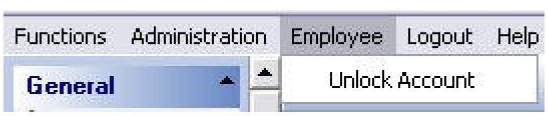
Part 48 BackOffice Toolbar

The **Toolbar** is located at the very top of the **BackOffice** within the gray area.

***Note: This Section is for Dealers and any Owner/Managers set up to use the area.**

This is the regular screen that is shown for the Back Office Toolbar.

BackOffice Toolbar when you are in the Employees section

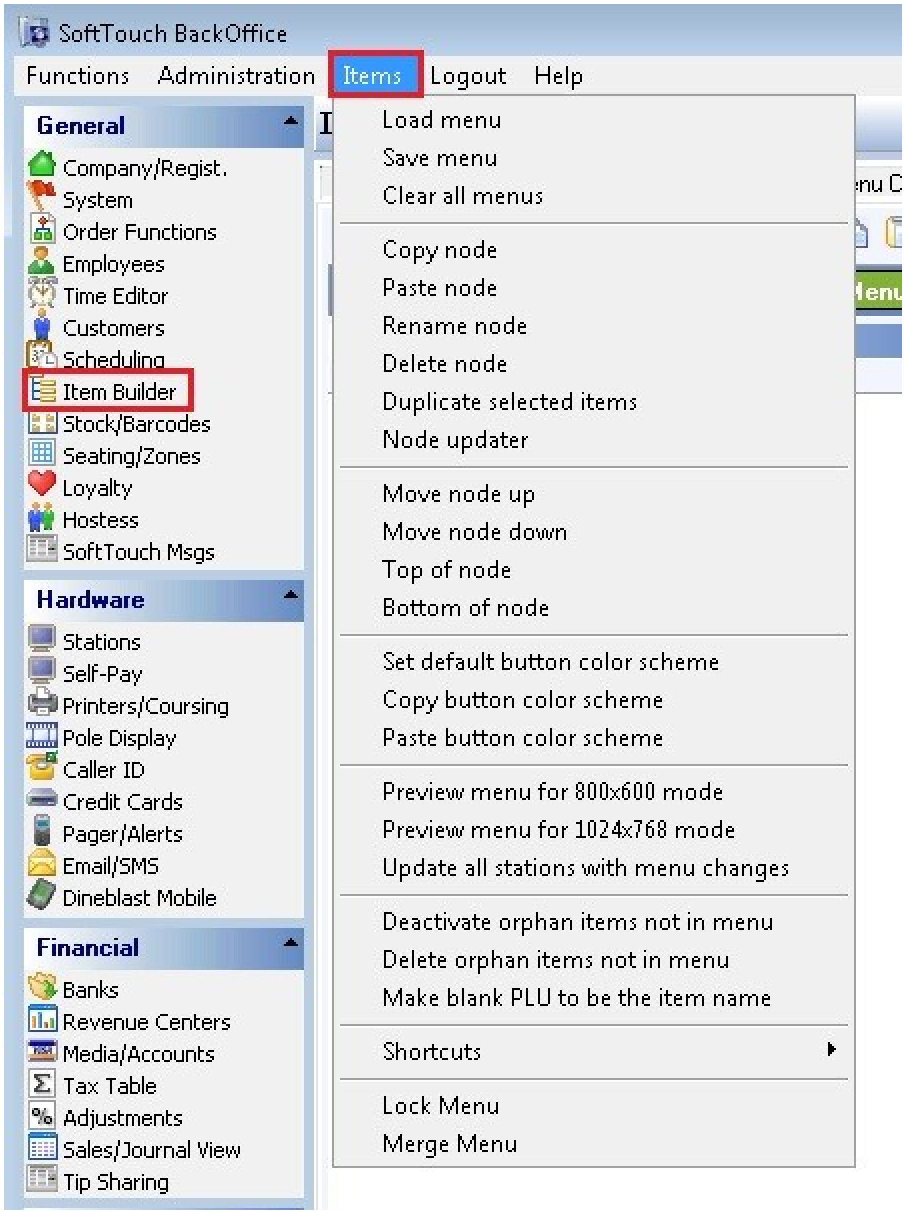


The only difference between this section and above is that the Employee drop-down shows up, allowing you to unlock a particular employee if they have locked themselves out of BackOffice.

Example: A manager has typed in the wrong BackOffice password five times and is now locked out. He cannot remember his password after he has been locked out, so he has to call SoftTouch's main office to unlock the account. Once the account has been unlocked, the Employee must be highlighted then the **Unlock Account** option from the **Employee** drop-down must be selected. Once unlocked, the employee can change their BackOffice password to one they will be able to remember.

***Note:** Charges may apply for getting the account unlocked.

BackOffice Toolbar when you are in the Item Builder section



Everything in the Items list a dealer would use are the same things that are listed in Item Builder->Command Bar.

***Note:** Currently the "Deactivate orphan items not in menu" and the "Delete orphan items not in menu" are not to be used.

***Note:** The "Lock Menu" and "Merge Menu" are for online purpose only as of right now.

48.1 Administration

Under the **Back Office Toolbar** located at the Top of the Back Office System in gray, Select the **Administration Option**.

The following BackOffice Toolbar settings and features in the Administration drop-down are explained in this section:

1. Template Screen

2. System Reset

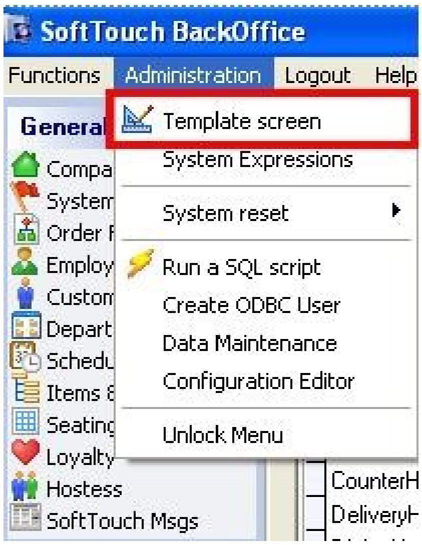
3. Database Maintenance

The System Expressions, Run a SQL script, Configuration Editor, and Unlock Menu options are for internal use only.

Refer to the Soft Touch knowledge base for instructions on how to use the Create ODBC User option.

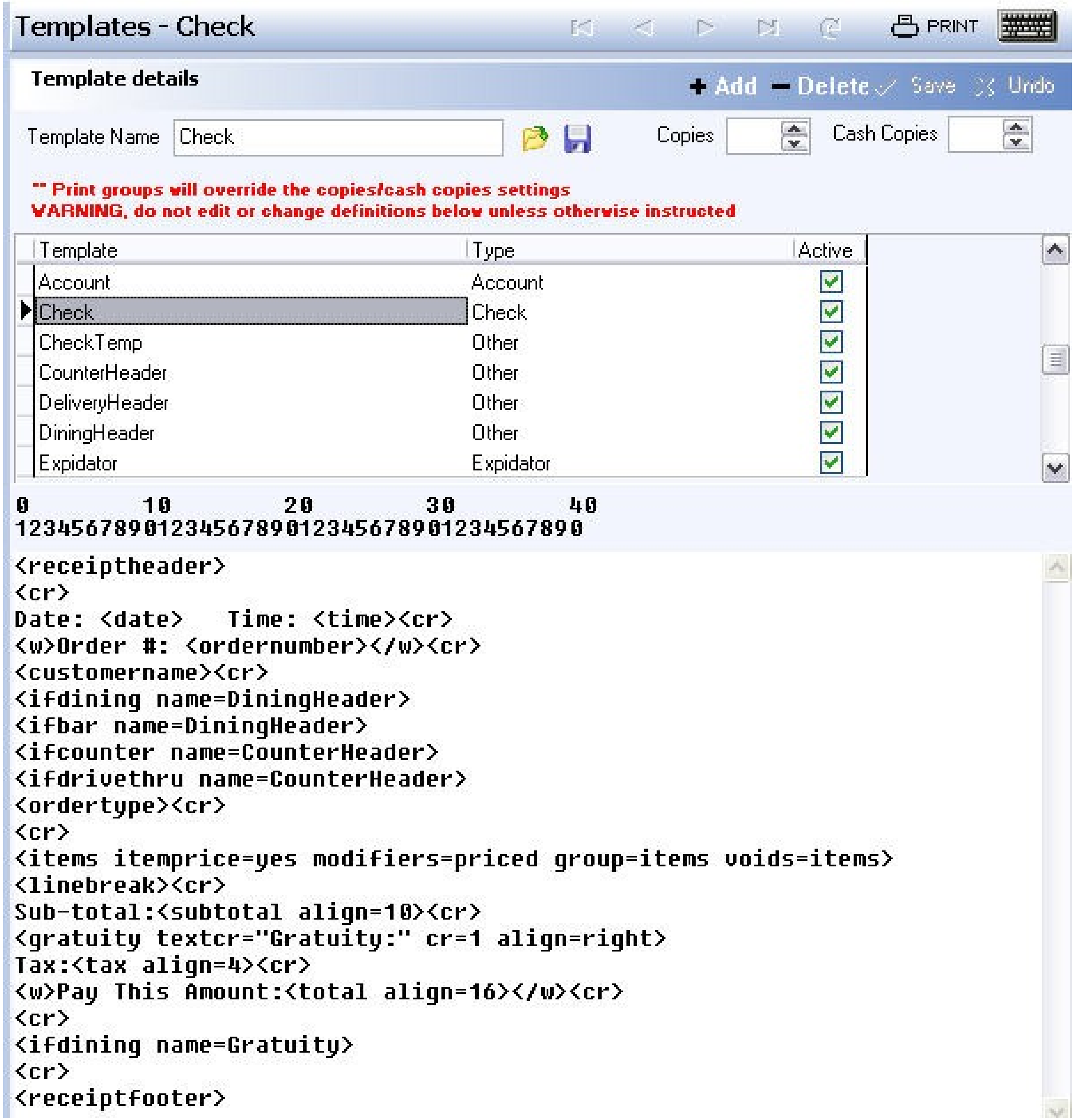
48.1.1 Template Screen

Under the **Back Office Toolbar** located at the Top of the Back Office System in gray, click on **Administration** then **Template screen**.



Here is where you design your print templates. Be sure to remain inside of the 40 character ruler to ensure that all data prints on the receipt. You will notice that some tagged items go beyond the rule, but that is ok because the actual item being printed is much shorter.

Under the **Template** part of the screen you have all the available tags for quick reference.



- All the Tags Explained -

<cr>	Insert carriage return.
<w></w>	Wide print start and wide print end.
<r></r>	Red print start and red print end.
	Thick print start and bold print end.

<u></u>	Underline start and underline end.
<c></c>	Center text start and center text end.
<partial cut>	Cuts the check, but not all the way so it is still slightly attached to the ribbon of other checks.
<fullcut>	Cuts the check completely.
<receiptheader>	Print header. Remember, you've set up your header under **Hardware section->Receipt Template**.
<receiptfooter>	Print footer. Remember, you've set up your footer under **Hardware section->Receipt Template**.
<date>	Print date.
<time>	Print time.
<operationdate>	Print operation date.
<ordernumber>	Print order number.
<ordertype>	Print order type (COUNTER, DINING, BAR, DELIVERY, TAKEOUT, DRIVETHRU).
<customername>	Print customer name.
<customerphone>	Print customer phone (usually used for deliveries).
<customeraddress>	Print customer address (usually used for deliveries).
<customercity>	Print customer city (usually used for deliveries).

<customerstate>	Print customer state (usually used for deliveries).
<customerzipcode>	Print customer zip code (usually used for deliveries).
<zonecode>	Print customer zone code (usually used for deliveries).
<complex>	Print customer complex (usually used for deliveries).
<directions>	Print directions (usually used for deliveries).
<gatecode>	Print customer gate code (usually used for deliveries).
<customernotes>	Print customer notes.
<customercard>	Print either the customer card # or the RFID # assigned to the customer.
<creditaccountinfo>	Prints account number and name from accounts.
<taxid>	Prints tax ID for non-taxable checks.
<taxdetail>	Print tax table details on receipt to break down the tax info.
<printername>	Prints printer name that printed the check.

<items>	Items can have the following properties and their values: **itemprice**=yes or no (print item price or not) **modifiers**=yes, no or priced (print all modifiers or none, or print priced only) **modifierformat**=red or black (print modifiers in red or black) **group**=items or no (group items or not) **Example:** A customer ordered two glasses of pepsi. Instead of printing on the receipt: 1 Pepsi 1 Pepsi it would print: 2 Pepsi **voids**=yes, no or items (print all voids or not, or print voided items only) **otheritems**=yes or no (print other items that went to another printer or not) **disablechanges**=yes or no (disables the message that changes were made to the order) **barcode**=yes or no (print barcode for items. Used with server paging system) **bspacing**=x (x can be integers from 1 to 9...this changes the spacing between the server scan barcode and the chef scan barcode to help prevent the wrong code from being scanned accidentally.)
<labelitems>	Use this for label printers. **modifiers**=yes or no (print modifiers for label items) **messages**=yes or no (print messages for label items)
<subtotal>	Prints subtotal amount.
<orderpaid>	For use with kitchen monitors, sends a "paid" or "not paid" status.

<loyalty>	Prints loyalty details.
<companyname>	Prints the name of the company associated with this customer if this field is filled out.

<tax>	Prints tax.
<gratuity>	Prints gratuity.
<deliverycharge>	Prints delivery charge.
<rounding>	Prints rounding total.
<totalnotip>	Prints total amount without tip.
<tiptotal>	Prints total for all tips.
<total>	Prints total amount.
***NOTE:** every time there's an if statement in a tag it usually means "if something is so and so, then do this." Most of the time, whenever you see an "if" statement, there will also be a corresponding "endif" statement placed after the information you want to display if that condition is met.	
<iftiphandled>	If tip has been entered before printing.
<iftipnothandled>	If tip has not been entered before printing.
<ifnotip>	If no tip.
<ifcredit>	If payment type is credit.
<ifdebit>	If payment type is debit.

<ifcash>	If payment type is cash.
<iftakeout>	If the current mode is Take Out.
<ifcounter>	If the current mode is Counter.
<ifdining>	If the current mode is Dining.
<ifbar>	If the current mode is Bar.
<ifdelivery>	If the current mode is Delivery.
<ifdrivethru>	if the current mode is Drive Thru.
<ifsignature> <endif>	If signature is required by using "Min amount required for signature" in the Credit Cards section.
<ifconveniencetipguestcount+> <endif>	If the guest count entered for "Convenience tip guest count" in **System->Tips** is met or exceeded.
<conveniencetipamount1>	Prints the tip calculated from the percentage you entered for "Convenience tip percentage 1." Remember you've set it up under **System->Tips**.
<conveniencetipamount2>	Prints the tip calculated from the percentage you entered for "Convenience tip percentage 2." Remember you've set it up under **System->Tips**.
<conveniencetipamount3>	Prints the tip calculated from the percentage you entered for "Convenience tip percentage 3." Remember you've set it up under **System->Tips**.
<conveniencetippercent1>	Prints the percentage you entered for "Convenience tip percentage 1." Remember you've set it up under **System->Tips**.

<conveniencetippercent2>	Prints the percentage you entered for "Convenience tip percentage 2." Remember you've set it up under **System->Tips**.
<conveniencetippercent3>	Prints the percentage you entered for "Convenience tip percentage 3." Remember you've set it up under **System->Tips**.
<conveniencetiptotal1>	Prints the total after the tip from the percentage you entered for "Convenience tip percentage 1" has been added. Remember you've set it up under **System->Tips**.
<conveniencetiptotal2>	Prints the total after the tip from the percentage you entered for "Convenience tip percentage 2" has been added. Remember you've set it up under **System->Tips**.
<conveniencetiptotal3>	Prints the total after the tip from the percentage you entered for "Convenience tip percentage 3" has been added. Remember you've set it up under **System->Tips**.
<gratuitycalc1>	Prints gratuity amount calculated from Minimum Percentage (example: $1.50). Remember you've set it up under **Order Functions->Bar/Dining**.
<gratuitycalc2>	Prints gratuity amount calculated from Suggested #1 (example: $1.60). Remember you've set it up under **Order Functions->Bar/Dining**.
<gratuitycalc3>	Prints gratuity amount calculated from Suggested #2 (example: $1.80). Remember you've set it up under **Order Functions->Bar/Dining**.
<gratuitypercentage>	Prints Minimum Percentage (example: 15%).
<gratuitysuggested1>	Prints Suggested #1 percentage (example: 18%).
<gratuitysuggested2>	Prints Suggested #2 percentage (example: 20%).

<multitenders>	Prints "Multi Tender" text to let you know there is more than 1 payment.
<tendername>	Prints the payment type name (visa, amex, mastercard, cash, etc).
<tenderamount>	Prints the payment amount.
<tendertip>	Prints the payment tip amount.
<paymenttype>	Prints the payment type.

<authcode>	Prints authorization code from the credit card company.
<refno>	Prints reference number from the credit card company.
<paymentnumber>	Prints unique number of payment (a Server uses that number later on to add a tip amount specified by the guest to the payment).
<creditcardnumber>	Prints the last 4 digits of the credit card number.
<creditcardexp>	Prints the expiration date of the credit card.
<creditcardname>	Prints the name of the customer from the credit card.
<tendertotal>	Prints the total of all payments given.
<guest>	Prints guest count.
<change>	Prints the change amount.
<checkdatetime>	Prints when the check was started.

<closedatetime>	Prints when the check was finished.
<scheduledatetime>	Prints when the order has been scheduled for.
<linebreak>	Prints dashed horizontal line. You can specify number of dashes if needed. **Example:** <linebreak count=50>
<server>	Prints Server's user ID.
<operationdate>	Prints current operation date.
<employee>	Prints user ID.
<stationnumber>	Prints the station number.
<drawernumber>	Prints the drawer number.
<drawername>	Prints the drawer name.
<seatingnumber>	Prints table/seat number.
<tablenumber>	Prints table number.
<guestcount>	Prints guest count.
<eatineatout>	Will print Eat In or Eat Out (Counter mode ONLY).
<template>	You can include another template inside your current template. **Example:** <template name=name> ***Note:** template inserts are case sensitive.

<amount>	General amount for refunds or paid in, paid out.
<reason>	Reason for refunds or paid in, paid out.
<title>	Prints the title.
<clockin>	Prints clock in time of the employee.
<clockout>	Prints clock out time of the employee.
<timeclocks>	Prints all the time clocks for the day.
<clocktotal>	Prints total hours of being clocked in.
<zones>	Prints employee zone detail.
<ordernumberbarcode>	Prints a unique barcode for each order on customer's check.
<employeenumberbarcode>	Barcode used to page the server who took the order. The server paging system must be installed.
<taxdetail>	Prints a detailed description of all taxes charged on the check (for use on the bottom of customer receipt). ***Note:** Do not use in place of <tax> tag.
<station>	The station location defined in BackOffice.
<coasternumber>	Used in conjunction with coasters for counter mode. This will print the number of the coaster given to the customer. ***Note:** This is used for counter orders only.

Under **Template Definition** part of the screen you create a template name and with the help of special tags, design how it will look. Use the 40 character ruler to help with aligning the text on the printer.

** Print groups will override the copies/cash copies settings
WARNING, do not edit or change definitions below unless otherwise instructed

	Template	Type	Active
	Account	Account	☑
▶	Check	Check	☑
	CheckTemp	Other	☑
	CounterHeader	Other	☑
	DeliveryHeader	Other	☑
	DiningHeader	Other	☑
	Expidator	Expidator	☑

```
0         10        20        30        40
12345678901234567890123456789012345678901234567890
<receiptheader>
<cr>
Date: <date>   Time: <time><cr>
<w>Order #: <ordernumber></w><cr>
<customername><cr>
<ifdining name=DiningHeader>
<ifbar name=DiningHeader>
<ifcounter name=CounterHeader>
<ifdrivethru name=CounterHeader>
<ordertype><cr>
<cr>
<items itemprice=yes modifiers=priced group=items voids=items>
<linebreak><cr>
Sub-total:<subtotal align=10><cr>
<gratuity textcr="Gratuity:" cr=1 align=right>
Tax:<tax align=4><cr>
<w>Pay This Amount:<total align=16></w><cr>
<cr>
<ifdining name=Gratuity>
<cr>
<receiptfooter>
```

Under the **Template Details** part of the screen you can save a template to a file or open one from a file, and you can specify the number of copies to print and the number of cash copies to print.

48.1.1.1Create a Check Template

Template Tags

In the example below we will design a check template. Click the Add button and on the left side in the blank field marked with * type in the name for your template. Click the ✓ Save button. You are now ready to design with tags.

Check template tags:

<receiptheader>	print the header you have set up under **Hardware section/Receipt Template**.
<cr>	insert carriage return.
Date: <date> Time: <time><cr>	print date and time.
<w>Order #: <ordernumber></w><cr>	start wide print, print Order number, end wide print and insert carriage return.
<customername><cr>	print customer name and insert carriage return.
<ifdining name=DiningHeader>	if statement - if the mode is dining, include template called DiningHeader.
<ifbar name=DiningHeader>	if statement - if the mode is bar, include template called DiningHeader.
<ifcounter name=CounterHeader>	if statement - if the mode is counter, include template called CounterHeader.
<ordertype><cr>	print order type (COUNTER, DINING, BAR etc) and insert carriage return.
<cr>	insert carriage return.
<items itemprice=yes modifiers=priced group=items voids=items>	print item price, print modifier price, group items, print voided items.
<linebreak><cr>	print dashed horizontal line and insert carriage return.
<w>Sub-total: <subtotal><cr>	start wide print, print sub-total amount and insert carriage return

<gratuity text="Gratuity : " cr=1>	this is kind of an invisible way to handle tags. In this case it's the gratuity. Meaning, if there is no gratuity, nothing will be printed, this tag will be ignored. However, if there is a Gratuity it will be printed and one carriage return will be inserted.
Tax : <tax><cr>	print tax and insert carriage return.
Total : <total></w><cr>	print total amount, end wide print and insert carriage return.
<cr>	insert carriage return.
<receiptfooter>	print the footer you have set up under **Hardware section/Receipt Template**.
<cr>	insert carriage return.
<ordernumberbarcode>	print a unique barcode for the order.

- Check template result -

According to the design tags above, here is how our check will look.

Pizza Italiano
123 Magic St.
Fort Lauderdale, FL 33301
(954) 123-4567

Date: 08/01/03 Time: 03:26 pm
Order #: 23

Server: cv
Guest: 2
Table #: 7
DINING

2 L-SPRITE	$3.00
1 L-ICED TEA	$1.50
1 LARGE FRIES	$2.95
1 L-SPAG & MEAT SAUCE	$4.99
1 L-CHICKEN CACCIATORE	$6.25
1 L-CHEESE CAKE CHOC	$2.95

Food Total "$21.64"

Sub-total: $21.64
Tax : $1.30
Total : $22.94

Thank you and come again

48.1.1.2Remote Ticket Template

Remote Ticket Template

- Remote Ticket with Items from Other Printers -

Some restaurants assign different items to go to different remote printers (**Example:** items that need to be cooked in the kitchen are assigned to the Hot Printer, pizza items are assigned to Pizza Printer, subs are assigned to Cold Printer etc.) and when a server sends the customer's order from SoftTouch, each item from that order is printed at the remote printer it was assigned to go to and a cook knows what to make.

But what if the customer orders both, a hot item and a pizza? The hot item goes to the Hot Printer and pizza goes to the Pizza Printer. The cook that receives the hot item is not aware that a customer also ordered a pizza. And the pizza man is not aware that a customer also ordered a hot item.

You can customize the remote ticket template to show all items a customer ordered on each remote printer.

All you have to do is customize the items tag a little. And to make it easier for chefs/cooks to read the ticket, have the main item print in **Bigger and Bolder** characters using the wide print tags (<w><items...></w>), separate it from all other items by a line (<linebreak><cr>) then list all other items in smaller characters at the bottom (<items otheritems=yes...>)

Example:

On the Pizza Printer the pizza item will print in **Bigger and Bolder** characters and the hot item will print at the bottom in smaller characters.

On the Hot Printer the hot item will print in **Bigger and Bolder** characters and the pizza, sub or soda that a customer might have also ordered along with the hot item will print at the bottom of the ticket in smaller characters.

Here is how the ticket from the Hot Printer would look:

Order #: 21 DINING
Server: cv
Table #: 18
Guest: 2
Friday 09/02/05 11:45AM
----
2 L-FRIED CALAMARI
1 CHICK PARM
Penne
Salad Mini
Honey Mustard
1 CHICK PARM
Rigatoni
Mini Minestrone
----
2 L-HOUSE SALAD
1 w/ Ranch
1 w/ 1000 Island

Notice that the hot items are listed at the top with like items grouped and modifiers printed in red, while the salads (Cold Printer items) are listed at the bottom below the break line.

- Remote ticket's template tags -

And the template tags according to the ticket above would be:

<w>Order #: <ordernumber> <ordertype><cr></w>	start wide print, print Order number, print Order type (COUNTER, DINING, BAR, DELIVERY, TAKEOUT, DRIVETHRU), end wide print.
<customername><cr>	print customer name and insert carriage return.
<ifcounter name=CounterHeader>	if statement - if the mode is counter, include template called CounterHeader.
<ifdining name=DiningHeader>	if statement - if the mode is dining, include template called DiningHeader.
<iftakeout name=TicketTakeOut>	if statement - if the mode is takeout, include template called TicketTakeOut.

<date format=dddd> <date format=mm/dd/yy> <time format=hh:mmAM/PM><cr>	print day of the week, print date, print time and insert carriage return.
<scheduledatetime text="" cr=1>	print when the order has been scheduled for (if it has been).
<linebreak><cr>	print dashed horizontal line and insert a carriage return.
<w><items price=no modifiers=noprice modifierformat=red group=items voids=yes seating=no coursing=no disablechanges=yes></w>	start wide print, don't print item price/don't print modifier price/print modifiers in red/group items/print all voids/don't print seating, don't print courses, don't print CHANGES TO ORDER #, end wide print.
<linebreak><cr>	print horizontal line and insert a carriage return
<items otheritems=yes price=no modifiers=noprice group=all voids=yes seating=no>	print other items that went to another printer/don't print item price/don't print modifier price/group items/printall voids/don't print seating.

There are several reasons you would want the remote ticket template to show all items a customer ordered on each printer.

1. It shows that there is other food being made for this customer at different stations. And if the Pizza man sees that there is a hot item that takes 20 minutes to cook and a pizza only takes 10 minutes to cook, then he can wait approximately 10 minutes before putting his pizza in the oven. This way all the food is ready at the same time.

2. If you look at any ticket from any of the printers and add the **Larger and Bolder items** with the smaller items, then you know everything a customer has ordered and someone else can assemble the order from all stations and present the entire order to the customer.

- Remote ticket and Super Departments -

A customer may order liquor as well as food. The cook at the remote printer in the kitchen, pizza station and cold station has no need to be confused with seeing liquor or a merchandise item printed on the ticket. Since **only items under Super Departments categorized as Food print on the remote printer's ticket and any items under Super Department that's categorized as Beverage or Merchandise do not print** you have a way to eliminate liquor and/or merchandise from being printed at the bottom of the ticket. That is where the categories of Super Departments (Food, Beverage, Merchandise) come into play. Read about Super Department categorization under **Item Builder->Departments**.

Some restaurants do not want to use this bottom portion of the ticket at all. Therefore you can have 2 templates: one with the other printer's items at the bottom portion of the ticket and one without. And then tie either one of those templates to the remote printers. For a more detailed explanation on printers read **Hardware->Printers/Coursing**.

48.1.1.3 Expeditor Template and Seat Positions

On the **Toolbar** click on **Administration** then the **Template** Screen.

- Expediter and Kitchen Printers -

Restaurants may have a separate printer solely for expediter purposes.

Situation 1:

In some restaurants Servers take the order from the customers and Food Runners bring the order to the customers. In this situation, a Food Runner brings the food to the table and has no idea which person at the table ordered what food. But if a Food Runner looks at the expediter ticket, they know exactly what was ordered from which seat.

Situation 2:

Virtually any employee can assemble the order from the expediter ticket and present the entire order to the customer.

If each of the menu items in a restaurant is assigned to go to the expediter printer as well as the remote printer, do the following to set up this configuration:

1. Set up an expediter template to print seat numbers.
2. Set up an expediter printer. Refer to **Hardware->Printers/Coursing**.
3. Assign an expediter printer to each menu item that you want to print on the expediter ticket. Read about menu items settings under **Item Builder->Items**.

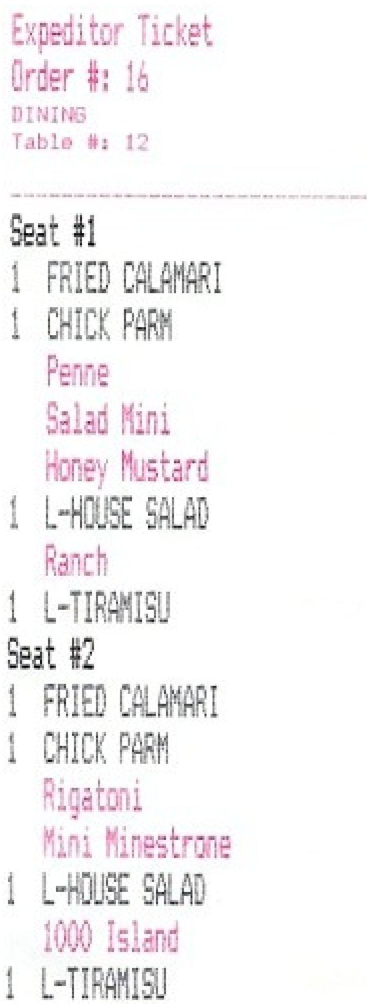
- Expediter template tags -

<w><r>Expedite Ticket<cr>	Start wide print, start red print, print Expediter Ticket, end red print, insert carriage return.
Order #: <ordernumber></w><cr>	Print order number, end wide print, insert carriage return
<ordertype></r><cr>	Print order type (COUNTER, DINING, BAR, DELIVERY, TAKEOUT, DRIVETHRU), insert carriage return.
<cr>	Insert carriage return.

<items itemprice=no modifiers=noprice modifierformat=red voids=yes seating=yes coursing=no>	Don't print item price/don't print modifier price/print modifiers in red/group items/print voids/print seat numbers/don't print courses.

Expediter template result:

According to the design tags above, here is how our expediter ticket will look.



Expeditor Ticket
Order #: 16
DINING
Table #: 12

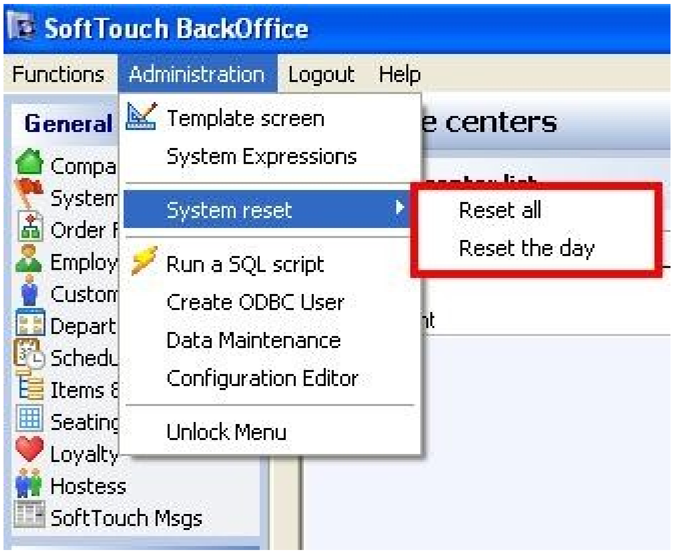
Seat #1
1 FRIED CALAMARI
1 CHICK PARM
Penne
Salad Mini
Honey Mustard
1 L-HOUSE SALAD
Ranch
1 L-TIRAMISU
Seat #2
1 FRIED CALAMARI
1 CHICK PARM
Rigatoni
Mini Minestrone
1 L-HOUSE SALAD
1000 Island
1 L-TIRAMISU

48.1.2 System Reset

Under the **Back Office Toolbar** located at the Top of the Back Office System in gray, click on **System Reset**.

System Reset

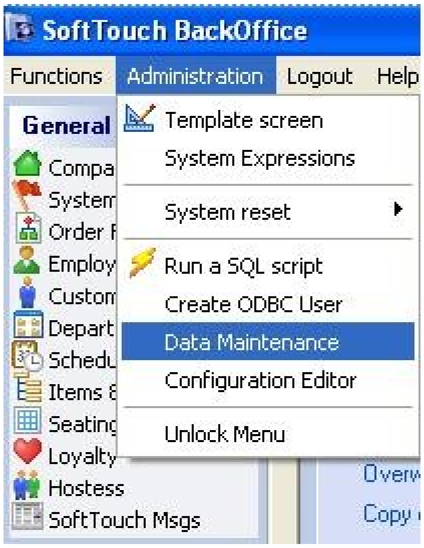
This is where you can clear either all your sales history on your checks or only the sales history on one day.



Reset All	Keeps all the settings in BackOffice, but deletes all the checks (sales you entered). ****Warning**:** Do NOT use if the customer wants to keep all check and sales history**.**
Reset the day	Deletes only the checks for the current operation date. ****Warning**:** If you have the incorrect operation date, it will clear the checks on that day. **Example:** If you wanted to clear the checks on today's date but had the SoftTouch operation date as yesterday's date, you would clear all the checks from yesterday.

48.1.3 Data Maintenance

Under the **Back Office Toolbar** located at the Top of the Back Office System in gray, click on **Administration** then **Data Maintenance**.



***Caution*: The features in this section should generally be used with assistance from Tech Support.**

Make a database backup to external drive	Creates pos.pgbk on an external drive connected to the computer. Drive specified by user.

Make a database backup to local C drive	Creates pos.pgbk in the C:\SoftTouch folder on the server.
Create an offsite database Backup…	Use this option for creating backups that will be offsite. Credit card numbers are removed from the backup. ****Warning**: This is what Dealers and/or Restaurant should be using when they take a database offsite.**
Copy POS.PGDB Database to…	Copies the pos.pgdb to a location specified by the user.
Copy POS.PGDB Database to external drive	Copies the pos.pgdb to an external drive connected to the computer. Drive specified by user.
Restore a database Backup…	Can be used to restore a pos.pgbk or pos.pgbk.bzip file. You will be prompted to close and re-open BackOffice after restoring a backup. ***Caution***: **This will overwrite the database that is currently loaded.**
Restore a PGDB database file	Can be used to restore a pos.pgbd database file. You will be prompted to close and re-open BackOffice after restoring a database file. ***Caution***: **This will overwrite the database that is currently loaded.**
Restore license file	Can be used to restore a license file. You will be prompted to close and re-open BackOffice after restoring a backup. ***Caution***: **This will overwrite the database that is currently loaded.**
Check database Pages	Runs a scan on the Database Pages to check for errors.
Rebuild database pages	Rebuilds the Database Pages (good for when an error is found in the Database Pages). Also can reduce database file size. ***Caution*: ALWAYS make a backup before using this feature.**
Run Locally - 1 Client	Use this setting when you need to run SoftTouch on a computer that is NOT plugged into a network. ***Note:** Restart computer after making this change.

Run Network - X Client	Use this setting when you need SoftTouch to run on a network (live install). ***Note:** Restart computer after making this change.

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